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Index ................................................................................................................. i
1. Introduction

Welcome to the FieldManager\textsuperscript{\textregistered} module, a fast, easy-to-use, computer-based system for documenting construction progress, initiating contractor payment, and communicating with your agency’s central office contract administration system. This user’s guide is the key to discovering the FieldManager module’s vast capabilities, and is a valuable resource both for novice and experienced users.

The FieldManager module can record and maintain item progress information, stockpiles, contract modifications, and daily diaries. At the end of the pay period, an estimate can be generated and exported to your agency’s central office contract administration system. After processing, the updated payment information is imported back from your agency’s system into the FieldManager module. Contract modifications are initiated in the FieldManager module, and once approved, are sent to your agency’s central office contract administration system. All item progress data, daily diary entries, contract modifications, and reports are maintained in the FieldManager module and are instantly available to the user.
1.1 FieldManager Workflow

FieldManager software focuses on refining the workflow of construction contract management at the field office level. With FieldManager software, the field office can manage field-gathered data and then interface with a central office. FieldManager software allows several users to update contract information, and it implements a shared database to expand an agency’s data-sharing ability.

Figure 1-1 displays FieldManager software’s basic contract management workflow.
1.2 FieldManager System Requirements

This version of FieldManager software is designed to run on a Microsoft® Windows® operating system.

Before you install or update FieldManager software, click the following Web link to view detailed hardware and software configurations:

http://www.cloverleaf.net/sys_arch/

1.3 About This Manual

This section describes the prerequisites for using FieldManager software, and the formatting conventions used throughout FieldManager software’s documentation.

1.3.1 Overview

Training or experience with Microsoft Windows operating system is a prerequisite for FieldManager software. If you have never used computers or do not know how to use a Windows operating system, read the documentation that came with your Windows operating system software before using FieldManager software.

The FieldManager User’s Guide provides information about FieldManager software’s functions, including advanced features. A comprehensive online Help system complements this user’s guide, and offers a quick reference to menu commands and window fields. Additionally, we have included a sample database and contract that you can test while learning the system:

- sample_contract.dat in c:\ProgramData\FieldManager
- fmsample.db in c:\ProgramData\FieldManager\database\sample

All of these files are located in the FieldManager data directory.

1.3.2 Documentation Conventions

This document uses different techniques to help identify important information. Small caps are used to identify keys to press and buttons to click to invoke actions. An example of this is “Press the ALT key.” Tab names are also shown in small caps.

Menu options are identified in bold, such as “Choose Open from the File menu.” Important terms are identified by italics.

- **Note:** Important notes are indented from both the right and left margins and flagged with small note icons. Notes contain extra information that may help you work more efficiently or understand a process more fully.
**Warning:** Warnings look very similar to notes, but are flagged with an exclamation point icon. Read all warnings; they contain important information that you should not disregard.
2. Installing FieldManager Software

This chapter describes how to install FieldManager software from a disc or a networked drive, on various supported versions of Microsoft Windows operating systems. You may have already completed the installation if you worked through the *FieldManager Installation and Conversion Guide*.

2.1 Running the FieldManager Setup Application

This section presents detailed instructions for running the FieldManager Setup application.

2.1.1 Installing from a Disc

To install from a disc, insert the FieldManager software disc into the disc drive of your computer.

Note: This example uses D as your disc drive letter. Your disc drive may be assigned a different letter.

Run the Setup program from the Task Bar by choosing **Run** from the **Start** menu.

Type in `d:\fieldmgr\FieldManager.msi` and press the **ENTER** key.

When the FieldManager Setup program begins, proceed to Section 2.2.

2.1.2 Installing from a Networked Drive

To install from a networked drive, run the Setup program by specifying the appropriate navigational path.
Note: This example uses F as your networked drive letter. Your networked
drive may be assigned a different letter.

Run the Setup program from the Task Bar by choosing Run from the Start menu.

Type in f:\fieldmgr\FieldManager.msi and press the ENTER key.

When the FieldManager Setup program begins, proceed to Section 2.2.

2.2 When the Installation Program Begins

The installation program will go through a setup period, indicated by a progress meter on
the screen. Once this is complete, a Welcome screen will appear.

2.2.1 Completing the Welcome, Installation Password, and Licensing
        Screens

To continue with the installation, click NEXT.

To cancel the installation, click CANCEL.

If you click NEXT, the Installation Password screen will display. This screen requires you
to enter the correct installation key provided. Type the 17-character password installation
key in the field. The installation software is case insensitive, meaning you can enter
either uppercase or lowercase letters according to your preferences.

To continue with the installation, click NEXT.

To cancel the installation, click CANCEL.

If you click NEXT and are installing an Annual Single-Copy License or a One-Time
License, the License Agreement screen will appear. If you accept all the terms of the
license agreement, click YES to continue. Otherwise, click NO to exit the installation.

2.2.2 Selecting the Installation Type

The next screen, Select Installation Type, allows you to choose between installing
FieldManager software so that it will connect to an existing networked database on a
server, or installing FieldManager software so that it will connect to a database on your
computer. For a networked database installation, the database client software must
already be installed on your computer.

Note: If you are unsure whether to pick Networked Database or Single
        Machine Database, contact your FieldManager software support personnel.
        If you pick the Networked Database option, you will be required to enter the
        server name, which your support personnel will be able to supply.
To continue with the installation, click NEXT.

To cancel the installation, click CANCEL.

### 2.2.3 Selecting the Application Destination Location

By this point in the installation process, the installation program will have checked to see if previous installations of FieldManager software reside on your computer. If so, the path in the Destination Directory area will reflect the location of the prior installation, and it is highly recommended that you install this new release in the same location. If not, the destination directory path will show the default location selected by your agency.

To install the application in a different location, click BROWSE to bring up a dialog box to search for or enter a new path. Normally, you will simply accept the directory that the Setup program has designated.

When you have finished choosing the appropriate installation path, click NEXT to continue or click CANCEL if you wish to stop the installation.

### 2.2.4 Selecting the Program Folder

The next screen, Select Program Folder, allows you to choose the program folder into which the FieldManager icons will be placed. Either type a folder name in the Program Folders field, or select one from the list of existing folders.

Click NEXT and the files you need to run the selected application(s) will be transferred to the location specified. Otherwise, click CANCEL to discontinue the installation.

___ Note: ___ If the installation finds a previous installation of FieldManager on your machine, it will first prompt you to remove it before proceeding. Existing databases will remain in their original locations while newly created data sources will be placed under %ALLUSERSPROFILE%\FieldManager\database by default.

### 2.3 During Installation

When the installation program requires more information, respond to the prompts and select options as appropriate.

If the installation program determines that there is not enough disk space to install the FieldManager software components, a message will display letting you know that the drive specified does not have enough free space to install the software. The message will ask if you want to install to the drive anyway. If you are installing over a previous version, choose YES to continue with the installation. Otherwise, remove any unneeded files so there is enough free disk space to install FieldManager software.
The final screen of the installation allows you to initiate the FieldNet™ client installation. Detailed instructions for the FieldNet client install can be found in Section 6 of the 
*FieldManager Installation and Conversion Guide*.

### 2.4 After Installation

A new program group will be created at the end of the installation containing icons for running the applications.

You must reboot your computer before the applications will run.

To start the application after rebooting, go to the Microsoft Windows operating system Task Bar and select **Programs** from the **Start** menu, and then choose **FieldManager** from the Programs submenu.

The first time you log on, type *admin* in the **User ID** field and *password* in the **Password** field (see Section 3.1 for more information). You will receive an Invalid Agency Configuration message prompting you to browse to your configuration file. Refer to section 2.5 for more information.

### 2.5 Importing Agency Configuration Information

You will not be able to access the data within FieldManager software until you load the FieldManager ACP file.

After logging on for the first time, the Invalid Agency Configuration message prompts you to browse to your configuration file. If you click **CANCEL**, FieldManager will close and you will not be able to use the application. Click **OK** to open the Load Agency Configuration File window to browse to your configuration file. The default name for the file is *fieldmgr.acp*, but it may have been renamed by your agency. Once you have selected your file, FieldManager displays the Load ACP message to tell you that the file has been loaded successfully. Click **OK**.

This will allow you to access all areas of the system. You can then add yourself as a FieldManager software user and select your own ID and password (see Section 3.3.3).
3. Getting Started

This chapter provides information needed to begin using FieldManager software to keep track of construction contracts.

3.1 Logging On to FieldManager Software

Microsoft Windows operating system must be running for FieldManager software to start. When FieldManager software is installed, Microsoft Windows operating system creates a program group that houses the FieldManager icon. To start FieldManager software, go to the Windows taskbar and select Programs from the Start menu, and then choose FieldManager from the Programs submenu.

FieldManager software displays the FieldManager Login window (see Figure 3-1). Each time you open FieldManager software, you will be required to enter a User ID and password assigned by your system administrator.

![FieldManager Login Window](image)

Figure 3-1. FieldManager Login Window
Enter your User ID in the User ID text box, and then press TAB to advance to the Password text box. Enter your password and click OK. To prevent other people from learning your password, letters will not display as you type your password. When you log on successfully, one of two events will occur. Typically FieldManager software’s Application Window will display, and you can begin working in FieldManager software.

3.1.1 Setting the Default Datasource and Default User ID

In the login window, there is a Set as Default check box next to the Datasource drop-down menu. Check this box if you wish to have the selected datasource to be selected by default the next time you log in.

![FieldManager login window]

Figure 3-2. FieldManager Login Window with Check Boxes Selected

Use the Set as Default for this Datasource check box next to the User ID if you wish to have the entered user ID appear by default the next time you choose the selected datasource. Each datasource can have its own default user ID.

- **Note:** Each Windows user can set his own default datasource and default user ID for each datasource.

3.1.2 Logging On as a Different User

To log on to FieldManager software as a different user without exiting the application, select Log On as Different User from the File menu. The FieldManager Login window displays (see Figure 3-1). Enter the desired User ID and password and click OK. FieldManager software recognizes the newly designated user as the current user, and that user’s preferences are established for further work with the software.
3.2 FieldManager Software’s User Interface

FieldManager software operates in a graphical user interface that is easy to use once it is understood how the different components operate.

3.2.1 Understanding the Application Window and Toolbars

When you start FieldManager software, the Application Window displays and remains displayed as long as FieldManager software is running. Figure 3-3 shows the different components of FieldManager software’s Application Window.

![FieldManager Application Window Components](image)

Figure 3-3. FieldManager Application Window Components—Contracts List Window

Within the Application Window, there is an area for other FieldManager windows that open when FieldManager commands are invoked.
Along with the window display area, there are several other elements of the Application Window.

**Menu Bar**
Contains names to click to display drop-down lists of commands.

**Window Toolbar**
Changes as the window display changes, showing only those commands that can be invoked for the active window.

**Application Toolbar**
Remains static, or constant, regardless of where the user is in the system. In other words, it always displays the same buttons no matter what commands are being invoked. Click these buttons to work with specific contract information; for example, click IDRS to access the Inspector’s Daily Reports.

**Title Bar**
Contains standard Windows controls for minimizing, maximizing, and closing the window.

**Status Bar**
Changes depending on what the user is doing, offering helpful information about various functionalities.

The **Application Toolbar** and the **Window Toolbar** have buttons, which open other windows in which you can work. Clicking the down arrow beside the **Quick Query** toolbar button on the Window Toolbar will display *fly-out* buttons for accessing specific inquiries appropriate to the active window. Each time you open a window associated with a contract, the Quick Query fly-out toolbar button appears with Cont Status as its label. This label simply indicates the first inquiry available: the Contract Status inquiry. If you select another inquiry, that inquiry will show on the Quick Query fly-out toolbar button instead of the Cont Status inquiry.

### 3.2.2 Using the Mouse

**Clicking**
To *click* something, rest the mouse pointer on the window object and press the left mouse button once.

**Double-clicking**
*Double-clicking* is just like clicking, except you press the left mouse button twice in rapid succession.

**Highlighting**
To *highlight* text with the mouse, begin by resting the mouse pointer on the desired starting point of the text. Next, hold down the left mouse button and at the same time drag the mouse by running its I-beam across the text. As you drag, the text is highlighted, and will remain so even when the mouse button has been released. To reverse the highlighting, simply click somewhere else in the window.
Selecting

To select a record from a list window, move the mouse so the pointer rests on the record, and click once so the record is highlighted on the list. Some list windows allow for multiple record selection, which can be done by holding down either the CTRL key or SHIFT key while clicking on the records.

3.2.3 Using Menus to Invoke Commands

Another way to invoke commands besides using toolbars is to choose commands from the menus on the Menu Bar. These menus contain all of the commands offered by toolbar buttons, in addition to several other commands. To invoke a command in a window, click the menu name and then select a command from the drop-down list.

For instance, FieldManager software can back up a database at any time while working in FieldManager software. To back up a database, choose Backup Database from the File menu to display the Backup Database window. The window displays the history of previous backups and a text box for entering or changing the name and drive of the backup file.

![Backup Database Window]

To back up the database, close all open windows and click BACKUP. FieldManager software goes through a series of steps to perform the backup. Once complete, a window will display confirming that the backup was successful.

- **Note:** For additional details on how to back up your FieldManager database refer to Section 13.5 of this document.
3.2.4 Understanding Keyboard Operations

The keyboard must be used to type in various field entries. FieldManager software offers an Undo option to help correct mistakes made in text entry fields. To undo the last keystroke made, select Undo from the Edit menu. You can also use the Undo option to cancel out the last copy/paste action made.

Along with using the keyboard for data entry, many users also find it helpful to access some of FieldManager software’s commands via the keyboard. The Application Toolbar buttons and the menus available from the Menu Bar can be accessed using the keyboard. The proper combination of keys held down at the same time allows this access.

To access the Application Toolbar buttons with the keyboard, press and hold down the CTRL and SHIFT, and at the same time, press the underlined letter in the name of the button you wish to activate. For example, to invoke the IDRS button with the keyboard, press and hold down CTRL and SHIFT, and then while still holding down those buttons, press the letter D (for IDRs).

The same procedure is used to choose menus from the Menu Bar, except the ALT key is used in place of the CTRL and SHIFT keys. For instance, to access the Utilities menu, press and hold down the ALT key and type the letter U (for Utilities). To select a command from the activated menu, simply type the letter underlined in that command. For example, to choose the Inquiries command from the View menu, press and hold down the ALT key and type the letter V (for View). Then, type the letter Q (for the Quick Inquiries command). At that point, you can also type the letter C to access the Contract Status command.

Within the View menu is a listing of the shortcut keys, as they are commonly known, for accessing the Application Toolbar buttons. Several other shortcut keys may be found within the different drop-down menus, and with practice, you will become more facile at maneuvering around in FieldManager software.

3.2.5 Using List Windows

A list window displays a list of records to work with. The Contracts list window always displays when FieldManager software is first opened (see Figure 3-3). Before changing and deleting records in a list window, select the record to work with by clicking on that record.

List windows display only the most important information about a record. To add or change a record in the list window, it is necessary to invoke the proper command before working with the record’s data in a tab window (for information on tab windows, see Section 3.2.6).

If the list window contains more records than can be displayed in the window, the window will contain a scroll bar used to view records further down in the list. Depending on the information in the window, there could be a scroll bar to the right of the window.
and at the bottom of the window. The right scroll bar is for viewing up and down in the window, and the bottom scroll bar is for viewing from left to right.

If you double-click a record in a list window, FieldManager software displays the information for the record in tab windows that you can modify.

List windows have right mouse button menus, which contain frequently used commands. To bring up a right mouse button menu, point the mouse on the record to associate the command with, and then click the right mouse button.

### 3.2.6 Using Tab Windows

Tab windows contain dividing tabs, and they provide a lot of detail about a record; they also allow a record’s data to be changed, and they allow new records to be created. While list windows only display certain fields of information about a record, tab windows go into greater detail and can be modified. Figure 3-5 identifies some common elements of tab windows.

![Figure 3-5. Change Contract Documentation Tab Window—GENERAL Tab](image)

The following are common elements that may appear in tab windows.

**Tab Names**

These define the tabs that may be clicked to access different information about a record.

**Status Area**

This area containing blue text cannot be modified. Various types of status areas may be displayed depending on the functionality of the tab window.

**Text Box**

Click in these fields to add to or modify field entries.

**Radio Buttons**

Click one of these buttons to make a restricted selection.
Calendar Tools

Click these drop-down menus to quickly enter dates for date fields.

Clicking a Calendar drop-down menu displays a Calendar tool as shown in Figure 3-6.

![Calendar Tool](image)

Figure 3-6. Calendar Tool

Within this drop-down menu, simply use the left and right arrows to select the correct month and year, and then click the desired day. Click OK to accept the date selected and that date will automatically be entered in the appropriate date field, or click CANCEL to cancel the entry. If you prefer, you can type dates directly into date fields rather than using the Calendar tool.

To advance to the next text box in a tab window, simply press the TAB key or click in the text box. Simultaneously pressing the TAB and SHIFT keys results in a backtab, which moves you back to the previous text box.

Figure 3-7 displays two other elements that may appear in tab windows.

**Drop-down List Box**

A text box with an accompanying arrow on which to click to display a list of valid values for the field from which to choose.

**Check Box**

A square box that can be selected or deselected. When clicking in a check box, an X or check mark displays in the box to indicate the option is selected. To deselect a check box, simply click in the box again to remove the X or check mark. Check boxes are like light switches that can be turned on and off with a click of the mouse.
3.2.7 Using Modal Windows

Modal windows require a response before continuing in the application. An example is shown in Figure 3-8.

When a modal window appears, you will be unable to access the FieldManager menus and toolbars. Simply respond as appropriate to be able to continue.
### 3.2.8 Changing the Way Windows are Displayed

FieldManager windows display in several ways to help organize the work being done. Figure 3-9 shows the locations on which to click to resize or re-organize several parts of a list window.

![Items List Window](image.png)

Figure 3-9. Items List Window

The size and organization of a window can be changed as follows.

**Resizing Windows**
To resize a window, rest the mouse pointer on the border of the window until it displays as a double-arrow. Click and hold the mouse button to grab the window edge and drag the window border to any size.

**Resizing Columns**
To resize a column, rest the mouse pointer on the border between two column headings, to the right of the column to be resized, until it displays as a bar with two arrows pointing to each side. Click and hold the mouse button to grab the column edge and drag the column to the right or left, increasing or decreasing its width.

**Re-ordering Columns**
To re-order columns, click in the column heading so that FieldManager software highlights the entire column. Hold down the mouse button in the heading, and FieldManager software will display a faint gray bar down the length of the column. Continue to hold down the mouse button, and as you move the mouse, the gray bar will move. Release the mouse, and the column will be ordered in the window wherever the gray bar rests.
Choosing the **Tile Vertical**, **Tile Horizontal**, **Layer**, or **Cascade** command from the **Window** menu will also display the windows in a different way, according to standard Windows functionality.

### 3.3 Using System Utilities

The system utilities contain a variety of tools used to customize the FieldManager software environment and to support contract management.

#### 3.3.1 Setting User Preferences

Adjust the settings in FieldManager software by choosing **User Preferences** from the **Utilities** menu to display the User Preferences window (see Figure 3-10).

![User Preferences Window](image)

Figure 3-10. User Preferences Window

Table 3-1 lists the options that can be set.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GENERAL</td>
<td>Current Datasource</td>
<td>The datasource that you are currently accessing.</td>
</tr>
<tr>
<td>GENERAL</td>
<td>Default Database Backup Location</td>
<td>The database will be backed up in the location specified here.</td>
</tr>
<tr>
<td>GENERAL</td>
<td>Warn User When Exiting Application</td>
<td>If this option is selected, you will be prompted each time before exiting FieldManager software.</td>
</tr>
<tr>
<td>GENERAL</td>
<td>Automatically Get Mail from FieldNet When Logging In</td>
<td>If this option is selected, the system automatically gets new FieldNet messages when you log in.</td>
</tr>
<tr>
<td>Tab</td>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>LIST WINDOW</td>
<td>Include column headers in a copy</td>
<td>If this option is selected, the column headers will be included each time data is copied from a list window to the clipboard.</td>
</tr>
<tr>
<td>LIST WINDOW</td>
<td>Save list window settings when closing list</td>
<td>If this option is selected, each time FieldManager software closes a list window, any modifications made to the display and sort order of that list window will be saved. This way, the next time the list window is opened, the current display and sort order will be in effect. Clicking the RESET SETTINGS button will reset all window displays back to their original settings.</td>
</tr>
<tr>
<td>LIST WINDOW</td>
<td>Save modal window settings when closing list</td>
<td>If this option is selected, each time FieldManager software closes a modal window, any modifications made to the display and sort order of that modal window will be saved. This way, the next time the modal window is opened, the current display and sort order will be in effect. Clicking the RESET SETTINGS button resets all modal window displays back to their original settings.</td>
</tr>
<tr>
<td>LIST WINDOW</td>
<td>Save built-in filter settings when closing list</td>
<td>If this option is selected, built-in filter settings remain after you close and then re-open a list window. Clicking the RESET SETTINGS button resets all built-in filters. This setting does not apply to custom filters.</td>
</tr>
<tr>
<td>ENTRY DEFAULTS</td>
<td>Station and Location fields default to last entry</td>
<td>If this option is selected, the Station and Location information from the previous IDR (Inspector’s Daily Report) item posting will remain in effect for the next IDR item entry, minimizing user keying.</td>
</tr>
<tr>
<td>ENTRY DEFAULTS</td>
<td>Remarks field defaults to last entry</td>
<td>If this option is selected, the Remarks field information from the previous IDR (Inspector’s Daily Report) item posting will remain in effect for the next IDR item entry, minimizing user keying.</td>
</tr>
<tr>
<td>ENTRY DEFAULTS</td>
<td>Form date field defaults to last entry</td>
<td>If this option is selected, the form date from the previous material approval will remain in effect for the next material approval.</td>
</tr>
<tr>
<td>ENTRY DEFAULTS</td>
<td>File field defaults to last entry</td>
<td>If this option is selected, the file from the previous material approval will remain in effect for the next material approval.</td>
</tr>
<tr>
<td>ENTRY DEFAULTS</td>
<td>Form field defaults to last entry</td>
<td>If this option is selected, the form from the previous material approval will remain in effect for the next material approval.</td>
</tr>
<tr>
<td>ENTRY DEFAULTS</td>
<td>Source field defaults to last entry</td>
<td>If this option is selected, the source from the previous material approval will remain in effect for the next material approval.</td>
</tr>
<tr>
<td>Tab</td>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>IMPORT</td>
<td>Define default import locations</td>
<td>The import locations displayed on this tab dictate the options available via the drop-down list of locations accessed when importing IDRs from the FieldBook™ component (refer to Section 14.2.1). To add a location to the list, click ADD LOCATION and type in the desired location or use the BROWSE button to find and assign the location. To delete a location, select that location and click DELETE LOCATION. The list of locations is automatically updated when a user types in a new location while performing an IDR import. The number of locations maintained in the list is determined by your agency.</td>
</tr>
<tr>
<td>EXPORT</td>
<td>Define default export locations</td>
<td>The export locations displayed on this tab dictate the options available via the drop-down list of locations accessed when exporting contract information to the FieldBook component (refer to Section 14.2.2). To add a location to the list, click ADD LOCATION and type in the desired location or use the BROWSE button to find and assign the location. To delete a location, select that location and click DELETE LOCATION. The list of locations is automatically updated when a user types in a new location while performing a contract export. The number of locations maintained in the list is determined by your agency.</td>
</tr>
<tr>
<td>TOOLBAR</td>
<td>Window Toolbar Position</td>
<td>Sets where the Window Toolbar will be displayed on your screen.</td>
</tr>
<tr>
<td>TOOLBAR</td>
<td>Application Toolbar Position</td>
<td>Sets where the Application Toolbar will be displayed on your screen.</td>
</tr>
<tr>
<td>TOOLBAR</td>
<td>Show Toolbar Button Text</td>
<td>If this option is selected, the text below the icon within the button will be displayed.</td>
</tr>
<tr>
<td>TOOLBAR</td>
<td>Show Toolbar Power Tips</td>
<td>If this option is selected, when your cursor is over a toolbar button, text will display describing the functionality of the button.</td>
</tr>
<tr>
<td>TOOLBAR</td>
<td>Default Toolbar Settings</td>
<td>If this option is selected, the toolbar settings will return to the default settings.</td>
</tr>
<tr>
<td>INQUIRIES</td>
<td>Save Quick Queries Selections</td>
<td>If this option is selected, the most recently selected Quick Query button is saved and becomes the default button that appears in the Window Toolbar. If you close the window and return later, that Quick Query button remains the default. Clicking the RESET SETTINGS button will reset all default Quick Query buttons to the original system settings.</td>
</tr>
</tbody>
</table>

Table 3-1. User Preferences Tab Window—Options
Once your preferences are set, click OK to save the changes, or click CANCEL to cancel the changes.

### 3.3.2 Changing Your Password

To change your password, first log on to FieldManager software with your old password. Choose **Change Password** from the **Utilities** menu to display the Change Password window (see Figure 3-11).

![Change Password Window](image)

Figure 3-11. Change Password Window

To change to another password, enter your old password, press **TAB**, enter the new password, press **TAB**, and re-enter the new password for verification. Click **OK** to accept the change, or click **CANCEL** to close the window without changing the password.

- **Note**: When a user changes a password, the new password cannot be set to the same value as the old or previous password.

### 3.3.3 Managing the System

Users who are at the System Administrator level have access to options within the Utilities menu that define how, and by whom, the system is used.

**Maintaining User Information**

To add, change, or delete information about a user, choose **System Management** from the **Utilities** menu, and then choose **Maintain Users** from the System Management submenu. As shown in Figure 3-12, a Users window will display listing all the users currently allowed access to the system.
To simply review a user’s information, select the user from the list and click REVIEW on the Window Toolbar. FieldManager software displays the user’s information in a mode in which you can view, but not alter, the text. Click CANCEL to return to the Users window.

Note: To learn how to find a user quickly from an extensive user list, see Section 3.4.

There are four levels of security at which users may be placed depending on their read/write access, or in other words, depending on their ability to view (read) and alter (write) system information.

**FieldManager User**

Has read/write access to everything in the system except user information.

**FieldBook User**

Has read/write access to the FieldBook component’s functionality and read only access to the rest of the system excluding user information.

**Read Only**

Has read only access to everything in the system except user information.

**System Administrator**

Has read/write access to everything in the system including user information.
Adding a User

To add a new user to the system, from the Users window, click ADD on the Window Toolbar. Alternatively, click the right mouse button and choose Add User. An Add User window will display. Enter information about the new user in the fields provided. The User ID is typically the user’s last name and first initial with no spaces in between; however, your agency may have a different protocol to follow. As a security measure, when entering and re-entering the user’s password, asterisks will display rather than letters. To choose the security level at which to place the user, click the down arrow beside the Security Level field and choose the appropriate designation. Click OK to add the user, or click CANCEL to cancel the addition.

An example of a completed Add User window is shown in Figure 3-13.

![Add User Window](image)

**Figure 3-13. Add User Window**

- **Note:** The Device ID fields are primarily used for interfacing with Info Tech Mobile Inspector. Please see section 19.2 for more information.

Changing User Information

To change a user’s information, select the user from the Users window and click CHANGE on the Window Toolbar. Alternatively, select the user, click the right mouse button, and choose Change User. A Change User Information window will display for the selected user. Change any of the information displayed, and then click OK to accept the changes or click CANCEL to cancel the changes.

Deleting a User

To delete a user from the system, select the user from the Users window, and click DELETE from the Window Toolbar. Alternatively, select the user, click the right mouse
button, and choose **Delete User**. FieldManager software displays a Delete Warning window to verify the deletion. Click **YES** to confirm the deletion, or **NO** to cancel the deletion.

**Understanding Password Rules**

The Agency Configuration Program has an option to set the number of days before a user’s password expires. With this setting, there is also an option to set the number of days before a password expires that a message will be displayed to warn the user of the impending expiration.

If your agency selects to use this option, upon log on to FieldManager software, the user will receive a message stating “Your password expires in X days. Do you want to change your password now?” Clicking the **NO** button will allow the user to log on to FieldManager software. Clicking the **YES** button will open the Change Password window to allow the user to change their password.

Another feature in the Agency Configuration Program allows you to set the minimum number of characters a user password must contain. When a user adds or changes their password, the new password will be required to contain at least the minimum number of characters as specified in the Agency Configuration Program. If the minimum number of characters is not met, an error message will be displayed and the user will be returned to the password entry screen.

**Removing a Contract Lock**

Occasionally, a lock may be placed on a contract in FieldManager software to prevent alteration to the contract. This might occur, for instance, if an estimate is being produced for the contract and there is a power outage, causing FieldManager software to shut down. Before removing a lock from a contract, contact your system administrator to ensure that you are taking the proper action.
To remove a lock that was placed on a contract, choose **System Management** from the **Utilities** menu, and then choose **Contract Locks** from the System Management submenu. FieldManager software will display a Locked Contracts window (see Figure 3-14).

![Figure 3-14. Locked Contracts Window](image)

This window lists any locked contracts along with when, why, and by whom the contracts were locked. Select the contract to unlock, and click **REMOVE LOCK**. Click **OK** to remove the lock, or click **CANCEL** to cancel the action.

### Loading Agency Configuration

The following three actions trigger the configuration file load process.

- You log on to a database that does not have an agency configuration set loaded.
- You log on to a database that has an agency configuration set loaded, but is for an older version of the application.
- System Administrator selects the new Load Agency Configuration option on the System Administrator submenu of the Utilities menu.

**Note:** This option is available only to system administrators.

FieldManager displays the following message after you perform either of the first two actions.

![Figure 3-15. Invalid Agency Configuration Window](image)
Click OK, the Load Agency Configuration File window appears. The **Look in:** drop-down list box defaults to the FieldManager installation directory. The **Files of type:** drop-down list box defaults to *.acp* files, but you can remove the filter to look for other file types.

![Figure 3-16. Load Agency Configuration File Window](image)

Once you locate a configuration file, FieldManager verifies, in sequence, the following four characteristics of the file:

- The selected file is a valid FieldManager configuration file.
- The FieldManager configuration file version matches the application version.
  
  - **Note:** Only the first 3 characters of the version number will be compared. (4.2 will be used in the comparison, not 4.2b.)
- If there was a previous configuration loaded, the agency name of the old configuration must match the agency name of the new configuration file.
- If there was a previous configuration loaded that had a creation timestamp, the creation timestamp of the configuration in the selected file will be compared against the creation timestamp of the previous configuration.

If the selected configuration file passes the verifications, then the configuration will be loaded into the database, overwriting any previous versions. If the load of the agency configuration file fails for any reason, the following message will be displayed. If a user logging on caused the failure of the configuration file load, then the log on will fail and the application will shut down.

![Figure 3-17. Error Window](image)
**Configuring the System**

To adjust the system configuration settings in FieldManager software, choose **System Management** from the **Utilities** menu, and then choose **System Configuration** from the System Management submenu to display the System Configuration tab window (see Figure 3-18).

![System Configuration Tab Window](image)

Table 3-2 shows the options that can be set. The data in the Reference Data Last Updated, Agency Configuration Creation Date, and Agency Configuration Import Date fields is automatically assigned upon import of the files.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GENERAL</td>
<td>District Number</td>
<td>Applicable for agencies using a network setup, this is the number for the district in which the contracts are being administered.</td>
</tr>
<tr>
<td>GENERAL</td>
<td>Inbox Location</td>
<td>Information that is imported from your agency’s central office contract administration system is placed in the location specified here.</td>
</tr>
<tr>
<td>GENERAL</td>
<td>Outbox Location</td>
<td>In preparation for being exported to your agency’s central office contract administration system, the files created when contracts or estimates are generated, or when contracts are transferred, are placed in the location specified here.</td>
</tr>
<tr>
<td>GENERAL</td>
<td>Contract Archive Location</td>
<td>When contracts are archived, they are placed in the location specified here.</td>
</tr>
<tr>
<td>GENERAL</td>
<td>Reference Data Last Updated</td>
<td>This field displays the date of the last reference data import.</td>
</tr>
<tr>
<td>GENERAL</td>
<td>Agency Configuration Creation Date</td>
<td>This field displays the date the Agency configuration file was created.</td>
</tr>
<tr>
<td>GENERAL</td>
<td>Agency Configuration Import Date</td>
<td>This field displays the date of the last Agency Configuration file import.</td>
</tr>
</tbody>
</table>
### Table 3-2. System Configuration Tab Window - Options

<table>
<thead>
<tr>
<th>Tab</th>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FIELDNET</td>
<td>Account Status</td>
<td>This check box must be checked before FieldNet can be set up. FieldNet can be used to transfer data between FieldManager software and your agency’s central office contract administration system.</td>
</tr>
<tr>
<td>FIELDNET</td>
<td>FieldNet Account</td>
<td>This is also called the <strong>FMgr Account</strong> on the sticker containing your account information. An example would be fmgr001.</td>
</tr>
<tr>
<td>FIELDNET</td>
<td>Last Deactivation Date</td>
<td>This is the date when the FieldNet account was last set to a deactivated status.</td>
</tr>
<tr>
<td>FIELDNET</td>
<td>FieldNet ID</td>
<td>This is your FieldNet ID, which should correspond with the ID set up on the FieldNet server.</td>
</tr>
<tr>
<td>FIELDNET</td>
<td>Password</td>
<td>This is your FieldNet password. This can be found on the sticker containing your account information as <strong>Password</strong>.</td>
</tr>
<tr>
<td>FIELDNET</td>
<td>Verification</td>
<td>This is a field to verify that the FieldNet password was entered correctly. Simply retype your password to confirm this.</td>
</tr>
<tr>
<td>FIELDNET</td>
<td>FieldNet Archive Directory</td>
<td>This is the location of the backed up incoming messages from FieldNet.</td>
</tr>
<tr>
<td>FIELDNET</td>
<td>Auto Send Messages</td>
<td>This option enables the sending of FieldNet messages immediately if you have a dedicated connection. The system automatically disables this option if it is unable to send the FieldNet Outbox; after this happens, a warning appears every time you log in until you return to the FieldNet tab and click OK.</td>
</tr>
<tr>
<td>FIELDNET</td>
<td>Auto Retrieve Upon Send</td>
<td>This option enables you to retrieve messages immediately after sending messages, instead of manually requesting the messages.</td>
</tr>
</tbody>
</table>

**Note:** If your agency is using FieldNet, all the corresponding options on the FIELDNET tab must be completed (except the checkbox options) for it to function properly.

Once your options are set, click **OK** to save the changes, or click **CANCEL** to cancel the changes.

### 3.3.4 Using the Spell Check

The spell check utility is provided whenever the user can modify data in a tab window. You can choose to check the spelling for each modifiable text field in the window by choosing **Spell Check** from the **Utilities** menu, or you can spell check the current field only by choosing **Spell Check** from the right mouse button menu.
For example, to spell check an entire window, from the Contracts list window, click DOCU on the Application Toolbar. Choose **Spell Check** from the **Utilities** menu or click SPELLCHECK on the Window Toolbar. The spell check will examine the current tab window for every modifiable text field that contains information. If a word has been misspelled, the Spell Check window will display (see Figure 3-19).

![Figure 3-19. Spell Check Window](image)

This window is similar to those found in many word processing programs. Respond as you would to any spell check utility.

If you find that there are construction-related words your agency uses that are not typically recognized by the spell check utility, you can create a custom dictionary that includes those words. To do this, click **OPTIONS** in the Spell Check window. The Spell Options window displays.

![Figure 3-20. Spell Options Window](image)

Click **OPEN CUSTOM** and select the file named **custom.dic**. Click **OPEN**, and then click **OK** to confirm your selection of the custom dictionary. The custom dictionary is now active, and in response, the **ADD TO CUSTOM** button is enabled in the Spell Check window. As the spell check lists words it does not recognize, you can add those words to the custom dictionary by clicking **ADD TO CUSTOM**. When the spell check encounters those words in subsequent searches, it will recognize them as being correctly spelled.
3.3.5 Using the Calculator

FieldManager software offers a calculator function that can be used at any time to do some quick calculations. Choose **Calculator** from the **Utilities** menu to display the Calculator (see Figure 3-21).

![Calculator](image)

Figure 3-21. Calculator

The FieldManager calculator can be used just like a desk calculator. Click the number keys with the mouse to enter numbers, and use the operations + (add), - (subtract), *(multiply), and / (divide) to calculate values. Clicking the C button clears the display completely, CE clears the last value you selected, and BACK reverts back one value.

3.4 Finding Information

FieldManager software provides several different functions to help find specific information quickly and easily.

3.4.1 Using the Find Feature on List Windows

The top left corner of most list windows contains a **Find text box** used to advance to a specific record in a list window (see Figure 3-22). As you enter the first few numbers or letters of the value for the field identified in the text box label, the highlight in the list window advances to the first record in the list that matches the information specified for the field. To change the field on which the search is based, simply double-click the column heading desired to appear in the text box label.
3.4.2 Sorting List Windows

To sort a list window, double-click in the column header of the field to sort. The first time you double-click, FieldManager software performs an ascending sort. Double-click a second time, and it performs a descending sort. This sorting technique is for single fields only.

It is also possible to sort a list window in ascending or descending order according to specific fields, and up to six fields may be chosen to sort by.

To sort a list window, click SORT on the Window Toolbar, and select a field from the drop-down list in the Order By text box. Click either the ASCENDING or DESCENDING radio button. If you select ASCENDING, FieldManager software lists numeric records from...
lowest to highest first, and then sorts from A to Z (regardless of capitalization). DESCENDING reverses this order.

To sort by additional fields, select them in the Then By text boxes, and choose ASCENDING or DESCENDING to determine the order in which those fields are sorted. Click MORE to display additional Then By text boxes. When multiple fields are chosen, FieldManager software will first sort the records based on the choice of column heading and sort order specified in the Order By box (the first choice in the Sort window). Then, with that original sort in place, it will sort by each successive column heading and sort order specified in the Then By box.

If you have entered sort criteria and then decide to retain the original sort, click RESET to return the window to the previous sort criteria.

Click APPLY to sort the list window, or CANCEL to cancel the sort operation. The RESET button can only be used prior to clicking APPLY. Once applied, the chosen criteria dictate the sorting.

Once a sort is applied to a window, that sort applies each time the window is opened until the sort order is changed again. If you applied the sort listed in Figure 3-23 to the Items list window shown in Figure 3-22, that window would then display as shown in Figure 3-24. The sort order specified first sorts the Items list window by Units in ascending order and then sorts by Item Description in ascending order.

![Figure 3-24. Items List Window—Sort Example](image-url)
3.4.3 Filtering List Windows

List windows can be filtered so that only records with a specific set of information display. One or more filter criteria may be specified using the column, operator, and value of the filter. Filters may also be saved for future use.

To filter a list window, begin by clicking FILTER on the Window Toolbar. The Filter window will display (see Figure 3-25).

![Filter Window](image)

Figure 3-25. Filter Window

Click the down arrows in the Column and Operator fields to display lists of values from which to choose information. The Column field lists the names of all the columns in the list window on which the filter can be based. The Operator field has a separate scrolling area with operators that can be used to narrow the filter. The last four operators—Contains, Does not Contain, Like, and Not Like—rely on pattern matching. The Contains option narrows the search and only lists entries that contain the given text anywhere within the data. Alternatively, the Does not Contain option only lists entries that do not include the given text. The Like option narrows the search and only lists entries that match the given text at the beginning of the data. In contrast, the Not Like option only lists entries that exclude the given text at the beginning of the data.

Information typed in the third field, the Value field, designates the filter criterion used as a delimiter, or which you are trying to match. Click OK to apply the filter to the list window, or CANCEL to cancel the filter and return to the list window.

If the filter shown in Figure 3-25 were applied to the Items list window shown in Figure 3-22, that window would then display as shown in Figure 3-26.
In the right corner of every list window, there is a Filter text box that identifies the filter applied to that window. When you apply a simple (also known as a temporary) filter, the Filter text box will show `<Temporary Filter>`. To display all the records in a list window and remove the filter, choose `<Show All>` from the drop-down list in the Filter text box.

**Using an Advanced Filter**

Clicking ADVANCED displays an expanded version of the Filter window in which to select multiple rows of filter criteria and save any filters created (see Figure 3-27).

Within this window, you can name the filter in the Name field so that it may be saved and used again. In the Select Filter Condition area, set the conditions for the Column Name, Operator, and Value(s) fields just as with a simple filter.
To add additional rows of filter criteria, click INSERT ROW at the bottom of the window and enter the appropriate values. Each time a row is inserted, FieldManager software will place it above the currently selected row. To add a row of criteria at the bottom of the list of rows, click ADD ROW. To delete a row of criteria, select the row and click DELETE ROW.

Once several rows of filter criteria have been entered, specify whether the filter finds information that contains all or only some of the filter criteria. To do this, choose an **And** or **Or** operator between rows. **And** finds records that meet both criteria, and **Or** finds records that meet one or the other criterion. Select **And** or **Or** from a drop-down list attached to the field.

There may be times when two rows of criteria are needed. In this case, parentheses marks may be used to group rows in a filter. To group two rows of criteria, highlight the first row of criteria and click the (+ button to insert an open parenthesis mark before the criteria. On the same row, select the **And** or **Or** operator that associates the two rows of criteria. Then, select the second row and click the )+ button to insert a close parenthesis mark. To remove a parenthesis, select the row where the parenthesis is, and click the (- or )- buttons.

Once all the filter criteria have been entered, click SAVE to save the filter, CLOSE to close the filter without applying it to the window, or APPLY to apply the filter to the window. If you click CLOSE or APPLY and have not saved the filter, FieldManager software will ask if you want to save the filter. To do so, enter a filter name in the Name field. To delete an existing advanced filter, open the Advanced Filter window, select the filter from the Name field, click DELETE, and then click OK when FieldManager software asks to verify the deletion.

In the advanced filter displayed in Figure 3-27, the user named the filter (Greater than 1000m2) so that it may be saved and re-used, and decided to limit the Items list window to items that have Units of m2 and an Authorized Quantity of greater than $1000. If this filter were applied to the Items list window shown in Figure 3-28, that window would then display as shown in Figure 3-29.
While working in FieldManager software, there may be times when you have several windows open at once. As you work in one window, the information in the other windows may be affected by the changes you make to the first. Normally the changes are not reflected in the other windows until you close and re-open those windows. You can,
however, use an option in FieldManager software to refresh, or update, the information in the other windows without having to exit those windows.

To ensure that you are viewing the most updated information for all open windows, click REFRESH on the Window Toolbar, or alternatively, select Refresh from the View menu. FieldManager software will update the information in the windows according to any changes made in the system that affect those windows.

- **Note:** FieldManager software will only refresh windows according to information that has been saved in the system. In other words, you will need to click SAVE or SAVE/CLOSE in a window before that window’s changes can be used to refresh any other open windows.

### 3.5.1 Understanding Window Refresh (Example)

As an example of how FieldManager software’s Refresh option can be useful, presume that you are working in the Items list window (see Figure 3-30).

![Figure 3-30. Items List Window (with Clearing Item Selected)](image)

While scanning the information listed for the Clearing item, it occurs to you that an IDR still needs to be entered that includes usage for that item. Without closing the Items list window, you then begin to enter an IDR (Inspector’s Daily Report) that includes an item posting for the Clearing item.
After clicking OK to confirm the posting for the Clearing item, you click SAVE to save your work. When you return to the Items list window, however, you realize that the IDR posting just completed is not yet reflected in the Items list. To update the Items list window with the newly added information, you click REFRESH on the Window Toolbar. The Items list window is immediately updated and contains the correct usage for the Clearing item.

As demonstrated in this example, FieldManager software’s Refresh option can be very handy. It can be particularly useful when you need to update several open windows at once without closing all those windows beforehand.
3.6 Using the Print Button

The PRINT button is always displayed on the Window Toolbar, and it may be used to print inquiries, reports, and list window contents.

To print information, click PRINT to display the Print dialog box (see Figure 3-33).

![Figure 3-33. Print Dialog Box](image)

The Print dialog box is similar to those found in many word processing programs. Respond as you would to any print utility. More information about FieldManager software’s print functionality can be found in Chapter 13, Working with Inquiries and Reports.

3.6.1 Printing Reports from List Windows

Certain list windows allow you to print reports, as well as list contents directly from the list window. These are the list windows from which you can print reports:

- IDR List
- Daily Diary List
- Estimates List
- Contract Modifications List
- Miscellaneous Reports: Contract’s Performance List
- Miscellaneous Reports: FieldBook Import Report List
- Miscellaneous Reports: Notice of Change in Construction Status List
- Miscellaneous Reports: Weekly Report of Time Charges List

To print reports, open the list window and select one or more rows for which you want to print reports. Click PRINT. FieldManager software opens a Print Options window containing two or more option buttons.

The first option is the List Print option. If you select this option, FieldManager software will print the contents of the list window. The other option buttons represent the type of reports that may be printed for the rows selected in the list window. If you select this option for multiple reports, you can print all reports as one job by selecting the Consolidate into one print job check box. One advantage of doing so is that if you are printing to a PDF writer, you can save all reports to one PDF file, rather than saving separate PDF files for each report.

As an example, the Print Option window for the Contract Modifications list window is shown in Figure 3-34.

![Print Options Window (for the Contract Modifications List Window)](image)

To print the reports, select the options for the reports you wish to print and click OK. FieldManager software displays the Print dialog box (see Figure 3-33). Click OK in the Print dialog box. If more than one report was selected in the list window, FieldManager software displays a Progress Meter window so that you can monitor the progress of your print job.
3.7 Using Online Help

Experienced and new computer users alike will appreciate the comprehensive online Help system provided with FieldManager software. Help provides a quick reference to menu commands and window fields, and it answers many questions about FieldManager software. It is designed to be the user’s main reference and guide.

FieldManager software’s online Help works similar to Help in Microsoft applications. Links, identified by the color green, enable the user to go directly to related topics. In addition, FieldManager software’s online Help is context sensitive, meaning that users can readily access information geared toward the activity taking place on the screen. The context sensitive aspect of Help is available at various times by choosing Help from the right mouse button menu or, in some modal windows, by clicking HELP that displays.

3.7.1 Using the Using Help Menu Choice

To learn more about using FieldManager software’s Online Help, press the F1 key, or from the Help menu, choose Using Help.

3.7.2 Using the Contents and Index Menu Choice

To open the FieldManager Help Topics window and display a table of contents and index of the major topics in Help, from the Help menu, choose Contents and Index.

3.7.3 Using the Keyboard Menu Choice

To display helpful information about using the keyboard to access software shortcuts, from the Help menu, choose Keyboard.

3.7.4 Using the Glossary Menu Choice

To access FieldManager software’s glossary of terms, from the Help menu, choose Glossary.

3.7.5 Using the Technical Support Menu Choice

To open a window displaying the names and phone numbers of persons in your agency available for help on specific topics, from the Help menu, choose Technical Support.

3.7.6 Using the About FieldManager Menu Choice

To open a window displaying release information about your FieldManager software, from the Help menu, choose About FieldManager.
3.7.7 Using the Advanced Field Info Menu Choice

In addition to the online Help options available from the Help menu, FieldManager software also provides configuration information for individual fields in the application. To access this information, place your mouse pointer in the desired field and select Advanced Field Info from the right mouse button menu. FieldManager software displays a Field Help window.

![Field Help Window](image)

Figure 3-35. Field Help Window

This window defines several characteristics of the chosen field: the exact label for the field, the name of the field as internally referenced in the FieldManager software, the maximum character length of the field, the default value for the field, and the modes in which the field can be used. The Field Help window also provides any verifications (or requirements) for the field, such as the verification shown in Figure 3-35, which indicates that the Inspector field must be nonblank (or, in other words, the Inspector field must be completed before FieldManager software will save the data in the window). Finally, the Field Help window offers a brief description of the chosen field.

- **Note:** For detailed descriptions of fields, use options available from the Help menu (see Sections 3.7.1 and 3.7.2).

3.8 Maintaining FieldManager Datasources

FieldManager software gives you the option to point to more than one database when you log on to the system. This allows you to have access to any client/server or standalone databases that are on your network. To access the area where these datasources are maintained, from the Utilities menu, select System Management, then Maintain FieldManager Datasources. FieldManager software presents you with a list of the available datasources from your computer (see Figure 3-36).
To delete any datasource that is not the current datasource and is not the default datasource, from the Maintain FieldManager Datasources window, click the DELETE button.

To close the Maintain FieldManager Datasources modal window, from the Maintain FieldManager Datasources window, click the CLOSE button.

To add a new datasource, from the Maintain FieldManager Datasources window, click the ADD button. The Add FieldManager Datasource modal window appears.

Note: If a Windows user not having Administrator access attempts to delete a ‘System’ datasource, a message will appear saying that the user must be running FieldManager with Administrator access in order to delete ‘System’ datasources.

The Add FieldManager Datasource modal window (see figure 3-37), allows you to choose either a standalone or a client/server database to be able to connect to during the logon process.
If you select **Standalone database (local)** option, FieldManager software gives you the option to add a new database or point to an existing database. For both the new and existing options you must put in the name of the datasource.

![Add FieldManager Datasource Modal Window – Local Database](image1)

**Figure 3-38. Add FieldManager Datasource Modal Window – Local Database**

If you selected the **Client/Server database** option, you must point to the location of a valid database connection file. The file contains the connection parameters needed to connect to either a SQLAnywhere or Oracle database. For instructions on how to create this file, see the *FieldManager System Management Guide*.

![Add FieldManager Datasource Modal Window – Database Connection File](image2)

**Figure 3-39. Add FieldManager Datasource Modal Window – Database Connection File**

You can delete any datasource that is not the current datasource and is not the default datasource by clicking the DELETE button from the main modal window. You can also select any datasource to be the default datasource, which means the datasource that is defaulted upon initial log on, by highlighting the desired datasource record and clicking the SET DEFAULT button. Clicking CLOSE closes the Maintain FieldManager Datasources modal window.
3.9 Exploring FieldManager with Sample Data

FieldManager contains a sample database and a sample contract, allowing users to explore the various functions within the FieldManager software without interfering with live data. These sample files allow users to log into FieldManager and perform tasks without affecting their main production environment.

3.9.1 FieldManager Sample Contract Setup

A designated sample FieldManager database was installed with your FieldManager program. This database is preloaded with configuration settings and reference information to support your sample contract. The following steps will set up your FieldManager sample datasource, which allows you to use the provided sample database:

1. To access FieldManager, you can open the Start menu, select Programs, and then find and select the FieldManager program.
2. If you get the login window, go on to step 3. If you get the Add FieldManager Datasource window, jump to step 6.
3. Log into FieldManager as a system administrator.
4. From the Contracts List Window, select Utilities > System Management > Maintain FieldManager Datasources.
5. From the Maintain FieldManager Datasources window, click Add.
6. From the Add FieldManager Datasource window, select Standalone database (local) and click NEXT.
7. Enter a unique name (i.e. “Sample”) for your sample database.
8. Select the EXISTING radio button.
9. Browse to the location of the sample database. (The location would be C:\ProgramData\FieldManager\database\sample\fmsample.db for Windows 7 operating systems.) Select the fmsample.db and click the Open button.
10. Click FINISH.
11. Click CLOSE to close the FieldManager Datasources window.

Now that the FieldManager Sample Datasource has been set up, the next step is to log into the FieldManager Sample Datasource and load the sample contract.

1. Run FieldManager.
2. At the login screen select Datasource: “Sample”, User ID: admin, Password: password. Note that the password may be different if this sample database has been used before.

3. A window asking you to change your password might appear. If so, complete this and click OK.

4. Select File > Import > File.

5. From the Select Import File window, select the sample_contract.dat file and click OK.

6. Click OK to the Import Complete message.

Now that you have the sample contract loaded, you can start using the contract to explore FieldManager. To get started working with the sample contract, you will want to enter in some basic contract information.

**General Tab**

1. Project Engineer: Enter any name.

2. Resident Engineer: Enter any name.

3. Managing Office: Enter “Sample”.

4. Notice to Proceed Date: The current date.

5. Construction Started Date: The current date.

6. Click the SAVE button.

**Entering Time Charges Start Dates for the Contract Sites**

**Site Times Tab**

1. Select the first site. In the Time Charges Start Date field, enter the current date.

2. Select the second site. In the Time Charges Start Date field, enter the current date.

3. Click the SAVE/CLOSE button.

At this point, using the sample contract and this sample datasource, you should be able to fully explore the features of FieldManager which are described in the rest of this User’s Guide.
3.9.2 Using the Sample Contract in FieldBook.

If you want to explore the interaction of FieldManager with FieldBook or if one of your inspectors wants to explore FieldBook without affecting real data, then you may want to create a FieldBook load file for the sample contract. Before you do this, we suggest adding a FieldBook user to the “Sample” database for interaction with FieldBook. The process of adding a user is as follows:

1. Log into FieldManager as an administrator.
3. Click the ADD button.
4. Enter the new user criteria and set the Security Level to FieldBook User.
5. Click OK.

FieldBook Interaction

FieldBook is a subset of the FieldManager software designed for a field person to enter Inspector’s Daily Reports (IDRs) and then submit them to the central office FieldManager. The user will import a copy of the contract that was exported from FieldManager and create the IDRs and export the IDRs back to the FieldManager admin to be imported into FieldManager for processing.

Exporting Contracts to FieldBook

If this is the first time you are transferring anything to FieldBook, include reference files. If you are updating the contract information, you do not need the reference information unless additional items have been added to your master item list.

1. From the Contracts list window in FieldManager: select Export – FB from Windows Toolbar.
2. Highlight the sample contract from the modal Contracts list window.
3. Click Select.
4. Browse to the desired save location, then click OK.
5. Click OK to the contract being exported.

Logging Into the FieldBook Sample Datasource

To access FieldBook, you can open the Start menu, select Programs, and then find and select the FieldBook program.
If this is your first time logging into FieldBook, you need to establish a new FieldBook datasource or add a datasource from the login window.

1. FieldBook will open with a window to select the exported .ebl file from FieldManager.
2. Select the exported file from FieldManager and click OPEN.
3. Accept the default name and click OK.
4. Log into the FieldBook datasource using the FieldBook login created in FieldManager.

**Exporting IDR s to FieldManager**

1. In FieldBook: Export – FM from Windows Toolbar (must be on Contracts list).
2. Highlight the IDR s from the modal IDR s list window.
3. Click SELECT.
4. Browse to the desired save location, then click OK.
5. Click OK to the IDR s being exported.

**Importing Contracts from FieldManager**

1. In FieldBook: Import – FM from Windows Toolbar.
2. Browse to the folder location of the exported contracts from FieldManager.
3. Click OK to the contract(s) being imported.

**3.9.3 Resetting the Sample FieldManager Contract**

Occasionally, it may be necessary to reset the sample contract back to its original state. The simplest method to revert the sample contract back to its original status is to transfer sample contract out to file, delete the leftover read-only copy, and then import the original sample contract load file. Once this is performed, the sample contract will be in its original status.

**Transfer the Working Contract**

2. Highlight the sample contract from the modal Contracts list window.
3. Click SELECT.

4. Select the TRANSFER THE CONTRACT radio button.

5. Click OK.

6. Navigate to the desired location for saving. This file can be deleted later.

7. Click SAVE.

8. Click OK to the contract being exported.

**Deleting the Read-Only Contract**

1. Highlight the now read-only contract in the Contracts list window.

2. Select **Edit > Delete**.

3. Confirm the deletion by clicking **YES**.

**Importing a New Copy of the Sample Contract**

1. Select **File > Import > File**.

2. Select the **sample_contract.dat** file.

3. Click **OPEN**.

4. Click **OK** to the Import Complete message.
4. Working with Contracts

In FieldManager software, a *contract* is made up of one or more projects, and all progress is recorded at the contract level.

4.1 Viewing the Contracts List Window

The Contracts list window automatically displays when FieldManager software is first opened (see Figure 4-1). This window lists all the contracts that are currently loaded into FieldManager software. 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.

*Read-only contracts* are copies of working contracts that can be viewed but not modified, and can be of the following two types: regular read-only copy and contractor read-only copy. A *regular read-only copy* contains all contract information. A *contractor read-only copy* of a contract has had confidential or inappropriate information removed by the owning agency. The contractor read-only can refer to the electronic file created that would be loaded into FieldManager software or it can refer to the contract after it has been loaded into FieldManager software. Both are considered read-only copies.
On the Contract list window the Access column displays the type of contract you have. For Contractor Read-Only and Regular Read-Only contracts, the date the copy was created is also displayed.

![Contracts List Window (with a Read-Only Contract Selected)](image)

### 4.2 Loading Contracts

Before contracts may be accessed in FieldManager software, they must first be loaded into the system. Contracts can be imported from your agency’s central office contract administration system or FieldBuilder™, or they can be transferred between FieldManager software installation sites.
To import contracts, choose **Import** from the **File** menu, and then choose **File** from the **Import** submenu. FieldManager software displays the Select Import File window, from which to select the location of the file to load (see Figure 4-2).

![Select Import File Window](image)

**Figure 4-2. Select Import File Window**

- **Note:** A file that contains a contract exported from an agency's central office contract administration system or from FieldBuilder will usually have a **.dat** extension. A file that contains a contract exported from FieldManager software will have numbers in the extension such as **.001**.

Once the appropriate file and location are specified in the Select Import File window, click **OK**.

When the contract has been successfully loaded, the new contract will appear in the Contracts list window.

### 4.3 Changing Contract Documentation

When a contract is loaded into FieldManager software, it includes contract documentation, which provides general, site time, and subcontractor information about the contract. As long as the contract is not read-only, its documentation information may be changed after it is loaded into FieldManager software.
4.3.1 Changing General Information

To change a contract’s documentation, select a contract from the Contracts list window and click DOCU on the Application Toolbar.

FieldManager software opens the Change Contract Documentation tab window with the GENERAL tab displayed (see Figure 4-3).

![Change Contract Documentation Tab Window—GENERAL Tab](image)

Figure 4-3. Change Contract Documentation Tab Window—GENERAL Tab

On the GENERAL tab, the following information may be changed.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing Office</td>
<td>The name of the office that manages the contract.</td>
</tr>
<tr>
<td>Managing Office Comments</td>
<td>Contract-level comments (for example, a high-level summary of the contract that is more detailed than the contract description).</td>
</tr>
<tr>
<td>Contract Level Settings</td>
<td>Various settings that control display information and business rules for this contract only. Button may or may not be visible depending on your agency’s settings. See Section 4.3.2, Changing Contract-Level Settings, for more detail.</td>
</tr>
<tr>
<td>Construction Started Date</td>
<td>The date construction actually started on the contract.</td>
</tr>
<tr>
<td>Closed To Traffic Date</td>
<td>The date the construction site is closed to traffic.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open To Traffic Date</strong></td>
<td>The date the construction site is open to traffic.</td>
</tr>
<tr>
<td><strong>All Contract Work Completed</strong></td>
<td>The date on which all contract work is completed.</td>
</tr>
<tr>
<td><strong>Open To Traffic Date Not Applicable</strong></td>
<td>If your agency requires the Open To Traffic Date to be set before a final estimate can be created, then the Open To Traffic Date Not Application check box will appear on this tab. Checking the Open To Traffic Date Not Application check box will bypass the Open To Traffic Date requirement when creating a final estimate.</td>
</tr>
<tr>
<td><strong>Create Electronic Files</strong></td>
<td>Indicates whether electronic files are created.</td>
</tr>
<tr>
<td><strong>StandAlone Contract</strong></td>
<td>Indicates whether the contract may be managed without going through the agency’s contract administration system.</td>
</tr>
<tr>
<td><strong>Contract Closed</strong></td>
<td>Indicates whether or not the contract is closed (see Section 11.1.1, Creating a Final Estimate for more information).</td>
</tr>
<tr>
<td><strong>View IDRs in FieldBook for ___ days</strong></td>
<td>The number of days of IDRs that will be included in a refresh file passed from the FieldManager module to the FieldBook component. For instance, if the number chosen is 14, IDRs that were produced in the last 14 days will be included in the export to the FieldBook component. For more information about the FieldBook component, see Chapter 16, Using FieldBook Software, of this document.</td>
</tr>
<tr>
<td><strong>View IDR Attachments in FieldBook for ___ days</strong></td>
<td>The number of days of IDR attachments that will be included in a refresh file passed from the FieldManager module to the FieldBook component. For instance, if the number chosen is 7, IDR attachments that were produced in the last 7 days will be included in the export to the FieldBook component. The number entered in this field cannot be greater than the number entered in the View IDRs in FieldBook for ___ days field. For more information about the FieldBook component, see Chapter 16 Using FieldBook Software, of this document.</td>
</tr>
<tr>
<td><strong>Disable Interim CPE Edits for &lt;previous year&gt;</strong></td>
<td>Indicates whether the Interim CPE Edits will be disabled for the prior calendar year.</td>
</tr>
<tr>
<td><strong>Traffic Comments</strong></td>
<td>Comments detailing specifics on the traffic data entered in this window.</td>
</tr>
</tbody>
</table>
Note: Updating the Create Electronic Files option requires the System Administrator security level.

You cannot modify the following fields, which display information your agency’s central office contract administration system passed to FieldManager software.

**Prime Contractor**  The name of the prime contractor. This must be entered in your agency’s central office contract administration system or FieldBuilder.

**Notice To Proceed Date**  The date when work can begin on the contract. This date must be entered in your agency’s central office contract administration system or FieldBuilder.

After you have finished entering information on the GENERAL tab, click SAVE/CLOSE on the Window Toolbar to save your work and close the Change Contract Documentation tab window. FieldManager software will save the information and then revert back to the Contracts list window.

Note: To continue working in the Change Contract Documentation tab window, click the SAVE button rather than the SAVE/CLOSE button. FieldManager software will save the information added and continue to display the Change Contract Documentation tab window, enabling you to work with other tabs. This same procedure applies to the rest of the tasks and their associated tab windows described in this section.

### 4.3.2 Changing Contract-Level Settings

Often times, there are different business rules needed for different contracts. The Contract-Level Settings functionality gives you the ability to change a number of settings at the contract level, where those settings will be confined to that contract only.

To change contract-level settings, click the CONTRACT LEVEL SETTINGS button on the GENERAL tab of the Change Contract Documentation tabbed folder window. The settings established at the agency level, which were loaded with the *.acp file initially, will display.

FieldManager software opens the Contract Level Settings tabbed modal window with the GENERAL tab displayed (see Figure 4-4).

In the Contract Level Settings window, you can change general information about the agency, report format, estimates signatures, and contract modification signatures.
General Tab

To choose the agency logo, in the **Agency Information** area, click the **BROWSE** button. A Select File dialog box displays for you to browse to the location of your agency logo’s .bmp file. Select the file you wish to display on your reports, and then click **OPEN**. The dialog box will close. Your agency’s logo now appears in the **Agency Logo** area.

To change the agency name, in the **Agency Information** area, type your agency’s name in the **Agency Name** text box.

To choose the default report sort order, in the **Report Item Sort Order** area, select one of the following items: **Item Description**, **Prop. Line**, and **Item Code**.

To have the reports group items by project by default leave the **Group Items By Project / Category** check box unchecked. To have the reports group items by category by default check the check box.

To define the proposal and project line increments for new items, in the **New Items** area, type the number of lines to increment in the **Prop. line increment for new items** and **Project Line increment for new items** text boxes.

To define the quantity an item can overrun, in the **Quantity Overruns** area, select the appropriate option and if applicable complete the text boxes.

To overwrite all the data that has been stored at the contract level with the corresponding options that have been set at the agency level and were brought in when loading the *.acp file, click the **RESTORE DEFAULT OPTIONS** button.
When complete, either click OK to save the information and close the window, click CANCEL to not save your changes and close the window, or click the ESTIMATES tab or CONT MOD SIGNATURES tab to make more changes.

**Estimates Tab**

![Figure 4-5. Contract Level Settings Window—ESTIMATES Tab](image)

To specify the text for the signature block on estimates, in the **Estimates Signature Block Text** text box, insert the appropriate text.

To specify the signature labels for the Pay Estimate Report, in the **Signature Labels for Pay Estimate Report** area, select the signature labels form the drop-down list boxes. You can select one of four predefined options from the drop-down list box, which will pull those fields, or you can type whatever you wish. You can also add additional text to the left or to the right of the predefined text, as long as the format has not been modified.

As an example, if you select <<Prime Contractor>>, you can type additional text, such as **Authorized By:** before the predefined text <<Prime Contractor>>, so it will display **Authorized By: <<Prime Contractor>>**. When you see the signature, it will retrieve whoever the prime contractor is for that particular contract. For example, if Interstate Contracting is the prime contractor, the signature will display **Authorized By: Interstate Contracting**.

When complete, either click OK to save the information and close the window, click CANCEL to not save your changes and close the window, or click the GENERAL tab or CONT MOD SIGNATURES tab to make more changes.
Cont Mod Signatures Tab

To specify the text for the signature block on contract modifications, in the **Contract Modification Signature Block Text** text box, insert the appropriate text.

To specify the signature labels for the contract modification, in the **Contract Modification Signature Blocks** area, select the signature labels from the drop-down list boxes.

Similarly to the **Signature Labels for Pay Estimate Report** area, you can select predefined options from the drop-down list box, which will pull those fields, or you can type whatever you wish. You can also add additional text to the left or to the right of the predefined text, as long as the format has not been modified.

As an example, if you select **<<Prime Contractor>>**, you can type additional text, such as **Authorized By** before the predefined text **<<Prime Contractor>>**, so it will display **Authorized By: <<Prime Contractor>>**. When you see the signature, it will retrieve whoever the prime contractor is for that particular contract. For example, if Interstate Contracting is the prime contractor, the signature will display **Authorized By: Interstate Contracting**.

If you would like something other than **Signature** and **Date** to appear below the signature line, you can edit the text box that currently has **Signature** and **Date** as the default.

To add signature block rows, click the **Add Signature Block Row** button.

To delete signature block rows, click the **Delete Signature Block Row** button.

To include the FAA block, select the **Include FAA Block** check box.
To include the FHWA block, select the **Include FHWA Block** check box.

When complete, either click **OK** to save the information and close the window, click **CANCEL** to not save your changes and close the window, or click the **GENERAL** tab or **ESTIMATES** tab to make more changes.

### 4.3.3 Viewing/Editing Contract Administrators

The **ADMINISTRATORS** tab lists the administrators assigned to the contract including the Managing Office Manager, Resident Engineer, and Project Engineer for the contract. There also may be additional administrators listed depending on your agency’s settings.

![Figure 4-7. Change Contract Documentation Tab Window—ADMINISTRATORS Tab](image)

On the **ADMINISTRATORS** tab, the following information can be changed:

- **Managing Office Manager**
  - The name of the person in charge of the office that manages the contract.
- **Resident Engineer**
  - The name of the resident engineer for the contract.
- **Project Engineer**
  - The name of the project engineer for the contract.

FieldManager requires the entry of either the Project Engineer or Resident Engineer.

### 4.3.4 Viewing/Editing Site Time Information

The **SITE TIMES** tab lists all the contract sites and the amount of time allotted and completed for each site.
To view site time information for a contract, select the contract in the Contracts list window and click DOCU on the Application Toolbar. FieldManager software opens the Change Contract Documentation tab window. Click the SITE TIMES tab (see Figure 4-8).

![Figure 4-8. Change Contract Documentation Tab Window—SITE TIMES Tab](image)

The SITE TIMES tab is divided into three areas: the status area, the site times list area, and the time charges area. The Time Charges Start and Stop dates for each site on this tab may be entered or changed, but the site time must be charged through Daily Diary entries for available day contracts. To record a Time Charges Start or Stop Date, select the site time from the list of available site times, and add the date by using the Calendar tool or by typing it directly in the appropriate field.

Once you have finished, click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
4.3.5 Adding and Deleting Breakdowns

The BREAKDOWNS tab contains a list of all the contract breakdowns currently assigned to a contract. These breakdowns are assigned at the project, item, and category levels.

Adding Breakdowns

To add a breakdown to a contract, select the contract in the Contracts list window and click DOCU on the Window Toolbar. FieldManager software opens the Change Contract Documentation tab window. Click the BREAKDOWNS tab (see Figure 4-9).

![Figure 4-9. Change Contract Documentation Tab Window—BREAKDOWNS Tab](image)

To add a breakdown, click ADD BREAKDOWN at the bottom of the window. FieldManager software displays a new blank row. Click the down arrow in the Project column to select the project to which to assign the breakdown. A Breakdown ID must be entered, and duplicate Breakdown IDs per project are not allowed.

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

Deleting Breakdowns

To delete a breakdown from a contract, select the contract in the Contracts list window and click DOCU on the Window Toolbar. FieldManager software opens the Change Contract Documentation tab window. Click the BREAKDOWNS tab.

Select the breakdown to delete, and click DELETE BREAKDOWN at the bottom of the window. FieldManager software displays a Delete Warning window to confirm the deletion. Click YES to delete the breakdown, or NO to cancel the deletion.
Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.

### 4.3.6 Adding and Deleting Site Events

Within the SITE EVENTS tab, FieldManager software offers a facility to document major events that occur on a site.

**Adding Site Events**

To add a site event, select the contract in the Contracts list window and click DOCU on the Window Toolbar. FieldManager software opens the Change Contract Documentation tab window. Click the SITE EVENTS tab. If no site events have been recorded on the contract, the tab will display as a blank gray window (see Figure 4-10).

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![Figure 4-10. Change Contract Documentation Tab Window—SITE EVENTS Tab](image)

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To add the site event, click ADD EVENT. FieldManager software will display a screen in which to enter information about the event (see Figure 4-11).

![Figure 4-11. Change Contract Documentation Tab Window—SITE EVENTS Tab—Adding a Site Event](image)

Click the down arrow in the Site field to choose a contract site.

Use the Action and Date fields to indicate the time frame for the event. Click the down arrow in the Action field to select the appropriate action. Choose the **TS: Time Suspended** option to indicate that time charges have been stopped as of the date selected in the Date field. Choose the **TR: Time Resumed** option and the appropriate date in the Date field when time charges are resumed. Any other options displayed for the Action field have been set by your agency and are simply used to document information about the event. If you have questions about these options, please contact your System Manager.

Enter any additional remarks about the event in the Remark field.

Once you have finished, click either **SAVE** or **SAVE/CLOSE** on the Window Toolbar depending on how you would like to proceed.

**Deleting Site Events**

A site event that has been added may only be deleted if it has not yet been saved. In other words, the only time you can delete a site event is after adding it but prior to saving or exiting the Change Contract Documentation tab window.

To delete a site event, select the appropriate site event from the list, and click DELETE EVENT. FieldManager software displays a Delete Warning window to confirm the deletion. Click **YES** to delete the site event, or **NO** to cancel the deletion.

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

The USERS tab allows you to associate users of FieldManager to a contract.

To add users, click ADD USER at the bottom of the window. FieldManager software displays the Select Users modal list window.

On the Select Users modal list window, select one or more users and click SELECT. The USERS tab will now show the users as associated to the contract.
4.3.8 Adding, Changing, and Deleting Attachments

From the ATTACHMENTS tab, you can store files and URL links as attachments. You may attach one or more files and URL links to associate to the contract. A few examples of file attachments include meeting minutes, baseline design plans, decision logs, and correspondence records. Examples of link attachments include links to agency website, FieldNet website, or the Cloverleaf website. You can also change an added attachment, or delete an added attachment for both files and links.

**Adding Attachments**

To add an attachment to a contract, select the appropriate contract in the Contracts list window, and click DOCU on the Application Toolbar. The FieldManager module opens the Change Contract Documentation tab window. Click the ATTACHMENTS tab.
If there are no attachments, the ATTACHMENTS tab displays as below (see Figure 4-15).

![Figure 4-15. Contract Documentation Tab Window—ATTACHMENTS Tab](image)

To add a file as an attachment, click ADD FILE at the bottom of the tab window. As shown in Figure 4-16, FieldManager software displays the Add File Attachment window.

![Figure 4-16. Add File Attachment Window](image)

Insert the name of your file attachment in the Name field. Enter a description of the file in the Description field. Click BROWSE to select the attachment. FieldManager opens the Attach a File window.
Select the file you wish to attach and click OPEN. FieldManager attaches the file to the contract. Click ADD and the file attachment record will be added (see Figure 4-18).

To add a link as an attachment click ADD LINK at the bottom of the tab window. As shown in Figure 4-19, FieldManager software displays the Add Link Attachment window.
Insert the name of your link attachment in the Name field. Enter the URL in the URL field. Enter a description of the link in the Description field. Click **ADD**, and the link attachment record will be added (see Figure 4-20).

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

**Changing Attachment Properties**

To change the name or description of an attachment to a contract, select the appropriate contract in the Contracts list window, and click **DOCU** on the Application Toolbar. The
FieldManager module opens the Change Contract Documentation tab window. Click the ATTACHMENTS tab.

For file attachment, select the file attachment whose properties you wish to change and click CHANGE FILE. FieldManager opens the Change File Attachment window.

![Change File Attachment Window](image1)

Enter the new information in the appropriate fields. To change the actual file, click BROWSE and navigate to the location of the new file. Select the file and click OPEN. FieldManager attaches the new file. Click CHANGE in the Change File Attachment window to change the attachment in FieldManager and return to the Change Contract Documentation window.

For link attachment, select the link attachment whose properties you wish to change and click CHANGE LINK. FieldManager opens the Change Link Attachment window.

![Change Link Attachment Window](image2)
Enter the new information in the appropriate fields. Click CHANGE in the Change Link Attachment window to change the attachment in FieldManager and return to the Change Contract Documentation window.

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

**Changing or Viewing File Attachments**

To change the contents of a file attachment to a contract, select the appropriate contract in the Contracts list window, and click DOCU on the Application Toolbar. The FieldManager module opens the Change Contract Documentation tab window. Click the ATTACHMENTS tab.

Select the file attachment you wish to change and click VIEW FILE. The program used to create the attachment opens with the attachment displayed.

**Note:** This differs from earlier version of FieldManager, which opened the attachment directly in FieldManager.

Make any changes and save the document to your computer. Click CHANGE FILE and use the BROWSE button to select the newly edited file and save it back into FieldManager.

If you have the original attachment on your computer already, you can edit the file without using FieldManager, and then use the CHANGE FILE button to upload the edited file.

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

**Exporting File Attachments**

To export file attachments to file, select the appropriate contract in the Contracts list window, and click DOCU on the Application Toolbar. The FieldManager module opens the Change Contract Documentation tab window. Click the ATTACHMENTS tab.

Select the file attachment you wish to export and click EXPORT FILE. As shown in Figure 4-23, FieldManager will show a FileSave dialog with the default file name, which is the original name of the attached file. When you click the EXPORT FILE button and have multiple file attachments selected, then each file attachment will have a separate FileSave dialog. Save the file attachment to your computer.

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

To open a link attachment of a contract, select the appropriate contract in the Contracts list window, and click DOCU on the Application Toolbar. The FieldManager module opens the Change Contract Documentation tab window. Click the ATTACHMENTS tab.

Select the link attachment you wish to change and click OPEN LINK. The link will be open using your default browser.
Printing File Attachments

To print a file attachment, first click VIEW FILE to open it with the application used to create the attachment, then use that application’s printing function, assuming that it has one. Note that this process depends upon which programs your computer uses to open your attachment’s file type. For example, image files with a .jpg extension might open with a different program than those with a .bmp extension, meaning that the steps for printing those images might be different.

Deleting Attachments

To delete an attachment to a contract, select the appropriate contract in the Contracts list window, and click DOCU on the Application Toolbar. The FieldManager module opens the Change Contract Documentation tab window. Click the ATTACHMENTS tab.

For file attachment, select the appropriate file attachment to delete, and then click DELETE FILE at the bottom of the tab. FieldManager software displays a Delete Warning window that asks to confirm the deletion. Click YES to confirm the deletion or NO to cancel the deletion.

For link attachment, select the appropriate link attachment to delete, and then click DELETE LINK at the bottom of the tab. FieldManager software displays a Delete Warning window that asks to confirm the deletion. Click YES to confirm the deletion or NO to cancel the deletion.

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

4.3.9 OLE for Older Attachments in FieldManager

If you have an attachment that was added to FieldManager in version 4.3a or earlier, it was attached using OLE. Because of difficulties with file size and printing issues, this way of attaching files is no longer used.

If you wish to keep the attachments in OLE, you may do so. However, if you wish to attach the file using the old method, you must open the OLE-attached file and save it to your computer, then attach it again using the method described in Section 4.3.8.
5. Working with Contractors

Info Tech added the Contractors functionality to the FieldManager module to ease the way users manage contractors. This includes adding contractors as well as associating items to contractors. In this section, Info Tech explains how to associate either regular items or unattached items with a contractor. The primary difference between the Contractors list window and associating contractors to a single item under the Items list window is that now you may add multiple items to a single contractor. Under the Items list window, the relationship works in the opposite direction in that it is possible to associate multiple contractors to one item.

The Contractors list window lists all contractors associated with that particular contract. To display the Contractors list window, select a contract in the Contracts list window, and, on the Application Toolbar, click CONTRACTORS.

The Contractors list window contains two fields: Contractor Name and Vendor Number. The prime contractor is shown with a bold and italicized text style (see Figure 5-1).

Figure 5-1. Contractors List Window
5.1 Adding New Contractors

A new contractor may be added to a contract via the Contractors list window by completing the appropriate tabs in the Add Contractor tabbed folder window.

On the Window toolbar, click ADD. The FieldManager module displays the Add Contractors window, which contains a list of all the contractors in the master vendor list (see Figure 5-2).

![Figure 5-2. Add Contractor Window](image)

As with any list window, click FILTER and SORT to filter and sort the Add Contractor window. Choose one contractor and click SELECT. The FieldManager module returns you to the GENERAL tab.
5.1.1 Adding General Information About Contractors

The GENERAL tab of the Add Contractor tabbed folder window displays all the general information about the contractor. It contains the contractor’s name and address, as well as a drop-down for the contractor Work Type and a Subcontract Amount field. The drop-down will show the work type code descriptions. This field may be required depending on your agency’s settings. The Subcontract amount field is not required and is a dollar amount field. It will not be displayed for prime contractors. You cannot change the Contractor Name that appears in blue text, but you may modify the Contractor Address (see Figure 5-3).

![Figure 5-3. Add Contractor Tabbed Folder Window - GENERAL Tab](image-url)
5.1.2 Adding Items to Contractors

The ITEMS tab of the Add Contractor tabbed folder window displays all of the items that are associated with that contractor. From this tab, you may add or remove an item association to a contractor. You may add all types of items, including unattached items.

To add an item to a contractor, select ADD from the ITEM tab of the Add Contractor tabbed folder window. The FieldManager module opens a modal window that displays a list of items available to be added to the contractor (see Figure 5-4). This window will contain the same list of items as the Items window (available from the Application toolbar).

![Figure 5-4. Add Item List Window](image-url)
Select the item or items that need to be added to the contractor. You may select more than one item from the Item list window by holding down the CTRL key and clicking the items that need to be added. All of the items that were selected should now populate the ITEMS tab of the Contractors tabbed folder window (see Figure 5-5).

Once you have added one or more items, you may add remarks to each contractor-item association. To return to the Contracts list window, click SAVE and CLOSE. The items are now associated to the new contractor and posting can be made to that item on behalf of the new contractor.

## 5.2 Changing Contractors

You may change some portions of a contractor or even the prime contractor. Areas that can be changed include the Contractor Address and items that are associated to a contractor.

### 5.2.1 Changing General Information About Contractors

On the GENERAL tab, you may change the address of the contractor, including the address of the prime contractor. You cannot change the contractor’s name or vendor number.

### 5.2.2 Changing Items Associated to Contractors

Once a contractor has been added, you may add or remove items that are associated to that contractor.

To add more items to a contractor, click the ITEM tab of the Contractor tabbed folder window. Then, click ADD on the Window toolbar and add any new items that need to be
associated to the contractor. Follow the same steps to add the original items (see Section 5.1.2, Adding Items to Contractors). You may add items to any contractor, including the prime.

To delete items from a contractor, on the Contractor tabbed folder window, click the ITEM tab. Select the item that needs to be deleted and click DELETE.

! **Warning:** You cannot delete items that have posting associated to that contractor. To delete an item, you must first remove any postings associated with that item (see Section 8.3.7, Deleting Item Postings from an Existing IDR, for information about deleting item postings).

### 5.3 Deleting Contractors

- **Note:** You may remove contractors that were added to the contract, if they are not the prime and have no items associated with them.

To delete a contractor, remove any items associated to that contractor. The same rules apply to deleting a contractor as changing a contractor. Any posting, associated to an item a contractor is associated with, must be removed, and then the item can be deleted. After all postings have been removed, you may delete the contractor.

### 5.4 Importing Contractor Data from SiteXchange Contract File

For agencies such as Iowa, adding new contractors manually into FieldManager is redundant because this data is also entered by the agency in PES/LAS and by the prime contractor using SiteXchange. A complete set of this information is available in the SiteXchange *.con contract file. FieldManager can import this file, hence adding new contractors and item associations to the contract automatically.

To import contracts, choose **Import** from the **File** menu, and then choose **File** from the **Import** submenu. FieldManager displays the Select Import File window, from which you can select the location of the file to load (see Figure 5-6).
Once the appropriate file and location are specified in the Select Import File window, click OK.

When the SiteXchange *.con file has been successfully loaded, the SiteXchange Import Report window will appear, listing the contractors and associated items that were imported. The contractors will also appear in the Contractor list windows.
6. Working with Items

FieldManager contracts contain two types of items: regular items and unattached items. Regular items are those that are passed to FieldManager software from your agency’s central office contract administration system or FieldBuilder™ software (these items are also known as original items), or which are added to a contract through a contract modification. For the latter type of regular items, your agency designates specific terms used to differentiate among those items (for example, change order, supplemental agreement). Unattached items are items created in the FieldManager module or the FieldBook™ component so that their progress may be monitored, but which are not eligible for payment because they have not yet been approved through the contract modification process.

- **Note:** For information about the Items functionality specific to the FieldBook component, refer to Section 16.2.3, Items Functionality, of this document.

The Items list window lists all the items in the contract, and it shows whether an item is regular or unattached. To display the Items list window, select a contract in the Contracts list window, and, on the Application Toolbar, click ITEMS.
The Item Type column indicates whether an item is an original item, an unattached item, or an item that has been attached to a contract modification (see Figure 6-1).

![Figure 6-1. Items List Window](image)

### 6.1 Adding New Unattached Items

A new unattached item may be added to a contract via the Items list window by completing the appropriate tabs in the Add Item tab window.

- **Note:** Adding an unattached item 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 Item 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.
6.1.1 Adding General Information About a New Item

The **GENERAL** tab of the Add Item tab window displays all the general information about an item. To add general information about a new unattached item, select the appropriate contract in the Contracts list window, and click **ITEMS** on the Application Toolbar to display the Items list window. Click **ADD** on the Window Toolbar to open the Add Item tab window. The **GENERAL** tab will automatically display (see Figure 6-2).

![Figure 6-2. Add Item Tab Window—GENERAL Tab](image)

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

**Item**

The item number from your agency’s master item list. (Required) If you do not know the correct item number, click the drop-down arrow next to the Item number box. A master item list for your agency will display. Select the item to add.

**Supplemental Description**

Text used to more precisely describe new items that are added to the contract. 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.

**Section**

Each category is associated with a section number. (Required) There can be one or more categories associated with a section number. It is possible to associate the new item with more than one category as long as the categories are in the same section.

**Project Category**

Check each category with which to associate the item. (Required)
Click SAVE/CLOSE on the Window Toolbar to save your work and close the Add Item tab window. FieldManager software will save the information and then revert to the Items list window.

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

- **Note:** The Supplemental Description field as shown in Figure 6-3 consists of two 60-character text fields. The first supplemental description field has to be populated before anything can be entered into the second supplemental description field and saved. If a user attempts to save a new item that has text in the second supplemental description field, but has no text in the first supplemental description field an error will be displayed stating the following: “Please enter the supplemental description into the first supplemental description field. If more room is needed, then enter the additional description in the second field.” Once you click OK on the error message, you will be returned to the Items GENERAL tab with the cursor placed in the first Supplemental Description field.

Figure 6-3 shows an example of the GENERAL tab after it has been saved.

![Figure 6-3. Add Item Tab Window—GENERAL Tab (After Save)](image)
6.1.2 Adding Documentation About a New Item

To add documentation about a new item, select the appropriate contract in the Contracts list window, and click ITEMS on the Application Toolbar to display the Items list window. Click ADD on the Window Toolbar to open the Add Item tab window, and then click the DOCUMENTATION tab (see Figure 6-4).

Figure 6-4. Add Item Tab Window—DOCUMENTATION Tab
Enter information in the following fields.

**Item Completed**
Only approved items may be marked Complete. To prevent an unapproved item from being marked Complete by mistake, this option is disabled when you are adding a new unattached item. See Section 6.2.2, Changing Documentation About an Existing Item, for information about changing an item’s status to Complete.

**Documentation**
You may add documentation to this item to indicate the location of any supporting files.

**Attention Check Box (Item Level)**
A flag that marks an item for future attention (by either the engineer or the supervisor). This flag will appear in the Item Usage tab as part of the Estimate creation process. To activate the Attention check box, place the mouse pointer on the box and click the left mouse button. The flag remains on the item until it is manually removed. If the attention flag is set, a note must be entered in the Notes field.

**Notes**
This area is provided for additional notes on the new item. This field is required if the Attention check box is checked.

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
6.1.3 Associating Materials with a New Item

The MATERIALS tab displays all the materials associated with the new item. To associate materials with a new item, select the appropriate contract in the Contracts list window, and click ITEMS on the Application Toolbar to display the Items list window. Click ADD on the Window Toolbar to open the Add Item tab window, and then click the MATERIALS tab.

If no materials are associated with the item, the MATERIALS tab displays as a blank gray tab (see Figure 6-5).

Click ADD MATERIAL at the bottom of the window. As shown in Figure 6-6, FieldManager software displays a Select Materials window that lists all the materials assigned to the contract.

![Figure 6-5. Add Item Tab Window—MATERIALS Tab](image)

![Figure 6-6. Select Materials Window](image)
Filter and sort the Select Materials window just as with any other list window. Choose one or more materials from the Select Materials window, and click SELECT to continue or click CANCEL to cancel the selection.

As shown in Figure 6-7, if you click SELECT, FieldManager software displays the MATERIALS tab with the following fields in which to record information about the material.

**Usage Factor**  
Used to calculate the quantity of material used per quantity of item used. Specify up to four places to the right of the decimal.

**Remarks**  
This area is for additional comments on the material.

![Figure 6-7. Add Item Tab Window—MATERIALS Tab](image)

To associate more materials with the item, click ADD MATERIAL again and enter information for each material.

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

- **Note:** Refer to Section 7.1.3, Associating Items with a New Material, of this document for more information.
6.1.4 Associating Breakdowns with a New Item

The BREAKDOWNS tab displays breakdowns for an item. To associate a breakdown with a new item, select the appropriate contract in the Contracts list window, and click ITEMS on the Application Toolbar to display the Items list window. Click ADD on the Window Toolbar to open the Add Item tab window, and then click the BREAKDOWNS tab.

If no breakdowns are associated with the item, the BREAKDOWNS tab displays as a blank gray tab (see Figure 6-8).

![Figure 6-8. Add Item Tab Window—BREAKDOWNS Tab](image)
As shown in Figure 6-9, clicking ADD BREAKDOWN ITEMS at the bottom of the window displays a row to enter information in the following fields.

**Project**
The Project Number with which the breakdown is associated. (Required)

**Catg.**
The Category Number. (Required)

**Breakdown ID**
The Breakdown ID associated with the project selected. (Required) FieldManager software will automatically enter the Breakdown description, which can be modified.

**Breakdown Item Comment**
This area is for additional comments about the breakdown.

To associate more breakdowns with the item, click ADD BREAKDOWN ITEMS again and enter information for each breakdown added.

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

- **Note:** For more information about breakdowns, see Section 4.3.4, Adding and Deleting Breakdowns.
Figure 6-10 displays an Items list window with a newly added unattached item.

![Figure 6-10. New Unattached Item—Items List Window](image1)

### 6.1.5 Associating Contractors with a New Item

The **CONTRACTORS** tab displays all the contractors associated with an item. To associate contractors with a new item, select the appropriate contract in the Contracts list window, and click **ITEM** on the Application Toolbar to display the items list window. Click **ADD** on the Window Toolbar to open the Add Item tab window, and then click the **CONTRACTORS** tab.

The **CONTRACTORS** tab displays with the prime contractor automatically associated with the item.

![Figure 6-11. Add Item Tab Window—CONTRACTORS Tab](image2)
To associate a contractor with a new item, click ADD CONTRACTOR at the bottom of the window. As shown in Figure 6-12, FieldManager software displays a Select Contractors window that lists all contractors assigned to the contract.

Choose one or more contractors from the Select Contractors window, and click SELECT to proceed adding a contractor to a new item or click CANCEL to cancel the selection.

To associate more contractors to an item, click ADD CONTRACTOR again and choose the desired contractor.

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

It is possible to change item information via the Items list window at any time. The only difference between changing a regular item and changing an unattached item is that you cannot change any of the general information in the Change Item tab window for a regular item.

6.2.1 Changing General Information About an Existing Item

To change the general information for 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 CHANGE on the Window Toolbar to display the Change Item tab window. The GENERAL tab will automatically display (see Figure 6-13).

![Change Item Tab Window—GENERAL Tab](image)

If you selected an unattached item, you will be able to change the information in the Supplemental Description field. If you selected a regular item, you cannot change any general item information.

Click SAVE/CLOSE on the Window Toolbar to save your work and close the Change Item tab window. FieldManager software will save the information and then revert to the Items list window.

- **Note:** To continue working in the Change Items tab window, click SAVE rather than SAVE/CLOSE. FieldManager software will save the information added and continue to display the Change Items tab window, enabling you to work with other tabs. This same procedure applies to all tab windows in this section.
6.2.2 Changing Documentation About an Existing Item

To change an existing item’s 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, and click CHANGE on the Window Toolbar to display the Change Item tab window. Click the DOCUMENTATION tab (see Figure 6-14).

![Change Item Tab Window—DOCUMENTATION Tab](image)

You can change any of the information except the blue fields at the top of the tab window.

**Marking Items as Completed**

When an item is completed, regardless of whether the actual item usage equals the original specified quantity for the item, choose the Yes option of the ITEM COMPLETED radio button. This will ensure that FieldManager software takes the item’s completed status into account while performing final balancing calculations, and it will allow the item’s status to display correctly on various inquiries. Only approved items can be marked as completed.

- **Note:** To simultaneously mark multiple items as completed, begin by accessing the Items list window, and then select the items to mark. To choose more than one item at a time, hold down the CTRL key while selecting the items. To choose several items that are adjacent to each other, select the first row and then hold down the SHIFT key as you select the last row. All the items to be marked will be highlighted. Select Mark Items Completed from the Edit menu, click OK in the Warning window that displays, and click YES in the final Warning window. To mark multiple items as NOT completed, follow the same procedure, but choose Mark Items Not Completed.

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
6.2.3 Changing and Adding Materials Associated with an Existing Item

To change materials associated with an 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 CHANGE on the Window Toolbar to display the Change Item tab window. Click the MATERIALS tab (see Figure 6-15).

You can change the Usage Factor and Remarks fields, and can also add additional materials to the item (see Section 6.1.3, Associating Materials With a New Item).

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

- **Note**: Refer to Section 7.2.4, Changing and Adding Items Associated with an Existing Material, of this document for more information.
6.2.4 Deleting Materials from an Existing Item

To delete item materials, 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 CHANGE on the Window Toolbar to display the Change Item tab window. Click the MATERIALS tab. Select the row(s) to delete, and click DELETE MATERIAL at the bottom of the window. As shown in Figure 6-16, FieldManager software displays a Delete Warning window that asks to confirm the deletion.

![Delete Warning Window](image)

Figure 6-16. Delete Warning Window

Click YES to complete the deletion or CANCEL to cancel the deletion. If you selected more than one material to delete, you can click NO to cancel the deletion of the material listed in the Delete Warning window and move on to the next selected material.

**Warning:** You cannot delete materials from an item if the materials have usage. To delete materials that have usage, first delete all usage (see Section 8.2.9, Deleting Material Usage for an Existing IDR, for more information).

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
6.2.5 Changing and Adding Breakdowns Associated with an Existing Item

To change existing item breakdowns, 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 **CHANGE** on the Window Toolbar to display the Change Item tab window. Click the **BREAKDOWNS** tab (see Figure 6-17).

![Change Item Tab Window—BREAKDOWNS Tab](image)

You can choose new values for any of the fields, and can also add additional breakdowns to the item (see Section 6.1.4, Associating Breakdowns with a New Item).

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

6.2.6 Deleting Breakdowns Associated with an Existing Item

To delete breakdowns 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 **CHANGE** on the Window Toolbar to display the Change Item tab window. Click the **BREAKDOWNS** tab. Select the row(s) to delete, and click **DELETE BREAKDOWN ITEMS** at the bottom of the window. FieldManager software displays a Delete Warning window that asks to confirm the deletion (see Figure 6-18).

![Delete Warning Window—BREAKDOWNS Tab](image)
Click YES to complete the deletion or NO to cancel the deletion.

1 Warning: You cannot delete item breakdowns if those breakdowns have usage. To delete breakdowns that have usage, first delete all item usage within those breakdowns (see Section 8.3.7, Deleting Item Postings from an Existing IDR, for more information).

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

6.2.7 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 and click CHANGE on the Window Toolbar to display the Change Item tab window. Click the CONTRACTORS tab.

Figure 6-19. Change Item Tab Window—CONTRACTORS Tab
You can add any additional contractors to an existing item by clicking ADD CONTRACTOR (see Section 6.1.5, Associating Contractors with a New Item). Figure 6-20 displays an existing item with multiple contractors associated with it.

![Figure 6-20. Change Item Tab Window—CONTRACTORS Tab](Image)

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

### 6.2.8 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 CHANGE on the Window toolbar to display the Change Item tab window. Click the CONTRACTORS tab. Select the contractors to be removed and click DELETE CONTRACTOR at the bottom of the window. FieldManager software displays a Delete Warning window that confirms the deletion (see Figure 5-22)

![Figure 6-21. Delete Warning Window—CONTRACTORS Tab](Image)

Click YES to complete the deletion or NO to cancel the deletion.

- **Note:** There must be at least one contractor assigned to every item. The user will not be able to save if there are not contractors listed on the contractors tab.
• **Note:** A user cannot remove the contractor from the list if that contractor is associated to any postings from that item.

### 6.3 Deleting Items

Only unattached items that have no item postings may be deleted.

To delete one or more items, select the contract to which the item(s) is assigned in the Contracts list window, and click **ITEMS** on the Application Toolbar. Select the item from the Items list window, and click **DELETE** on the Window Toolbar. As shown in Figure 6-22, if you attempt to delete an attached item, or an unattached item that has postings, FieldManager software will display a Warning window indicating the item cannot be deleted.

![Error Window—Delete Attached Item](image)

Figure 6-22. Error Window—Delete Attached Item

As shown in Figure 6-23, if you attempt to delete an unattached item that has no postings, FieldManager software displays a Delete Warning window that lists the project(s) and category(ies) from which the item will be deleted.

![Delete Warning Window—Delete Unattached Item](image)

Figure 6-23. Delete Warning Window—Delete Unattached Item

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

**Warning:** You cannot delete items that have usage. To delete an item with usage, first delete all postings of the item in IDR (see Section 8.3.8, Deleting Item Postings from an Existing IDR, for more information).

To close the Items list window, on the Window Toolbar, click **CLOSE**. FieldManager software displays the Contracts list window.
6.4 Reviewing Items

To review an item, select the contract to which the item is assigned in the Contracts list window, and click ITEMS on the Application Toolbar. Select the item from the Items list window, and click REVIEW on the Window Toolbar. FieldManager software displays the Review Item tab window in a mode in which you can view but not change information. The GENERAL tab automatically displays (see Figure 6-24).

Click any of the tabs to review information for the item.

Click CLOSE on the Application Toolbar to close the Review Item tab window and return to the Items list window.
7. Working with Materials

Some agencies will use FieldManager software to track the amount of material used per item posted to the contract. FieldManager software’s Materials functionality provides an easy way to track materials when item usage is posted. Materials that are qualified/certified products are pre-approved for use on the site so test reports are not needed. Qualified/certified product usage can still be tracked even though approvals are not an issue.

At times, a material may lose or gain qualified/certified product status. In that case, the material should be added to the contract again as a new material, with a slight change in the material description making it unique from the prior classification.

Note: For information about the Materials functionality specific to the FieldBook component, refer to Section 16.2.4, Materials Functionality, of this document.
The Materials list window displays all the materials associated with a contract. It also shows whether materials have been designated as qualified/certified products. To display the Materials list window, select a contract in the Contracts list window, and click the MATERIALS button on the Application Toolbar. The Qual/Cert Product column lists whether a material is a qualified/certified product (see Figure 7-1).

![Figure 7-1. Materials List Window](image)

If there is a Yes in the Qual/Cert Product column, the material has been prequalified; if there is a No, the material is not a qualified/certified product and therefore requires testing documentation.

### 7.1 Adding New Materials to a Contract

New materials may be added to a contract via the Materials list window by completing the appropriate tabs in the Add Material tab window.

**Note:** Adding materials to a contract 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 Material tab window throughout, disregarding the navigational path at the beginning of each subsequent step, and clicking the SAVE rather than the SAVE/CLOSE button upon completing each step.
7.1.1 Adding General Information About a New Material

The GENERAL tab of the Add Material tab window displays all the general information about a material. To add general information about a new material, select the appropriate contract in the Contracts list window, and click the MATERIALS button on the Application Toolbar to display the Materials list window. Click ADD on the Window Toolbar to open the Add Material tab window. The GENERAL tab will automatically display (see Figure 7-2).

![Add Material Tab Window—GENERAL Tab](image)

Figure 7-2. Add Material Tab Window—GENERAL Tab

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

- **Material Description**: Choose a value from the Agency and Local Master Material list by clicking the down arrow beside this field. Another option is to type in a new material. (Required)

- **Unit**: When an item is selected from the Agency Master Material list, FieldManager automatically enters the unit. If you type in a material that is not on the master list, enter its unit here. (Required)

Click SAVE/CLOSE on the Window Toolbar to save your work and close the Add Material tab window. FieldManager software will save the information and then revert to the Materials list window.

**Note**: To continue working in the Add Material tab window, click SAVE rather than SAVE/CLOSE. FieldManager software will save the information added and continue to display the Add Material tab window, enabling you to work with other tabs. This same procedure applies to all tab windows in this section.
7.1.2 Adding Approvals to a New Material

A material can either be a qualified/certified product, or it can be a material that requires testing. A qualified/certified product is a material that has been previously approved by your agency, and therefore requires no testing. Designating a material as a qualified/certified product notifies FieldManager software that it does not need to track approval quantities for that material. Material usage can still be tracked for qualified/certified product(s). If a material in not a qualified/certified product, then it must receive approved testing documentation in order to be used on the project.

The APPROVALS tab displays the approvals for a material. If there are no approvals posted for a material, then the APPROVALS tab displays as a blank gray tab (see Figure 7-3).

![Figure 7-3. Add Material Tab Window—APPROVALS Tab](image)

**Materials Requiring Testing**

To add approvals to a new material that requires testing, select the appropriate contract in the Contracts list window, and click the MATERIALS button on the Application Toolbar to display the Materials list window. Click the ADD button on the Window Toolbar to open the Add Material tab window.
To post the material approvals, click on the APPROVALS tab, and then click on the ADD APPROVAL button at the bottom of the window (see Figure 7-4).

![Add Material Tab Window—APPROVALS Tab—Add Approval](image)

Figure 7-4. Add Material Tab Window—APPROVALS Tab—Add Approval

Enter information in the following fields to create a complete approval record.

**Form Date**
- The date on the material approval form.

**File**
- The approval’s file identification code for the material.
  - (Required) To add files to the list, see Section 15.1.1, Adding Material Files, Forms, and Sources.

**Form**
- The approval’s form identification code for the material.
  - (Required) To add forms to the list, see Section 15.1.1, Adding Material Files, Forms, and Sources.

**Form Seq. No.**
- The approval form’s sequence number used for placing the file in sequential order.

**Quantity Approved**
- The approved quantity for the material. If not used, the default is 0.00. If used, enter a valid numeric value (up to two decimal places are accepted).

**Source**
- The source of the approval for the material.
  - (Required) To add sources to the list, see Section 15.1.1, Adding Material Files, Forms, and Sources.

**Lot Numbers**
- The lot numbers for the approved material.

**Remarks**
- General remarks concerning the material approval.
Click OK to add the approval, CANCEL to cancel the approval, or ADD MORE to add more approvals for the material. If you click OK, FieldManager software displays the approval on the APPROVALS tab.

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

**Qualified/Certified Products**

To designate a new material as a qualified/certified product, select the appropriate contract in the Contracts list window, and click the MATERIALS button on the Application Toolbar to display the Materials list window. Click the ADD button on the Window Toolbar to open the Add Material tab window.

Click on the APPROVALS tab (see Figure 7-3), and then click on the ADD APPROVAL button at the bottom of the window.

Enter information in the following fields to create a complete qualified/certified product record.

<table>
<thead>
<tr>
<th><strong>Qualified/Certified Product</strong></th>
<th>Click the YES radio button to mark the material as a qualified/certified product.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Form Date</strong></td>
<td>The date on the material approval form.</td>
</tr>
<tr>
<td><strong>Qty. Approved</strong></td>
<td>The value in the Quantity Approved field must be zero. If this field contains a value, the material will not be considered a qualified/certified product even if the QUALIFIED/CERTIFIED PRODUCT radio button is set to YES.</td>
</tr>
<tr>
<td><strong>Source</strong></td>
<td>The source of the approval for the material. (Required)</td>
</tr>
<tr>
<td><strong>Remarks</strong></td>
<td>General remarks concerning the prequalified material.</td>
</tr>
</tbody>
</table>

Click OK to accept the information or click CANCEL to cancel. If you click OK, FieldManager software returns to the APPROVALS tab with the qualified/certified product information.

Click either the SAVE or the SAVE/CLOSE button on the Window Toolbar depending on how you would like to proceed.
7.1.3 Associating Items with a New Material

The ITEMS tab displays the items that are associated with a material. If no items are associated with the material, the ITEMS tab displays as a blank gray tab (see Figure 7-5).

To associate items with a new material, select the appropriate contract in the Contracts list window, and click the MATERIALS button on the Application Toolbar to display the Materials list window. Click the ADD button on the Window Toolbar to open the Add Material tab window.

Click on the ITEMS tab, and then click on the ADD ITEM button at the bottom of the window. As displayed in Figure 7-6, FieldManager software displays a Select Items for Material window that lists all the items in the contract.
Filter and sort the Select Items for Material window just as with any other list window. Choose an item from the Select Items for Material window and click SELECT, or click CANCEL to cancel the selection.

As shown in Figure 7-7, if you click SELECT, FieldManager software displays the ITEMS tab with the following fields in which to record information about the material.

**Usage Factor**

The Usage Factor is the quantity of material used per quantity of item used. If you enter 5 units of a material per 1 unit of an item, then an item comprised of 10 units would use 50 units of the material.

**Remarks**

This area is for general remarks concerning the material’s usage or its relationship to the item.

![Figure 7-7. Add Material Tab Window—ITEMS Tab (with 1 Item)](image)

To associate more items with the material, click ADD ITEM again, and enter information for each item.

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

**Note:** For more information, refer to Section 6.1.3, Associating Materials with a New Item.

### 7.2 Changing Existing Materials

It is possible to change existing material information via the Materials list window at any time. This is true regardless of whether the material is a qualified product or a material that requires testing.
| Warning: | If a material has lost or gained a qualified product classification, do not change the material. Instead, complete the steps listed in Section 7.1, Adding New Materials to a Contract, to add a new material, slightly changing the material’s description to make it unique from the prior classification. |

7.2.1 Changing General Information About an Existing Material

To change the general information for an existing material, select the contract to which the material is assigned from the Contracts list window, and click MATERIALS on the Application Toolbar to display the Materials list window. Select the material, and click the CHANGE button on the Window Toolbar to display the Change Material tab window. The GENERAL tab will automatically display (see Figure 7-8).

![Figure 7-8. Change Material Tab Window—GENERAL Tab](image)

You may change the Material Description and Unit fields.

Click SAVE/CLOSE on the Window Toolbar to save your work and close the Change Material tab window. FieldManager software will save the information and then revert to the Materials list window.

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

7.2.2 Changing and Adding Approvals for an Existing Material

To change approvals for an existing material, select the contract to which the material is assigned from the Contracts list window, and click the MATERIALS button on the Application Toolbar to display the Materials list window. Select the material, and click the CHANGE button on the Window Toolbar to display the Change Material tab window.
Click the **APPROVALS** tab. If the material is not a qualified product, you can add additional material approvals (see Section 7.1.2, Adding Approvals to a New Material). To change an approval, click the **CHANGE APPROVAL** button, make the appropriate changes, and click OK. Click the **DELETE APPROVAL** button to delete an approval (see Section 7.2.3, Deleting Approvals from an Existing Material).

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

### 7.2.3 Deleting Approvals from an Existing Material

To delete existing material approvals, select the contract to which the material is assigned from the **Contracts** list window, and click the **MATERIALS** button on the Application Toolbar to display the **Materials** list window. Select the material, and click the **CHANGE** button on the Window Toolbar to display the Change Material tab window.

Click on the **APPROVALS** tab. Select the approvals to delete, and click the **DELETE APPROVAL** button at the bottom of the window.

FieldManager software displays a Delete Warning window that asks to confirm the deletion. Click **YES** to complete the deletion, or **CANCEL** to cancel the deletion. If you selected more than one approval to delete, you can click **NO** to cancel the deletion of the approval listed in the Delete Warning window and move on to the next selected approval.

**Warning:** You cannot delete approvals for materials which have usage. To delete an approval for a material with usage, first delete all usage (see Section 8.3.10, Deleting Material Usage for an Existing IDR for information about deleting material usage).

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

### 7.2.4 Changing and Adding Items Associated with an Existing Material

To change items associated with an existing material, select the contract to which the material is assigned from the **Contracts** list window, and click the **MATERIALS** button on the Application Toolbar to display the **Materials** list window. Select the material, and click the **CHANGE** button on the Window Toolbar to display the Change Material tab window.

Click on the **ITEMS** tab. You can change the Usage Factor and Remarks fields, and can also add additional items to the material (see Section 7.1.3, Associating Items with a New Material).

Click either the **SAVE** or the **SAVE/CLOSE** button on the Window Toolbar depending on how you would like to proceed.
Note: For more information, refer to Section 6.2.3, Changing and Adding Materials Associated with an Existing Item.

7.2.5 Deleting Items from an Existing Material

To delete items from an existing material, select the contract to which the material is assigned from the Contracts list window, and click the MATERIALS button on the Application Toolbar to display the Materials list window. Select the material, and click the CHANGE button on the Window Toolbar to display the Change Material tab window.

Click on the ITEMS tab. Select the items to delete, and click on the DELETE ITEM button at the bottom of the window.

FieldManager software displays a Delete Warning window that asks to confirm the deletion. Click YES to complete the deletion, or CANCEL to cancel the deletion. If you selected more than one item to delete, you can click NO to cancel the deletion of the item listed in the Delete Warning window and move on to the next selected item.

Warning: You cannot delete items from a material if the items have usage. To delete items that have usage, first delete all usage. (For more information, refer to Section 8.3.7, Deleting Item Postings from an Existing IDR.)

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

7.3 Deleting Materials

To delete a material, select the contract to which the material is assigned in the Contracts list window, and click the MATERIALS button on the Application Toolbar. Select the material from the Materials list window, and click the DELETE button on the Window Toolbar.

As shown in Figure 7-9, FieldManager software displays a Delete Warning window that asks to confirm the deletion.

Click YES to complete the deletion, or CANCEL to cancel the deletion. If you selected more than one material to delete, you can click NO to cancel the deletion of the material listed in the Delete Warning window and move on to the next selected material.
**Warning:** You cannot delete materials that have usage or approvals. To delete a material with usage, first delete all usage. (For more information, refer to Section 8.3.8, Deleting Material Usage for an Existing IDR.) To delete a material with approvals, first delete all approvals. (For more information, refer to Section 7.2.3, Deleting Approvals from an Existing Material.)

Click **CLOSE** on the Window Toolbar to close the Materials tab window. FieldManager software displays the Contracts list window.

### 7.4 Reviewing Materials

To review a material, select the contract to which the material is assigned in the Contracts list window, and click the **MATERIALS** button on the Application Toolbar. Select the material from the Materials list window, and click the **REVIEW** button on the Window Toolbar. FieldManager software displays the Review Material tab window in a mode in which you can view but not change information. The **GENERAL** tab automatically displays (see Figure 7-10).

![Review Material Tab Window—GENERAL Tab](image)

Click on any of the tabs to review information for the material.

Click **CLOSE** on the Application Toolbar to close the Review Material tab window and return to the Materials list window.
8. Working with Inspector’s Daily Reports

Note: This chapter pertains to adding, changing, deleting, and reviewing IDRs in FieldManager software. For information about importing IDRs from the FieldBook component into the FieldManager module, refer to Section 14.2.1, Importing Inspector’s Daily Reports. For information about the IDRs functionality specific to the FieldBook component, refer to Section 16.2.5, IDRs Functionality.

An IDR (Inspector’s Daily Report) tracks all the activity at the project site on a particular day. IDRs can be created in the FieldBook component or the FieldManager module. You can add general, contractor personnel and equipment, item posting, and material usage information, and even make a sketch of the project work.

The IDRs list window displays the IDRs that have been created.

To display the IDRs list window, select a contract in the Contracts list window, and click IDRS on the Application Toolbar (see Figure 8-1).

![Figure 8-1. IDRs List Window](image-url)
8.1 Adding New Inspector’s Daily Reports

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. (For more information, refer to Section 8.2, Copying IDR Information to a New Inspector’s Daily Report.)

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.

8.1.1 Adding General Information for a New IDR

The GENERAL tab of the Add IDR tab window records all the general information that makes up an inspector’s report.

To add general information for a new IDR, select the appropriate contract in the Contracts list window, and click IDRS on the Application Toolbar to display the IDRs list window. Click ADD on the Window Toolbar to open the Add IDR tab window. The GENERAL tab will automatically display (see Figure 8-2).

![Figure 8-2. Add IDR Tab Window—GENERAL Tab](image)

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

**IDR Date**

The date of the IDR. Typically, this is the date the work was completed.

**Inspector**

The inspector who recorded the information. (Required). When adding an IDR in FieldManager software, on the GENERAL tab,
the Inspector field displays the current user as the default. When a user performs the Copy IDR function, the Inspector field remains blank, which is consistent with the intended use of the Copy IDR function.

**Weather**
The weather for the day. Enter a description of the weather, or click the down arrow beside the field to display a drop-down list of previously entered weather descriptions from which to select. If this field is not completed, the Low Temperature, High Temperature, or Comments field is required.

**Low Temperature**
The low temperature. If this field is not completed, the Weather, High Temperature, or Comments field is required.

**High Temperature**
The high temperature. If this field is not completed, the Weather, Low Temperature, or Comments field is required.

**Comments**
General comments. These comments may or may not pertain to the items and materials, which may be commented on later in the process. Double-clicking this field opens a larger window in which to add more extensive comments. It also provides the **SPELL CHECK button** to check your spelling. If this field is not completed, the **Weather**, **Low Temperature**, or **High Temperature** field is required.

As information becomes available, FieldManager software automatically enters information in the following fields at the top of the tab window.

**Date/Time Entered**
The date and time the IDR was first created.

**Entered By**
The name of the user logged on to FieldManager software.

**Sequence Number**
More than one IDR can be created on the same day by the same inspector. This number differentiates between them.

**Generated**
This indicates **No** if not generated, and **Yes** when generated. Generally, once the IDR is considered complete, it should be generated.

**Revised By**
If an IDR has been revised, the initials of the user who last revised it will display here.

**Revision Date**
The date an IDR was last revised.

**Revision Number**
The number of times an IDR has been revised.

**Origin**
The application that was used to initially create the IDR.
Click SAVE/CLOSE on the Window Toolbar to save your work and close the Add IDR tab window. FieldManager software will save the information and then revert to the IDRs list window.

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

### 8.1.2 Adding Contractor Personnel to a New IDR

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

To add contractor personnel to a new IDR, select the appropriate contract in the Contracts list window, and click IDRS on the Application Toolbar to display the IDRs list window. Click ADD on the Window Toolbar to open the Add IDR tab window, and then click the **CONTRACTORS** tab (see Figure 8-3).

![Figure 8-3. Add IDR Tab Window—CONTRACTORS Tab](image)

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. An X (or check mark, depending on your Windows version) 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 8-4, 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.

![Click ADD PERSONNEL to display text boxes.](image)

**Figure 8-4. Add IDR Tab Window—CONTRACTORS Tab—Personnel Box**

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

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

*Note:* If the On Site check box was not selected when the subcontractor was selected, FieldManager software will automatically select the On Site check box once information is entered in the Number text box. This is done to indicate that the selected subcontractor worked on site with the equipment and personnel listed.

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

**8.1.3 Adding Contractor Equipment to a New IDR**

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

To add contractor equipment to a new IDR, select the appropriate contract in the Contracts list window, and click **IDRS** on the Application Toolbar to display the IDRs list window. Click **ADD** on the Window Toolbar to open the Add IDR tab window, and then click the **CONTRACTORS** tab (see Figure 8-3).
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. An X (or check mark, depending on your Windows version) 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 8-5, 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 8-5. Add IDR Tab Window—CONTRACTORS Tab—Equipment Box](image)

- **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.

- **Note:** If the **On Site** check box was not selected when the subcontractor was selected, FieldManager software will automatically mark the **On Site** check box once information is entered in the **Number** field. This is done to indicate that the selected subcontractor worked on site with the equipment and personnel listed.

Click either **SAVE** or **SAVE/CLOSE** on the Window Toolbar depending on how you would like to proceed.
8.1.4 Adding Site-Times Information to a New IDR

In FieldManager software, Inspectors can now capture Site-Time information within IDRs in either FieldManager or FieldBook. This information can then be moved passed on to FieldManager Daily Diaries. There are three types of sites tracked in Fieldmanager software: available day (also called working day), calendar day, and completion date (see Appendix A for more information).

Available day sites allow the contractor to complete the contract work within a specific number of days, while completion date and calendar day contracts require the contract to be completed by a certain date. It is not necessary to track daily site time for a completion date or calendar day site; however, it is required for an available day site to keep track of the amount of time worked on the site. The SITE TIMES tab displays all site times associated with the contract.

To add site time information and various comments about each site for a new IDR, select the appropriate contract in the Contracts list window and click IDRs on the Application Toolbar to display the IDR list window. Click ADD on the Window Toolbar to display the Add IDR tab window, and then click the SITE TIMES tab (see Figure 8-6).

The SITE TIMES tab is divided into three areas: the status area, the site times list area, and the time charges area. To record time charges or add comments, select the site time from the list of available site times. Both the status area and the time charges area may change depending on the type of site selected.

FieldManager software displays the appropriate time charges based on the site type with the following fields in which to record information.

**Time Charge**

The amount of time to charge for the site for this day’s Daily Diary entry. This field is only shown for available day sites.
<table>
<thead>
<tr>
<th><strong>Contractor(s) Working</strong></th>
<th>A radio button to indicate whether or not the contractor(s) was on site for this day’s entry. Choose either <strong>YES</strong> or <strong>NO</strong>.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hours Available</strong></td>
<td>The number of hours available to the contractor for this day’s entry.</td>
</tr>
<tr>
<td><strong>Hours Worked</strong></td>
<td>The number of hours worked by the contractor for this day’s entry.</td>
</tr>
<tr>
<td><strong>Controlling Operation</strong></td>
<td>The controlling operation for this day’s Daily Diary.</td>
</tr>
<tr>
<td><strong>Reason for Delays</strong></td>
<td>Any reasons for delay for this day’s Daily Diary.</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>Any comments for this day’s Daily Diary.</td>
</tr>
</tbody>
</table>

To record a time charge for an available day site, it is necessary to enter a value in the Time Charge field. The installation options set for your agency determine the values that can be entered. If you have any questions about how the installation option was set for your agency, ask your System Manager.

Click either **SAVE** or **SAVE/CLOSE** on the Window Toolbar.

### 8.1.5 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.

If there are no item postings, the **POSTINGS** tab displays as a blank gray tab (see Figure 8-7).
Click **ADD POSTING** at the bottom of the tab window. As shown in Figure 8-8, FieldManager software displays the contract Items list window from which to select the item to which progress will be posted.

**Note:** You can post progress to an unattached item, but the item will not be paid for until it is approved through a contract modification.

Filter and sort the contract Items list window just as with any other list window. Choose the item to post to either by double-clicking it, or by clicking the item and then clicking **SELECT**. Another helpful navigational tool is the **Find Item Description** text box. To
quickly advance to a record, simply begin keying the item description in the Find Item Description text box, and the list will jump to that point.

Once an item is chosen, FieldManager software displays the status area and entry area for that item (see Figure 8-9).

![Figure 8-9. Add IDR Tab Window—POSTINGS Tab](image)

Enter information in the following fields to create a complete record.

**Contractor**
One that agrees to furnish materials or perform services for a specified price. The prime contractor is the winning bidder for a specified project; the contract is awarded to them. They hire subcontractors to assist with the project work. The contractor includes the prime as well as any subcontractors.

**Project/Category**
The project number within the contract and the category number within the project on which the item posting will occur. (Required)

**Quantity**
The quantity of the item posting. (Required) This may be a fractional quantity (up to three digits to the right of the decimal point). Zero can be a valid entry. For agencies using autopay items, the Quantity field will not allow an entry (see Appendix A for more information on autopay items).

**Station From**
The starting station number for the item usage. If this field is not completed, the Station To or Location field is required. (For information on retaining the Station From field information for the next IDR item entry, refer to Section 3.3.1, Setting User Preferences.)
**Station To**  
The ending station number for the item usage, which corresponds with the information in the Station From field. If this field is not completed, the Station From or Location field is required. (For information on retaining the Station To field information for the next IDR item entry, refer to Section 3.3.1, Setting User Preferences.)

**Location**  
The location at which the item was used/placed. If this field is not completed, the Station From or Station To field is required. (For information on retaining the Location field information for the next IDR item entry, refer to Section 3.3.1, Setting User Preferences.)

**Attention Check Box (Item Posting Level)**  
A flag that marks an item posting for future attention (by either the engineer or the supervisor). This flag will appear in the Inspector’s Daily Report. To activate the Attention check box, place the mouse pointer on the box, and click the left mouse button. The flag remains on the item until it is manually removed. If the attention flag is set, a remark must be entered.

**Breakdown**  
Further breakdown of items. Breakdowns are typically associated with plan sheets or structures. If your agency does not use breakdown items, this field will be blank (even when you click the drop-down arrow). If your agency uses breakdown items, you may select from a list of breakdown item entries. (For information on adding and deleting breakdowns, see Section 4.3.4, Adding and Deleting Breakdowns.)

**Remarks**  
Any comments concerning this particular item posting. Each posting is unique, and may carry its own set of comments. This field is required if the Attention check box is checked. (For information on retaining the Remarks field information for the next IDR item entry, refer to Section 3.3.1, Setting User Preferences.)

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.

**Note:** If the item being posted to is associated with any materials, those materials must be reviewed before the posting may be accepted. For more information, refer to Section 8.1.6, Adding Material Usage to a New IDR.
Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.

8.1.6 Adding Material Usage to a New IDR

If you post to an item that has associated materials, the MATERIALS button in the bottom left corner of the POSTINGS tab of the Add IDR tab window will be enabled (see Figure 8-10). When this happens, it is necessary to review all material usage before saving the IDR.

Click MATERIALS. As shown in Figure 8-11, FieldManager software will display the material status area and usage entry area.

Figure 8-10. Add IDR Tab Window—POSTINGS Tab—Enabled MATERIALS Button

Figure 8-11. Add IDR Tab Window—POSTINGS Tab—Materials Area
Enter information in the following material usage fields.

**Quantity Used**  The material used for the quantity of item posted. If a factor has been established for the item/material combination, the material used will already be displayed when you are in Add mode. If necessary, you can manually override the quantity used amount to reflect actual usage at the project site.

**Remarks**  Comments made for this particular material posting.

Use the PREV and NEXT to review multiple materials. FieldManager software requires that you review all associated materials; however, only the materials used that day must be posted. This is a flexible feature that comes in handy if various materials are substituted for each other in the item placed.

If the placed item quantity changes for an item with associated materials, you must recalculate the material quantity for each material by clicking **RECALCULATE MATERIAL QUANTITY USED**.

![RECALCULATE MATERIAL QUANTITY USED Button](image)

**Figure 8-12. RECALCULATE MATERIAL QUANTITY USED Button**

When you click **RECALCULATE MATERIAL QUANTITY USED**, FieldManager software multiplies the current placed item quantity by the usage factor and puts the result in the Qty. Used field, overwriting any previous entry. If there are multiple materials associated with the item, you must click **RECALCULATE MATERIAL QUANTITY USED** for each material.

After reviewing the materials associated with the item, there are several options. Click ITEM to return to the Items area on the POSTINGS tab, or click ADD MORE buttin to add more item postings. Click OK to accept the changes and return to the posting list, or click CANCEL to return to the posting list without saving changes to the last item posting.

Once all the information has been added and/or reviewed, click either **SAVE** or **SAVE/CLOSE** on the Window Toolbar.
8.1.7 Adding Materials to the Contract via a New IDR

If you have reviewed the material usage for an item via the POSTINGS tab of the Add IDR tab window and discover that another material must be associated with the item, you can add that material without having to exit the IDR being created. To do this, click ADD MATERIALS in the lower right corner of the window. The Add/Delete Materials from Item window will open displaying the materials currently associated with the item (see Figure 8-13).

To add a new material to the item, click ADD MATERIAL. In the Select Materials window that displays, choose one or more materials and click SELECT to continue or click CANCEL to cancel the selection. The selected material(s) will now appear in the Item Materials window, and you can assign a usage factor and remarks for the material(s) as necessary. You can also edit the usage factor and remarks for any materials that were already associated with the item. (For more information, refer to Section 6.1.3, Associating Materials with a New Item.)

To delete a material(s), select that material(s), click DELETE MATERIAL, and then click YES in the Delete Warning window(s) that displays.

**Note:** You cannot delete materials from an item if the materials have usage. To delete materials that have usage, first delete all usage. (For more information, refer to Section 8.3.10, Deleting Material Usage for an Existing IDR.)

When you have finished making any changes within the window, click OK to confirm those changes or click CANCEL to exit the window without saving your changes.
Adding Materials to the Contract via a New IDR

As you are working in the Add/Delete Materials from Item window, you may realize that you need to add a new material(s) to the contract via the Add Material tab window. To accommodate this need, FieldManager software provides the ADD MATERIAL TO CONTRACT button. This button can automatically close the Add/Delete Materials from Item window while at the same time opening the Add Material tab window.

To switch directly from the Add/Delete Materials from Item window to the Add Material tab window, click ADD MATERIAL TO CONTRACT. If no changes were made in the Add/Delete Materials from Item window, that window will close and the Add Material tab window will display. If you have made changes within the Add/Delete Materials from Item window, FieldManager software will display a Close window.

Click YES to save the changes, NO to cancel the changes, or CANCEL to return to the Add/Delete Materials from Item window. If you click either YES or NO, FieldManager software will close the Add/Delete Materials from Item window and display the Add Material tab window. Add the desired material(s) using the instructions provided in Section 7.1, Adding New Materials to a Contract.

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
### 8.1.8 Associating Breakdowns With an Item via a New IDR

If you are adding a posting to a new IDR via the POSTINGS tab of the Add IDR tab window and discover that another breakdown must be associated with the item, you can add that breakdown without having to exit the IDR being created. To do this, click ADD BREAKDOWNS in the lower right corner of the window. A window opens displaying the breakdowns currently associated with the item (see Figure 8-15).

![Figure 8-15. Change Item Breakdown Status Window](image)

To add a new breakdown, click ADD BREAKDOWN ITEMS. FieldManager software inserts a row into which to add information about the breakdown. Assign a project, category, and breakdown ID for the breakdown using the down arrows to the right of the corresponding fields, and then type any comments about the breakdown in the Breakdown Item Comments field. In the same way, you can also edit any breakdowns that were already associated with the item. (For more information, refer to Section 6.1.4, Associating Breakdowns with a New Item.)

To delete a breakdown(s), select that breakdown(s), click DELETE BREAKDOWN ITEMS, and then click YES in the Delete Warning window(s) that displays.

When you have finished making any changes within the Change Item Breakdown Status window, click OK to confirm those changes or click CANCEL to exit the window without saving your changes.

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

### 8.1.9 Adding Attachments to a New IDR

File attachments are drawings or pictures of the site that offer a visual view of information provided in the IDR. To add an attachment 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 or click change to add an attachment to an already-existing IDR, and then click the ATTACHMENTS tab of the Add or Change IDR tab window.

If there are no attachments, the ATTACHMENTS tab displays below (see Figure 8-16).

To add a file as attachment, click ADD FILE at the bottom of the tab window. As shown in Figure 8-17, FieldManager software displays the Add File Attachment window.
Insert the name of your file attachment in the Name field. Enter a description of the file in the Description field. Click BROWSE to select the attachment. FieldManager opens the Attach a file window.

![Attach a file window](image)

**Figure 8-18. Attach a File Window**

Select the file you wish to attach and click OPEN. FieldManager attaches the file to the IDR. Click ADD, and the file attachment record will be added (see Figure 8-19).

![IDR Attachment Record](image)

**Figure 8-19. IDR Attachment Record**

Click either SAVE or SAVE/CLOSE on the Window Toolbar.
8.1.10 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 posting IDRs.

To view a draft IDR, click the VIEW tab of the Add IDR tab window to see the electronic copy of the report that will print out when you generate the IDR (see Figure 8-20).

![Add IDR Tab Window — VIEW Tab](image)

When the new SORT ORDER button is clicked, a modal window will appear containing the sort options available. The modal window will display three radio buttons for the three sorting options: Item Code, Item Description, and Prop. Line Number (see Figure 8-21).

![Select Item Sort Order](image)

The field that the sort order is currently based on will be selected when opened. The user can select another sort order and select OK and the report will be redrawn based on the
selected field. Selecting CANCEL will not change the sort order. The modal window title will display Select Item Sort Order.

Any sort order change within the report window is only temporary for that current tabbed dialog session. For example, if the default sort order was Item Description for an IDR, and a user changed it to Item Code while in review mode, if they were to leave the IDR and come back in within review mode, the report would revert back to the default sort of Item Description. Printing will always be based on what is on screen. When a user generates an IDR or Contract Modification, the report will revert back to the original item sort for the official print of the document.

The user will not have the ability to override the item sort when generating an IDR or Contract Modification or when printing these reports directly from the list window.

If all the information is correct and you are ready to generate the IDR, for further instructions, refer to Section 8.6, Generating the Inspector’s Daily Report. Otherwise, click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.

### 8.2 Copying IDR Information to a New Inspector’s Daily Report

Because contractors often work with similar bid items for weeks at a time, you may track similar construction information over consecutive days. The Copy IDR command on the Edit menu allows you to copy similarly defined IDRs and eliminates the need to reenter data for each new IDR. After you copy the IDR, you can then enter any minor changes to the new IDR in the tab window.

- **Note:** You can only copy IDR information to a new IDR for the same contract.

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.

![Copy IDR Warning Window](image)

Figure 8-22. Copy IDR Warning 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.

**General Tab**  
Comments are copied.

**Contractors Tab**  
All information is copied.

**Postings Tab**  
All information except item quantity and material quantity will be copied. Item and material quantities will be set to 0.

No information will be copied from the ATTACHMENTS tab.

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

### 8.3 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.

#### 8.3.1 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 (see Figure 8-23).

![Figure 8-23. Change IDR Tab Window—GENERAL Tab](image)
You can change any of the fields on the GENERAL tab. (For entry field descriptions, refer to Section 8.1.1, Adding General Information for a New IDR.) 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.

### 8.3.2 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 (see Figure 8-24).

![Figure 8-24. Change IDR Tab Window—CONTRACTORS Tab](Image)

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. (For more information, refer to Section 8.1.2, Adding Contractor Personnel to a New IDR.)

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
8.3.3 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 (see Figure 8-24).

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. (For more information, refer to Section 8.1.3, Adding Contractor Equipment to a New IDR.)

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

8.3.4 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 (see Figure 8-24).

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.

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

8.3.5 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 (see Figure 8-24).

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.

Click either SAVE or SAVE/CLOSE on the Window Toolbar.
8.3.6 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 IDR list window. Select the IDR, and click CHANGE on the Window Toolbar to display the Change IDR tab window. Click the POSTINGS tab (see Figure 8-25).

![Figure 8-25. Change IDR Tab Window—POSTINGS Tab](image)

To add an item posting, click ADD POSTING. (For more information, refer to Section 8.1.4, Adding Site Times Information to a New IDR)

8.3.7 Adding Item Postings to a New IDR.

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.
8.3.8 Deleting Item Postings from an Existing IDR

To delete an item posting, select the contract for which the existing IDR was created from the Contracts list window. Next, click IDR on the Application Toolbar to display the IDRs list window. Select the IDR, and click CHANGE on the Window Toolbar to display the Change IDR tab window. Click the POSTINGS tab (see Figure 8-25).

Select one or more postings, and click DELETE POSTING at the bottom of the window.

FieldManager software displays a Delete Warning window that asks to confirm the deletion. Click YES to confirm the deletion or CANCEL to cancel the deletion. If you selected more than one posting to delete, you can click NO to cancel the delete of the posting listed in the Delete Warning window and move on to the next selected posting.

Another way to delete an item posting is by selecting a posting on the POSTINGS tab, clicking CHANGE POSTING on the bottom of the window, and clicking DELETE.

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

8.3.9 Changing Material Usage for an Existing IDR

To change the material usage information for an item you have posted progress to, select the contract for which the existing IDR was created from the Contracts list window. Next, click IDR on the Application Toolbar to display the IDRs list window. Select the IDR, and click CHANGE on the Window Toolbar to display the Change IDR tab window. Click the POSTINGS tab (see Figure 8-25).

Select a posting, and then click CHANGE POSTING at the bottom of the window. Click MATERIALS in the bottom left corner of the window. You can change the Qty. Used and Remarks fields.

When you change the Qty. Used amount, you must also click RECALCULATE MATERIAL QUANTITY USED to recalculate the value for Item Qty. placed. If there are multiple materials associated with the item, you must click RECALCULATE MATERIAL QUANTITY USED for each material. Click PREV and NEXT to review and change multiple materials for the item.

When finished, click OK to save any changes or CANCEL to cancel any changes and return to the posting list.

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
8.3.10 Deleting Material Usage for an Existing IDR

To effectively delete the material usage information for an item you have posted progress to, select the contract for which the existing IDR was created from the Contracts list window. Next, click IDRS on the Application Toolbar to display the IDRs list window. Select the IDR, and click CHANGE on the Window Toolbar to display the Change IDR tab window. Click the POSTINGS tab (see Figure 8-25).

Select a posting, and then click CHANGE POSTING at the bottom of the window. Click MATERIALS in the bottom left corner of the window and display the material usage to be deleted. Click PREV and NEXT to move between multiple materials for the item.

Delete the entry in the Qty. Used field, and delete any comments from the Remarks field. To do this, simply highlight the data in the field, and press the DELETE key on the keyboard.

Note: FieldManager software does not display a Delete Warning window. Deleting material usage is the same as changing the material usage to zero.

When finished, click OK to save any changes or click CANCEL to cancel the deletion and return to the posting list.

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

8.3.11 Changing and Adding Material Associations via an Existing IDR

If you are working with item postings in an existing IDR via the POSTINGS tab of the Change IDR tab window and discover that a material association must be added or changed, you can do so without having to exit the IDR being edited. To do this, click ADD MATERIALS in the lower right corner of the window. A window will open displaying the materials currently associated with the item (see Figure 8-13).

To add a new material to the item, click ADD MATERIAL. (For more information, refer to Section 8.1.7, Adding Materials to the Contract via a New IDR.) You can also edit the usage factor and remarks for any materials that were already associated with the item (see Section 6.1.3 for more information).

When you have finished making any changes within the window, click OK to confirm those changes or click CANCEL to exit the window without saving your changes.

Adding Materials to the Contract via an Existing IDR

As you are working in the Add/Delete Materials from Item window, you may realize that you need to add a new material(s) to the contract via the Add Material tab window. To accommodate this need, FieldManager software provides the ADD MATERIAL TO
CONTRACT button. This button can automatically close the Add/Delete Materials from Item window while at the same time opening the Add Material tab window.

To switch directly from the Add/Delete Materials from Item window to the Add Material tab window, click ADD MATERIAL TO CONTRACT. If no changes were made in the Add/Delete Materials from Item window, that window will close and the Add Material tab window will display. If you have made changes within the Add/Delete Materials from Item window, FieldManager software will display a Close window.

![Close Window](image)

Click **YES** to save the changes, **NO** to cancel the changes, or **CANCEL** to return to the Add/Delete Materials from Item window. If you click either **YES** or **NO**, FieldManager software will close the Add/Delete Materials from Item window and display the Add Material tab window. Add the desired material(s) using the instructions provided in Section 7.1, Adding New Materials to a Contract.

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

### 8.3.12 Deleting Material Associations via an Existing IDR

If you are working with item postings in an existing IDR via the POSTINGS tab of the Change IDR tab window and discover that a material association must be deleted, you can do so without having to exit the IDR being edited. To do this, click **ADD MATERIALS** in the lower right corner of the window. A window will open displaying the materials currently associated with the item (see Figure 8-13).

To delete a material(s), select that material(s), click **DELETE MATERIAL**, and then click **YES** in the Delete Warning window(s) that displays.

**Note:** You cannot delete materials from an item if the materials have usage. To delete materials that have usage, first delete all usage. (For more information, refer to Section 8.3.10, Deleting Material Usage for an Existing IDR.)

When you have finished making any changes within the window, click **OK** to confirm those changes or click **CANCEL** to exit the window without saving your changes.

Click either **SAVE** or **SAVE/CLOSE** on the Window Toolbar depending on how you would like to proceed.
8.3.13 Changing and Adding Breakdowns via an Existing IDR

If you are working with item postings in an existing IDR via the POSTINGS tab of the Change IDR tab window and discover that a breakdown must be added or changed, you can do so without having to exit the IDR being edited. To do this, click ADD BREAKDOWN in the lower right corner of the window. A window will open displaying the breakdowns currently associated with the item (see Figure 8-15).

To add a new breakdown, click ADD BREAKDOWN ITEMS (For more information, refer to Section 8.1.8, Associating Breakdowns With an Item via a New IDR.) You can also edit any breakdowns that were already associated with the item. (For more information, refer to Section 6.1.4, Associating Breakdowns with a New Item.)

When you have finished making any changes within the Change Item Breakdown Status window, click OK to confirm those changes or click CANCEL to exit the window without saving your changes.

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

8.3.14 Deleting Breakdowns via an Existing IDR

If you are working with item postings in an existing IDR via the POSTINGS tab of the Change IDR tab window and discover that a breakdown must be deleted, you can do so without having to exit the IDR being edited. To do this, click ADD BREAKDOWN in the lower right corner of the window. A window will open displaying the breakdowns currently associated with the item (see Figure 8-15).

To delete a breakdown(s), select that breakdown(s), click DELETE BREAKDOWN ITEMS, and then click YES in the Delete Warning window(s) that displays.

When you have finished making any changes within the Change Item Breakdown Status window, click OK to confirm those changes or click CANCEL to exit the window without saving your changes.

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
8.3.15 Changing Attachments for an Existing IDR

To change either the name or description of the attachment, from the Contracts list window, select the contract for which the existing IDR was created. Click IDR on the Application Toolbar to display the IDRs list window. Select the IDR. To display the Change IDR tab window, click CHANGE on the Window Toolbar. Click the ATTACHMENTS tab.

![Figure 8-27. Change IDR Tab Window—ATTACHMENTS Tab](image)

At the top of the tab in the Attachment Description area, select the file attachment to change, and then click CHANGE FILE at the bottom of the window. FieldManager displays the Change File Attachment window.

![Figure 8-28. Change File Attachment Window](image)
Enter the changes to the Name or Description of the file attachment. You can also change the actual attachment by clicking BROWSE and selecting a new attachment. When you are finished, click CHANGE.

To change the contents of the actual file attachment, click VIEW FILE. The program used to create the attachment opens with the attachment displayed.

Note: This differs from earlier version of FieldManager, which opened the attachment directly in FieldManager.

Make any changes and save the document to your computer. Click CHANGE FILE and use the BROWSE button to select the newly edited file and save it back into FieldManager.

If you have the original attachment on your computer already, you can edit the file without using FieldManager, then use the CHANGE FILE button to upload the edited file.

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

8.3.16 Deleting Attachments from an Existing IDR

To delete a file attachment, 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 ATTACHMENTS tab.

At the top of the tab in the Attachment Description area, select the attachment to delete, and then click DELETE FILE at the bottom of the tab. FieldManager software displays a Delete Warning window that suggests ways to save the file attachment outside of FieldManager and asks to confirm the deletion. Click YES to confirm the deletion or NO to cancel the deletion.

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

8.3.17 Viewing the Revised Inspector’s Daily Report

After changing an IDR, you may want to verify the information before generating the IDR again. To check the 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 the IDR, and click CHANGE on the Window Toolbar to display the Change IDR tab window. Click the VIEW tab (see Figure 8-29).
Review the information for the IDR 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.

### 8.4 Deleting Inspector’s Daily Reports

To delete 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 the IDR(s) to delete. Click DELETE on the Window Toolbar.

As FieldManager software begins the delete process, it first checks for item postings on the IDR. If there are any postings, FieldManager software will display a Warning window indicating that the IDR cannot be deleted (see Figure 8-30).

If this message displays, you must delete all the item postings in the IDR before deleting the IDR. (For more information, refer to Section 8.3.8, Deleting Item Postings from an Existing IDR.)
Warning: You cannot delete an IDR that has item postings. In addition, if there are any posted quantities on the IDR, which have been paid on an estimate, the IDR cannot be deleted.

If there are no item postings, or if you have deleted all existing item postings, FieldManager software displays a Delete Warning window that asks to confirm the deletion. Click YES to complete the deletion, or CANCEL to cancel the deletion. If you selected more than one IDR to delete, you can click NO to cancel the deletion of the IDR listed in the Delete Warning window and move on to the next selected IDR.

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

8.5 Reviewing Inspector’s Daily Reports

To review 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 the IDR, and then click REVIEW on the Window Toolbar. FieldManager software displays the Review IDR tab window, which allows you to view, but not change, data. The GENERAL tab automatically displays (see Figure 8-31).

Click any of the tabs to review information for the IDR.

Click CLOSE on the Application Toolbar to close the Review IDR tab window and return to the IDRs list window.
8.6 Generating the Inspector's Daily Report

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

To generate an IDR, select the contract for which the IDR was created from the Contracts list window, and click IDRS on the Application Toolbar to display the IDRs list window. Select one or more IDRs to generate, and click GENERATE on the Window Toolbar.

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

FieldManager software displays a Generate window that identifies the IDR to generate (see Figure 8-32).

![Figure 8-32. Generate IDR Message Window]

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 (for more information, refer to Section 8.5, Reviewing Inspector's Daily Reports), and then click PRINT on the Window Toolbar.

To close the IDRs list window and return to the Contracts list window, on the Application Toolbar, click CLOSE.
8.7 Tracking Revisions

When an IDR has already been generated, the GENERATE button on the Window Toolbar will not be enabled when accessing tab windows for that IDR. Instead, the GENERATE button appears dimmed, which means it is unavailable.

In the list window, the GENERATE button is always enabled, but notice that the IDRs list window includes a column labeled Gen which indicates whether or not an IDR has been generated.

Every time you change an IDR that has already been generated, the IDR must be generated again. Once you change and save the IDR, the revision number in the Revision Number field displayed on the GENERAL tab of the Change IDR tab window will increase. To determine how many times an IDR has been revised, simply look at this field (see Figure 8-33).

![Change IDR Tab Window—GENERAL Tab](image)

Figure 8-33. Change IDR Tab Window—GENERAL Tab

**Note:** Notice the top, right-hand side of the GENERAL tab. This area contains the Revised By, Revision Date, and Revision Number information. On new IDRs, this information will be blank. On IDRs which have been changed, this information will automatically be filled in by FieldManager software.
9. 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, and you charge time to a site through a Daily Diary record.

It is best to enter a Daily Diary record for each day of the contract to correctly charge time to the contract. FieldManager software includes helpful functions to quickly and easily add or edit information for the Daily Diary.

The Daily Diaries list window displays the Daily Diary records that have been created. To display the Daily Diaries list window, select a contract in the Contracts list window, and click DIARIES on the Application Toolbar (see Figure 9-1).

![Daily Diaries List Window](image)

Figure 9-1. Daily Diaries List Window
9.1 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.

Note: Adding a Daily Diary record 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 Daily Diary 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.

9.1.1 Adding General Information for a New Daily Diary

To add general information for a new Daily Diary record, select the appropriate contract in the Contracts list window, and click DIARIES on the Application Toolbar to display the Daily Diaries list window. Click ADD on the Window Toolbar to display the Add Daily Diary tab window. The GENERAL tab will automatically display (see Figure 9-2).

Figure 9-2. Add Daily Diary Tab Window—GENERAL Tab

Enter values in the following fields.

**Diary Date**

Automatically displays 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 and FieldManager software replaces the entry with whatever is typed or you can use the calendar feature.

**Author**

The name of the engineer creating the Daily Diary. (Required)
To select from a list of names, click the drop-down arrow next to the box.
**Low Temperature**

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 temperature recorded in any generated IDRs will be brought into the Low Temperature field. 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.

**High Temperature**

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 highest temperature recorded in any generated IDRs will be brought into the High Temperature field. 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.

**Sunrise**

The local time of sunrise.

**Sunset**

The local time of sunset.

**Weather**

The summary of the weather for the contract site for the day. Be aware that clicking **BRING IN WEATHER AND COMMENTS** will not automatically bring weather information into this field, but will fill the Comments field instead. Use the Weather field to summarize the weather for the day based on the inspectors’ reports.

**Comments**

Click **BRING IN WEATHER AND COMMENTS** at the bottom right of the **GENERAL** tab to quickly bring in weather information and comments 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. 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.
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.

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

### 9.1.2 Adding Site Time Information for a New Daily Diary

In FieldManager software, you can only enter site time charges through the Daily Diary. There are three types of sites to track in FieldManager software: available day (also called working day), calendar day, and completion date (see Appendix A for more information).

Available day sites allow the contractor to complete the contract work within a specific number of days, while completion date and calendar day contracts require the contract to be completed by a certain date. It is not necessary to track daily site time for a completion date or calendar day site, but it is required for an available day site to keep track of the amount of time worked on the site.

The **SITE TIMES** tab displays all site times associated with the contract. To add site time information and various comments about each site for a new Daily Diary, 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, and then click the **SITE TIMES** tab (see Figure 9-3).

![Figure 9-3. Add Daily Diary Tab Window—SITE TIMES Tab](image-url)
The SITE TIMES tab is divided into three areas: the status area, the site times list area, and the time charges area. To record time charges or add comments, select the site time from the list of available site times. Both the status area and the time charges area may change depending on the type of site selected.

As shown in Figure 9-3, FieldManager software displays the appropriate time charges based on the site type with the following fields in which to record information.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time Charge</strong></td>
<td>The amount of time to charge for the site for this day’s Daily Diary entry. This field is only shown for available day sites.</td>
</tr>
<tr>
<td><strong>Contractor(s) Working</strong></td>
<td>A radio button to indicate whether or not the contractor(s) was on site for this day’s entry. Choose either YES or NO.</td>
</tr>
<tr>
<td><strong>Hours Available</strong></td>
<td>The number of hours available to the contractor for this day’s entry.</td>
</tr>
<tr>
<td><strong>Hours Worked</strong></td>
<td>The number of hours worked by the contractor for this day’s entry.</td>
</tr>
<tr>
<td><strong>Controlling Operation</strong></td>
<td>The controlling operation for this day’s Daily Diary.</td>
</tr>
<tr>
<td><strong>Reason for Delays</strong></td>
<td>Any reasons for delay for this day’s Daily Diary.</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>Any comments for this day’s Daily Diary.</td>
</tr>
</tbody>
</table>

To record a time charge for an available day site, it is necessary to enter a value in the Time Charge field. The installation options set for your agency determine what values can be entered. If you have any questions about how the installation option was set for your agency, ask your System Manager.

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

To bring in site time data from that day’s IDR(s) click the BRING IN SITE DATA button on the SITE TIMES tab. When this button is clicked, FieldManager will populate all entry fields for the selected site with the site data from the generated IDR with the same date as the Daily Diary.
9.1.3 Viewing the New Daily Diary Report

It is a good idea to check your work before saving the Daily Diary. To check the record, click the VIEW tab of the Add Daily Diary tab window (see Figure 9-4).

![Figure 9-4. Add Daily Diary Tab Window—VIEW Tab](image)

If all the information is correct and you are ready to generate the Daily Diary record, for further instructions, refer to Section 9.5, Generating a Daily Diary Record. Otherwise, click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.

9.1.4 Adding Attachments to a New Daily Diary Report

File attachments are drawings or pictures of the site that offer a visual view of information provided in the Daily Diary. To add a file attachment to a new Daily Diary, select the appropriate contract in the Contracts list window, and click DIARIES on the Application Toolbar to display the Daily Diary list window. Click ADD on the Window Toolbar to open the Add Daily Diary tab window or click CHANGE to open the Change Daily Diary tab window, and then click the ATTACHMENTS tab of the Add or Change Daily Diary tab window.
If there are no attachments, the ATTACHMENTS tab displays as below (see Figure 9-5).

![Add Daily Diary Tab Window—ATTACHMENTS Tab](image)

To add a file as attachment, click ADD FILE at the bottom of the tab window. As shown in Figure 9-6, FieldManager software displays the Add File Attachment window.

![Add File Attachment Window](image)

Insert the name of your file attachment in the Name field. Enter a description of the file in the Description field. Click BROWSE to select the attachment. FieldManager opens the Attach a file window (see Figure 9-7).
Select the file you wish to attach and click OPEN. FieldManager attaches the file to the contract. Click ADD, and the file attachment record will be added (see Figure 9-8).

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
9.2 Changing an Existing Daily Diary Record

At times, Daily Diary record information may be entered incorrectly. This may be corrected via the Daily Diaries list window.

9.2.1 Changing General Information for an Existing Daily Diary

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 (see Figure 9-9).

![Change Daily Diary Tab Window—GENERAL Tab](image)

You can change any of the fields on the GENERAL tab except the fields in the status area. (For field descriptions, refer to Section 9.1.1, Adding General Information for a New Daily Diary.)

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.

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

9.2.2 Changing a Site Time Entry for an Existing Daily Diary

You can change a site time entry in an existing Daily Diary record, even if the Daily Diary has been generated, as long as the Daily Diary has not been included on any
estimates. To change the site time on a Daily Diary record that has already been included on an estimate, you will need to make a site time adjustment (refer to Section 9.2.4, Adding a Site Time Adjustment for an Existing Daily Diary).

To change a site time entry, 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. Click the SITE TIMES tab (see Figure 9-10).

![Change Daily Diary Tab Window—SITE TIMES Tab](image)

You can change any of the fields except the fields in the status area. To change information, click in a text box and add or delete information.

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

**9.2.3 Deleting a Site Time Entry from an Existing Daily Diary**

You can delete a site time entry in a Daily Diary record, even if the Daily Diary has been generated, as long as the Daily Diary has not been included on any estimates. To delete the site time entry on a Daily Diary record that has already been included on an estimate, you will need to make a site time adjustment (refer to Section 9.2.4, Adding a Site Time Adjustment for an Existing Daily Diary).

To delete 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. Click the SITE TIMES tab (see Figure 9-10).
From the site times list, select the site time entry to delete, and click DELETE DIARY TIME RECORD at the bottom of the window. As shown in Figure 9-11, FieldManager software displays a Delete Confirmation window that asks to confirm the deletion.

![Delete Confirmation Window](image)

Figure 9-11. Time Charge Delete Confirmation Window

Click YES to delete the time charge, or NO to cancel the deletion. If the response is YES, the time charges area will be reset to blanks for the diary time record deleted.

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

### 9.2.4 Adding a Site Time Adjustment for an Existing Daily Diary

To make a change to a site time record after the existing Daily Diary record has been included on an estimate, you must make a site time adjustment. To change the site time charged to a day through an adjustment, 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. Click the SITE TIMES tab (see Figure 9-10).
Select the site to which to add an adjustment from the site list. Click **ADJUST TIME RECORDS** at the bottom of the tab window. As shown in Figure 9-12, FieldManager software displays a new row for time charge adjustment information.

<table>
<thead>
<tr>
<th>Site</th>
<th>Description</th>
<th>Type</th>
<th>Charge</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>OVERALL_CONTRACT</td>
<td>Working Days</td>
<td>Original Charge</td>
</tr>
<tr>
<td>01</td>
<td>TRAFFIC_RESTRICTION</td>
<td>Calendar Days</td>
<td>Adjustment</td>
</tr>
</tbody>
</table>

![Change Daily Diary Tab Window—SITE TIMES Tab—Adjusting a Time Record](image)

To decrease the amount of time charged to an available day site, enter a negative number in the Time Charge Adjustment field. To increase the time charged, enter a positive number in the Time Charge Adjustment field. The total time charges for a Daily Diary must stay within the minimum and maximum specified by your agency.

If desired, complete the Hours Available, Hours Worked, and Comments fields, and then click either **SAVE** or **SAVE/CLOSE** on the Window Toolbar depending on how you would like to proceed.

### 9.2.5 Changing a Site Time Adjustment for an Existing Daily Diary

You can change an adjusted site time entry in an existing Daily Diary record, even if the Daily Diary has been generated, as long as the Daily Diary has not been included on any estimates. To change an adjusted site time on a Daily Diary record that has already been included on an estimate, you will need to make a new site time adjustment (refer to Section 9.2.4, Adding a Site Time Adjustment for an Existing Daily Diary).

To change an adjusted site time entry, 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. Click the **SITE TIMES** tab (see Figure 9-10).
As shown in Figure 9-13, you can change any of the fields except the fields in the status area. To change information, click in a text box and add or delete information.

Figure 9-13. Change Daily Diary Tab Window—SITE TIMES Tab—Changing a Site Time Adjustment

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
9.2.6 Changing Attachments from an Existing Daily Diary

To change either the name or description of the file attachment, from the Contracts list window, select the contract for which the existing IDR was created. Click DIARIES on the Application Toolbar to display the Daily Diaries list window. Select the Daily Diary. To display the Change Daily Diary tab window, click CHANGE on the Window Toolbar. Click the ATTACHMENTS tab.

![Change Daily Diary Tab Window — ATTACHMENTS Tab](image)

At the top of the tab in the Attachment Description area, select the file attachment to change, and then click CHANGE FILE at the bottom of the window. FieldManager displays the Change File Attachment window.

![Change File Attachment Window](image)
Enter the changes to the Name or Description of the file attachment. You can also change the actual file attachment by clicking BROWSE and selecting a new attachment. When you are finished, click CHANGE.

To change the contents of the actual file attachment, click VIEW FILE. The program used to create the attachment opens with the attachment displayed.

**Note:** This differs from earlier version of FieldManager, which opened the file attachment directly in FieldManager.

Make any changes and save the document to your computer. Click CHANGE FILE and use the BROWSE button to select the newly edited file and save it back into FieldManager.

If you have the original attachment on your computer already, you can edit the file without using FieldManager, then use the CHANGE FILE button to upload the edited file.

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

### 9.2.7 Deleting Attachments from an Existing Daily Diary

To delete a file attachment, select the contract for which the existing Daily Diary was created from the Contracts list window, and click DIARIES on the Application Toolbar to display the Daily Diary list window. Select the Daily Diary, and click CHANGE on the Window Toolbar to display the Change Daily Diary tab window. Click the ATTACHMENTS tab.

At the top of the tab in the Attachment Description area, select the file attachment to delete, and then click DELETE FILE at the bottom of the tab. FieldManager software displays a Delete Warning window that suggests ways to save the file attachment outside of FieldManager and asks to confirm the deletion. Click YES to confirm the deletion or NO to cancel the deletion.

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

### 9.2.8 Deleting a Site Time Adjustment from an Existing Daily Diary

To delete a site time adjustment, 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 existing Daily Diary record to change, and click CHANGE on the Window Toolbar to display the Change Daily Diary tab window. Click the SITE TIMES tab (see Figure 9-10).

The lists of sites should include original site times that cannot be deleted, and a list of any adjustments.
Note: You can only delete adjustments that have not yet been included on an estimate.

Select the adjustment to delete, and click DELETE DIARY TIME RECORD at the bottom of the window. As shown in Figure 9-16, FieldManager software displays a Delete Confirmation window that asks to confirm the deletion.

![Delete Confirmation Window—Time Charge Adjustment](image)

Figure 9-16. Delete Confirmation Window—Time Charge Adjustment

Click YES to delete the time charge adjustment, or NO to cancel the deletion.

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

### 9.3 Deleting a Daily Diary Record

To delete a Daily Diary record, select the appropriate contract in the Contracts list window, and click DIARIES on the Application Toolbar to display the Daily Diaries list window. Select the record to delete, and click DELETE on the Window Toolbar. FieldManager software displays a Delete Confirmation window that asks to confirm the deletion (see Figure 9-17).

![Delete Confirmation Window—Daily Diary](image)

Figure 9-17. Delete Confirmation Window—Daily Diary

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.

Warning: You cannot delete Daily Diary records that have been included on an estimate.
Click CLOSE on the Application Toolbar to close the Daily Diaries list window and return to the Contracts list window.

9.4 Reviewing a Daily Diary Record

To review a Daily Diary record, select the appropriate contract in the Contracts list window, and click DIARIES on the Application Toolbar. Select a record and click REVIEW on the Window Toolbar. FieldManager software displays the Review Daily Diary tab window in a mode in which you can view, but not change, data. The GENERAL tab automatically displays (see Figure 9-18).

Click any of the tabs to review the information for the Daily Diary record.

Click CLOSE on the Application Toolbar to close the Review Daily Diary tab window and return to the Daily Diaries list window.
9.5 Generating a Daily Diary Record

Once a Daily Diary record is correct and complete, generate it so that the Daily Diary records can be included on the next estimate created in FieldManager software.

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

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

FieldManager software displays a Generate window that identifies the Daily Diary record to generate (see Figure 9-19).

![Generate Window—Daily Diary](image)

Figure 9-19. Generate Window—Daily Diary

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 (refer to Section 9.4, Reviewing a Daily Diary Record), 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.
10. Working with Stockpiles

- **Note:** In order to constrain the automatic deduction of a stockpiled item to that item only, you can disable stockpile sharing functionality in the FieldManager Agency Configuration Program by deselecting the Stockpile Sharing check box.

Stockpile processing was invented to allow payment to a contractor for contract item materials that are stockpiled for later use (usually at least 30 days in the future). FieldManager software takes much of the burden out of the stockpile process.

When contractors apply for a stockpile (material allowance) payment, your agency’s central office contract administration system handles the payment in terms of dollars paid to the contractor. Once a stockpile payment has been made to the contractor, it must be recovered as the stockpile is incorporated into the work item.

With FieldManager software, you assign each stockpile to one or more items. Once this is done, FieldManager software can 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.
Four buttons at the bottom of the window in the Stockpile Wizard allow you to go through the steps of the stockpile process.

CANCEL Closes the window at any time without either adding a new stockpile or making changes to an existing stockpile.

PREV Allows for movement backward through the steps of the Stockpile Wizard.

NEXT Allows for movement forward through the steps of the Stockpile Wizard. Some steps require you to fill in information before moving forward with this button.

FINISH Saves the work done, and closes the Stockpile Wizard.

10.1 Adding Stockpiles

FieldManager software allows you to assign a stockpile to one or more items. FieldManager software automatically recovers the stockpile payment when an estimate that contains items assigned to that stockpile is created.

If there are multiple stockpiles assigned to a single item, the stockpiles will be recovered simultaneously when an estimate is generated that includes the item. The recovered amount is dependent on the quantity paid on the estimate for the stockpiled item and the recovery rate assigned to the item in each stockpile.

To add a stockpile, select the appropriate contract in the Contracts list window, and click the STOCKPILES button on the Application Toolbar to display the Stockpiles list window. Click the ADD button on the Window Toolbar to open FieldManager software’s Add Stockpile Wizard. The Introduction will automatically display (see Figure 10-1).

Figure 10-1. Add Stockpile Wizard—Introduction
Once you have read the instructions in the Introduction, click the NEXT button at the bottom of the Wizard to move on to Step 1 of 4 of the Add Stockpile Wizard.

**Step 1 of 4**

Step 1 of 4 asks you to describe the stockpile (see Figure 10-2).

![Figure 10-2. Add Stockpile Wizard—Step 1 of 4](image)

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 Comments**

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

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

Step 2 of 4 asks you to describe the transaction (see Figure 10-3).

![Image of Add Stockpile Wizard—Step 2 of 4]

Figure 10-3. Add Stockpile Wizard—Step 2 of 4

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)

**Transaction Comments**  
Any comments about the transaction. (Required)

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

Step 3 of 4 asks you to assign items to the stockpile, and dollar amounts to each item (see Figure 10-4).

![Add Stockpile Wizard—Step 3 of 4](image)

Click the **ADD ITEM** button near the bottom of the Wizard. The Items list window will display (see Figure 10-5).

![Add Stockpile Wizard—Items Window](image)
Choose one or more items to associate with the new stockpile, and click the SELECT button (see Figure 10-6), or click CANCEL to cancel associating items with the stockpile.

![Figure 10-6. Add Stockpile Wizard—Step 3 of 4 (After Assigning Items)](image)

If an item selected is in more than one category, FieldManager software displays a Multiple Categories window (see Figure 10-7). 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 10-7. Multiple Categories Window](image)
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 Amount**

The dollar amount to assign to the item. (Required) The sum of all the 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 10-8, the following fields are automatically filled in by FieldManager software, and are there to help with this procedure.

**Transaction Dollar Amount**

The total dollar amount of the transaction.

**Dollar Amount Left to Distribute**

The dollar amount in the transaction that has not yet been distributed among the items.

![Figure 10-8. Add Stockpile Wizard—Step 3 of 4 (After Assigning Dollar Amounts)](image)

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

This also means that items which have not yet been approved, and items with a negative authorized quantity, cannot be assigned to a stockpile. If you have included either of these types of items, select the item to remove from the stockpile, and click the DELETE ITEM button.
Click the NEXT button at the bottom of the Wizard to move on to Step 4 of 4 of the Add Stockpile Wizard.

**Step 4 of 4**

Step 4 of 4 asks you to indicate the recovery factor or recovery quantity for each item assigned to the stockpile (see Figure 10-9).

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. To assign an item to the stockpile, yet postpone the effect of the stockpile on item payment, specify a $0 recovery factor. When the time comes for the stockpile to affect item payment, simply change this recovery factor. If you specify a value for the Recovery Factor, the Recovery Quantity will be filled in automatically when you tab out of the field.

**Recovery Quantity**

The number of units of the item that you want to use to recover the stockpile payment. The Fastest value and Slowest value are listed to assist in completing this field. The Recovery Quantity must be between the Fastest and Slowest values. 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.
10.2 Changing Stockpiles

There are many reasons to change a stockpile:

- An error made during creation of a new stockpile.
- Delivery of a new shipment to the existing stockpile.
- The stockpile payment being recovered too quickly or too slowly.
- The need to redistribute the stockpile among the items.
- The need to balance a stockpile. (Before a final estimate can be created, your agency must have recovered the full stockpile amount paid to the contractor.)
- A brand new stockpile being added to the contract, but to a stockpile description that has already been used.

The Change Stockpile Wizard guides you through the process of making changes to stockpiles to resolve these, as well as other, issues. If there are no unpaid transactions for the stockpile, FieldManager software automatically adds a new transaction to accommodate any changes you make to the stockpile, and the first window displayed is the Introduction screen (see Figure 10-11). If there is at least one unpaid transaction for the existing stockpile, however, the first window that displays is the Change Stockpile window (see Figure 10-10).

In this window you can choose between adding a completely new transaction to the stockpile and changing the last unpaid transaction. When you choose the first option, a new transaction is added to the stockpile and that transaction displays when you view the Stockpile Summary by Stockpile inquiry. If you choose the second option, the existing unpaid transaction is modified and the Stockpile Summary by Stockpile does not reflect an additional transaction, only a change to the existing one.
Once you have completed the Change Stockpile window, the Introduction screen displays (see Figure 10-11).

![Change Stockpile Wizard—Introduction](image)

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.

**10.2.1 Correcting Errors**

To correct errors on stockpiles, select the appropriate contract in the Contracts list window, and click the STOCKPILES button on the Application Toolbar to display the Stockpiles list window. Select the stockpile from the Stockpiles list window, and click the CHANGE button on the Window Toolbar.

If there are no unpaid transactions for the stockpile, the Introduction screen displays. If there is at least one unpaid transaction for the stockpile, the Change Stockpile window displays. In the Change Stockpile window, choose the first option if you wish to add a new transaction to the stockpile, or choose the second option if you want to change the last unpaid transaction. Click OK and FieldManager software displays the Introduction screen.

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 Change Stockpile Wizard.

**Step 1 of 4**

Step 1 of 4 of the Change Stockpile Wizard allows you to change the Stockpile Description if an estimate for the stockpile has not yet been generated. The Stockpile Comments can be changed at any time.
Click the NEXT button at the bottom of the Wizard to move on to Step 2 of 4 of the Change Stockpile Wizard.

**Step 2 of 4**

If there is an incorrect Transaction Date, it can be modified. If you filled in the wrong Transaction Dollar Amount previously, enter a balancing value in the Transaction Dollar Amount field to equal the amount it should have been. If no errors were made, this value can remain at $0. Enter a transaction comment in the Transaction Comments field.

Click the NEXT button at the bottom of the Wizard to move on to Step 3 of 4 of the Change Stockpile Wizard.

**Step 3 of 4**

If you specified a Transaction Dollar Amount other than $0 in Step 2 of 4, it is necessary either to redistribute the amount among the items listed, or to add or delete items.

To redistribute the remaining stockpile amount among the items, individually select the items and enter values in the Change in Dollar Amount (+/-) field so the Current Dollar Amount value equals the total dollar amount desired for each item. The Stockpile Dollar Amount Remaining and Dollar Amount Left to Distribute fields are there to help with this procedure.

To assign new items to the stockpile, click the ADD ITEM button. To delete items from the stockpile, select the item(s) to delete, and click the DELETE ITEM button. If payment has already been associated with the item, you will be unable to delete the item.

Click the NEXT button at the bottom of the Wizard to move on to Step 4 of 4 of the Change Stockpile Wizard.

**Step 4 of 4**

If you specified a Transaction Dollar Amount other than $0 in Step 2 of 4, or redistributed the Stockpile Dollar Amount Remaining among the items, it may be necessary to specify new Recovery Factors or Recovery Quantities for the items. Individually select the items and specify a new Recovery Factor or Recovery Quantity for each item.

Click the FINISH button at the bottom of the Wizard to save the changes and close the Change Stockpile Wizard. FieldManager software displays the Stockpiles list window that now reflects the changes that were made.

**10.2.2 Adding a New Shipment to an Existing Stockpile**

To add a new shipment to an existing stockpile, select the appropriate contract in the Contracts list window, and click the STOCKPILES button on the Application Toolbar to
display the Stockpiles list window. Select the stockpile from the Stockpiles list window, and click the CHANGE button on the Window Toolbar.

If there are no unpaid transactions for the stockpile, the Introduction screen displays. If there is at least one unpaid transaction for the stockpile, the Change Stockpile window displays. In the Change Stockpile window, choose the first option. Click OK and FieldManager software displays the Introduction screen.

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 Change Stockpile Wizard.

**Step 1 of 4**

Step 1 of 4 of the Change Stockpile Wizard allows you to change the Stockpile Description if the contractor has not yet received payment for the stockpile. The Stockpile Comments can be changed at any time.

Click the NEXT button at the bottom of the Wizard to move on to Step 2 of 4 of the Change Stockpile Wizard.

**Step 2 of 4**

Enter the amount of the new stockpile shipment in the Transaction Dollar Amount field. Enter a transaction comment in the Transaction Comments field.

Click the NEXT button at the bottom of the Wizard to move on to Step 3 of 4 of the Change Stockpile Wizard.

**Step 3 of 4**

It is now possible to redistribute the remaining amount among the items listed, or to add or delete items.

To distribute the new shipment amount among the items, individually select the items and enter values in the Change in Dollar Amount (+/-) field so the Current Dollar Amount value equals the total dollar amount desired for each item. The Stockpile Dollar Amount Remaining and Dollar Amount Left to Distribute fields are there to help with this procedure.

To assign new items to the stockpile, click the ADD ITEM button. To delete items from the stockpile, select the item(s) to delete, and click the DELETE ITEM button. If payment has already been associated with the item, you will be unable to delete the item.

Click the NEXT button at the bottom of the Wizard to move on to Step 4 of 4 of the Change Stockpile Wizard.
Step 4 of 4

It may be necessary to specify new Recovery Factors or Recovery Quantities for the items where changes were made to their Current Dollar Amount. Individually select the items and specify a new Recovery Factor or Recovery Quantity for each item.

Click the FINISH button at the bottom of the Wizard to save the changes and close the Change Stockpile Wizard. FieldManager software displays the Stockpiles list window that now reflects the changes that were made.

10.2.3 Changing the Rate of Recovery

If the stockpile payment is being recovered too quickly or too slowly, changes will need to be made to the item’s recovery factors. To do this, select the appropriate contract in the Contracts list window, and click the STOCKPILES button on the Application Toolbar to display the Stockpiles list window. Select the stockpile from the Stockpiles list window, and click the CHANGE button on the Window Toolbar.

If there are no unpaid transactions for the stockpile, the Introduction screen displays. If there is at least one unpaid transaction for the stockpile, the Change Stockpile window displays. In the Change Stockpile window, choose the first option if you wish to add a new transaction to the stockpile, or choose the second option to change the last unpaid transaction. Click OK and FieldManager software displays the Introduction screen.

Once you have read the instructions in the Introduction, click twice on the NEXT button at the bottom of the Wizard to move directly to Step 2 of 4 of the Change Stockpile Wizard.

Step 2 of 4

Enter a transaction comment in the Transaction Comments field.

Click the NEXT button at the bottom of the Wizard two times to move on to Step 4 of 4 of the Change Stockpile Wizard.

Step 4 of 4

Select the items for which payment was too fast or too slow, and specify a new Recovery Factor or Recovery Quantity for each item.

Click the FINISH button at the bottom of the Wizard to save the changes and close the Change Stockpile Wizard. FieldManager software displays the Stockpiles list window that now reflects the changes that were made.

10.2.4 Redistributing the Stockpile

To redistribute the stockpile, select the appropriate contract in the Contracts list window, and click the STOCKPILES button on the Application Toolbar to display the Stockpiles list.
window. Select the stockpile from the Stockpiles list window, and click the CHANGE button on the Window Toolbar.

If there are no unpaid transactions for the stockpile, the Introduction screen displays. If there is at least one unpaid transaction for the stockpile, the Change Stockpile window displays. In the Change Stockpile window, choose the second option. Click OK and FieldManager software displays the Introduction screen.

Once you have read the instructions in the Introduction, click twice on the NEXT button at the bottom of the Wizard to move directly to Step 2 of 4 of the Change Stockpile Wizard.

**Step 2 of 4**

Enter a transaction comment in the Transaction Comments field.

Click the NEXT button at the bottom of the Wizard to move on to Step 3 of 4 of the Change Stockpile Wizard.

**Step 3 of 4**

It is now possible to redistribute the additional amount among the items listed, or to add or delete items.

To redistribute the remaining stockpile amount among the items, individually select the items and enter values in the Change in Dollar Amount (+/-) field so the Current Dollar Amount value equals the total dollar amount desired for each item. The Stockpile Dollar Amount Remaining and Dollar Amount Left to Distribute fields are there to help with this procedure.

To assign new items to the stockpile, click the ADD ITEM button. To delete items from the stockpile, select the item(s) to delete, and click the DELETE ITEM button. If payment has already been associated with the item, you will be unable to delete the item.

Click the NEXT button at the bottom of the Wizard to move on to Step 4 of 4 of the Change Stockpile Wizard.

**Step 4 of 4**

It may be necessary to specify new Recovery Factors or Recovery Quantities for the items where changes were made to their Current Dollar Amount. Individually select the items and specify a new Recovery Factor or Recovery Quantity for each item.

Click the FINISH button at the bottom of the Wizard to save your changes and close the Change Stockpile Wizard. FieldManager software displays the Stockpiles list window that now reflects the changes that were made.
10.2.5 Balancing Stockpiles

- **Note:** Stockpiles may be balanced at any time according to the instructions which follow. They may also be balanced while producing a Final estimate (refer to Section 11.2.1).

Balancing a stockpile in preparation for the final estimate is a three-step process. The first step is to zero the transaction with a negative transaction dollar amount for the entire stockpile. The second step is to zero the items with negative assigned dollar amounts. The third and final step is to zero the recovery factors. The Change Stockpile Wizard will help you move accurately and efficiently through this process.

To balance a stockpile, select the appropriate contract in the Contracts list window, and click the **STOCKPILES** button on the Application Toolbar to display the Stockpiles list window. Select the stockpile from the Stockpiles list window, and click the **CHANGE** button on the Window Toolbar.

If there are no unpaid transactions for the stockpile, the Introduction screen displays. If there is at least one unpaid transaction for the stockpile, the Change Stockpile window displays. In the Change Stockpile window, choose the first option. Click **OK** and FieldManager software displays the Introduction screen.

Once you have read the instructions in the Introduction, click **twice** on the **NEXT** button at the bottom of the Wizard to move directly to Step 2 of 4 of the Change Stockpile Wizard.

**Step 2 of 4**

Enter a negative amount in the Transaction Dollar Amount field so the Dollar Amount Remaining is $0. The next time an estimate is created, the remaining stockpile dollar amount will be recovered.

Enter a transaction comment in the Transaction Comments field.

Click the **NEXT** button at the bottom of the Wizard to move on to Step 3 of 4 of the Change Stockpile Wizard.

**Step 3 of 4**

For each item, place a value in the Change in Dollar Amount (+/-) field so the Current Dollar Amount is $0. When done, the Stockpile Dollar Amount Remaining and Dollar Amount Left to Distribute should both show $0.

Click the **NEXT** button at the bottom of the Wizard to move on to Step 4 of 4 of the Change Stockpile Wizard.
Step 4 of 4

For each item, specify a Recovery Factor of $0.

Click the FINISH button at the bottom of the Wizard to save your changes and close the Change Stockpile Wizard. FieldManager software displays the Stockpiles list window that now reflects the changes that were made.

- **Note:** The negative transaction amount entered in Step 2 of 4 will appear in the next estimate as a negative dollar value.

10.3 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 a contract in the Contracts list window and click on the STOCKPILES button on the Application Toolbar to display the Stockpiles list window. Select the stockpile to view, and click the Quick Query fly-out toolbar button on the Window Toolbar. Click on the SP SUMMARY button to display the Stockpile Summary by Stockpile inquiry window (see Figure 10-12).

![Figure 10-12. Stockpile Summary by Stockpile Inquiry Window](image)

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

10.4 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 10-13, FieldManager software displays a Delete Warning window that asks to confirm the deletion.

Figure 10-13. Delete Stockpile Warning Window

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.

If the stockpile cannot be deleted because it has been paid on an estimate, then the DELETE button operation will instead allow you to delete the last unpaid transaction of the stockpile.
10.5 Stockpile Decrementing

During the estimate process, FieldManager software records the gradual decrease in stockpile quantities as work progresses on the contract and calculates resulting payments to be recovered by the contractor. This process is called *Stockpile Decrementing*.

Establishing a stockpile means that FieldManager software will pay the contractor a specified number of dollars in advance (before the work has actually been completed), therefore, it is easiest to think of stockpiles strictly as dollars. Since the contractor has already been paid ahead of time, that dollar amount must be recouped during the contract’s lifecycle. The stockpile dollar amount is recovered by specifying a certain rate of recovery. The rate at which the recovery occurs is assigned in Step # 4 of the Stockpile Wizard as shown in Figure 10-14.

![Figure 10-14. Add Stockpile Wizard—Step 4 Window](image)

To properly recover the stockpile amount, you must assign either a **Recovery Factor** or a **Recovery Quantity**, either of which can represent the speed with which the stockpile dollar amount will be recovered. You must assign a value in one of these fields on the Stockpile Wizard Step 4 window:

- **Recovery Factor**
  
  For every 1 unit of the item that is placed, this amount of dollars will be recovered.

- **Recovery Quantity**
  
  Number of units of the item that is used to recover the dollars.

  - **Note**: When one of these fields is updated, FieldManager software recalculates the other field automatically.

FieldManager software displays a rate of recovery range in blue directly below the Recovery Quantity field. This is the Recovery Quantity range, and indicates the slowest to the fastest rate that the dollars can be recovered. As long as your specified Recovery
Quantity is within this range, FieldManager software will automatically recover the stockpile amount for you as work progresses.

As an example of a stockpile payment and recovery, suppose you paid a contractor $5,000 in advance (shown in the Assigned Dollar Amount field in Figure 10-15). This amount represents the cost of 100 units of the stockpiled item (the Recovery Quantity). You plan to recover that dollar amount at a rate of $50.00 per one item unit placed (the Recovery Factor).

Enter one of these values in either the Recovery Factor field or the Recovery Quantity field. It doesn’t matter which field you assign a value, FieldManager software will update the other automatically.

![Change Stockpile Wizard Window](image)

**Figure 10-15.** Add Stockpile Wizard Window
Now look at the Stockpile Summary By Stockpile Inquiry for the Steel Stockpile in Figure 10-16. The Transaction entry, under the Total Transaction Dollar Amount column, indicates the initial stockpiled dollar amount. Notice that the Automatic Decrement entry reduced the stockpile by $1,500.00, leaving $3,500.00 remaining. This decrement resulted from a payment for 30 m² at a Recovery Factor of $50.00 per m².

Figure 10-16. Stockpile Summary by Stockpile Inquiry Window

10.5.1 Recovering a Stockpile that was Established with a Zero Recovery Factor and Quantity

! Caution: Establishing Stockpiles with a zero Recovery Factor is not a recommended practice!

As discussed in the previous section, if a Recovery Factor and Recovery Quantity are specified, FieldManager software automatically recovers the stockpiled dollar amount as work progresses and item usage occurs. However, if these fields are set to 0, the stockpiled dollar amount will not be recovered automatically. In this case, you are responsible for recovering this amount. There are two ways to accomplish this.
10.5.1 Recovering a Stockpile During the Final Estimate Process

In order to finalize the contract, all stockpiles must be balanced, meaning they must have a dollar amount of $0.00. When a Final Estimate is created for a contract containing stockpiles that have not been properly balanced, FieldManager software displays a Balance Stockpile check box in the Add Estimate window (see Figure 10-17).

![Figure 10-17. Add Estimate Window](image)

Click this check box to automatically calculate the outstanding stockpile amount and decrease the Estimate accordingly.

It’s important to remember that this functionality is only available at the time you create a Final Estimate. Because of this, the stockpile dollar amount will not be recovered until the end of the contract when it is finalized.
10.5.2 Manually Decrementing a Stockpile

Manual decrementation of stockpiles is required to recover stockpiles that were established with a zero Recovery Factor/Recovery Quantity. This situation occurs when payment has been previously made against item(s) that were added after the stockpile association was made. This procedure can be used anytime throughout the contract’s lifecycle.

As an example, assume a new stockpile is being created as shown in Figure 10-18. Notice that a 0.00 Recovery Factor and Recovery Quantity have been specified for the stockpile. In this situation, FieldManager software will not recover any of the stockpiled amount ($5,000.00) as work progresses.

- **Note:** In this example, when you click the finish button, FieldManager software will display a Warning Message explaining the consequences of specifying a zero Recovery Factor and Recovery Quantity.
FieldManager software allows you to use manual decrements to recover this stockpile. To manually decrement a stockpile, open the Stockpiles List window.

Select the Stockpile to be decremented in the Stockpiles List window, and click the CHANGE button. FieldManager software displays the Change Stockpile window.

Select the appropriate option in the Change Stockpile Window and click the NEXT button to navigate to Step # 2.

Recall that our original stockpile amount was for $5,000.00. Look at the Transaction Dollar Amount field in Figure 10-20. In this example, the user has entered a value of negative 1,800.00 (-1800.00). This negative value is known as a manual decrement.
In this example, our original stockpile amount was $5,000.00. We have now added a manual decrement of negative 1,800.00, therefore, the stockpile Dollar Amount Remaining is $3,200.00.

Click the NEXT button to continue to the next step of processing the manual decrement.

Figure 10-21. Change Stockpile Wizard—Step 3 Window

In Figure 10-21, notice that the Change in Dollar Amount field is displaying negative 1,800.00. As in the previous step, you must specify the amount the stockpile is to be decremented in this field. The Change in Dollar Amount should be the same as the Transaction Dollar Amount assigned in Step 2.

After you have assigned the amount to manually decrement the stockpile you may continue to Step 4 of the Stockpile Wizard. Click NEXT to proceed to Step # 4.

Figure 10-22. Change Stockpile Wizard—Step 4 Window
In Figure 10-22 notice that, due to our manual decrement, the Current Dollar Amount is now $3,200.00. You can now enter a Recovery Factor and Recovery Quantity or you can leave these fields with a value of 0.00. If you decide to leave these fields with a 0.00 value, you must continue to perform manual decrements until the full stockpiled dollar amount has been recovered.

In our example, the result of a manual stockpile decrement of $1,800.00 is shown in Figure 10-23.

Figure 10-23. Stockpile Summary by Stockpile Window
11. Producing Estimates

An estimate is a contract-level listing of item usage since the last payment to the contractor. Your agency’s overrun rule determines the quantity that can be paid for each item with usage. Stockpiles are also calculated based on the item usage for the estimate. Once an estimate is generated, load information from that estimate into your agency’s central office contract administration system, which can then apply any retainage, liquidated damages, and adjustments at the project level to produce vouchers for contractor payment.

11.1 Understanding How FieldManager Creates Estimate/Voucher Information

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

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

- **Note:** The Notice To Proceed Date, which is set in your agency’s system, must be filled for your agency’s voucher process to run successfully. In the case of standalone contracts, however, this date is not required, so a warning window does not display even if no Notice To Proceed Date has been specified.

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. Based on the agency’s overrun rule, 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.

FieldManager software then calculates the charges for all the site types involved in the project. For completion date and calendar day sites, FieldManager software bases its calculations on the date of the estimate. For available day sites, FieldManager software bases its calculations on generated Daily Diary records that have not yet been sent to your agency’s central office contract administration system. Also for available day sites, only positive whole days are sent to your agency’s system, and helpful information, such as the Days Charged This Estimate and the Days Charged To Date, is displayed on the General tab of the Add Estimate tab window.

The next step for FieldManager software is breaking down the Total Dollar Amt. to the project level. In an agency’s central office contract administration system, payment is made at the project level by creating vouchers. Each project in the contract is listed on the Voucher tab of the Add Estimate tab window along with its estimated dollar amount. Any voucher with an amount other than zero must be included in the estimate. It is up to you whether or not zero or negative dollar vouchers are included in the estimate.

FieldManager software lists all the information it gathers in this process on the report discussed in Section 11.2.8, Viewing the Construction Pay Estimate Report.

If the CREATE ELECTRONIC FILES radio button of the Change Contract Documentation tab window is set to Yes, once the estimate is generated, FieldManager software creates a file in your outbox. If it is a CAS-created contract, the file is called vchr###.exp. If it is a SiteManager-created contract, the file is called vchr###.smp. The applicable file can be loaded into your agency’s central office contract administration system. If your agency is using FieldNet and requires supervisor approval, a second file called vchr###.txt will be created. This is a full look at the Construction Pay Estimate Report. FieldManager software then prints the Construction Pay Estimate Report, the Construction Pay Estimate Amount Balance Report, and the Insufficient Materials Report.

- **Note:** If your agency is using FieldNet, these two files are automatically sent to the proper place when you send your outbox to FieldNet.
11.1.1 Creating a Final Estimate

If you are producing a type of final estimate, 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 IDR's for the estimate must be generated.
- All Daily Diaries for the estimate must be generated.
- There can be no unattached items.
- All items for the contract must be marked as completed (refer to Section 6.2.2, Changing Documentation About an Existing Item).
- 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.
- Depending on your agency’s settings, an approved Final CPE might be required for all subcontractors.
- Depending on your agency’s settings, an approved Final CPE might be required for the prime contractor.
- Depending on your agency’s settings, the Open To Traffic Date might need to be set.

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 (refer to Section 10.3, Viewing the Stockpile Summary), 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 (refer to Section 11.2.1, Adding General Information).

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.
11.1.2 Re-opening a Contract and Creating a Post-Final Estimate

You may discover at some point that you must re-open a contract that has already been closed via a final estimate. For instance, you might find that errors were made on the final estimate or you might need to make some corrections to the contract documentation. To re-open a contract, click **DOCU** on the Application Toolbar to access the **GENERAL** tab of the Change Contract Documentation tab window, and then select the **No** option for the **CONTRACT CLOSED** set of radio buttons.

Once a contract has been re-opened, you can work with that contract as you would any other contract. Often it is necessary to produce a post final estimate for re-opened contracts. To create a post-final estimate, follow the same procedures as you would to produce a final estimate (refer to Section 11.1.1, Creating a Final Estimate). Depending on your agency's settings, you may be restricted to select only Final estimates types at this point.

11.2 Adding Estimates

To add an estimate, select the appropriate contract from the Contracts list window, and click **ESTIMATES** on the Application Toolbar to display the Estimates list window. Click **ADD** on the Window Toolbar. A Select Estimate Date and Type window will display (see Figure 11-1).

![Select Estimate Date and Type Window](image)

Figure 11-1. Select Estimate Date and Type Window

Use the Calendar drop-down menu 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 the Estimate Type from the drop-down list box. 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 (refer to Section 11.1, Understanding How FieldManager Creates Estimate/Voucher Information) and then opens the Add Estimate tab window with the GENERAL tab displayed (see Figure 11-2).

![Figure 11-2. Add Estimate Tab Window-GENERAL Tab](image)

- **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.
11.2.1 Adding General Information

Begin with adding general information about the estimate on the GENERAL tab of the Add Estimate tab window.

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

**Estimate Type**
- Click the down arrow next to the Estimate Type text box to select an estimate type. Before choosing a final estimate type, be sure to read Section 11.1.1, Creating a Final Estimate.

**Estimate Comments**
- Enter any comments about the estimate.

- **Note:** For contracts passed from FieldBuilder, FieldManager software must be provided with information about retainage and adjustments to the payment; to accommodate this, the Add Estimate tab window is reconfigured to include two additional fields just below the Estimate Comments field: a Retainage field and an Adjustments field. These additional fields are mandatory for FieldBuilder-passed contracts, and entries must be made in these fields even if the entries are for $0.00.

The Balance Stockpiles check box may be used to zero out any remaining stockpiles. This check box is only available if the estimate is designated as a final estimate type in the Estimate Type field.
11.2.2 Updating the Contract Documentation

If necessary, update the contract documentation to ensure that the estimate contains the most up-to-date information about the contractor. This will also ensure that valid information about the contract is sent to your agency’s central office contract administration system.

To update the contract documentation, click the GENERAL tab in the Add Estimate tab window, then click CONT DOCU on the Window Toolbar (not to be confused with the DOCU button, which is on the Application Toolbar). FieldManager software displays the Update Contract Documentation window (see Figure 11-3).

![Update Contract Documentation Window](image)

Figure 11-3. Update Contract Documentation Window

For information about the fields that may be changed, refer to Section 4.3, Changing Contract Documentation.

Make any necessary changes, and click OK to update the contract documentation, or CANCEL to cancel any changes made. If OK is clicked, FieldManager software updates the contract document and closes the Update Contract Documentation window. If you later delete this estimate, the contract documentation will remain updated.
11.2.3 Reviewing Item Usage

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

To review item usage, click the ITEM USAGE tab to see a list of items eligible for payment (see Figure 11-4).

![Add Estimate Tab Window—ITEM USAGE Tab](image)

The items listed contain the following information.

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

### Allowable Qty.
Maximum allowable quantity calculated by FieldManager software to be paid for the item on this estimate.

### Allowable Dollar Amount
Maximum allowable dollar amount calculated by FieldManager software to be paid for the item on this estimate. This is the Allowable Qty. times the Unit Price for the item.

#### 11.2.4 Withholding Payment

To withhold payment on an item, while working on the ITEM USAGE tab, select the item and click REVIEW/CHANGE at the bottom of the window. As shown in Figure 11-5, FieldManager software changes the display of the ITEM USAGE tab so that it is divided into two parts: a List of Item Usage by Category and a List of Insufficient Materials in the Item for the selected item.

![Figure 11-5. ITEM USAGE Tab—List of Item Usage/Insufficient Materials](image)

FieldManager software provides PREV and NEXT buttons at the bottom of the window to move through the list of items more easily.

All of the projects and categories to which the selected item is assigned display in the List of Item Usage by Category. You can only change the Quantity this Estimate field for the categories that have item usage. The maximum allowable quantity for each category can be found in the Allowable Quantity field. Once this field is changed so the appropriate payment is made, click NEXT to work with other selected items, OK to save the change and return the ITEM USAGE tab to its normal display, or CANCEL to cancel any change made to the current item and return the ITEM USAGE tab to its normal display.
Remember that you cannot save an estimate. The information changed on the ITEM USAGE tab will not be permanently stored in FieldManager software until you generate the estimate.

11.2.5 Allowing Payment for Items with Insufficient Materials

An item with insufficient materials has material usage recorded that puts it over its approved material amount. Items with insufficient materials will show a calculated Qty. this Estimate of zero. You can change this quantity to a quantity between zero and the Allowable Qty., if desired (refer to Section 11.2.4, Withholding Payment).

11.2.6 Calculating Percentage Items

Percentage items are items that are paid for as the work is completed on a certain percentage of the contract. (For more information about percentage items, refer to Chapter 15, Maintaining Reference File Information.) Your agency determines whether percentage items will be used, and sets the payment parameters for the specific contractual items. If FieldManager software determines that an estimate reaches a contract complete threshold specified for a percentage item, a window will display indicating that the item’s actual quantity placed does not match its suggested quantity placed (see Figure 11-6).

![Percentage Item Warning Window]

Figure 11-6. Percentage Item Warning Window

The Percentage Item Warning window simply offers information about suggested item quantities placed. You can either continue with the Estimate process, or discontinue the process and adjust the item quantity placed as suggested.
11.2.7 Viewing Vouchers

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

To view a voucher, click the VOUCHERS tab. A list of the projects in the contract and the estimated payment for each project will be displayed (see Figure 11-7).

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 11-1 describes the acceptable settings for the Create Voucher check box for all contract types except SiteManager-initiated contracts.

<table>
<thead>
<tr>
<th>Voucher Amount</th>
<th>Default Setting</th>
<th>Modifiable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater than $0.00</td>
<td>Checked</td>
<td>No</td>
</tr>
<tr>
<td>Equal to $0.00</td>
<td>Not checked</td>
<td>Yes</td>
</tr>
<tr>
<td>Less than $0.00 (negative)</td>
<td>Checked</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Table 11-1. Create Voucher Check Box Settings for Non-SiteManager-Initiated Contracts

As noted in Table 11-1, 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

Figure 11-7. Add Estimate Tab Window—VOUCHERS Tab
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. For a SiteManager-initiated contract, Table 11-2 describes the settings for the Create Voucher check box.

<table>
<thead>
<tr>
<th>Voucher Amount</th>
<th>Default Setting</th>
<th>Modifiable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater than $0.00</td>
<td>Selected</td>
<td>No</td>
</tr>
<tr>
<td>Equal to $0.00</td>
<td>Selected</td>
<td>No</td>
</tr>
<tr>
<td>Less than $0.00 (negative)</td>
<td>Selected</td>
<td>No</td>
</tr>
</tbody>
</table>

Table 11-2. Create Voucher Check Box Settings for SiteManager-Initiated Contracts

11.2.8 **Viewing the Construction Pay Estimate Report**

Before generating the estimate, always check your work. Click the **VIEW ESTIMATE** tab of the Add Estimate tab window to view an electronic copy of the Construction Pay Estimate Report that will print out when the estimate is generated (see Figure 11-8).

- **Note:** The report can be viewed and printed with three different sort options, by Proposal Line Number, Item Description, or Item Code. To sort according to any of these options, click the sort order button at the bottom of the window. The sorting will not interfere with the By Project and By Item formats.

![Figure 11-8. Add Estimate Tab Window—VIEW ESTIMATE Tab](image)

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 areas are included on the report to verify information found there.

**Item Usage Summary**
Lists each item with usage by project and then by category, the quantity of the item to be paid, and the estimated payment to the contractor. Subtotals are included by category and project, as well as the total estimated payment for all items with usage.

**Stockpile Summary**
Lists stockpiles by project and then by category, the quantity of payment being made for the stockpile, and the cumulative quantity paid on the stockpile. Subtotals are included by category and project, as well as the total estimate payment for all stockpiles.

**Pre-Voucher Summary**
Lists for each project the voucher number, the estimated item payment, the estimated material allowance amount, and the total estimated payment that does not include retainage and central office autopay items.

**Current Time Charges**
Lists the days charged to each site in the contract. Only available day sites will show a value; all other sites will show N/A.
11.2.9 Viewing the Construction Pay Estimate Amount Balance Report

Click the VIEW AMT BAL tab of the Add Estimate tab window to view an electronic copy of one of the reports that will print out when the estimate is generated (see Figure 11-9).

- **Note:** The report can be viewed and printed with three different sort options, by Proposal Line Number, Item Description, or Item Code. To sort according to any of these options, click the sort order button at the bottom of the window. The sorting will not interfere with the By Project and By Item formats.

![Figure 11-9. Add Estimate Tab Window—VIEW AMT BAL Tab](image)

The VIEW AMT BAL tab displays the Construction Pay Estimate Amount Balance Report that shows the quantity paid versus the authorized quantity for each contract item.

- **Note:** Your report may be formatted somewhat differently depending on your agency’s settings.
11.2.10 Viewing the Insufficient Materials Report

- **Note:** You may not have access to the Insufficient Materials Report if your agency has not selected it as an option.

Click the **VIEW INSUFF MTL** tab of the Add Estimate tab window to view an electronic copy of one of the reports that will print out when the estimate is generated (see Figure 11-10).

![Figure 11-10. Add Estimate Tab Window—VIEW INSUFF MTL Tab](image)

The **VIEW INSUFF MTL** tab displays the Insufficient Materials Report. This report shows the items for which the cumulative material quantity used exceeds the approved material quantity.
11.2.11 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.

**Warning:** If you attempt to close the Add Estimate window, FieldManager software displays a warning message. If you close the Add Estimate window without generating the estimate, all of the information entered while processing the estimate will be lost.

To generate the estimate, click GENERATE. As shown in Figure 11-11, FieldManager software displays a Generate window to confirm the generation of the estimate.

![Generate Window](image)

Figure 11-11. Generate Window

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

If the CREATE ELECTRONIC FILES radio button of the Change Contract Documentation tab window is set to **Yes**, once the estimate is generated, FieldManager software creates a file in your outbox. If it is a CAS-created contract, the file is called `vchr###.exp`. If it is a SiteManager-created contract, the file is called `vchr###.smp`. The applicable file can be loaded into your agency’s central office contract administration system. If your agency is using FieldNet and requires supervisor approval, a second file called `vchr###.txt` will be created. This is a full look at the Construction Pay Estimate Report.

- **Note:** If your agency is using FieldNet, these files are automatically sent to the proper place when you send your outbox to FieldNet.

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 (refer to Section 11.3, Reviewing an Estimate), 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.

11.3 Reviewing an Estimate

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

FieldManager software displays the Review Estimate tab window in a mode in which you can view, but not change, data (see Figure 11-12).

![Figure 11-12. Review Estimate Tab Window—GENERAL Tab](image)

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, then click PRINT on the Window Toolbar. To reprint the Insufficient Materials Report, click the VIEW INSUFF MTL tab, then click PRINT on the Window Toolbar.

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

Depending on your agency’s settings and the type of contract on which you are working, you may or may not have the ability to delete estimates from that contract. For instance, if FieldManager software is not configured to accept refreshes from your agency’s central office contract administration system, you will not be able to delete estimates. If you do have the ability to delete estimates for a contract, you will only be able to delete the most recently generated estimate in FieldManager software. For example, if you generate Estimate 1 and then generate Estimate 2, you will only be able to delete Estimate 2. You will not be able to delete Estimate 1.

To delete 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 DELETE on the Window Toolbar.

FieldManager software stores all your estimate files in your outbox for either pick-up by or export to (depending on your office’s practices) your agency’s central office contract administration system. If the file that gets loaded into your agency’s system has not yet been sent, FieldManager software displays the Delete Processing window (see Figure 11-14).

The Status column in the Estimates list window indicates whether an estimate has been refreshed with data back from your contract administration system. Estimates that have been created but not refreshed will have a status of Exported in the Status column. Only the most recently added estimate can have a status of Exported. New estimates cannot be added until all previous estimates have been refreshed. Estimates with a status of Refreshed cannot be deleted or rolled back.
To delete an estimate, select it in the Estimates list window and click the DELETE button on the Window Toolbar.

FieldManager software stores all your estimate files in your outbox for either pick-up by or export to (depending on your office’s practices) your agency’s central office contract administration system. If the file which gets loaded into your agency’s system has not yet been sent, FieldManager software displays the Delete Processing window (see Figure 11-14)

![Delete Processing Window](image)

Figure 11-14. Delete Processing Window

To delete the estimate, click YES. To cancel the deletion, click NO.

If the estimate has already been sent to your agency’s central office contract administration system, FieldManager software will display the Delete Warning window (see Figure 11-15).

![Delete Warning Window](image)

Figure 11-15. Delete Warning Window

Before clicking YES, make sure that the estimate has not yet gone beyond the point in your agency’s system where it cannot be redone. To continue with the deletion, click YES. To cancel the deletion, click NO. If you clicked YES, FieldManager software will display a second Delete Warning window (see Figure 11-16).

![Second Delete Warning Window](image)

Figure 11-16. Second Delete Warning Window
This Delete Warning window explains that a rollback file will be created to wipe out the old estimate and a new estimate will need to be created to replace it. To continue, click YES. To cancel, click NO.

If you clicked YES, FieldManager software will create a rollback file in your outbox to be sent to your agency’s central office contract administration system, and it will open the Add Estimate tab window to create a new estimate to replace the old one. For more information about creating a new estimate, see Section 11.2, Adding Estimates.
12. Working with Contract Modifications

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

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

The Contract Modifications list window displays the modifications previously made on a contract. To display the Contract Modifications list window, select a contract in the Contracts list window, and click CONT MODS on the Application Toolbar (see Figure 12-1).

![Figure 12-1. Contract Modifications List Window](image-url)
12.1 Adding New Contract Modifications

A new contract modification may be created via the Contract Modifications list window by completing the appropriate tabs in the Add Contract Modification tab window (see Figure 12-2).

**Note:** Adding a contract modification 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 Contract Modification 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.

If your agency requires the selection of a Contract Modification Type, then FieldManager will first show the Select Contract Modification Type modal window. Here you will be required to select a Type to assign to your Contract Modification.

![Figure 12-2. Select Contract Modification Type Modal Window](image)

Use the drop-down list box to select the correct Contract Modification Type. The possible selections are defined by your agency. Once selected, click **OK** to continue or click **CANCEL** to cancel the Add Contract Modification process.

Note: Be sure to select the correct Contract Modification Type. You will not be able to change it later without restarting the entire Contract Modification.

The Contract Modification Type will appear in the Contract Modification list and the General tab of the Add Contract Modification tab window.

12.1.1 Adding General Information for a New Contract Modification

The **GENERAL** tab of the Add Contract Modification tab window contains general information about a contract modification. To add general information for 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. The GENERAL tab will automatically display (see Figure 12-3).

![Figure 12-3. Add Contract Modification Tab Window—GENERAL Tab](image)

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

**Short Description**

This is a short description of the contract modification which will display in the Contract Modifications list window, and which will be sent to your agency’s central office contract administration system. (Required)

**Description of Changes**

This is a longer, more detailed description of the contract modification which is not sent to your agency’s system. If the changes to the contract are strictly wording changes, this description is required; otherwise, use this area to document miscellaneous changes to the contract at your discretion. Up to 32,000 characters may be entered.

Click SAVE/CLOSE on the Window Toolbar to save your work and close the Add Contract Modification tab window. FieldManager software will save the information and then revert to the Contract Modifications list window.

Note: To continue working in the Add Contract Modification tab window, click SAVE rather than SAVE/CLOSE. FieldManager software will save the information added and continue to display the Add Contract Modification tab window, enabling you to work with other tabs. This same procedure applies to all tab windows in this section.
12.1.2 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, 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 INC/DEC tab (see Figure 12-4).

![Figure 12-4. Add Contract Modification Tab Window—INC/DEC Tab](image)

Click ADD ITEM at the bottom of the window. FieldManager software displays the contract Items list from which the item(s) can be selected. Choose one or more items, and click SELECT at the bottom of the window (see Figure 12-5).

![Figure 12-5. INC/DEC Tab (After Selecting an Item)](image)
If an item selected is in more than one category, FieldManager software displays a Multiple Categories window (see Figure 12-6). In that case, choose the category(ies) for which to increase or decrease the item quantity, and click either SELECT or SELECT ALL at the bottom of the window.

![Figure 12-6. Multiple Categories Window](image)

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. If desired, document the reason for the change in the Reason field.

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

### 12.1.3 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 the beginning and add all the item information through the Contract Modification process. The second method is to establish an unattached item through FieldManager software’s Item functionality, and then add it to a contract through the Contract Modification process.

**Note:** It is a good idea to check an unattached item’s documentation before adding it to a contract through a contract modification. For more information, refer to Section 6.4, Reviewing Items.
To add an item through a new contract modification, select the appropriate contract in the Contracts list window, and click CONT MODS on the Application Toolbar to display the Contract Modifications list window. Click ADD on the Window Toolbar to open the Add Contract Modification tab window, and then click the NEW ITEMS tab (see Figure 12-7).

![Figure 12-7. Add Contract Modification Tab Window—NEW ITEMS Tab](image)

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

As shown in Figure 12-8, FieldManager software displays the Items dialog box.

![Figure 12-8. Items Dialog Box](image)

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

**Adding a New Item**

To add a new item, choose the ADD A NEW ITEM option in the Items dialog box (see Figure 12-8) and click OK to proceed, or click CANCEL to quit.

FieldManager software displays an entry area on the NEW ITEMS tab to add the new item (see Figure 12-9).
To create a complete item record, enter information in the following fields.

**Field**

**Item**

The item number from your agency’s master item list.

(Required) If you do not know the correct item number, click the drop-down arrow next to the item number box. This will display your agency’s master item list. From there, select the item to add.

**Item Type**

A code value representing the kind of item. (Required) Click the drop-down arrow to reveal your agency’s defined Item Types.

**Unit Price**

The cost of one unit of the new item selected. (Required) A system option determines whether you can enter a negative number in this field.

**Reason**

The reason the item needs to be added to the contract.

(Required)

**Section**

The number assigned to the grouping of proposal work items.

(Required)

**Contractor**

Select the contractor that is initially assigned to the item. The default value is the prime contractor.

**Proposed Quantity**

The initial quantity to be established for the new item.

(Required) Enter a quantity for each category with which to associate the item. The quantity can be either positive or negative.

**Supplemental Description**

An area to more fully describe the new item. This is particularly useful when the description of the new item does not precisely
match the agency’s master items database.

This field may be required under certain circumstances, depending on your agency’s settings. Enter a description on the first line before entering anything on the second line.

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

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.

**Attaching an Unattached Item**

To attach an unattached item to the contract through a new contract modification, choose the ATTACH AN ITEM SAVED PREVIOUSLY option in the Items dialog box (see Figure 12-8) and click OK to proceed, or click CANCEL to quit.

FieldManager software displays the Select Unattached Item list window (see Figure 12-10).

Choose the item to attach, and click SELECT at the bottom of the window.

FieldManager software displays an entry area on the NEW ITEMS tab to alter the information about the item as necessary (see Figure 12-11).
You can modify any fields except the Item and Section fields (for field descriptions, refer to the subsection of Section 12.1.3, Adding a New Item). The Quantity Placed fields for each category listed will show if any item postings have been placed for the item and in which category.

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

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

### 12.1.4 Updating Item Documentation via a New Contract Modification

When either the NEW ITEMS or INC/DEC tab is displayed, FieldManager software adds the ITEM DOC button to the Window Toolbar to provide quick access to item documentation from these item-related tabs. As long as the tab has at least one item in it, the ITEM DOC button is enabled.

- **Note:** In the NEW ITEMS tab, you will not be able to update an item’s documentation until you have saved the contract modification.

To update item documentation 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. From either the NEW ITEMS tab or the INC/DEC tab, select the item to update, and click ITEM DOC on the Window Toolbar.

FieldManager software displays the Update Item Documentation window (see Figure 12-12).
For descriptions of the fields that may be changed, see Section 6.1.2, Adding Documentation About a New Item.

Click OK to save any changes, or CANCEL to cancel any changes to the item documentation.

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

**12.1.5 Adding Attachments via a New Contract Modification**

File attachments are drawings or pictures of the site that offer a visual view of information provided in the contract modification. To add a file attachment 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 ATTACHMENTS tab (see Figure 12-13).
If there are no attachments, the ATTACHMENTS tab displays as below (see Figure 12-13).

![Add Contract Modification Tab Window—ATTACHMENTS Tab](image)

Figure 12-13. Add Contract Modification Tab Window—ATTACHMENTS Tab

To add a file attachment, click ADD FILE at the bottom of the tab window. As shown in Figure 12-14, FieldManager software displays the Add File Attachment window.

![Add File Attachment Window](image)

Figure 12-14. Add File Attachment Window

Insert the name of your file attachment in the Name field. Enter a description of the file in the Description field. Click BROWSE to select the attachment. FieldManager opens the Attach a File window.
Select the file you wish to attach and click OPEN. FieldManager attaches the file to the Cont Mod. Click ADD, and the file attachment record will be added (see Figure 12-16).

Click either SAVE or SAVE/CLOSE on the Window Toolbar.

12.1.6 Adding Time Extensions via a New Contract Modification

Extensions of time to a contract must be done through the Contract Modification process. To extend time on a contract through a new contract modification, select the appropriate contract in the Contracts list window, and click CONT MODS on the Application Toolbar to
display the Contract Modifications list window. Click ADD on the Window Toolbar to open the Add Contract Modification tab window, and then click the TIME EXTENSIONS tab (see Figure 12-17).

![Add Contract Modification Tab Window — TIME EXTENSIONS Tab](image)

Figure 12-17. Add Contract Modification Tab Window — TIME EXTENSIONS 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 (see Appendix A for more information). 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.

**Extending Time on an Available Day Site**

To extend time on an available day site, begin by selecting the site from the list of sites on the TIME EXTENSIONS tab. Next, enter a value in the Additional Number of Days field that extends the number of days at the site to the proper number. Enter the reason the contract site time needs to be extended in the Reason field.

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

**Extending Time on a Calendar Day or Completion Date Site**

To extend time on a calendar day or completion date site, begin by selecting the site from the list of sites on the TIME EXTENSIONS tab. Enter a new date in the New Compl. Date field, and enter the reason the contract site time needs to be extended in the Reason field.

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
12.1.7 Viewing the New Contract Modification

It is a good idea to check your work before generating the contract modification. To check the record, click the VIEW tab of the Add Contract Modification tab window to view an electronic copy of what will print out when the contract modification is generated (see Figure 12-18).

If all the information is correct and you are ready to generate the contract modification, for further instructions, refer to Section 12.3, Generating a Contract Modification. Otherwise, click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.

12.2 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 Review Agencies that use FieldNet have the option of this status, which means the contract modification has been generated in FieldManager software, but is waiting on a supervisory review through FieldNet. Once the supervisor has reviewed and approved the contract modification, a message will be sent to FieldManager software changing the status to Pending Approval.

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.

### 12.2.1 Changing General Information for an Existing Contract Modification

To change the general information for an existing 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, and click **CHANGE** on the Window Toolbar to display the Change Contract Modification tab window. The **GENERAL** tab will automatically display (see Figure 12-19).

![Figure 12-19. Change Contract Modification Tab Window—GENERAL Tab](image)

You can change either of the entry fields on the **GENERAL** tab (for field descriptions, refer to Section 12.1.1 Adding General Information for a New Contract Modification). To change information, tab to or click in 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 Contract Modification tab window. FieldManager software will save the information and then revert to the Contract Modifications list window.

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

### 12.2.2 Changing Item Quantity Increases or Decreases via an Existing Contract Modification

To change an item quantity increase or decrease entered on an existing 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, and click **CHANGE** on the Window Toolbar to display the Change Contract Modification tab window. Click the **INC/DEC** tab.

Select the item to change, and adjust the entry in the Qty Change (+/-) field. You can also change the Reason field.

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

### 12.2.3 Deleting Item Quantity Increases or Decreases via an Existing Contract Modification

To delete item quantity increases or decreases entered on an existing 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, and click **CHANGE** on the Window Toolbar to display the Change Contract Modification tab window. Click the **INC/DEC** tab.

Select the item(s) to delete, and click **DELETE ITEM** at the bottom of the window.

FieldManager displays a Delete Warning window that asks to confirm the deletion. Click **YES** to complete the deletion, or **CANCEL** to cancel the deletion. If you selected more than one item to delete, you can click **NO** to cancel the deletion of the item listed in the Delete Warning window and move on to the next selected item.

Click either **SAVE** or **SAVE/CLOSE** on the Window Toolbar depending on how you would like to proceed.
12.2.4 Changing and Adding New Items for an Existing Contract Modification

To change items in the 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, and click CHANGE on the Window Toolbar to display the Change Contract Modification tab window. Click the NEW ITEMS tab. To add a new item, click ADD ITEM at the bottom of the window (for more information, refer to Section 12.1.3, Adding New Items to a Contract via a New Contract Modification). To change an item, select that item and click CHANGE ITEM at the bottom of the window.

FieldManager displays a window with an entry area to alter the information about the item (see Figure 12-20).

![Figure 12-20. NEW ITEMS Tab (Changing a New Item)](image)

You can change the Supplemental Description, Item Type, Unit Price, Reason, and Proposed Quantity fields (for field descriptions, refer to the subsection of Section 12.1.3, Adding a New Item). Once finished, click OK, or click CANCEL to cancel the change.

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

12.2.5 Deleting New Items from an Existing Contract Modification

To delete new items from an existing 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, and click CHANGE on the Window Toolbar to display the Change Contract Modification tab window. Click the NEW ITEMS tab. Select the item(s) to delete, and click DELETE ITEM at the bottom of the window.
FieldManager software displays a Delete Warning window that asks to confirm the deletion. Click YES to complete the deletion, or CANCEL to cancel the deletion. If you selected more than one item to delete, you can click NO to cancel the deletion of the item listed in the Delete Warning window and move on to the next selected item.

If you attempt to delete an item that has postings, the item will be removed from the contract modification, but will still be available from the Contract Items list window as an unattached item.

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

12.2.6 Changing Time Extensions for an Existing Contract Modification

To change the time extensions entered on an existing 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, and click CHANGE on the Window Toolbar to display the Change Contract Modification tab window. Click the TIME EXTENSIONS tab (see Figure 12-21).

![Figure 12-21. Change Contract Modification Tab Window—TIME EXTENSIONS Tab](image)

Select the site to change, and adjust the entry in the Additional Number of Days or Compl. Date field (depending on the site type). You can also change the Reason field.

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

12.2.7 Deleting Time Extensions from an Existing Contract Modification

To effectively delete a time extension entered on an existing 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, and click CHANGE on the Window Toolbar to display the Change Contract Modification tab window. Click the TIME EXTENSIONS tab.

Select the appropriate Time Extension, and delete the entry in the Additional Number of Days or Compl. Date field (depending on the contract type) so that the field is empty. To do this, simply highlight the value in the field, and press the DELETE key on the keyboard.

**Note:** FieldManager software does not display a Delete Warning window. Deleting a time extension is just like changing the time extension to zero.

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

### 12.2.8 Changing Attachments to an Existing Contract Modification

To change either the name or description of the file attachment, from the Contracts list window, select the contract for which the existing contract modification was created. Click CONT MODS on the Application Toolbar to display the Contract Modifications list window. Select the contract modification. To display the Change Contract Modification tab window, click CHANGE on the Window Toolbar. Click the ATTACHMENTS tab.

![Figure 12-22. Change Cont Mod Tab Window—ATTACHMENTS Tab](image)

At the top of the tab in the Attachment Description area, select the file attachment to change, and then click CHANGE FILE at the bottom of the window. FieldManager displays the Change File Attachment window.
Enter the changes to the Name or Description of the file attachment. You can also change the actual file attachment by clicking BROWSE and selecting a new file attachment. When you are finished, click CHANGE.

To change the contents of the actual attachment, click VIEW FILE. The program used to create the attachment opens with the attachment displayed.

- **Note:** This differs from earlier version of FieldManager, which opened the attachment directly in FieldManager.

Make any changes and save the document to your computer. Click CHANGE FILE and use the BROWSE button to select the newly edited file and save it back into FieldManager.

If you have the original file attachment on your computer already, you can edit the file without using FieldManager, then use the CHANGE FILE button to upload the edited file.

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

### 12.2.9 Deleting Attachments for an Existing Contract Modification

To delete a file attachment, select the contract for which the existing contract modification was created from the Contracts list window, and click CONT MODS on the Application Toolbar to display the Contract Modifications list window. Select the contract modification, and click CHANGE on the Window Toolbar to display the Change Contract Modification tab window. Click the ATTACHMENTS tab.

At the top of the tab in the Attachment Description area, select the file attachment to delete, and then click DELETE FILE at the bottom of the tab. FieldManager software displays a Delete Warning window that suggests ways to save the attachment outside of
FieldManager and asks to confirm the deletion. Click YES to confirm the deletion or NO to cancel the deletion.

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

12.2.10 Viewing the Revised Contract Modification

After changing a contract modification, it is a good idea to check your work before generating the contract modification again. To do this, click the VIEW tab of the Change Contract Modification tab window to view an electronic copy of what will print out when you generate the contract modification (see Figure 12-24).

![Figure 12-24. Change Contract Modification Tab Window—VIEW Tab](image)

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.

12.3 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 12-25, FieldManager displays a Generate window that identifies the contract modification to generate.

![Generate Window](image)

Figure 12-25. Generate Window

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 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.

Note: If your agency is using FieldNet, a window will display asking if the contract modification needs supervisory review. If you click YES, FieldManager software will change the contract modification status to pending review, and will have FieldNet send a report of the contract modification to your supervisor. Once your supervisor reviews and approves the report, FieldNet will change the status of that contract modification to pending approval.

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

12.3.1 Creating Information for Your Agency’s Central Office Contract Administration System

If the CREATE ELECTRONIC FILES radio button of the Change Contract Documentation tab window is set to YES when a contract modification is generated, FieldManager software creates a file in your outbox called cmgen###.exp, unless it is a SiteManager-initiated contract. This file contains basic header information about the contract modification that is ready to be loaded into your agency’s central office contract administration system. If
your agency is using FieldNet and requires supervisor approval, a second file called `cmgen###.txt` will be created. This is a full look at the contract modification report.

**Note:** If your agency is using FieldNet, these two files are automatically sent to the proper place when you send your outbox to the FieldNet system.

**Note:** This file may not be created depending on your agency’s settings.

### 12.4 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.

**Note:** You can approve a contract modification from the Contract Modifications list window or from any of the Contract Modification tab windows.

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 12-26, FieldManager software displays the Contract Modification Approval window.

![Figure 12-26. Contract Modification Approval Window](image)

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.

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

12.4.1 Creating Information for Your Agency’s Central Office Contract Administration System

If the CREATE ELECTRONIC FILES option button of the Change Contract Documentation tab window is set to Yes and once a contract modification is approved, it creates a file called cmapr###.exp in the FieldManager outbox with the exception of SiteManager-initiated contracts. For SiteManager-initiated contracts, it creates a file called cmapr###.smp in the FieldManager outbox. This file contains all the information about the contract modification (item quantity changes, new items, and time extensions) and is ready to be loaded into your agency’s central office contract administration system.

Note: If your agency is using FieldNet, this file is automatically sent to the proper place when you send your outbox to FieldNet.

12.5 Deleting a Contract Modification

To delete 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 delete.

Warning: You cannot delete approved contract modifications.

Click DELETE on the Window Toolbar to delete the selected contract modifications.

FieldManager software displays a Delete Warning window that asks to confirm the deletion. Click YES to complete the deletion, or CANCEL to cancel the deletion. If you selected more than one contract modification to delete, you can click NO to cancel the deletion of the contract modification listed in the Delete Warning window and move on to the next selected contract modification.

Note: After it has been generated, a contract modification may be deleted; however, it will always display with a deleted status in the Contract Modifications list window, and it cannot be further modified.
Click CLOSE on the Application Toolbar to close the Contract Modifications list window and return to the Contracts list window.

12.6 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.

12.7 Creating a Balancing Contract Modification

Your agency has the option of allowing users to have FieldManager software automatically create a balancing contract modification, taking into account all items marked as completed (for more information about marking items as completed, refer to Section 6.2.2, Changing Documentation About an Existing Item). If your agency has chosen to allow this option, a BALANCE COMPLETED ITEMS button will be available on the INC/DEC tab of the Add Contract Modification tab window; otherwise, the button will not appear.

इँ. नोट: You can still create a balancing contract modification without using the BALANCE COMPLETED ITEMS button by manually balancing each individual contract item.

To create a balancing 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 display the Add Contract Modification tab window. Enter a description in the Short Description field on the GENERAL tab that identifies the contract modification as a balancing contract modification. Click the INC/DEC tab, and then click BALANCE COMPLETED ITEMS at the bottom left of the window.

इँ. नोट: If you have any IDRs containing item postings which have not yet been generated, a Balancing Contract Modification Warning window will display indicating that these postings will be taken into account when creating the balancing contract modification. Click OK to continue, or CANCEL to cancel the balancing contract modification.
**Note:** If you attempt to create a balancing contract modification before balancing all stockpiles, a Warning window will display asking if you want to continue anyway. Click YES to create the balancing contract modification, or NO to cancel the action.

If all the completed contract items were already balanced prior to clicking BALANCE COMPLETED ITEMS, FieldManager software will display a Balancing Contract Modification window stating that fact (see Figure 12-27).

![Figure 12-27. Balancing Contract Modification Window](image)

If, however, all the completed contract items have not yet been balanced, FieldManager software will examine the remaining item data, and create a balancing Qty Change entry for the unsettled balance.

Click SAVE/CLOSE on the Window Toolbar to save the contract modification once FieldManager software completes adding entries on the INC/DEC tab.

Like any other contract modification, a balancing contract modification must receive signatures and be marked for approval.

**Balancing Lump Sum Items**

FieldManager does not allow the balancing of items that use units of Lump Sum (LS). Additionally, FieldManager will not take Lump Sum items into consideration when using the BALANCE COMPLETED ITEMS button. To balance a Lump Sum item, many agencies create a negative adjustment in dollars to offset the cost of the Lump Sum item. In this case, the Lump Sum item and its adjustment are paid for on the same Construction Pay Estimate Report to create a net payment of zero, which rectifies the balancing requirement. For information on balancing Lump Sum items for your agency, contact your system administrator.
13. 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.

13.1 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.

13.1.1 Viewing and Printing Inquiries Using Quick Query

Each window associated with a contract contains a Quick Query fly-out toolbar button. A fly-out toolbar button is used to group multiple toolbar buttons behind it. A fly-out toolbar button looks like any other toolbar button, but with the addition of a drop-down arrow to its right. Clicking on the drop-down arrow reveals a grouping of one or more buttons that have something in common. In the case of the Quick Query fly-out toolbar button, all the associated buttons bring up inquiries.

Each time you open a window associated with a contract, the Quick Query fly-out toolbar button appears with Cont Status as its label. This label simply indicates the first inquiry available: the Contract Status inquiry. For instance, if you click the CONT STATUS toolbar button in any window associated with a contract, FieldManager software will display the Contract Status inquiry window. If you select another inquiry, that inquiry will show on the Quick Query fly-out toolbar button instead of the Cont Status inquiry.
As an example, from the Contracts list window, select the appropriate contract, and click **CONT STATUS** on the toolbar to view the Contract Status inquiry window (see Figure 13-1).

![Contract Status Inquiry Window](image)

**Figure 13-1. Contract Status Inquiry Window**

Click **CLOSE** on the Window Toolbar to return to the Contracts list window. Now click **ITEMS** on the Application Toolbar, and then click the arrow next to the **CONT STATUS** button. FieldManager software displays a fly-out set of buttons, one button for each type of inquiry you can view in the active list or tab window (see Figure 13-2).

![Items List Window—Fly-out Buttons](image)

**Figure 13-2. Items List Window—Fly-out Buttons**

These inquiries display information only for the current contract. In this case, most of the inquiries available are related to contract items. Any of the item inquiries will be based on which items are selected in the list.
Select one or more items in the Items list window. Click the drop-down arrow on the Quick Query fly-out toolbar button, and click ITEM STATUS to display the Item Status inquiry window (see Figure 13-3).

![Item Status Inquiry Window](image)

Figure 13-3. Item Status Inquiry Window

When viewing an inquiry, click PREVIOUS PAGE and NEXT PAGE in the window, or scroll using the vertical scroll bar at the right of the window, to move between multiple pages. Clicking PRINT on the Window Toolbar will print the inquiry, while clicking CLOSE will close the inquiry.

If you click PRINT, FieldManager software displays a Print dialog box for the printer assigned to your computer. Adjust the printer settings as needed and click OK to print the inquiry, or click CANCEL to cancel the print job.

To close the Item Status inquiry window, click CLOSE on the Window Toolbar.
13.1.2 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 (see Figure 13-4).

![Inquiries List Window](image)

Figure 13-4. Inquiries List Window

There are approximately 50 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 (see Figure 13-5).

![Figure 13-5. Select Item Postings by Item in IDR Order (Does Not Include Material Usage) List Window](image)

After selecting one or more records, the inquiry is displayed, as shown in Figure 13-6.

![Figure 13-6. Item Postings by Item in IDR Order (Does Not Include Material Usage) Inquiry Window](image)

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.

13.1.3 Viewing and Printing Inquiries from Multiple Contract Inquiries List

Unlike inquiries that display data from only one contract, Multiple Contract Inquiries display data aggregated from one or more contracts within the database. To access Multiple Contract Inquiries list window shown in figure 13-7, while on the contract list window, click the †MULT CONT INQ button on the Windows toolbar.

![Multiple Contract Inquiries List Window](image)

Figure 13-7. Multiple Contract Inquiries List Window
This area appears and operates in the exact manner as the contract inquiries, except when you select an inquiry. Instead, FieldManager software displays the Select Contract Summary modal window to select one or more contracts upon which the inquiry data will be based.

Figure 13-8. Select Contracts Summary Modal Window

After selecting one or more contracts, the inquiry displays, see the Contracts Summary inquiry in figure 13-9 for an example.

Figure 13-9. Contracts Summary
13.2 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.

13.2.1 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 13-1.

<table>
<thead>
<tr>
<th>Generation</th>
<th>Automatic Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>IDR</td>
<td>Inspector’s Daily Report</td>
</tr>
<tr>
<td></td>
<td>FieldBook Import Report (not printed, this report is only created in response to importing one or more IDRs from the FieldBook component)</td>
</tr>
<tr>
<td>Contract Modification</td>
<td>Contract Modification</td>
</tr>
<tr>
<td>Daily Diary</td>
<td>Daily Diary Report</td>
</tr>
<tr>
<td>Estimate</td>
<td>Construction Pay Estimate Report</td>
</tr>
<tr>
<td></td>
<td>Construction Pay Estimate Amount</td>
</tr>
<tr>
<td></td>
<td>Balance Report</td>
</tr>
<tr>
<td></td>
<td>Insufficient Materials Report (only available if an agency has selected it as an option)</td>
</tr>
</tbody>
</table>

Table 13-1. 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.

13.2.2 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.

![Add Estimate Window with SORT ORDER Button Displayed](image1)

**Figure 13-10. Add Estimate Window with SORT ORDER Button Displayed**

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 Window](image2)

**Figure 13-11. Pay Estimate Report Sort Window**

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.

### 13.2.3 Viewing and Printing Agency Reports from the Miscellaneous Reports List

FieldManager software’s Miscellaneous Reports functionality is used for viewing agency-specific reports. Each report is designed from an agency report, where the user is prompted to enter the data to be shown on the report. These reports can be saved and printed.

To display a list of agency reports that can be viewed or printed for a selected contract, choose a contract from the Contracts list window, and then click MISC RPTS on the Application Toolbar. (Alternatively, select Miscellaneous Reports from the Utilities menu.) FieldManager software displays the Miscellaneous Reports list window (see Figure 13-12).

![Figure 13-12. Miscellaneous Reports List Window](image-url)
These are the available reports.

- **Note:** These reports might not appear, depending on your agency’s settings.

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contractor’s Performance</td>
<td>Details a contractor’s project work performance, including the assignment of an overall performance rating for the contractor.</td>
</tr>
<tr>
<td>Contractor’s Performance Evaluation</td>
<td>Customizable report of the contractor’s project work performance. This report will appear on the list only if the Show Contractor’s Performance Report option is selected in the ACP file. The report details the overall performance rating for the contractor.</td>
</tr>
<tr>
<td>FieldBook Import Report</td>
<td>Created when IDR's are successfully loaded into FieldManager software (refer to Section 14.2.1, “Importing Inspector’s Daily Reports”). This report can be viewed, but not modified.</td>
</tr>
<tr>
<td>Notice of Change in Construction Status</td>
<td>Reports a change in the status of work contemplated under the terms of the contract or authorized by contract change order, excluding temporary suspension of work.</td>
</tr>
<tr>
<td>Weekly Report of Time Charges</td>
<td>Summarizes information from the week’s Daily Diaries to provide various weekly time charge totals such as percent of contract complete, open to traffic days, and contract time remaining.</td>
</tr>
</tbody>
</table>
From the list of reports available, select any report other than the Contractor’s Performance Evaluation Report and click **VIEW** on the toolbar. From here you will see a list of reports of the type selected that have already been created and saved previously (see Figure 13-13). Details regarding adding a Contractor’s Performance Evaluation Report are discussed in Section 13.3.

![Weekly Reports of Time Charges List Window](image)

**Figure 13-13. Weekly Reports of Time Charges List Window**

**Reviewing a Report**

To review one of the listed reports, select it and click **REVIEW** on the Window Toolbar. A tab window will open in a mode in which you can view but not edit information. Click the **VIEW** tab. From this tab, you can view and print the report.
**Adding a Report**

To add a new report, click ADD. As shown in Figure 13-14, another window will open containing tabs.

![Add Weekly Report of Time Charges Window](image)

*Figure 13-14. Add a Weekly Report of Time Charges Window*

**Changing a Report**

To change an existing report, select the report and then click CHANGE to display a similar window in which to modify the report information.

**Tab Window Information**

These windows in which to view, add, and change reports will always contain at least the GENERAL and VIEW tabs. The GENERAL tab contains information that must be entered by the user. Once information has been saved by clicking SAVE on the Window Toolbar, the VIEW tab will show the actual report which can be viewed and printed.

When viewing a report, click PREVIOUS PAGE and NEXT PAGE on the VIEW tab or use the vertical scroll bar at the right of the window to move between multiple pages, click PRINT to print the report, or click CLOSE to close the report.

**Generating a Report**

When you have finished creating a report, generate the report so that it will be recognized as being complete. You can generate a miscellaneous report at any time via the report’s tab window or the list window containing the report. The column labeled “Gen” in each report’s list window indicates whether an individual report has been generated. To generate a report, click GENERATE or choose Generate Report from the File menu.
When you generate a miscellaneous report, FieldManager software displays a Generate window that identifies the report to generate. 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 report 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 miscellaneous report as generated in the system.

- **Note:** If you do not want to print the miscellaneous 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 report from the appropriate list window, click REVIEW on the Window Toolbar, and then click PRINT on the Window Toolbar.

Click CLOSE on the Application Toolbar (multiple times if necessary) to return to the Contracts list window.

### 13.3 Contractor’s Performance Evaluation Report

The Contractor’s Performance Evaluation Report displays in the list of Miscellaneous Reports if the loaded ACP file enables the Show Contractor’s Performance Report option. This is a customizable report of the contractor’s project work performance that details the overall performance rating for the contractor. Selecting the Contractor’s Performance Evaluation Report option from the list and clicking VIEW will display a list of all the CPE’s available in the contract.

#### 13.3.1 Adding a New Contractor’s Performance Evaluation

A new CPE can be created via the CPE list window by completing the appropriate tabs in the Add CPE tab window. To add a new CPE report, click ADD. The Add CPE tab window opens.

**Adding General Information for New Contractor’s Performance Evaluations.**

The GENERAL tab of the Add CPE tab window contains general information about a CPE. To add general information for a new CPE:

Select the appropriate contract in the Contracts list window, click MISC REPORTS on the Application toolbar and click CONTRACTOR’S PERFORMANCE EVALUATION REPORT in the Misc Reports functional area to display the CPE list window.

Click ADD on the Window Toolbar to open the Add CPE tab window.
A modal window with a drop-down list of all the contractors in the contract and CPE types displays. Select a contractor and CPE type and click the OK button. The GENERAL tab will automatically display (see Figures below).

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

**Evaluator**
Drop-down selection of all users defined in FieldManager.

**Report Starting Date**
Calendar Picker Button available. Starting date for the CPE report

**Report Ending Date**
Calendar Picker Button available. Ending date for the CPE report

**Comments**
Detailed description of the CPE. Up to 32,000 characters may be entered.
Click *SAVE/CLOSE* on the Window Toolbar to save your work and close the Add CPE tab window. The FieldManager software will save the information and then revert to the CPE list window.

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

- A button titled *EVALUATION INSTRUCTIONS* displays at the bottom of the GENERAL tab. Clicking this button to view all the agency level evaluation instructions.

- The next sections will describe the Rating and View Tab.

**Entering or Modifying Rating Information for a New Contractor's Performance Evaluation.**

The most recent CPE Form Version will be displayed at top of the RATINGS tab to provide context. The agency level rating instructions for the CPE Form Version display below the CPE Form Version. The RATINGS tab will show a series of rating criteria specific to the CPE Form Version as specified by the agency in the FieldManager Agency Configuration Program. These criteria will be sorted and grouped by category.

There are two ways a user can respond to a rating criterion. If the Use Importance Factors flag is set in the loaded ACP file the user is required to enter a rating value against each criteria. If this flag is not set then user can chose to not respond by checking the N/A check box. The user can also enter remarks for each criterion (see Figure 13-15. Add CPE Window – RATINGS Tab).
To create a complete record, enter information in the following fields.

**Rating**
Numeric value that describes the contractor performance in a criterion

**N/A flag**
Checkbox indication for ‘Not Applicable’. Only visible when ACP option Use Importance Factor is set to ‘No’

**Rating Remarks**
Rating Criterion remarks

**Viewing the New Contractor’s Performance Evaluation**

It is a good idea to check your work before generating the CPE. To check the record, click the **VIEW** tab of the Add CPE tab window to view an electronic copy of what will print out when the CPE is generated (see Figure 13-16).
If all the information is correct and you are ready to generate the CPE, for further instructions, refer to Section 13.3.3, Generating a Contractor Performance Evaluation. Otherwise, click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.

### 13.3.2 Changing Existing Contractor’s Performance Evaluations

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

**Draft**

The CPE has been added in FieldManager software but not generated.

**Pending Approval**

The CPE has been generated in FieldManager software, but is waiting on approval and signatures.

**Deleted**

The CPE has been deleted. The status of the CPE will display as deleted in the CPE list window, and the CPE identification number will not be reused by FieldManager software for CPEs.

**Approved**

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

A CPE may only be changed when it is in draft or pending status. If you change a pending CPE, its status will revert to draft with a revision number and you will be required to generate it again. Once approved, a CPE cannot be modified or deleted in FieldManager.
Changing General Information for an Existing Contractor’s Performance Evaluation

To change the general information for an existing CPE, select the appropriate contract from the Contracts list window, click MISC REPORTS on the Application Toolbar, and click CONTRACTOR’S PERFORMANCE EVALUATION REPORTS in the list of Misc Reports to display the CPEs list window.

Select the CPE, and click CHANGE on the Window Toolbar to display the Change CPE tab window. The GENERAL tab will automatically display (see Figure 13-17).

You can change either of the entry fields on the GENERAL tab (for field descriptions, refer to Adding General Information for a New CPE). To change information, tab to or click in 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 CPE tab window. FieldManager will save the information and revert to the CPE list window.

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

Changing the Rating Information for an Existing Contractor’s Performance Evaluation

To change the rating information entered on an existing CPE, select the appropriate contract from the Contracts list window, click the Misc Reports on the Application
Toolbar and click CONTRACTOR’S PERFORMANCE EVALUATION REPORT in the Misc Report list to display the CPE list window.

Select the CPE, and click CHANGE on the Window Toolbar to display the Change CPE tab window.

Click the RATING tab.

![Image of Change CPE Window - CPE RATING Tab]

You can adjust the rating values, remarks or the N/A flag on a rating criterion.

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

**Viewing the Revised Contractor’s Performance Evaluation**

After changing a CPE, it is recommended that you check your work before generating the CPE again. To do this:

Click the VIEW tab of the Change CPE tab window to view an electronic copy of what will print out when you generate the CPE (see Figure 13-19).
Review the changed CPE 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.

### 13.3.3 Generating a Contractor’s Performance Evaluation

Once a CPE 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 CPEs.

To generate a CPE, select the appropriate contract from the Contracts list window, click the Misc Reports on the Application Toolbar, and click CONTRACTOR’S PERFORMANCE EVALUATION REPORT in the Misc Reports list to display the CPE list window.

Select the CPE to generate, and click GENERATE on the Window Toolbar.

- **Note:** You can generate a CPE from the CPE list window or from any of the CPE tab windows after working in them.
As shown in Figure 13-20, FieldManager displays a Generate window that identifies the CPE to generate. Click YES to confirm the generation, or NO to cancel the generation.

If the response is YES, FieldManager generates the CPE and then displays the Print dialog box. Adjust the printer settings 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 prints the CPE report and changes the status of the CPE to pending approval in the CPE list window. Click CLOSE on the Application Toolbar to close the CPE list window and return to the Contracts list window.

### 13.3.4 Approving a Contractor’s Performance Evaluation

Once the proper parties have signed a CPE, you must approve the CPE in FieldManager. Note that a CPE may only be approved if it is in Pending Approval status. Also note that once it is approved, a CPE cannot be modified or deleted in FieldManager.

- **Note:** If necessary, a user with System Administrator privileges can change an approved CPE, but only if it is the most recent CPE for that contractor.

To approve a CPE, select the appropriate contract from the Contracts list window, click the Misc Reports on the Application Toolbar, and click CONTRACTOR’S PERFORMANCE EVALUATION REPORT in the Misc Reports list to display the CPE list window.

Select the CPE to approve, and click APPROVAL on the Window Toolbar.

Enter the date the CPE was approved in the Approval Date field and the name of the person who approved it, and click OK to continue, or click CANCEL to cancel.

![Figure 13-21. CPE Approval Window](image-url)
• **Note:** Your agency may have configured default names for the Final Approval By field. You can overwrite the default name if necessary.

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

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

If you click **YES**, FieldManager software changes the status of the CPE to approved. Click **CLOSE** on the Application Toolbar to close the CPE list window and return to the Contracts list window.

**Creating Contractor’s Performance Evaluation Information for Your Agency’s Central Office Contract Administration System**

Depending on your agency’s settings and whether the Create Electronic File flag is set to **Yes** for the contract, once a CPE is approved it creates a file called `cpe###.exp` in the FieldManager outbox (with the exception of SiteManager-initiated contracts). This file contains all of the information about the CPE (cpe general information and rating values) and is ready to be loaded into your agency’s central office contract administration system.

• **Note:** If your agency is using FieldNet, this file is automatically sent to the proper place when you send your outbox to FieldNet.

**13.3.5 Deleting a Contractor’s Performance Evaluation**

To delete a CPE, select the appropriate contract from the Contracts list window, click the Misc Reports on the Application Toolbar and click **CONTRACTOR’S PERFORMANCE EVALUATION REPORT** in the Misc Report list to display the CPE list window.

Select the CPE to delete.

⚠ **Warning:** You cannot delete approved CPEs.

Click **DELETE** on the Window Toolbar to delete the selected CPE.

FieldManager software displays a Delete Warning window that asks to confirm the deletion. Click **YES** to complete the deletion, or **CANCEL** to cancel the deletion.

If you selected more than one CPE to delete, you can click **NO** to cancel the deletion of the CPE listed in the Delete Warning window and move on to the next selected CPE.
• **Note:** After it has been generated, a CPE may be deleted; however, it will always display with a **deleted** status in the CPE list window, and it cannot be further modified.

Click **CLOSE** on the Application Toolbar to close the CPE list window and return to the Contracts list window.

### 13.3.6 Reviewing a Contractor’s Performance Evaluation

To review a CPE, select the appropriate contract in the Contracts list window, click the Misc Reports on the Application Toolbar and click **CONTRACTOR’S PERFORMANCE EVALUATION REPORT** in the Misc Reports list to display the CPE list window.

Select a CPE, and click **REVIEW** on the Window Toolbar. FieldManager displays the Review CPE 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 CPE.

Click **CLOSE** on the Application Toolbar to close the Review CPE tab window and return to the CPE list window.
13.4 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. An example is shown in Figure 13-22.

![Figure 13-22. PRINT Button Will Print Item List](image)

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. An example is shown in Figure 13-23.

![Figure 13-23. PRINT Button Will Print Inspector’s Daily Report](image)
14. Importing and Exporting Information

Working with FieldManager software requires the frequent exchange of information between FieldManager and your agency’s central office contract administration system, and between computers running the FieldManager module and the FieldBook component. At times, it may also call for the transfer of data between computers running FieldManager.

14.1 Transferring Data Between FieldManager and Your Agency’s Central Office Contract Administration System

You can either import information from or export information to your agency’s central office contract administration system.
14.1.1 Importing from Your Agency’s Central Office Contract Administration System

To import contracts from your agency’s central office contract administration system, choose Import from the File menu, and then choose File from the Import submenu. FieldManager displays the Select Import File window (see Figure 14-1).

![Select Import File Window](image)

Figure 14-1. Select Import File Window

Select the location, directory, and file name for the file to import. To import the file, click OK, or click CANCEL to cancel the import. FieldManager can import files with a .dat file name extension originating from Transport CAS and can import files with an .smt file name extension originating from AASHTOWare Project SiteManager.

14.1.2 Retrieving FieldBook IDR Export Backup Files

Follow these steps to recover a FieldBook IDR export backup file:

1. Run Windows Explorer on the computer hosting the FieldBook component.

2. In the c:\ProgramData\FieldBook\idrbak folder, find the backup copy of the IDR export file that you wish to retrieve. The file name will have the extension bk*, where the * is a number (for example, MF_idr1.bk1).

3. Copy the backup file to an external media drive.

4. On the external medium, rename the file extension of the backup file from bk* to ebl. For example, the file MF_idr1.bk1 would be renamed to MF_idr1.ebl.

5. Insert the external medium containing the renamed backup file on the FieldManager computer.

6. Run FieldManager and import the renamed backup file.
14.1.3 Exporting Information from FieldManager to Your Agency’s Central Office Contract Administration System (Combining Outbox Files)

As you work on estimates and contract modifications, certain information needs to make its way to your agency’s central office contract administration system. When estimates and contract modifications are generated and when contract modifications are approved in FieldManager, export files are created containing contract information to be loaded into your agency’s system. These files are created “behind the scenes” and are placed in your FieldManager outbox until the time when they are imported into your agency’s central office contract administration system for processing.

**Note:** If your agency is using FieldNet, this section does not apply to you since the files in your outbox are automatically sent to the proper place when sending your outbox to FieldNet. (For more information, refer to Section 18.2.1, “Sending the Outbox to FieldNet.”)

If your agency has chosen to use another system besides FieldNet by which to transfer FieldManager information electronically, FieldManager’s Combine Outbox Files utility can help with the process. This utility assists with routing files to and from your agency’s central office contract administration system. To use this utility, choose **Combine Outbox Files** from the **Utilities** menu. FieldManager searches in the outbox location specified in your system’s configuration for any files with an .exp extension for data created from Trnsport CAS contracts and an .smp extension for data created from AASHTOWare Project SiteManager contracts.

If there are no files with the appropriate extension, a Message window displays with that information (see Figure 14-2).

![Figure 14-2. Message Window](image-url)
14.1.4 Working With Trns•port CAS Files Having .exp File Extensions

If there are files with an .exp extension, FieldManager consolidates those files according to your agency’s specifications. If your agency requires there to be separate files for payment information and contract modification information, FieldManager first displays a window asking you to choose the location in which to place the export payment file (see Figure 14-3).

You can enter the location for the file either by typing the location directly in the field, by using the drop-down arrow in the field and choosing the location from the drop-down list box, or by clicking BROWSE to choose the path if it is not available via the drop-down list box. Once the correct location is designated, click OK to continue or click CANCEL to cancel the action.
If you have a contract modification included within the export files, and/or if your agency requires the payment and contract modification information to be consolidated into one file, a window displays asking you to choose the location in which to place those export files (see Figure 14-4).

![Choose Location For Contract Update File Window](image)

Figure 14-4. Choose Location for Contract Update File Window

Enter the location for the export file and click OK or click CANCEL to cancel the action. If you click OK, FieldManager combines all the export files into one Payment file and/or one Contract Update file, and saves that file(s) in the location(s) specified.

If you have a contractor performance evaluation included within the export files, a window displays asking you to choose the location in which to place those export files (see Figure 14-5).

![Choose Location for CPE File Window](image)

Figure 14-5. Choose Location for CPE File Window

Enter the location for the export file and click OK, or click CANCEL to cancel the action.

After creating and saving the combined file(s), FieldManager displays a message indicating that the process is complete (see Figure 14-6).

![Message Window](image)

Figure 14-6. Message Window
At this point, you can import the Payment and/or Contract Update file into your agency’s central office contract administration system according to the methods your agency uses to manage FieldManager information.

14.1.5 Working With AASHTOWare Project SiteManager Files Having .smp File Extensions

If there are files with an .smp extension, FieldManager consolidates those files according to your agency’s specifications. If your agency requires separate files for payment information and contract modification information, FieldManager displays a window asking you to choose the location in which to place the export file (see Figure 14-7).

You can enter the location for the file either by typing the location directly in the field, by using the drop-down arrow in the field and choosing the location from the drop-down list box, or by clicking the BROWSE button to choose the path if it is not available via the drop-down list box. Once the correct location is designated, click OK to continue or click CANCEL to cancel the action.

If you click OK, FieldManager combines all the export files into one Contract Update file per contract and saves that file in the location specified under the file names(s) of contractid.xml. After creating and saving the combined file, FieldManager displays a message indicating that the process is complete (see Figure 14-8).

![Figure 14-7. Choose Location for Contract Update File Window](image)

![Figure 14-8. Message Window](image)
14.2 Transferring Data Between FieldManager and FieldBook

There may be times when you need to import Inspector’s Daily Reports (IDRs) from the FieldBook component or export contract information to the FieldBook component.

14.2.1 Importing Inspector’s Daily Reports

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

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

To load an IDR file, choose Import from the File menu, and then choose IDRs from FieldBook from the Import sub-menu. (Alternatively, from the Contracts list window, click the IMPORT-FB button on the Window Toolbar.) As shown in Figure 14-9, FieldManager displays the Import IDRs window.

![Import IDRs Window](image)

Figure 14-9. Import IDRs Window

Type the location of the file in the text box, including the drive and path where the file is located. 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 prints the Inspector’s Daily Report, which includes an individual report for each IDR loaded. FieldManager 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 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 so that they can update their contract information.

### 14.2.2 Exporting Contracts to FieldBook

Loading IDRs from a FieldBook file into the FieldManager module provides the inspector with a file that updates the contract information in the FieldBook component. 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 the FieldBook component 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 the FieldBook component. In addition, to the actual contract information, other sets of information are passed, including the configuration file information that was loaded into FieldManager (for more information, refer to Section 2.5, Importing Agency Configuration Information), and security information on which the FieldBook component relies.

FieldManager displays a Select Contracts to Export to FieldBook window from which to select the contracts to export (see Figure 14-10).

![Figure 14-10. Select Contracts to Export to FieldBook Window](image-url)
Use the FILTER and SORT buttons to filter and sort the contracts. You can select more than one contract at a time, and you can also click a check box at the bottom of the window to include updated reference file information. The Use FieldNet check box is automatically checked if your system is configured to use FieldNet (refer to Section 3.3.3, Managing the System). You can clear the box if desired. If your system is not configured for FieldNet, the Use FieldNet check box is grayed out, meaning it is not accessible. Click SELECT to select the chosen contracts, or CANCEL to cancel the export.

**Exporting Contracts With FieldNet**

If your FieldNet account is activated, after selecting **File | Export | Contracts to FieldBook**, you will receive the following prompt.

![Export Contracts to FieldBook Dialog Box](image)

Figure 14-11. Export Contracts to FieldBook Dialog Box
If you click the NO button, you will continue on as detailed in Section 14.2.2, Exporting Contracts to FieldBook. If you click the CANCEL button, you will leave the export process. If you click the YES button, you will be prompted to select one or more contracts to export. After selecting the contracts, you will be prompted to select one or more recipients of the contract(s) from the Select FieldNet IDs modal window (see Figure 14-12).

![Select FieldNet IDs - Contract Export to FieldBook](image)

Figure 14-12. Choose FieldBook Account(s)

Once you click SELECT, FieldManager will send the message or queue the message to be sent later, depending on your settings (for more information, refer to Chapter 18, Setting Up and Using FieldNet).
Exporting Contracts Without FieldNet

After selecting the contracts, if the Use FieldNet check box is not selected, FieldManager displays the Export Contracts to FieldBook window from which to select the location to put the export file (see Figure 14-13).

![Export Contracts to FieldBook Window](image)

Figure 14-13. Export Contracts to FieldBook Window

Click the down arrow next to the text box to display a list of file locations from which to choose, or enter a new location. You can also click the BROWSE button to search for the location. Click OK once a location is selected, or CANCEL to cancel the export. If OK is selected, FieldManager saves the file `office.ebl` to the location specified. This file can then be loaded into the FieldBook component.
14.2.3 Exporting Reference Files to FieldBook

To export a reference file to the FieldBook component, choose **Export** from the **File** menu, and then choose **Reference Data to FieldManager/FieldBook** from the Export submenu. As shown in Figure 14-14, the Select Transfer File window displays.

![Select Transfer File Window](image)

Figure 14-14. Select Transfer File Window

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.

**Note:** You can also export reference files to the FieldBook component while exporting contracts to the FieldBook component. For more information, see Section 14.2.2, Exporting Contracts to FieldBook.
14.3 Transferring Data Between Computers Running FieldManager

Occasionally, you might need to prompt a transfer of information between computers running FieldManager. This section explains how to accomplish this.

14.3.1 Transferring Contracts to Another Computer Running FieldManager

There may be times when you need to transfer contracts to another computer running FieldManager, or when your supervisor needs a read-only copy of a contract. To accomplish either of these tasks, choose Export from the File menu, and then Transfer Contracts from the Export submenu.

As shown in Figure 14-15, FieldManager displays a Select Contracts to Transfer to Another FieldManager Machine window from which to select the contract to transfer.

![Select Contracts to Transfer to Another FieldManager Machine Window](image)

The FILTER and SORT buttons at the bottom of the window allow the contracts to be rearranged so that it is easy to find the desired contract(s), or use the Find Contract ID text box in the upper left of the window to go directly to the contract of choice.
Choose one or more contracts, and click the SELECT button to continue or click CANCEL to cancel. As shown in Figure 14-16, FieldManager displays the Transfer Contract to Another FieldManager window.

![Transfer Contract to Another FieldManager](image)

**Figure 14-16. Transfer Contract to Another FieldManager Window**

Choose among the following six options.

- **Create a regular read-only copy**
  
  This option transfers a read-only copy of the contract to another computer running FieldManager where it can be viewed but not modified.

- **Transfer the contract**
  
  This option transfers the working copy of the contract in its modifiable form and keeps a regular read-only copy for your personal use. Once transferred, you will not be able to modify the regular read-only copy of the contract.

- **Create contractor read-only copy**
  
  This option transfers a contractor read-only copy of the contract to another computer running FieldManager where it can be viewed but not modified.

- **Include attachments**
  
  This option includes the attachments associated with the contract being transferred. When sending a regular read-only copy of the contract, this option is not required; however, when sending a working copy of the contract, FieldManager automatically selects this option and sends the associated attachments.

- **Note:** If more than one contract is selected, the options chosen in the Transfer Contract to Another FieldManager window apply to all the contracts. To allow the contracts to have different options, transfer them separately.
Click OK to transfer the contract(s) or CANCEL to cancel the transfer.

FieldManager requests a save location unless the Use FieldNet option was chosen, in which case the file is saved to the outbox.

14.3.2 Exporting Reference Data to Another Computer Running FieldManager

To export reference data to another computer running FieldManager, choose Export from the File menu, and then choose Reference Data to FieldManager/FieldBook from the Export submenu. As shown in Figure 14-17, the Select Transfer File window displays.

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

14.3.3 Importing Data from Another Computer Running FieldManager

To import contracts from another computer running FieldManager, choose Import from the File menu, and then choose File from the Import submenu. FieldManager displays the Select Import File window (see Figure 14-1).

If the desired contract is not initially displayed, click the down arrow in the List files of type: drop-down text box, and choose Contract files (*.c). This displays all files in a subdirectory.

If you only want to import a contractor read-only file, click the down arrow in the List files of type: drop-down text box, and choose Contractor Read-only Files (*.cro). This displays all of the contractor read-only files in a subdirectory. Those files are denoted by a .cro extension.
If you only want to import a reference file, click the down arrow in the List files of type: drop-down text box, and choose Reference files (*.ref). This displays all of the reference files in a subdirectory. Those files are denoted by a .ref extension.

Select the location, directory, and file name for the file to import. To import the file, click OK, or click CANCEL to cancel the import.

### 14.4 Exporting a Read-Only Contract to a File

There are occasions where you will need to export a contract to a file to share with others. To share the file, select the File menu and select Export from the drop-down. From Export, select Read-Only/Contract to File...

FieldManager will give you a dialog window with a list of contracts to select from. Only Read-Only contracts will be active (black.) The other contracts will be grayed out and unavailable to be selected.
To help manage the contracts there are several buttons to assist you.

**Select**
Select the contract you wish to work with and the click the SELECT button. This will guide you into the save file name and location dialog box.

**Filter**
Clicking the FILTER button bring up the window to allow you to narrow down the number of contracts available. This is useful for showing only Read-Only contracts.

**Sort**
SORT allows for organizing by alphabetical listings or contract numerical listings.

**Cancel**
CANCEL will stop what you are doing and cancel the action.

**Help**
Selecting the HELP button provides you will help.

After select the Read-Only contract and clicking the SELECT button, FieldManager will prompt you for a file name and location to save this file into.
FieldManager will report back that the contract was saved.

### 14.5 Transferring Payment Data to a Financial System

FieldManager can export data from estimates to external financial systems that read files in a fixed width format. To bring up the Contractor Payment Summary Reports list window, choose **Contractor Payment Summary Reports** from the **Utilities** menu.

#### 14.5.1 Setting the Export Location

When this window has focus, the export location can be set by selecting **Set Financial Export Location** from the **File** menu. As shown in Figure 14-21, FieldManager displays the Set File Location for Financial Export window.

Type the location of the file in the text box, including the drive and path where the file will be located. The next time you export financial data, this file will be created. If it already exists, data will be appended to this file.
Click CLOSE on the Window Toolbar to close the Contractor Payment Summary Report list window and return to the Contract list window.

14.5.2 Adding a Contractor Payment Summary Report

A new Contractor Payment Summary Report may be added via the Contractor Payment Summary Reports list window by selecting Add from the Edit menu, or by clicking the ADD button on the Window Toolbar.

A Contractor Payment Summary Report will be created and populated with information from estimates on all contracts since the last Contractor Payment Summary Report was created. This report will be opened in View mode (see Figure 14-22).

Click CLOSE on the Window Toolbar to close the report and return to the Contractor Payment Summary Report list window.

14.5.3 Reviewing a Contractor Payment Summary Report

To review a Contractor Payment Summary Report, open the Contractor Payment Summary Report list window and select the row based on the Cycle Run Date/Time. Then click VIEW on the Window Toolbar to open the report (see Figure 14-22).

![Contractor Payment Summary Report](image)

Figure 14-22. Contractor Payment Summary Report

Click CLOSE on the Window Toolbar to close the report and return to the Contractor Payment Summary Report list window.
14.5.4 Deleting a Contractor Payment Summary Report

To delete a Contractor Payment Summary Report, open the Contractor Payment Summary Report list window and select the row based on the Cycle Run Date/Time. Then click DELETE on the Window Toolbar.

As FieldManager software begins the delete process, it first checks to see if the Contractor Payment Summary Report has been exported. If it has been exported, FieldManager software will display an Error window indicating that the Contractor Payment Summary Report cannot be deleted (see Figure 14-23).

![Figure 14-23. Contractor Payment Summary Report – Delete Error](image)

If the Contractor Payment Summary Report has not been exported, FieldManager software displays a Delete Warning window that asks to confirm the deletion. Click YES to complete the deletion, or CANCEL to cancel the deletion.

Click CLOSE on the Window Toolbar to close the Contractor Payment Summary Report list window and return to the Contract list window.

14.5.5 Exporting Financial Data from a Contractor Payment Summary Report

Once a Contractor Payment Summary Report is complete, it may be exported for use in financial systems that process fixed width files.

To export a Contractor Payment Summary Report, open the Contractor Payment Summary Report list window and select the row based on the Cycle Run Date/Time. Then click EXPORT on the Window Toolbar.

FieldManager displays a Warning window that asks to confirm the report to export, and explains that once this is done, the Contractor Payment Summary Report may no longer be deleted (see Figure 14-24).
Click YES to confirm the export or CANCEL to cancel the export. If you click YES, FieldManager software saves the data in the selected report to the file specified as the export location.

There is a configuration file that controls how data is exported. By default, this is installed to C:\ProgramData\FieldManager\financial_export_config.txt. For details, see the comments inside this configuration file.

14.6 Archiving and Restoring Completed Contracts

FieldManager can archive completed contracts using the Archive Contract option, and can restore contracts using the Restore Archived Contract option.

14.6.1 Archiving Contracts

Once a contract has been closed, it is available for archiving. To archive a closed contract, choose Archive Contract from the File menu. A dialog box displays with information about the archiving process (see Figure 14-25).

After reading the information, click YES to proceed or NO to cancel the procedure.

If you click YES, a Select Contract to Archive window displays (see Figure 14-26).
Figure 14-26. Select Contract to Archive Window

- **Note:** A contract that is closed may not be selectable from this list if it is still waiting for the refresh of the final pay estimate.

In this window you can select the contract to archive, and you can also choose to print a final history of the archived contract by clicking the Print Final History check box. The FILTER and SORT buttons at the bottom of the window allow the contracts to be rearranged so that it is easy to find the desired contract, or use the Find Contract ID text box in the upper left of the window to go directly to the contract of choice.

Choose a contract and click the SELECT button to archive the contract or click CANCEL to cancel the process. If you click SELECT and have chosen the Print Final History option, up to four consecutive Print dialog boxes display, each corresponding to a particular inquiry: Item History to Date, Material History to Date, Materials by Item, and Contract Modifications Summary. You can choose to print one, some, all, or none of the inquiries offered.

- **Note:** If you do not want to print a particular inquiry, click CANCEL in the appropriate Print dialog box. Doing so will not cancel the archiving process; it only cancels the printout of the report.

FieldManager archives the chosen contract to the location specified in the Contract Archive Location field of the System Configuration window (for more information, refer to Section 3.3.3, Managing the System). Once the contract is archived, an Archive window displays asking if you want to save the contract to another location (see Figure 14-27).
Click YES to choose another location or NO to end the process. If you click YES, the Select Archive FileName window displays (see Figure 14-28).

If the appropriate location is accessible through the folders and files displayed, go ahead and choose it. If the location needed is within a network directory, click the NETWORK button to display the Map Network Drive window (see Figure 14-29).

Use the down arrows beside the Drive and Path drop-down list boxes to choose the appropriate drive and navigational path, or just type them directly into the fields. If you would like the same drive connection to be available each time you log on to FieldManager, click the Reconnect at Logon check box. Click OK to accept the mapped drive information, which displays in the Select Archive FileName window, or click CANCEL to cancel the connection.
Once the appropriate file and location are specified in the Select Archive FileName window, click OK. The contract is archived to the specified location, and you are again given the opportunity to save the file to another location.

After a contract is archived, it is no longer available via the Contracts list window unless it is later restored.

### 14.6.2 Restoring Contracts

To restore an archived contract, choose **Restore Archived Contract** from the File menu. The Select Contract to Restore window displays (see Figure 14-30).

FieldManager stores contract archives to the Contract Archive Location specified in the System Configuration window. It also keeps an index of this directory in the database so that it can quickly show the Select Contract to Restore window. Use the Refresh button to have FieldManager scan the Contract Archive Location and update its index in case contract archive files have been added or removed outside the FieldManager application.

The FILTER and SORT buttons at the bottom of the window allow the contracts to be rearranged so that it is easy to find the desired contract, or use the Find Contract ID text box in the upper left of the window to go directly to the contract of choice.

Choose a contract and click the SELECT button to continue or click CANCEL to cancel. If you click SELECT, FieldManager restores the chosen contract. When a contract is restored, the corresponding archive file is automatically deleted, and the contract becomes available via the Contracts list window.

Click RESTORE FROM FILE to display a dialog box to import a restored contract directly into FieldManager.
14.7 Backing Up and Restoring a Database

FieldManager can back up a database at any time, and it can restore a database from a previous backup.

14.7.1 Backing Up a Database

To back up a database, choose **Backup Database** from the **File** menu to display the Backup Database window (see Figure 14-32).

The window displays the history of previous backups. The name of the backup file that will be created is in the text box at the bottom of the window. The name is based on
today’s date, but can be modified. The default database backup directory is set by choosing User Preferences from the Utilities menu.

When you back up the current database, FieldManager also backs up any files being held in the Inbox and Outbox. These files are consolidated and saved with the backup database file.

To back up the database, close all the open windows and click the BACKUP button. FieldManager goes through a series of steps to perform the backup. First FieldManager disconnects from the database. Then it backs up the database and the Inbox and Outbox files to the file name listed in the text box. Next FieldManager reconnects to the database. Finally, a window displays confirming that the backup was successful, and then a second window displays asking if you would like to copy the backup to an additional location (see Figure 14-33).

![Backup Window](image)

Figure 14-33. Backup Window

Click YES to initiate the backup or click NO to cancel the action. If YES is selected, the Select Backup File Name window displays, initiating from the local disk drive. Navigate to the location of where you want the backup saved and click SAVE.

If you already have a backup with the same name saved at that location, a Warning window displays informing you that any existing backup will be overwritten (see Figure 14-34).

![Warning Window](image)

Figure 14-34. Backup Warning Window

Click YES to complete the backup.

Once the backup is successfully saved, a Success window displays.
Click YES to save the backup in another location or click NO to return to the Backup Database window. Click CLOSE to return to FieldBuilder.

### 14.7.2 Restoring a Database

To restore a database along with its associated Inbox and Outbox files, choose **Restore Database From Backup** from the **File** menu to display the Restore Database window (see Figure 14-36).

To restore a database from the database list, select the database to be restored. Click the RESTORE button. If you would rather load a backup not listed in the Restore Database window, click BROWSE. FieldManager displays a Select Database File window.
When you locate the file you want to load, click **OPEN**. A Restore Warning window displays (see Figure 14-38).

![Figure 14-37. Select Database File Window](image)

![Figure 14-38. Restore Warning #1 Window](image)

This window is to confirm that you want to restore the chosen database. If you choose to restore the database, FieldManager automatically creates a backup of the current database, disconnects from that database, and attempts to restore the selected database. If the restore fails, FieldManager reconnects to the original database. If the restore is successful, FieldManager creates a subfolder titled Restore within the current Inbox folder, and it will place the recovered Inbox files into that subfolder. Any existing outbox files are deleted and replaced by files from the restored Outbox.

If you are unsure of whether you should restore the chosen database, consult your System Administrator. If you want to continue with the restoring process, click **OK**, or click **CANCEL** to cancel the action.

If you click **OK**, FieldManager displays a final Restore Warning window (see Figure 14-39).
This Warning window lets you know that your current database (and all of the work associated with that database) will be replaced if you continue with the restoring process. The window also offers one last opportunity to discontinue the restoring process. If you are certain that you want to restore the selected database, click YES; otherwise, click NO to cancel the process. If you click YES, FieldManager restores the chosen database as described above.
15. Maintaining Reference File Information

Master reference files are lists of vendors, items, materials, code tables, and percentage items used by agencies in construction projects. These lists are maintained outside of FieldManager software and need to be updated periodically by reference file imports so that you are always working with current information.

Material files, forms, and sources are local reference files that are maintained on each computer running FieldManager. They are used when approving materials in FieldManager. Only agencies using the Materials functionality in FieldManager will need to maintain this information.

Note: To print any of the lists mentioned in this chapter, simply click PRINT on the Window Toolbar while the desired list is displayed.
15.1 Maintaining Material Files/Forms/Sources

**Note:** Only agencies using the Materials functionality will need to maintain information in this section.

To maintain material information for files, forms, and sources, choose **Maintain Material Files/Forms/Sources** from the **Utilities** menu. FieldManager displays the Material Files/Forms/Sources tab window, which contains a FILES tab, a FORMS tab, and a SOURCES tab (see Figure 15-1).

![Material Files/Forms/Sources Tab Window](image)

**Figure 15-1.** Material Files/Forms/Sources Tab Window

### 15.1.1 Adding Material Files, Forms, and Sources

To add a material file, form, or source, choose **Maintain Material Files/Forms/Sources** from the **Utilities** menu to display the Material Files/Forms/Sources tab window. Click the appropriate tab to be addressed. Each tab has an **ADD** button at the bottom. Click **ADD** to add a file, form, or source. FieldManager adds a row to the bottom of the list in which to type the new file, form, or source number and description (the **SOURCE** tab only has a description field).

Click **SAVE/CLOSE** on the Window Toolbar to save your work and close the Material Files/Forms/Sources tab window. FieldManager will save the information and then close the window.

**Note:** To continue working in the Material Files/Forms/Sources tab window, click **SAVE** rather than **SAVE/CLOSE**. FieldManager will save the information added and continue to display the Material Files/Forms/Sources tab window, enabling you to work with other tabs. This same procedure applies to all tab windows in this section.
15.1.2 Changing Material Files, Forms, and Sources

To change material files, forms, or sources, choose Maintain Material Files/Forms/Sources from the Utilities menu to display the Material Files/Forms/Sources tab window. Click the appropriate tab to be addressed. Click a record once to select it, and then click the record again to display a cursor in the text box containing data that may be changed. Use the arrow keys to move back and forth, and then type new text in the record, or use the DELETE key to delete information. To delete a block of text, simply highlight the text and press the DELETE key.

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

15.1.3 Deleting Material Files, Forms, and Sources

To delete a material file, form, or source, choose Maintain Material Files/Forms/Sources from the Utilities menu to display the Material Files/Forms/Sources tab window. Click the appropriate tab to be addressed. Each tab has a DELETE button at the bottom. Select the record to delete, and click DELETE to delete the selected file, form, or source. FieldManager displays a Delete Warning window (see Figure 15-2).

![Delete Warning Window](image)

Figure 15-2. Delete Warning Window

Click YES to delete the record or NO to cancel the deletion. If YES is selected, FieldManager deletes the record from the list.

Note: Only one record may be deleted at a time.

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.
15.2 Maintaining Local Material Lists

Note: Only agencies using the Materials functionality will need to maintain information in this section.

To maintain a local master materials list, choose Maintain Local Materials List from the Utilities menu. FieldManager displays the Local Material List tab window (see Figure 15-3).

![Local Material List Tab Window](image)

Figure 15-3. Local Material List Tab Window

15.2.1 Adding Local Materials

To add a material to the local master list, choose Maintain Local Materials List from the Utilities menu to display the MATERIALS tab of the Local Material List tab window. Click ADD MATERIAL at the bottom of the window, and FieldManager adds a row to the list in which to add a description and unit for the new material.

Click SAVE/CLOSE on the Window Toolbar to save your work and close the Local Material List tab window. FieldManager will save the information and then close the window.

Note: To continue working in the Local Material List tab window, click SAVE rather than SAVE/CLOSE. FieldManager will save the information added and continue to display the Local Material List tab window, enabling you to continue your work. This same procedure applies to all tab windows in this section.
15.2.2 Changing Local Materials

To change a local material, choose Maintain Local Materials List from the Utilities menu to display the MATERIALS tab of the Local Material List tab window. Click a record once to select it, and then click the record again to display a cursor in the text box containing data that can be changed. Use the arrow keys to move back and forth, and then type new text in the record, or use the DELETE key to delete information. To delete a block of text, simply highlight the text and press the DELETE key.

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

15.2.3 Deleting Local Materials

To delete a material from the local master list, choose Maintain Local Materials List from the Utilities menu to display the MATERIALS tab of the Local Material List tab window. Select the record to delete, and click DELETE MATERIAL to delete the selected material. FieldManager displays a Delete Warning window (see Figure 15-4).

![Delete Warning Window](image)

Figure 15-4. Delete Warning Window

Click YES to delete the record or NO to cancel the deletion. If YES is selected, FieldManager deletes the record from the list.

- **Note:** Only one record can be deleted at a time.

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

15.3 Reviewing Master Reference Lists

To review master reference lists, choose Agency Master Reference Lists from the Utilities menu, and then choose the list to review from the Agency Master Reference Lists submenu.

15.3.1 Reviewing Materials

The master material list is the list to select from when associating materials with a contract.
**Note:** Only agencies using the Materials functionality in FieldManager will have materials in this list.

To review the list of materials, choose **Agency Master Reference Lists** from the Utilities menu, and then choose **Materials** from the Agency Master Reference Lists submenu to display the Master Material Reference List window (see Figure 15-5).

![Figure 15-5. Master Material Reference List Window](image)

To see more detailed information on a material, select the material to review, and click **REVIEW** on the Window Toolbar (see Figure 15-6).

![Figure 15-6. Review Material Tab Window](image)

The following information is shown.
**Spec Year**  The material’s specification year.

**Material Number**  A unique material identification number assigned and used by FieldManager to track the material.

**Description**  A short description of the material.

**Unit**  The type of measurement used to determine the units of the material.

Click **CLOSE** on the Window Toolbar to close the window.

### 15.3.2 Reviewing Items

The master item list is the list to select from when adding items to a contract.

To review the list of items, choose *Agency Master Reference Lists* from the *Utilities* menu, and then choose *Items* from the Agency Master Reference Lists submenu to display the Master Item Reference List window (see Figure 15-7). Item lists are generally large, so it may take a moment for the items to appear.

![Figure 15-7. Master Item Reference List Window](image)
To see more detailed information on an item, select the item to review, and click REVIEW on the Window Toolbar. The Review Item tab window displays (see Figure 15-8).

![Review Item Tab Window](image)

Figure 15-8. Review Item Tab Window

The following information is shown.

- **Spec Year**: Associates the item with a specification year. Each contract is associated with a specification year. Items can only be associated with contracts having the same specification year.

- **Item Number**: The number assigned to the item.

- **Short Description**: A short description of the item. The Item Description for contract items draws upon this field plus any supplemental description.

- **Long Description**: A long description of the item.

- **Units**: The type of measurement used to determine the units of the item.

- **Obsolete**: Indicates whether an item is obsolete.

- **Escalation**: Indicates whether the item will be included in the calculations for the Category Escalation Summary by Estimate inquiry.

Click **CLOSE** on the Window Toolbar to close the window.
15.3.3 Reviewing Vendors

The master vendor list shows all the vendors that can be associated with a contract. FieldManager uses this list to locate and associate subcontractors with a contract. If the master vendor file was received from your agency’s central office contract administration system, it will be populated with every agency vendor (see Appendix A for more information).

To review the list of vendors, choose **Agency Master Reference Lists** from the **Utilities** menu, and then choose **Vendors** from the Agency Master Reference Lists submenu to display the Master Vendor Reference List window (see Figure 15-9). Vendor lists are generally large, so it may take a moment for the vendors to appear.

![Figure 15-9. Master Vendor Reference List Window](image-url)
Select the vendor to review, and click REVIEW on the Window Toolbar. The Review Vendor tab window displays (see Figure 15-10).

![Review Vendor Tab Window](image)

**Figure 15-10. Review Vendor Tab Window—VENDOR Tab**

Information about the chosen vendor will display. A vendor’s address is not essential to FieldManager’s operation and may often be blank. This information may be added, however, through either your agency’s central office contract administration system or FieldBuilder.

Click **CLOSE** on the Window Toolbar to close the window.
15.3.4 Reviewing Code Tables

The master code table reference list shows all of the code tables along with their code values. Code values (or simply codes) are used in several places within FieldManager to build drop-down selection lists. In adding a stockpile, for example, the user selects the type of stockpile (Stockpile Description) from a drop-down list that is built from the code tables list.

To review the list of code tables and values, choose Agency Master Reference Lists from the Utilities menu, and then choose Code Tables from the Agency Master Reference Lists submenu to display the Master Code Table Reference List window (see Figure 15-11).

![Figure 15-11. Master Code Table Reference List Window](image)

All of the codes for each code table are included in this list, so there is no REVIEW button for this window.

Click CLOSE on the Window Toolbar to close the window.
15.3.5 Reviewing Percentage Items

Percentage items are items that are paid for as the work is completed on a certain percentage of the contract. FieldManager includes percentage items as part of its initial calculations when adding an estimate. While performing estimate calculations, if FieldManager determines that an estimate reaches a contract complete threshold specified for a percentage item, FieldManager informs you that the item’s actual quantity placed does not match its suggested quantity placed. At that point, the estimate may still be created, or the item quantity placed can be adjusted as suggested.

To review the list of percentage items, choose Agency Master Reference Lists from the Utilities menu, and then choose Percentage Items from the Agency Master Reference Lists submenu to display the Master Percentage Items Reference List window (see Figure 15-12).

![Figure 15-12. Master Percentage Items Reference List Window](image-url)
Each threshold for a percentage item appears in this list. The following information for each item is shown.

<table>
<thead>
<tr>
<th>Spec Year</th>
<th>Associates the item with a specification year.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Description</td>
<td>The name of the percentage item.</td>
</tr>
<tr>
<td>Item Code</td>
<td>The code assigned to the percentage item.</td>
</tr>
<tr>
<td>% Cpt Thrshld</td>
<td>(Percent Complete Threshold) Once the contract completion percent reaches this threshold, the item can be included on an estimate.</td>
</tr>
<tr>
<td>% Cpt Basis</td>
<td>(Percent Complete Basis) The method used to determine the current percent of work complete for each threshold.</td>
</tr>
<tr>
<td>% Qty Paid</td>
<td>The percentage of the item that can be paid based on the percent complete threshold.</td>
</tr>
<tr>
<td>Max Amt Paid</td>
<td>Expressed as a percentage of the original contract amount, this is a limit on the maximum amount that can be paid to date at the contract threshold defined.</td>
</tr>
</tbody>
</table>

To review an individual percentage item, select that item and click REVIEW on the Window Toolbar. As shown in Figure 15-13, the Review Percentage Item tab window appears with information on the percentage item displayed.

![Figure 15-13. Review Percentage Item Tab Window](image)

Click CLOSE on the Window Toolbar to close the window.
16. Using FieldBook Software

The FieldBook™ component 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 the FieldBook component, 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.

The FieldBook component operates very much like the FieldManager module, but with a more limited range of functionality. This chapter explains how to install the FieldBook component and outlines 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 the FieldBook component.

16.1 Installing FieldBook Software

This section describes how to install the FieldBook component from a disc on a variety of versions of Microsoft Windows operating systems. If you are upgrading from a previous release, it is extremely important that you export all IDRs out of the current version before installing the new version, as data will be overwritten.
16.1.1 Running the FieldBook Setup Application

This section presents detailed instructions for running the FieldBook Setup application on a Microsoft Windows operating system.

Before you install or update the FieldBook component, click the Web link referenced in Section 1.2, FieldManager System Requirements, to view the detailed recommended hardware and software configurations.

### Installing from a Disc

To install from a disc, insert the FieldManager disc into the disc drive of your computer.

> Note: This example uses drive D as your disc drive letter. Your disc drive may be a different letter.

Run the Setup program from the Task Bar by choosing Run from the Start menu.

Type in \d:\fieldbk\FieldBook.msi and press the ENTER key.

When the FieldBook Setup program begins, proceed to Section 16.1.2, When the Installation Program Begins.

16.1.2 When the Installation Program Begins

The installation program will go through a setup period, indicated by a progress meter on the screen. Once this is complete, a Welcome screen will appear.

### Completing the Welcome, Installation Password, and Licensing Screens

To continue with the installation, click NEXT.

To cancel the installation, click CANCEL.

If you click NEXT, the Installation Password screen will display. This screen requires you to enter the correct installation key provided. Enter the 17-character password installation key. The installation software is case insensitive, meaning you can enter either uppercase or lowercase letters according to your preferences.

To continue with the installation, click NEXT.

To cancel the installation, click CANCEL.

If you click NEXT, depending on the type of license your agency has, the FieldBook component may display a License Agreement window. Click YES to accept all the terms of the license agreement and continue with the installation.
**Selecting the Application Destination Location**

By this point in the installation process, the installation program will have checked to see if previous installations of the FieldBook component or the FieldBook Tutorial reside on your computer. If so, the path in the Destination Directory area will reflect the location of the prior installation, and it is highly recommended that you install this new release in the same location. If not, the destination directory path will show the default location selected by your agency.

To install the application in a different location, click the BROWSE button to bring up a dialog box to search for or enter a new path. Normally, you will simply accept the directory that the Setup program has designated.

When you have finished choosing the appropriate installation path, click the NEXT button to continue or click CANCEL if you wish to stop the installation.

**Selecting the Program Folder**

The next screen, Select Program Folder, allows you to choose the program folder into which the FieldBook component’s icons will be placed. Either type a folder name in the Program Folders field, or select one from the list of existing folders.

Click NEXT and the files needed to run the selected application(s) will be transferred to the location specified. Otherwise, click CANCEL to discontinue the installation.

- **Note:** If the installation finds a previous installation of FieldBook on your machine, it will first prompt you to remove it before proceeding. Existing databases will remain in their original locations, while newly created data sources will be placed under %ALLUSERSPROFILE%\FieldBook\database by default.

### 16.1.3 During Installation

When the installation program requires more information, respond to the prompts and select options as appropriate.

If the installation program determines that there is not enough disk space to install the FieldBook software components, a message will display letting you know that the drive specified does not have enough free space to install the software. The message will ask if you want to install to the drive anyway. If you are installing over a previous version, choose YES to continue with the installation. Otherwise, remove any unneeded files so there is enough free disk space to install the FieldBook component.
16.1.4 After Installation

A new program group will be created at the end of the installation containing icons for running the applications.

You must shut down Microsoft Windows operating system and reboot your computer before the applications will run.

The first time you start the FieldBook software application, an Import Contracts window will display (see Figure 16-1).

![FieldBook Import Contracts Window](image)

Figure 16-1. FieldBook Import Contracts Window

There are two options for importing information into the FieldBook component via this window. Typically you will choose the first option, which is to import contract files being passed down from FieldManager. To import contract files, enter the navigational path for the files to import in one of three ways: type the path directly in, use the down arrow to the right of the drop-down list box to choose the path, or click BROWSE to choose the path if it is not available via the down arrow. Once you have designated the path for the import, click OK or click CANCEL to cancel the import.
The second option available via the Import Contracts window is to retrieve information from another FieldBook database. This option comes in handy, for instance, when you acquire a new computer and need to transfer the work already accomplished in the FieldBook component from your old computer to your new one. To retrieve the information from an existing FieldBook database, click RESTORE DATABASE. The FieldBook component displays the Restore Database window (see Figure 16-2).

![FieldBook Restore Database Window](image)

Figure 16-2. FieldBook Restore Database Window

In this window you can select a database that is listed. If the desired database to restore is listed, select that database and click the RESTORE button.

After making your selections in the Import Contracts and/or Restore Database windows, the FieldBook component will take a moment to download information from the stipulated files, including authorized user information, and will then display the FieldBook Login window.

Note: If you click CANCEL, or if you designate an incorrect navigational path, the FieldBook component will still display the FieldBook Login window; however, since no authorized user information will have been downloaded, the FieldBook component will not allow you to log on. Instead, you will need to exit the application by clicking CANCEL, and then restart the application.

As necessary, refer to the instructions in Section 3.1, Logging On to FieldManager Software, as you enter your approved User ID and password to log on and begin using the FieldBook component.

**16.2 Understanding Differences Between FieldBook and FieldManager**

The key differences between the FieldBook component and the FieldManager module are detailed in this section, and references are given to other portions of this user’s guide.
Unlike the FieldManager module, the FieldBook component does not have functionality in the following areas:

- Contract Documentation
- Daily Diaries
- Stockpiles
- Estimates
- Contract Modifications

The FieldBook component has an extra column in its Contracts list window, but it has fewer menu options than the FieldManager module, and it has different capabilities as regards the Items, IDR's, and Materials functionality.

### 16.2.1 Contracts List Window

The FieldBook component’s Contracts list window is very similar to the FieldManager module’s, though there are a couple of significant differences between the two. The FieldBook component’s window has fewer buttons on the Application Toolbar, because the FieldBook component’s range of functionality is much more limited than the FieldManager module’s. The FieldBook component also has a column labeled *Import Date* that is not present in FieldManager software (see Figure 16-3).

![FieldBook Contracts List Window](image)

*Figure 16-3. FieldBook Contracts List Window (with Import Date Column Displayed)*

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. The FieldBook component will inform you if this is attempted so you can prevent the overwrite from occurring.

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

While most of the FieldBook component’s menu options are identical to the FieldManager module’s, such as the Utilities menu option of changing your password (refer to Section 3.3.2, Changing Your Password), there are a few which differ. For instance, the FieldBook component’s Import and Export options under the File menu allow you to import a contract from FieldManager and export IDRIs to FieldManager, respectively. Understandably, this differs from FieldManager’s operation, though the steps required for the processes are very similar (refer to Section 14.2, Transferring Data Between FieldManager and FieldBook).

Because the FieldBook component does not have the full-featured system configuration capabilities of the FieldManager module, some of the options available via the FieldManager module’s System Configuration tab window have been placed in the FieldBook component’s User Preferences tab window. This is accessed by selecting User Preferences from the Utilities menu (see Figure 16-4).

![Figure 16-4. FieldBook User Preferences Tab Window—GENERAL Tab](image)

Another difference is that in the FieldManager module the FieldNet system’s default information is entered using the FIELDNET tab of the System Configuration tab window, whereas in the FieldBook component this data entry occurs via the FIELDNET tab of the User Preferences tab window.
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 the FieldBook component, 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 (refer to Section 15.1, Maintaining Material Files/Forms/Sources). This difference is because in FieldManager, the user can modify (maintain) the material files, forms, and sources, but in the FieldBook component, the user can only view them. Second, the FieldBook component has only two of the five reference lists available in the FieldManager module, Materials and Items (refer to Section 15.3, Reviewing Master Reference Lists).

### 16.2.3 Items Functionality

The FieldBook component’s and the FieldManager module’s Items functionality are practically identical (refer to Chapter 6, Working with Items), with the exception of changing item documentation. When changing an item in FieldManager, all the fields on the DOCUMENTATION tab can be altered (refer to Section 6.2.2, Changing Documentation About an Existing Item). In the FieldBook component, however, only the Item Completed flag field can be edited when changing an item (see Figure 16-6).

The FieldBook component’s users will have the ability to add new items to contractor associations only if the new item was added directly in the FieldBook component and has not yet been exported to FieldManager software. The associations added in the FieldBook component can be changed or deleted up until export as well. When the next IDR gets sent to FieldManager software, the newly added item to contractor associations will automatically be sent. Once sent, they can no longer be modified in the FieldBook component.
16.2.4 Materials Functionality

The FieldBook component’s and the FieldManager module’s Materials functionality are nearly identical (refer to Chapter 7, Working with Materials), with the exception of adding, changing, and deleting material approvals. When working with a material in FieldManager, you can add, change, or delete that material’s approval via the buttons on the APPROVALS tab (see Sections 7.1.2, 7.2.2, and 7.2.3). In the FieldBook component, though, all of the approval buttons are unavailable and cannot be used (see Figure 16-7).
16.2.5 IDR Functionality

The main difference between the FieldBook component’s and the FieldManager module’s IDR functionality is that the FieldBook component has a column in the IDRs list window that does not exist in FieldManager software (for more information about the FieldManager module’s IDR functionality, refer to Chapter 8, Working with Inspector’s Daily Reports). This additional column is the **Status** column, and it denotes the statuses of the IDRs listed (see Figure 16-8).

![Figure 16-8. FieldBook IDRs List Window (with Status Column Displayed)](image)

**Note:** The data listed in the Status column of the FieldBook component’s IDRs list window is separate and distinct from the generation data listed in the Gen column.
In the FieldBook component, each IDR has one of three statuses listed in the Status column.

**New**  
The IDR has just been created in the FieldBook component. 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 the FieldManager module, the FieldBook component automatically creates a backup file of those IDRs. The backup file is placed in the directory to which the FieldBook component 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 component.

On the Select IDRs to Export to FieldManager window, you can select the Include Previously Exported IDRs in List option. Selecting this displays all new and exported IDRs. When you re-export previously exported IDRs, any items, materials, item-material associations, or item-breakdown associations that were previously exported (but have not yet been refreshed) will be automatically re-exported. For assistance with this task, contact your system administrator.

**Refreshed**  
After the FieldBook component has received the contract data update file back from the FieldManager module, the status of the exported IDRs changes to Refreshed. A refreshed IDR cannot be changed or deleted by any inspector. The number of days of refreshed IDRs and IDR attachments that are passed to the FieldBook component is dependent upon the View IDRs in FieldBook for _____ days field and the View IDR Attachments in FieldBook for _____ days field, found in FieldManager on the GENERAL tab of the Change Contract Documentation tab window (refer to Section 4.3.1, Changing General Information). The FieldBook component’s overall item quantity information, however, which is refreshed along with the accompanying IDRs, is not dependent upon this field, and is available for viewing at any time.
16.2.6 Maintaining FieldBook Datasources

In this section, you will learn how to maintain the FieldBook component’s datasources.

From the FieldBook login window, click the button beside Datasource drop-down menu.

![FieldBook Login Window – Datasource Management Button](image)

Figure 16-9. FieldBook Login Window – Datasource Management Button

This opens the Maintain FieldBook Datasources modal window.

![Maintain FieldBook Datasources](image)

Figure 16-10. Maintain FieldBook Datasources

To delete any datasource that is not the current datasource and is not the default datasource, from the Maintain FieldBook Datasources window, click the DELETE button.

To close the Maintain FieldManager Datasources modal window, from the Maintain FieldBook Datasources window, click the CLOSE button.

To import a contract, from the Maintain FieldBook Datasources window, click the ADD button. The Import Contracts window appears.
Browse to the location of a contract that was exported from FieldManager software to be imported into the FieldBook component. When you find the contract to import, click the OPEN button.

The Add FieldBook Datasource window appears and prompts you to enter the name for the new datasource. Enter a name in the text box. To import the contract you selected and return to the Maintain FieldBook Datasources window, click the OK button. To return to the Maintain FieldBook Datasources window without importing a contract, click the CANCEL button.
17. Using FieldBuilder Software

The FieldBuilder component is an easy-to-use computer-based system for creating and modifying construction contracts for use with FieldManager software’s construction management system. This chapter details how to install the FieldBuilder software, and it describes how to access the primary resource for information about the FieldBuilder component’s functions, the FieldBuilder online Help system.

17.1 Installing FieldBuilder Software

The instructions in the following sections describe how to install FieldBuilder software on a Microsoft Windows operating system using a disc.

17.1.1 Running the FieldBuilder Setup Application

This section presents detailed instructions for running the FieldBuilder Setup application on a Microsoft Windows operating system.

Before you install or update the FieldBuilder component, click the Web link referenced in Section 1.2, FieldManager System Requirements, to view the detailed recommended hardware and software configurations.

**Installing from a Disc**

To install from disc, insert the FieldManager disc into the disc drive of your computer.

**Note:** This example uses drive D as your disc drive letter. Your disc drive may be a different letter.

Run the Setup program from the Task Bar by choosing **Run** from the **Start** menu.

Type in `d:\fbuilder\FieldBuilder.msi` and press the **ENTER** key.
When the FieldBuilder Setup program begins, proceed to Section 17.1.2, When the Installation Program Begins.

17.1.2 When the Installation Program Begins

The installation program will go through a setup period, indicated by a progress meter on the screen. Once this is complete, a Welcome screen will appear.

Completing the Welcome, Installation Password, and Licensing Screens

To continue with the installation, click NEXT.

To cancel the installation, click CANCEL.

If you click NEXT, the Installation Password screen will display. This screen requires you to enter the correct installation key provided. Enter the 17-character password installation key. The installation software is case insensitive, meaning you can enter either uppercase or lowercase letters according to your preferences.

To continue with the installation, click NEXT.

To cancel the installation, click CANCEL.

If you click NEXT, depending on the type of license your agency has, FieldManager software may display a License Agreement window. Click YES to accept all the terms of the license agreement and continue with the installation.

Selecting the Application Destination Location

By this point in the installation process, the installation program will have checked to see if a previous installation of FieldBuilder software resides on your machine. If so, the path in the Destination Folder area will reflect the location of the prior installation, and it is highly recommended that you install this new release in the same location. If not, the destination folder path will show the default location selected by your agency.

To install the application in a different location, click the BROWSE button to bring up a dialog box to search for or enter a new path. Normally, you will simply accept the directory that the Setup program has designated.

When you have finished choosing the appropriate installation path, click the NEXT button to continue or click CANCEL if you wish to stop the installation.

Selecting the Program Folder

The next screen, Select Program Folder, allows you to choose the program folder into which the FieldBuilder icon will be placed. Either type a folder name in the Program Folders field, or select one from the list of existing folders.
Click **NEXT** and the files needed to run the selected application(s) will be transferred to the location specified. Otherwise, click **CANCEL** to discontinue the installation.

**Note:** If the installation finds a previous installation of FieldBuild on your machine, it will first prompt you to remove it before proceeding. Existing databases will remain in their original locations while newly created data will be placed under %ALLUSERSPROFILE%\FieldBuilder by default.

### 17.1.3 During Installation

When the installation program requires more information, respond to the prompts and select options as appropriate.

If the installation program determines that there is not enough disk space to install FieldBuilder software, a message will display letting you know that the drive specified does not have enough free space to install the software. The message will ask if you want to install to the drive anyway. If you are installing over a previous version, choose **YES** to continue with the installation. Otherwise, remove any unneeded files so there is enough free disk space to install FieldBuilder software.

### 17.1.4 After Installation

A new program group will be created at the end of the installation containing an icon for running the application.

Once the FieldBuilder software has fully installed, a Setup Complete window displays noting that you must shut down Windows and reboot your machine before the application will run.

Click the **FINISH** button to indicate that you are aware of the procedures detailed in the Setup Complete window.

Because FieldBuilder software uses the same type of logon procedure as FieldManager software, you can reference the instructions in Section 3.1, Logging On to FieldManager Software, as necessary to enter your approved User ID and password to log on and begin using FieldBuilder software.

### 17.2 Creating Contracts With FieldBuilder Software

For information on creating contracts using FieldBuilder software, refer to the *FieldBuilder User's Guide* or access the FieldBuilder online Help system that automatically installs when you load the software. To do this, select **Search** from the **Help** menu. The FieldBuilder Help Topics window will display. Type in the first few letters of the word or phrase about which you want to inquire, and the Help system will
display topics that correspond with your entry. To display a topic that is listed, select the topic and click DISPLAY.

To see a table of contents for the Help system, click the CONTENTS tab in the FieldBuilder Help Topics window. Double-click the topics in the table of contents to view the information for those topics. For more information on using the Help system, double-click the book titled “How to Use FieldBuilder Online Help” and then double-click the topic page by the same name.

### 17.3 Using FieldBuilder Contracts in FieldManager

After a contract has been created in FieldBuilder software it must be sent to FieldManager software. While the functionality of a FieldBuilder contract is essentially the same as any other contract type, there are a few differences that are important. The following sections describe these differences.

#### 17.3.1 Retainage for FieldBuilder Contracts

Estimates on a FieldBuilder contract are performed in the same way as on another other type of contract, except that you are allowed to calculate retainage during the estimate process.

The Retainage field on the Add Estimate GENERAL Tab allows you to enter a dollar value for the total amount of retainage on the current estimate.

In Figure 17-1, notice that $5,840.00 was entered in the Retainage field. This value indicates that $5,840.00 of Retainage will be withheld, based on the Estimates Total Dollar Amount of $116,800.00.

![Figure 17-1. Add Estimate General Tab](image)
You can also choose a percentage of the Estimates Total Dollar Amount to be withheld for Retainage. To choose this option, click the DETAILS button shown in Figure 17-1 instead of entering a dollar amount in the Retainage field. FieldManager software displays the Estimate Retainage window.

![Estimate Retainage Window](image)

**Figure 17-2. Estimate Retainage Window**

The Estimate Retainage window contains three options.
**Withhold Retainage Option**

This option allows any percentage of the current Estimate Amount to be withheld for Retainage.

For example, in Figure 17-2, **5.00** has been entered as the percentage to be withheld for Retainage on the contract. Click **OK** to automatically calculate the Retainage amount. FieldManager software displays the Add Estimate **GENERAL** tab with a retainage amount of **$5,840.00**, which represents **5%** of the total estimate amount of **$116,800.00**.

![Image of Add Estimate - GENERAL Tab]

**Figure 17-3. Add Estimate – GENERAL Tab**

**Note:** The original default percentage to withhold for Retainage is **0**. However, once a percentage has been specified, the next Estimate will automatically withhold that same percentage for Retainage unless it is adjusted. In our example, the next Estimate would withhold another **5%** for Retainage.
An additional Summary area is added to the Construction Pay Estimate Report displayed on the VIEW ESTIMATE tab.

![Construction Pay Estimate Report](image)

Figure 17-4. Construction Pay Estimate Report

The Summary area lists payments with consideration to Retainage, Liquidated Damages and Adjustments. The left hand column displays information regarding the Current Estimate Payments while the right hand column is a computation of all payments to date.

This retainage information is displayed in the Summary area of this report:

**Current Retainage**  The amount of Retainage being withheld on the current estimate, based on the Total Estimated Payment.

**Retainage to Date**  The total amount of Retainage that has been withheld, based on all Total Estimated Payments to date.
Release Retainage Option

The Release Retainage option allows you to release any percentage of the Total Retainage to Date. In the example shown in Figure 17-5, 45% of the Total Retainage to Date ($5,840.00) will be released.

Figure 17-5. Estimate Retainage Window
Click OK to automatically calculate the amount of Retainage to Release. FieldManager software displays the Add Estimate GENERAL tab. $-2628.00 is displayed in the Retainage. This is the dollar amount of Retainage that will be released for this estimate.

When you select the Release Retainage option, the calculated amount will be displayed on the Construction Pay Estimate Report as well as shown in Figure 17-7.

Figure 17-6. Add Estimate – GENERAL Tab Window

Figure 17-7. Construction Pay Estimate Report
In Figure 17-7, the Current Retainage field displays (2,628.00). This is the amount of Retainage that will be released on this Estimate. Since this dollar amount is being released (paid) to the contractor, it will increase the Total Estimated Payment. The estimate’s total voucher (item) payment is $116,550.00, the current retainage is (−2,628.00) so, the Total Estimated Payment is now $119,178.00.

Since Retainage is being released, the Retainage to Date field will also be affected. Its value will decrease by the amount being released in this and each subsequent retainage payment until it equals $0.00.

**Maximum Retainage Amount Option**

The third option on the the Estimate Retainage window is the Maximum Retainage Amount for the Contract, which allows you to place a ceiling on the total amount of Retainage that can be withheld for the contract. In the example shown in Figure 17-5, the Total Retainage Withheld to Date cannot exceed $1,500.00.

### 17.3.2 Retainage for FieldBuilder Agency Contracts

FieldBuilder Agency contracts can use the Agency Retainage feature if activated in the FieldManager Agency Configuration Program. This allows an agency to configure FieldManager to automatically withhold an agency-specified amount of retainage at an agency-specified percentage point of the contract’s completion.

**Withholding Retainage**

The Retainage field on the Add Estimate GENERAL Tab shows you the retainage being withheld and allows the user to specify when to release retainage. No retainage activity can occur on a contract until the contract’s percent completion, based on the current contract amount, meets or exceeds the Percent Complete Threshold agency option.

The example in Figure 17-8 shows FieldManager automatically withholding $50,000 as seen in the Retainage field. The withholding occurred on this estimate because the current contract percent complete (% Complete(curr)) has exceeded the agency specified contract completion threshold of 85%. The $50,000 is the agency-specified maximum retainage amount allowed per contract.
A positive number in the Retainage field indicates retainage withholding. A negative number indicates retainage release.

Once Retainage is automatically withheld, the user can immediately choose to withhold a lesser amount or, if retainage was withheld on a previous estimate, release retainage. One way to do this is to directly update the Retainage field. You will not be able to withhold more than the maximum allowed by your agency nor will you be able to release more retainage than has been previously withheld for the contract.

**Note**: FieldManager will not withhold more retainage than the value of the estimate. In this circumstance, FieldManager will withhold the remaining retainage on future estimates unless the user overrides the withholding with a lesser amount.

**Estimate Retainage Details**

Clicking the DETAILS… button next to the Retainage will show the Estimate Retainage window which shows more information about the contract’s retainage.
The Estimate Retainage window shows the state of the contract and estimate as it pertains to retainage.

FieldManager uses the **Awarded Contract Amount** along with agency-specified settings to determine the amount of retainage to withhold.

The **Current Contract Amount** and the **Amount Paid to Date** determine the **% Contract Comp.(curr)** which then determines when the retainage will be automatically withheld.

The **Total Dollar Amount This Est** shows the value of the estimate and may impact how much retainage can be withheld.

The **Total Retainage To Date** shows the sum of all retainage activity—including withholdings and releases—on previous estimates.

The **Retainage This Est** field shows the amount of the retainage currently set for this contract.

### Releasing Retainage

As shown in Figure 17-10, you can use the **Release Retainage** radio button to calculate a percentage of the **Total Retainage To Date** to release.
When OK is selected, the Retainage This Estimate is populated on the Estimate GENERAL tab as shown in Figure 17-11.
Retainage Adjustment Section on Construction Payment Estimate Report

With the Agency Retainage feature, a new Retainage Adjustment section is shown on the Construction Payment Estimate Report. Figure 17-12 shows an example of the Retainage Adjustment.

Figure 17-11. Estimate General tab showing Retainage Release

Figure 17-12. Retainage Adjustment Section of the Construction Payment Estimate Report
The left-hand side of the Retainage Adjustment section shows the effects of the current estimate’s retainage amount on the Total Retainage to Date. In the example, $25,000 of the $50,000 retainage amount was released leaving $25,000 Total Retainage to Date.

The right-hand side of the Retainage Adjustment section shows the effects of the retainage amount on the Total Estimate Payment amount. In the example, the $25,000 being released is added to Total Estimate Payment.
18. Setting Up and Using FieldNet

The FieldNet™ system is an automated interface among the FieldBook™ component, the FieldManager module, and your agency’s central office contract administration system that allows for the transparent electronic transfer of contract, IDR, estimate, and contract modification information. It can also be used to obtain supervisor approvals for estimates and contract modifications, and for sending regular read-only and contractor read-only copies, as well as transferring and working copies of contracts to other FieldManager machines.

Note: If your agency is not using the FieldNet system, refer to Section 14.1.2, Retrieving FieldBook IDR Export Backup Files, for an alternative means to transfer FieldManager information electronically.
18.1 Setting Up FieldManager and FieldBook to Use FieldNet

To use the FieldNet system, some options must first be set in the FieldManager module and/or the FieldBook component. For the FieldManager module, from the Menu Bar select **System Management** from the **Utilities** menu, and then choose **System Configuration**. FieldManager displays the System Configuration tab window. Click the **FIELDNET** tab (see Figure 18-1).

![FieldManager System Configuration Tab Window—FIELDNET Tab](image)

Figure 18-1. FieldManager System Configuration Tab Window—FIELDNET Tab

For the FieldBook component, on the Menu Bar select **User Preferences** from the **Utilities** menu. The FieldBook component displays the User Preferences tab window. Click the **FIELDNET** tab (see Figure 18-2).

![FieldBook User Preferences Tab Window—FIELDNET Tab](image)

Figure 18-2. FieldBook User Preferences Tab Window—FIELDNET Tab
The following fields are automatically populated to indicate information regarding the FieldNet account status.

**Account Status**
The current status of the account. Once an account has been established successfully, possible statuses include Activated, Deactivated, and Restricted.

**Last Deactivation Date**
The date that the account was last deactivated.

Each of the following options is required for the FieldNet system to function.

**FieldNet ID**
This is your account ID that has been set up on the FieldNet server. An example would be `fmgr001`.

**Password**
This is your FieldNet password.

**Verification**
This is a field to verify that the FieldNet password was entered correctly. Simply retype your password to confirm this.

**FieldNet Archive Directory**
This is where files are archived. If this is not filled in, FieldManager and the FieldBook component will not archive your data after mailing files.

Each of the following options is optional for the FieldNet system to function.

**Auto Send Messages**
If selected, messages will be sent to the server immediately upon creation, instead of waiting for user interaction before sending. Recommended if you have a persistent connection. The system automatically disables this option if it is unable to send the FieldNet Outbox; after this happens, a warning appears every time you log in until you return to the FieldNet tab and click OK.

**Auto Retrieve Upon Send**
If selected, messages will be retrieved from the FieldNet server each time messages are sent automatically or through user interaction.
18.2 Using FieldManager, FieldBook, and FieldNet

This section details the various ways in which to manage the information flow between the FieldManager module, the FieldBook component, and the FieldNet system.

18.2.1 Sending the Outbox to FieldNet

From the Menu Bar, choose FieldNet from the Utilities menu, and then choose Send Outbox to FieldNet from the FieldNet submenu. This will mail everything in the outbox to the FieldNet system. If files have been moved out of the outbox, or if they were saved to other locations, they will not be mailed. After mailing the files, the FieldManager module and the FieldBook component will archive them in the FieldNet Archive Location (refer to Section 18.1, Setting Up FieldManager and FieldBook to Use FieldNet, for information about the Archive Location).

18.2.2 Files Returning from FieldNet

The FieldNet system will send all return information to the FieldNet accounts. To check to see if the FieldNet system has any messages for you, on the Menu Bar choose FieldNet from the Utilities menu and then choose Get Mail from FieldNet from the FieldNet submenu. This command will check the FieldNet system for any mail, and display a window that lists a summary of the files received from the FieldNet system. This window is referred to as your mailbox.

18.2.3 Sending and Receiving Simultaneously

To execute the Send Outbox to FieldNet and Get Mail from FieldNet operations at the same time, choose FieldNet from the Utilities menu and then choose Send Outbox / Get Mail.

18.2.4 Looking at Your FieldNet Mailbox

At any time, you can see what is in your the FieldNet system mailbox via the Menu Bar by selecting FieldNet from the Utilities menu, and then choosing Show Mailbox from the FieldNet submenu. Unlike the other commands on the FieldNet menu, it is not necessary to be connected to the FieldNet system to look at your mailbox.

The user may find it more convenient to use the FN MAILBOX button on the window toolbar to access the FieldNet system mailbox. This button will only display if your agency is using FieldNet and your FieldNet Account Status is Activated or Restricted.

The Mailbox window shows information about what has and has not yet been processed by the FieldManager module and the FieldBook component (see Figure 18-3). The filters at the top of the window offer various views of this data.
After receiving mail from the FieldNet system, look at the INBOX tab. This will show all the messages that have yet to be processed by the FieldManager module and the FieldBook component. To process an entry in the Mailbox window, simply click on the row to process, and then click the PROCESS MSG button on the Window Toolbar, or choose Process Message from the File menu.

Note: If you have the FieldBook User security level, you can only process a FieldNet message if you are the user who sent it and the message has type 131: IDR Upload from FieldBook.

For some message types, if there are multiple messages of the same type waiting to be processed in your inbox, FieldManager will ask if you wish to process all messages of that type. This will occur for messages of types 131: IDR Upload from FieldBook, 123: Regular Read-only Copy, and 124: Contractor Read-only.
18.2.5 Requesting a Contract Refresh File from FieldNet (FieldManager Only)

To refresh a contract, on the Menu Bar choose **FieldNet** from the **Utilities** menu, and then choose **Request Contract Refresh from FieldNet** from the FieldNet submenu. The dropdown arrow will display all FieldNet contracts that could be refreshed (see Figure 18-5). Normally, use this command only if the central office has added a project or category, or site, to an already existing contract.

![Contract Refresh Request to FieldNet](image1)

**Figure 18-4. Contract Refresh Request to FieldNet**

![Request Contract Refresh from FieldNet](image2)

**Figure 18-5. Request Contract Refresh from FieldNet**
18.2.6 Sending a Request for Reference Files from FieldNet

On the Menu Bar, choose FieldNet from the Utilities menu, and then choose Request Reference Files from FieldNet from the submenu. This will mail a request to the FieldNet system for the most current set of reference files.

18.2.7 Sending a Request for the FieldNet ID List

On the Menu Bar, choose FieldNet from the Utilities menu, and then choose Request FieldNet ID List from FieldNet from the submenu. This will mail a request to the FieldNet system for the most current list of FieldNet IDs. This list is used as the basis for selecting recipients of contract information, for example, the list of inspectors using the FieldBook component to send contracts to, or the list of contractors that will receive a copy of the contract on a periodic basis.

18.2.8 Automatic Message Purging

Each time messages are retrieved from FieldNet, old messages are automatically purged from the inbox and outbox. The ages of inbox messages are based on the message received date, while the ages of outbox messages are based on the message created date. Your agency determines how old messages must be before they are subject to purging. All Unsent messages and important Unprocessed messages will never be subject to purging.
18.3 Automatic Distribution of Read-Only Contracts

With the FieldNet system on, you can set up distribution lists that will receive either contractor read-only copies of contracts or regular read-only copies of contracts. Go to the Change Contract Documentation area by selecting the DOCU button. Within the R/O DISTRIBUTION tab, you can maintain a list of accounts that will automatically receive the appropriate copy upon generation of each estimate for that contract.

![Figure 18-7. Change Contract Documentation – R/O Distribution Tab](image)

For each list, the checkboxes control whether a read-only contract copy is sent to the FieldNet ID when an Estimate is generated, a Contract Modification is generated, or both. The INCLUDE ATTACHMENTS checkboxes on both sides indicate if any generated contractor contract copies will include their associated attachments.

The ADD RECIPIENT buttons on both sides bring up the same modal window, but with different sets of information. The data comes from the FieldNet ID list and then is filtered depending on which distribution list you are managing. When selecting accounts for the Contractor Read-Only copies, only FieldManager accounts that have been flagged as Contractor accounts will be displayed.

The AUTO-Populate button replaces the Contractor Read-Only Distribution List with the FieldNet IDs that are associated with the contractors for the current contract. The association between FieldNet IDs and contractors must be set up in FieldNet before the FieldNet ID list is requested and processed in FieldManager for this functionality to occur.
When selecting accounts for the Regular Read-Only copies, only FieldManager accounts that have not been flagged as Contractor accounts will be displayed.

When an account is added, the check box will automatically be selected. The Estimate and Cont Mod check boxes can be cleared and then re-selected at any time.
19. Interfacing with Info Tech Mobile Inspector™

Info Tech Mobile Inspector™ is a product separate from FieldManager that can be used to enter and submit IDRs for FieldManager using a mobile device. This chapter describes how to set up the standalone version of a key communication component, the Info Tech Bridge to FieldManager, from within FieldManager.

This chapter also lists the necessary steps needed to manage Mobile Inspector users in FieldManager software.

19.1 Setting Up and Configuring the Standalone Bridge to FieldManager

The Info Tech Bridge to FieldManager software enables contract and IDR data to flow between FieldManager and Mobile Inspector. The standalone Bridge is packaged for ‘Standalone’ FieldManager datasources and can be installed from within FieldManager.

Note: The standalone Bridge is only for ‘Standalone’ FieldManager datasources. If you connect to client/server datasources or if you wish to use the Bridge as a Windows Service, skip the standalone Bridge setup and instead download and install the regular Bridge to FieldManager software.
To set up and configure the standalone Bridge, first log into FieldManager using the Standalone database that you wish to set up. Everything to set up and configure the Standalone Bridge can be found in the Bridge tab of the User Preferences modal window. From the Menu Bar, select User Preferences from the Utilities menu. Click the BRIDGE tab (see Figure 19-1).

![FieldManager User Preferences Tab Window—BRIDGE Tab](image)

**Figure 19-1. FieldManager User Preferences Tab Window—BRIDGE Tab**

**Note**: The Bridge tab is only available if you are connected to a Standalone datasource and if you are logged into FieldManager with a security level of “FieldManager User” or “System Administrator”.

The Bridge tab is divided into three sections: Setup, Configuration, and Log of Most Recent Cycle.

### 19.1.1 Setup

The **Setup** section provides the controls needed to set up the standalone Bridge. When you first enter the Bridge tab the **Standalone Bridge** will show as Not Installed.

To install the standalone Bridge, click the Install Bridge button.

**Note**: In order to install the standalone Bridge, your FieldManager machine must be connected to the internet. The process installs the latest Bridge available.
An installed standalone Bridge is only available to the Windows user that installed it. If another Windows user logs into the same machine and wants the Bridge to cycle while they run FieldManager, then they would also need to first install the standalone Bridge.

If you need to uninstall the Bridge, click the Remove Bridge button. Removing the Bridge removes it only for the current Windows user.

Clicking the Get CMS ID button retrieves the unique FieldManager Database ID for your current database. FieldManager will give you the option to copy the Database ID to your clipboard. The FieldManager Database ID must be registered with the SYNC Service by e-mailing it to mobile.inspector@infotechfl.com. When registering, include an e-mail address designated to receive notifications about the Bridge’s activities.

19.1.2 Configuration

The Configuration section of the Bridge tab has only two options.

The checkbox option to Run standalone Bridge for current datasource indicates that you wish the Bridge to run against your current database. When checked, the Bridge will cycle silently in the background while you are running FieldManager against this database.

The other option is the Cycle every # minutes option which allows you to specify the number of minutes that elapses between Bridge cycles.

19.1.3 Log of Most Recent Cycle

The Log of Most Recent Cycle section shows the events that were created by the standalone Bridge during its last cycle with the current database.

19.2 Managing Info Tech Mobile Inspector with FieldManager

This section describes the Info Tech Mobile Inspector™-specific steps that must be taken in FieldManager in order to manage Mobile Inspector users. These steps will enable base contract data to be securely routed to the correct Mobile Inspector devices. These steps can be divided into two basic functions: Assigning Inspector Device IDs and Associating Inspectors to Contracts.

19.2.1 Assigning Inspector Device IDs

The Device ID is provided by the Mobile Inspector app and is unique to each instance of Mobile Inspector. In order for a Mobile Inspector device to work with FieldManager, its
Device ID must be assigned to the proper user (the Inspector using the mobile device) in FieldManager.

Only a FieldManager **System Administrator**, who has the security access to modify user information, will be able to enter and maintain an Inspector’s Device ID in FieldManager. Follow these steps to assign a Device ID to a FieldManager user:

1. Select Maintain Users from the Utilities | System Management sub-menu in FieldManager.

2. Open the Change User Information window for the Inspector as seen in the example below. Add the Inspector if he or she does not exist in FieldManager.

3. Enter the Device ID in the **Device 1 ID** field and select OK. Fields **Device 2 ID** and **Device 3 ID** can be used if the inspector is using more than device. Note that an inspector with multiple devices will not be able to share unsubmitted IDR data between devices.

**Important notes when assigning Inspector Device IDs:**

- Use caution when removing or changing a user’s Device ID. These actions will remove all contracts associated with this FieldManager database instance from that device and any unsubmitted IDR data on that device will be lost.

- A Device ID only needs to be assigned once to a FieldManager user (Inspector) in a FieldManager database instance. When this is complete, the inspector can be associated and disassociated to contracts as described in the next section. Note that a Device ID should not be assigned to multiple users in the same FieldManager database instance.
- A Device ID can be assigned in different FieldManager database instances. This allows the Inspector to use the same device to work with different FieldManager agency offices or organizations.

19.2.2 Associating Inspectors to Contracts

An Inspector with a Device ID assigned will receive contracts only if the user is also associated with one or more contracts in FieldManager. A user with a FieldManager User security level can follow these steps to associate Inspectors to contracts. This will allow the Inspector to receive contract data and submit new IDRs on that contract using their mobile device.

1. Select the Users tab on the Change Contract Documentation tabbed window for the contract as shown in the following example.

![Change Contract Documentation](image)

Figure 19-3. Change Contract Documentation

2. Use the Add User and Delete User buttons to manage the users that are assigned to the contract.


4. Repeat for each contract to be associated.

**Important notes when associating Inspectors to contracts:**

- Use caution when removing a user from a contract. This action will remove the contract from that user’s mobile device(s), and any unsubmitted IDR data on that device for this contract will be lost.
• If the inspector changes devices, such as to replace a device, only the Inspector’s Device ID needs to be updated, as the contract associations are tied to the user, rather than the Device ID.
## Appendix A: FieldManager Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ADD Button</strong></td>
<td>Located on the Window Toolbar, this button allows you to add a contractual element determined by the window name displayed on the Title Bar (for example, Items, Materials, IDR). Located within certain tab windows, and appended in name by various contractual elements (for example, Add Item, Add Posting, Add Site Event), this button allows you to add another of the currently selected element.</td>
</tr>
<tr>
<td><strong>ADD MORE Button</strong></td>
<td>Located within certain tab windows, this task-dependent button allows the user to add more of what is already being added (for example, item postings, material approvals, and material usage).</td>
</tr>
<tr>
<td><strong>ADD ROW Button</strong></td>
<td>Located within an advanced filter window, this button allows you to add an additional row of filter criteria at the bottom of the list of criteria rows. See also: Advanced Button.</td>
</tr>
<tr>
<td><strong>ADJUST TIME RECORDS Button</strong></td>
<td>Located within the SITE TIMES tab of the Change Daily Diary tab window, this button allows you to enter the number of days charged on available day contracts.</td>
</tr>
<tr>
<td><strong>ADVANCED Button</strong></td>
<td>Located within a filter window, this button opens an advanced filter window to allow the user to apply an advanced filter to the current list window.</td>
</tr>
<tr>
<td><strong>Agency Configuration Program</strong></td>
<td>A program that allows an agency to customize FieldManager software to adhere to that agency's specific regulations. It lets the agency choose from several options such as setting the allowable day charge increment, defining overrun payment rules, and establishing partial payment items. It even allows an agency to incorporate its own logo and report headers into FieldManager reports.</td>
</tr>
<tr>
<td><strong>Agency Master Reference Lists</strong></td>
<td>Five agency master reference lists are available in FieldManager software via the Utilities menu, one each for materials, items, vendors, codes (code tables), and percentage items. These lists are maintained by each agency. Agencies that do not implement the Materials functionality will not have materials listed in the Master Material Reference List.</td>
</tr>
<tr>
<td><strong>Allowable Quantity</strong></td>
<td>The unpaid placed quantity for an item that does not exceed the cap set by your agency.</td>
</tr>
<tr>
<td><strong>Application Toolbar</strong></td>
<td>Located in the far-left portion of the Application Window, this toolbar displays buttons that access FieldManager software’s functionality and specific contract information. The buttons available on this toolbar remain constant despite changes in the active window.</td>
</tr>
<tr>
<td><strong>APPLY Button</strong></td>
<td>Located in sort and advanced filter windows, this button applies the chosen sort order or filter to the current list window.</td>
</tr>
<tr>
<td><strong>APPROVE Button</strong></td>
<td>Located on the Window Toolbar, this button appears in conjunction with the Contract Modifications functionality, and is used to approve contract modifications.</td>
</tr>
<tr>
<td><strong>Archive Contract</strong></td>
<td>The procedure to remove a fully complete and closed contract from the FieldManager database and copy it to a designated historical area.</td>
</tr>
<tr>
<td><strong>Authorized Quantity</strong></td>
<td>The current contract quantity for an item. If an item has not been changed by contract modification, it is the original quantity in the bid proposal. If an item has been changed by contract modification, it is the result of the original contract quantity plus and minus all authorized changes.</td>
</tr>
<tr>
<td><strong>Automatic Payment Item</strong></td>
<td>An item that has a set schedule for payment can be designated as an automatic payment item (autopay item). FieldManager software, as well as other agency contract administration systems, automatically pays these items when designated thresholds are reached. Contract quantities on autopay items may not be changed, and supporting Inspectors’ Daily Reports are not necessary for these items. Payments for autopay items cannot be withheld once thresholds are crossed, nor may they be accelerated beyond the scheduled threshold limits.</td>
</tr>
<tr>
<td><strong>Autopay Item</strong></td>
<td>See Automatic Payment Item.</td>
</tr>
<tr>
<td>Term</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Available (Working) Day Site</td>
<td>A site for which the contractor must complete the contract work within a specific number of days. For this type of site, it is necessary for the project manager to keep track of the days charged to the contractor for the site.</td>
</tr>
<tr>
<td>Award Contract Amount</td>
<td>The dollar amount originally awarded for a contract.</td>
</tr>
<tr>
<td>Backup</td>
<td>The procedure to make a copy of the FieldManager or FieldBook database periodically to protect against accidental loss of the active FieldManager database. Most agencies have a specified schedule for backing up databases.</td>
</tr>
<tr>
<td>BACKUP Button</td>
<td>Located within the Backup Database window, this button allows you to save a FieldManager database backup.</td>
</tr>
<tr>
<td>BALANCE COMPLETED ITEMS Button</td>
<td>Located on the INC/DEC tab of the Add Contract Modification tab window, this button takes into account all completed items to create a balancing contract modification.</td>
</tr>
<tr>
<td>BALANCE QTY Button</td>
<td>Calculates the quantity to balance (Quantity Placed - Authorized Qty + Pending Changes). The value automatically displays in the Qty. Change (+/-) field.</td>
</tr>
<tr>
<td>Breakdowns</td>
<td>A facility in FieldManager software to accommodate items broken down into groups such as plan sheets, structures, or categories of work. Breakdown items are an agency option which are at their most effective when created during the plan development process, then downloaded to FieldManager software along with the contract, and then downloaded to the FieldBook component.</td>
</tr>
<tr>
<td>BRING IN TEMPERATURES Button</td>
<td>Located on the GENERAL tab of the Add Daily Diary tab window, this button brings into the Low Temperature and High Temperature fields information from inspectors’ reports for the Diary Date selected. The lowest reported temperature will display in the Low Temperature field, and the highest reported temperature will display in the High Temperature field.</td>
</tr>
<tr>
<td>BRING IN WEATHER AND COMMENTS Button</td>
<td>Located on the GENERAL tab of the Add Daily Diary tab window, this button brings into the Comments field any weather information and comments from inspectors’ reports for the Diary Date selected.</td>
</tr>
<tr>
<td>BROWSE Button</td>
<td>Located in certain import and transfer file windows, this button allows you to do a directory search to identify a desired file location.</td>
</tr>
</tbody>
</table>
**Calendar Day Site**  
A site for which the contractor must complete the contract work by a specified number of calendar days. FieldManager software automatically calculates progress on this type of site.

**CANCEL Button**  
Located in certain tab and modal windows, this button cancels the activity associated with the current window and closes that window.

**Category**  
A category is a subdivision of a project, with each category representing one or more related work items having the same funding sources. An item will have one or more associated categories.

**Category Description**  
A short description of a category’s purpose that designates the funding breakdown and details the specific responsible agency.

**Category Number**  
A unique identifier for a project category that functions as a link between the funding agency and the item.

**Central Office**  
The office that houses an agency’s central office contract administration system.

**CHANGE Button**  
Located on the Window Toolbar, this button allows you to change a contractual element determined by the window name displayed on the Title Bar (for example, Items, Materials, IDRs).

Located within certain tab windows, and appended in name by various contractual elements (for example, Change Item, Change Posting, Change Approval), this button allows you to change the currently selected element.

**Change Order**  
A written order issued by the engineer to the contractor, which covers permissible adjustments and minor plan changes or corrections and rulings with respect to omissions, discrepancies or intent of the plans and specifications, but does not include any extra work or other alterations that must be covered by a supplemental agreement.

**CHANGE SELECT Button**  
Located within certain inquiry windows, this button allows you to change the selection on which the inquiry information being viewed is based.

**Check Box**  
Located within certain tab windows, this is a square box that can be clicked on or off just as with light switches. When you click in a check box, an X or check mark displays in the box to indicate the option is selected. To deselect the box, simply click in the box again.
CLOSE Button  Located on the Window Toolbar and within the backup and restore database windows, this button closes the current window without saving any work completed in that window.

Located within an advanced filter window, this button closes the window without applying or saving the chosen filter.

Completion Date Site  A site for which the contractor must complete the contract work by a specified completion date. FieldManager software automatically calculates progress on this type of site.

Combine Outbox Files  The procedure to consolidate payment and/or contract modification files to assist with routing those files to and from your agency’s central office contract administration system. This procedure is unnecessary if your agency uses the FieldNet system to transfer contract files.

Construction Start Date  The date contract work begins.

CONT DOCU Button  Located on the Window Toolbar, this button appears in conjunction with the GENERAL tab of the Add Estimate, Add Contract Modification, and Change Contract Modification tab windows. When clicked, this button opens the Update Contract Documentation window in which to update contract documentation.

CONT MODS Button  Located on the Application Toolbar, this button opens the Contract Modifications list window, accessing FieldManager software’s Contract Modifications functionality.

Contract  A contract represents all the work awarded a contractor in a legal contract. A contract is made up of one or more projects. In FieldManager software, all progress is recorded at the contract level, and there are two different types of contracts: working contracts and read-only contracts.

Contract Description  A short overview of the types of work specified in the contract.

Contract Federal/State Project Number  The unique federal/state project number associated with a particular contract.

Contract ID  A unique identifier for a proposal or contract.

Contract Location  A short description of the primary location of the work for a contract.
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Locks</td>
<td>A menu option found within the Utilities menu and the System Management submenu that displays the Locked Contracts window allowing you to remove a lock that has been placed on a contract.</td>
</tr>
<tr>
<td>Contract Modification</td>
<td>A document that contains changes to a contract. It is used to add items to the contract, increase or decrease contract item quantities, add time extensions to the contract, and/or to make any other miscellaneous change to the contract, such as a wording change. Once approved, a contract modification cannot be modified or deleted.</td>
</tr>
<tr>
<td>Contract Modification Number</td>
<td>A unique identifier for a specific contract modification.</td>
</tr>
<tr>
<td>Contract Primary District</td>
<td>The primary area (district) in which a project is located.</td>
</tr>
<tr>
<td>Contract Site Number</td>
<td>A unique identifying number for a particular construction site. See Site Number.</td>
</tr>
<tr>
<td>Contractor</td>
<td>Someone who agrees to perform work or services for a specified price, especially for construction work. Includes all subcontractors as well as the prime contractor.</td>
</tr>
<tr>
<td>Contractor Read-only Contract</td>
<td>See Read-only contract.</td>
</tr>
<tr>
<td>CONTRACTS Button</td>
<td>This button only displays if the Contracts list window is closed. Clicking this button re-opens the Contracts list window.</td>
</tr>
<tr>
<td>Daily Diary</td>
<td>A contract-level record of the activities on the contract site for one day. In FieldManager software, the Daily Diary draws on information entered on IDRs for the same date. For available day sites, time is charged to a specific site through a Daily Diary entry.</td>
</tr>
<tr>
<td>Datasource</td>
<td>A client/server or standalone database instance.</td>
</tr>
<tr>
<td>Date of Estimate</td>
<td>The date an estimate was generated.</td>
</tr>
<tr>
<td>Date Open to Traffic</td>
<td>The date a specific contract site was opened to traffic.</td>
</tr>
<tr>
<td>Days Charged to Date</td>
<td>The days charged to a particular site to date.</td>
</tr>
<tr>
<td>Term</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>DELETE Button</strong></td>
<td>Located on the Window Toolbar, this button deletes the current selection. Located within certain tab windows, and appended in name by various contractual elements (for example, Delete Item, Delete Posting, Delete Site Event, Delete Diary Time Record), this button deletes the currently selected element(s).</td>
</tr>
<tr>
<td><strong>DELETE ROW Button</strong></td>
<td>Located within an advanced filter window, this button allows you to delete a selected row of filter criteria.</td>
</tr>
<tr>
<td><strong>DIARIES Button</strong></td>
<td>Located on the Application Toolbar, this button opens the Daily Diaries list window, accessing FieldManager software’s Daily Diaries functionality.</td>
</tr>
<tr>
<td><strong>DOCU Button</strong></td>
<td>Located on the Application Toolbar, this button opens the Change Contract Documentation tab window, allowing you to alter a specific contract’s documentation information.</td>
</tr>
<tr>
<td><strong>Draft Document</strong></td>
<td>A document in FieldManager software that is in an ungenerated state.</td>
</tr>
<tr>
<td><strong>Drop-down List Box</strong></td>
<td>A text box with an accompanying arrow to the right of the field that the user can click to obtain a list of valid values for the field from which to choose.</td>
</tr>
<tr>
<td><strong>Earnings to Date</strong></td>
<td>The total amount earned to date on a contract or project.</td>
</tr>
<tr>
<td><strong>Engineer</strong></td>
<td>A unique identifier indicating the engineer in charge of the district, area office, residency, or field office.</td>
</tr>
<tr>
<td><strong>Equipment</strong></td>
<td>Any mechanical tool or contrivance that must be bought, rented, or leased.</td>
</tr>
<tr>
<td><strong>Estimate</strong></td>
<td>A contract-level listing of item progress payments (one or more voucher payments) owed to the contractor. Information from the estimate may be loaded into a central office contract administration system and used to generate vouchers.</td>
</tr>
<tr>
<td><strong>ESTIMATES Button</strong></td>
<td>Located on the Application Toolbar, this button opens the Estimates list window, accessing FieldManager software’s Estimates functionality.</td>
</tr>
<tr>
<td><strong>Event</strong></td>
<td>Any worthy-of-note instance that takes place at a particular time (for example, an accident at the contract site).</td>
</tr>
</tbody>
</table>
**EXITFLDMGR Button**  This button only displays if the Contracts list window is closed. Clicking this button shuts down the FieldManager software application.

**EXPORT-FB Button**  Located on the Window Toolbar, this button allows the user to export contracts to the FieldBook component.

**Federal/State Project Number**  The federal or state project number identifying a particular project.

**Field Office**  The office that houses the FieldManager software system.

**FieldBook**  Primarily the IDR functionality from the FieldManager module. Inspectors run the FieldBook component on laptop computers to record information in the field for exporting to the FieldManager module.

**FieldBuilder**  FieldBuilder is used for the initial setup of an entire contract. It does not communicate interactively with FieldManager software in the same way as many agencies’ central office contract administration systems; however, with FieldBuilder you can create and modify contract structure and detail information for projects, categories, contract items, and contract sites. In addition, you can use FieldBuilder to maintain your agency’s master item list, vendor list, material list, item material association list, and FieldManager code table.

**FieldManager**  A PC-based system for documenting construction progress, initiating contractor payment, and communicating with your agency’s central office contract administration system.

**FieldNet**  The communication link between FieldManager software applications. The FieldNet system functions as an E-mail utility, allowing the user to easily transfer and receive files. In addition, supervisors can use the FieldNet system to approve or deny contract modifications and estimates.

**FILTER Button**  Located on the Window Toolbar and within certain modal list windows, this button allows the user to filter the records in the current list window.
Final Estimate

The last estimate created for a contract before that contract is closed. The final estimate takes into account all of the information necessary to close out the contract, including item, material, IDR, Daily Diary, contract modification, and stockpile information. Once you have created a final estimate, FieldManager software automatically marks the contract as closed.

Find Text Box

A text box found in the top left corner of most list windows used to advance to a specific record. While entering the first few numbers or letters of the value for the field identified in the text box label, the highlight in the list window advances to the first record in the list that matches the information specified for the field.

FINISH Button

Located within the Stockpile Wizard, this button saves the work completed on a stockpile and closes the Stockpile Wizard.

Force Account

A force account is an item of work that the SHA (State Highway Agency) pays at the contractor’s cost rather than at a bid price. The cost is determined by the materials, labor, and equipment the contractor actually uses to perform the work plus state-specified allowances for overhead and profit. The cost of labor and equipment are usually determined from state-specified schedules rather than the contractor’s actual payments.

Force account items are typically used when there is too much uncertainty in the work involved in the item for it to be bid knowledgeably. Examples include utilities relocation and toxic waste removal. Because the item is paid at cost, the unit of measure is dollars; therefore, force account items are often estimated as if they were lump sum. Because a force account is not a bid item, it is not passed to your agency’s central office contract administration system, and therefore requires a contract modification approved for payment.

Generate

In the FieldManager module and the FieldBook component, the term used for the process of finalizing a document such as an IDR, Daily Diary, estimate, or contract modification. It is equivalent to final completion of the document. Prior to being generated, a document is considered to be only a “draft” version. Only items in generated IDRs will be considered for payment and only time charges in generated Daily Diaries will be charged against the site time. In general, a generated document can still be changed with certain exceptions; however, it will revert to non-generated status when changed.
<table>
<thead>
<tr>
<th><strong>GENERATE Button</strong></th>
<th>Located on the Window Toolbar, this button is used to generate selected IDRs, Daily Diaries, estimates, and contract modifications.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GET MAIL Button</strong></td>
<td>Located on the Window Toolbar in conjunction with the FieldNet Mail Box window, this button retrieves and displays any mail messages received since the button was last invoked.</td>
</tr>
<tr>
<td><strong>HELP Button</strong></td>
<td>Located in certain modal windows, this button accesses FieldManager software’s Online Help, which offers instruction on performing various tasks in FieldManager software.</td>
</tr>
<tr>
<td><strong>IDRs Button</strong></td>
<td>Located on the Application Toolbar, this button opens the Inspector’s Daily Reports list window, accessing FieldManager software’s IDRs functionality.</td>
</tr>
<tr>
<td><strong>IMPORT-FB Button</strong></td>
<td>Located on the Window Toolbar, this button allows the user to import IDRs from the FieldBook component.</td>
</tr>
<tr>
<td><strong>INQUIRIES Button</strong></td>
<td>Located on the Application Toolbar, this button opens the Inquiries list window, accessing FieldManager software’s Inquiries functionality.</td>
</tr>
<tr>
<td><strong>Inquiry</strong></td>
<td>In both the FieldManager module and the FieldBook component, a brief view of contract information which may be accessed at almost any time while the contract is being processed. An inquiry is a “snapshot” of the status of contract information at the current time. An inquiry can be printed if desired.</td>
</tr>
<tr>
<td><strong>INSERT ROW Button</strong></td>
<td>Located within an advanced filter window, this button allows you to insert an additional row of filter criteria above the currently selected criteria row.</td>
</tr>
<tr>
<td><strong>Inspector</strong></td>
<td>The agent in the field who reports on construction contract progress.</td>
</tr>
<tr>
<td><strong>Inspector's Daily Report (IDR)</strong></td>
<td>The basic FieldManager or FieldBook document for recording item quantities, contractor personnel and equipment, comments, and, in agencies implementing the Materials functionality, material usage. IDRs can be created and generated in the FieldBook component by an inspector and then imported into FieldManager software, or they can be created and generated directly in FieldManager software.</td>
</tr>
<tr>
<td><strong>Insufficient Material</strong></td>
<td>The condition that exists, if the Materials functionality has been implemented by an agency, for a contract when a cumulative material quantity used for an item(s) exceeds the approved material quantity.</td>
</tr>
<tr>
<td><strong>Item</strong></td>
<td>The smallest unit of work identified within a project. Items can represent biddable work or non-biddable work, such as rights-of-way and force accounts. Groups of items can be defined to represent alternate design possibilities and the quantity of work for an item can be divided across multiple categories within a project.</td>
</tr>
<tr>
<td><strong>Item Awarded Quantity</strong></td>
<td>The original quantity of work specified for an item when the contract was awarded.</td>
</tr>
<tr>
<td><strong>ITEM Button</strong></td>
<td>Located within the POSTINGS tab of the Add IDR and Change IDR tab windows, this button is used to return to the Items Posting area of the POSTINGS tab after reviewing the material usage for an item.</td>
</tr>
<tr>
<td><strong>Item Code</strong></td>
<td>The identifier assigned to a work item as defined in the agency specifications and listed in the Agency Master Item List.</td>
</tr>
<tr>
<td><strong>ITEM DOC Button</strong></td>
<td>Located on the Window Toolbar, this button appears in conjunction with the INC/DEC and NEW ITEMS tabs of the Add Contract Modification and Change Contract Modification tab windows. It also appears in conjunction with the ITEM USAGE tab of the Add Estimate tab window, and the POSTINGS tab of the Add IDR and Change IDR tab windows. When clicked, this button opens a window in which to update item documentation.</td>
</tr>
<tr>
<td><strong>Item Price</strong></td>
<td>The unit price of an item.</td>
</tr>
<tr>
<td><strong>Item Quantity</strong></td>
<td>The number of units of work to be performed for an item.</td>
</tr>
<tr>
<td><strong>Item Supplemental Description</strong></td>
<td>Typically used in the case of a non-standard item, this is additional project-specific descriptive information for a project item.</td>
</tr>
<tr>
<td><strong>ITEMS Button</strong></td>
<td>Located on the Application Toolbar, this button opens the Items list window, accessing FieldManager software’s Items functionality.</td>
</tr>
<tr>
<td><strong>List Window</strong></td>
<td>A window which displays a list of records with which to work. Typically, list windows only display the most important information about each record displayed.</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>A short, two-line description of the primary location of the work for the proposal. The project location may be printed on some reports from your agency’s central office contract administration system, but is not used in any processing.</td>
</tr>
</tbody>
</table>
Lump Sum Item: An item with a single price for a clearly defined amount of work. Unlike typical work items, a lump sum item is not associated with a specific quantity. However, FieldManager software requires a quantity for each item, so the quantity of one is used to indicate there is a single price for the work item. This quantity cannot be modified.

MAIL REQUEST Button: Located in the Reference Request to FieldNet window, which is accessed via the Utilities menu, this button can either mail a request to the FieldNet system for an agency’s most recent set of reference files, or it can request that the agency create and forward an updated reference file at the time the request is received.

Maintain Material Files/Forms/Sources: A menu option found within the Utilities menu that displays the Material Files/Forms/Sources window. Within this window you can add, change, and delete material files, forms, and sources.

Maintain Users: A menu option found within the Utilities menu and the System Management submenu that displays the Users window allowing you to add, change, and delete information about a user.

Material: Any quantifiable physical entity that is consumed in the performance of an item of work.

Material Allowance: The amount paid for stockpiled materials on a contract.

Material Allowance Unit Price: The unit price of a stockpiled material.

Material Type: An identifier indicating the kind of material being stockpiled.

Material Usage: The quantity of a specific material used in an item quantity placed. Posting of material usage is only required when an agency has implemented the Materials functionality.

MATERIALS Button: Located on the Application Toolbar, this button opens the Materials list window, accessing FieldManager software’s Materials functionality.

Located within the POSTINGS tab of the Add IDR and Change IDR tab windows, this button, when enabled, accesses material usage information for the item being posted on the IDR.
Materials Functionality
The functionality in FieldManager software for controlling payment for item quantity by sufficiency of material tests or certifications. Implementation of the Materials functionality is an agency option. If the Material functionality is not implemented by an agency, there is no requirement for associating materials with items on the MATERIALS tab of the Items functionality in FieldManager software or for posting materials usage on the POSTINGS tab of the IDRs functionality.

Menu Bar
Located in the upper portion of the Application Window, this bar contains names to click on to display drop-down lists of commands (for example, File, Edit, View, Utilities).

Modal Window
This type of window requires a response before continuing in the application.

Modification Amount
The dollar amount of a contract modification.

MORE Button
Located within a sort window, this button allows the user to add more criteria by which to sort the current list window.

Net Payment
The total amount to pay the contractor for a project, which equals the estimate amount minus any withholdings (for example, liquidated damages, retainage).

NETWORK Button
Located within certain import and transfer file windows, this button allows you to map a network drive to your computer so that a network navigational path may be chosen.

New Completion Date
The new approved date for a time extension.

New Number of Days
Only applicable to available and calendar day sites, this is the new total number of days of site work as specified in a time extension.

NEXT Button
Located within certain tab windows and the Stockpile Wizard, this button allows the user to move to the subsequent item, material, or step.

NEXT PAGE Button
Located within certain view and inquiry windows, this button allows the user to see the next page of a multi-page document.

Notice to Proceed
The written notice to the contractor to proceed with the contract work including, when applicable, the date contract time begins.
<table>
<thead>
<tr>
<th><strong>Notice to Proceed Date</strong></th>
<th>The date the contractor was notified that work could begin on a contract.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of Days</strong></td>
<td>The number of calendar days that are available for completion of a contract site.</td>
</tr>
<tr>
<td><strong>Number of Days Charged</strong></td>
<td>The number of days charged to a site.</td>
</tr>
<tr>
<td><strong>Original Number of Days</strong></td>
<td>The original number of days that was specified for a site when the contract was awarded.</td>
</tr>
<tr>
<td><strong>Original Specified Completion Date</strong></td>
<td>The original completion date that was specified for a site when the contract was awarded.</td>
</tr>
<tr>
<td><strong>Pay Estimate</strong></td>
<td>The amount the contractor will be paid for the estimated work performed on the contract during a given pay period. The pay estimate is based on item progress and adjustments made for various reasons. FieldManager software’s Pay Estimate Report lists this information.</td>
</tr>
<tr>
<td><strong>Payment Adjustment 1,2,3</strong></td>
<td>The total adjustments of each type applied to contract project payments to date.</td>
</tr>
<tr>
<td><strong>Payment Quantity</strong></td>
<td>The quantity of a category item that will be paid for in a specific pay estimate.</td>
</tr>
<tr>
<td><strong>Pending Change</strong></td>
<td>The quantity for a work item on currently pending (not yet approved) contract modifications. When the contract modification is approved in FieldManager software, the pending quantity is added to the authorized quantity.</td>
</tr>
<tr>
<td><strong>Percent Complete (Earnings)</strong></td>
<td>The percentage of the contract that is complete on the basis of contract earnings.</td>
</tr>
<tr>
<td><strong>Percent Complete Threshold</strong></td>
<td>A percent of contract completion that determines if an item should be paid automatically.</td>
</tr>
<tr>
<td><strong>Percent of Quantity Paid</strong></td>
<td>The percentage of the current item quantity to be paid to date at an automatic payment threshold.</td>
</tr>
<tr>
<td><strong>Percentage Item</strong></td>
<td>In FieldManager software, a special class of item with a prescribed payment schedule, usually pre-defined in agency specifications. Mobilization and Traffic Control are examples of items that often have a prescribed payment schedule. FieldManager software accommodates such items, and also allows the user to override the prescribed payment schedule during the estimate preparation process.</td>
</tr>
</tbody>
</table>
**Personnel**
The personnel on site for a day. Used in the IDR functionality.

**Posting**
The generic term for recording item quantity placed. This term is also used for recording material test approvals and usage where the agency has implemented the Materials functionality.

**Post Final Estimate**
An estimate created for a contract after that contract has been closed via a final estimate. To produce a *post final estimate* for a contract, you must first re-open the contract in FieldManager software.

**PREV Button**
Located within certain tab windows and the Stockpile Wizard, this button allows the user to move to the prior item, material, or step.

**PREVIOUS PAGE Button**
Located within certain view and inquiry windows, this button allows the user to see the previous page of a multi-page document.

**Primary District**
The *primary district* in which the work for a contract or project will be performed.

**Prime Contractor**
The *prime contractor* is the *contractor* who is the winning bidder for a contract and is responsible for overseeing the contract and making sure the work is complete based on contract specifications. *Prime contractors* hire *subcontractors* to work on a contract.

**PRINT Button**
Located on the Window Toolbar, this button may be used to print inquiries, reports, and list window contents.

**PROCESS/VIEW Button**
Located on the Window Toolbar in conjunction with the FieldNet Mail Box window, this button first determines the nature of selected incoming messages, and then it appropriately processes and allows you to view those messages.

**Project**
A project represents all work identified by a single project number. It is the level at which payment vouchers are produced. One or more projects make up a contract.

**Project Control Number**
A unique number or alphanumeric that identifies a particular project.

**Project Description**
Two lines of data you enter to create a short description of the project. This description is printed on some reports from your agency’s central office contract administration system.
<table>
<thead>
<tr>
<th><strong>Project Item Sequence Number</strong></th>
<th>A unique sequential identifier for an item within a project.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Line Number</strong></td>
<td>See <em>Project Item Sequence Number</em>.</td>
</tr>
<tr>
<td><strong>Project Number</strong></td>
<td>See <em>Project Control Number</em>.</td>
</tr>
<tr>
<td><strong>Proposal Line Number (Propline)</strong></td>
<td>The line number assigned to each work item in the bid proposal.</td>
</tr>
<tr>
<td><strong>Qualified/Certified Product</strong></td>
<td>A material that is pre-approved for use on the site so test reports are not needed. Qualified/certified product usage can still be tracked with FieldManager software even though approvals are not an issue.</td>
</tr>
<tr>
<td><strong>Quantity Allowed</strong></td>
<td>See <em>Allowable Quantity</em>.</td>
</tr>
<tr>
<td><strong>Quantity Change</strong></td>
<td>An increase or decrease to a category item's authorized quantity as specified by a change order.</td>
</tr>
<tr>
<td><strong>Quantity Placed</strong></td>
<td>The quantity posted to an item.</td>
</tr>
<tr>
<td><strong>Quick Query Fly-out Toolbar Button</strong></td>
<td>Located on the Window Toolbar, this changeable button accesses the inquiry currently displayed as its label. Clicking on the down arrow beside this button displays “fly-out” buttons for accessing other specific inquiries appropriate to the active window. The default setting for this button is <em>Cont Status</em>, for the Contract Status inquiry; however, if you select another inquiry, that inquiry will show on the button instead of the Cont Status inquiry.</td>
</tr>
<tr>
<td><strong>Radio Button</strong></td>
<td>Located within certain tab windows, this is a circular recessed button that can be clicked in to make a restricted selection. When you click in a radio button, the circle is filled to indicate that the option is selected.</td>
</tr>
</tbody>
</table>
| **Read-only Contract** | A copy of a contract in FieldManager software that may be viewed but not modified. There are two types of read-only contracts:

A **regular read-only copy** of a contract is an unmodifiable copy of the contract that contains all contract information.

A **contractor read-only copy** of a contract is an unmodifiable copy of a contract that has confidential or inappropriate information removed by the owning agency. The contractor read-only can refer to the electronic file created that would be loaded into FieldManager software or it can refer to the contract after it has been loaded into FieldManager software. Both are considered read-only copies.

When a read-only contract is selected, an **R/O** or **Contractor R/O** notation (depending on type) will appear in the Title Bar of all windows. |
<p>| <strong>Recovery Factor</strong> | In FieldManager software's Stockpiles functionality, the dollar amount that a stockpile payment will be recovered per unit of item paid. To assign an item to a stockpile, yet postpone the effect of the stockpile on item payment, specify a $0 recovery factor. If a recovery factor is specified, the recovery quantity will automatically display when exiting the Recovery Factor field. |
| <strong>Recovery Quantity</strong> | In FieldManager software's Stockpiles functionality, the number of units of an item that you want to use to recover the stockpile payment. This number must fall within a range of fastest and slowest values set by FieldManager software. If a recovery quantity is specified, the recovery factor will automatically display when exiting the Recovery Quantity field. |
| <strong>Regular Read-only Contract</strong> | See Read-only contract. |
| <strong>REMOVE LOCK Button</strong> | Located within the Locked Contracts window, accessed via the Utilities menu, this button is not typically enabled; however, if a contract is locked within FieldManager software, this button may be used to unlock it, making the contract available for revision. Before removing a lock from a contract, consult your system administrator to ensure that you are taking the proper action. |
| <strong>RESET Button</strong> | Located within a sort window, this button returns the chosen sort criteria to their previous settings. |</p>
<table>
<thead>
<tr>
<th><strong>RESET SETTINGS</strong>&lt;br&gt;<strong>Button</strong></th>
<th>Located within the <strong>LIST WINDOW</strong> tab of the User Preferences tab window, which is accessed via the Utilities menu, this button resets all window displays back to their original settings in terms of column order, column width, and sort order.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Restore</strong></td>
<td>The process of restoring through backup a FieldManager or FieldBook database after accidental loss of the database.</td>
</tr>
<tr>
<td><strong>RESTORE Button</strong></td>
<td>Located in the Restore Database window, this button allows you to restore a FieldManager database.</td>
</tr>
<tr>
<td><strong>RESTORE DATABASE</strong>&lt;br&gt;<strong>Button</strong></td>
<td>Located in the FieldBook component’s Import Contracts window, this button makes it possible to restore a FieldBook database on a different computer than the one where the database originated.</td>
</tr>
<tr>
<td><strong>REVIEW Button</strong></td>
<td>Located on the Window Toolbar, this button allows you to review a contractual element determined by the window name displayed on the Title Bar (for example, IDR, Items, Estimates).</td>
</tr>
<tr>
<td><strong>REVIEW/CHANGE Button</strong></td>
<td>Located on the lower portion of the <strong>ITEM USAGE</strong> tab of the Add Estimate tab window, this button allows you to review the item usage by category, and to review insufficient materials for an item. It also allows you to change the Quantity this Estimate for item usage by category.</td>
</tr>
<tr>
<td><strong>SAVE Button</strong></td>
<td>Located on the Window Toolbar, this button saves all work completed in a window without closing that window.</td>
</tr>
<tr>
<td></td>
<td>Located within an advanced filter window, this button saves the chosen filter so that it may readily be used again.</td>
</tr>
<tr>
<td><strong>SAVE/CLOSE Button</strong></td>
<td>Located on the Window Toolbar, this button saves all work completed in a window and then closes that window.</td>
</tr>
<tr>
<td><strong>Section</strong></td>
<td>A section represents an informal grouping of proposal work items. Sections are created by grouping all items of the same work type. FieldManager software does not rely on this type of grouping to organize items, but it does allow for the use of sections to define item groups.</td>
</tr>
<tr>
<td><strong>SELECT Button</strong></td>
<td>Located within certain modal list windows, this button allows the user to make a selection upon which the activity in the following window will be based.</td>
</tr>
<tr>
<td><strong>SELECT ALL Button</strong></td>
<td>Located within certain modal list windows, this button allows the user to select all the listed elements, and the activity in the following window will be based upon that selection.</td>
</tr>
</tbody>
</table>
SEND OUTBOX Button
Located on the Window Toolbar in conjunction with the FieldNet Mail Box window, this button sends all files located in your outbox to the FieldNet system.

SET AGENCY NAME/LOGO Button
Located within the GENERAL tab of the Change Contract Documentation tab window, this button allows the user to specify an agency name and logo to be displayed on any inquiries or reports for the selected contract.

SHOW ALL Button
Located within a filter window, this button removes any filter which has been applied so that all records in the current list window will display.

Site
Proposal sites represent work locations for which time charges are accrued. The default situation is for a single site of time charges to be accrued on the contract as a whole; however, if several project entities (for example, bridges) are to be constructed as part of a single contract, each project entity can be treated as a separate site to assign completion time and assess liquidated damages.

Site Description
A short description of the proposal site.

Site Event
Located on the Change Contract Documentation tab window, this button offers a facility the ability to document major events that occur on a site.

Site Number
A unique identifying sequence number for each site. Each contract must have a Site 00 representing the contract as a whole in addition to any other sites.

Site Time
The time allowed by the contract for performing work on the contract. Often, the contract will also specify intermediate times for performing specific stages, or subdivisions, of the work. When this occurs, FieldManager software will display site time for the overall contract and for each intermediate time specified in the contract.

SORT Button
Located on the Window Toolbar, this button allows the user to sort the records in the current list window.

Spec Year
See Specification Book Year.
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specification Book Year</td>
<td>Because an agency’s central office contract administration system will contain projects that were designed at different times, the reference information about each item (such as description and unit) cannot be changed since doing so would change the meaning of projects already in progress. Instead, entirely new reference item lists can be created when needed. These lists are identified by a &quot;spec year.&quot;</td>
</tr>
<tr>
<td>Specification Year</td>
<td>See Specification Book Year.</td>
</tr>
<tr>
<td>Specified Completion Date</td>
<td>The projected date when work will be completed for a given site.</td>
</tr>
<tr>
<td>Specified Start Date</td>
<td>The projected date when work will be started at a given site.</td>
</tr>
<tr>
<td>SPELLCHECK Button</td>
<td>Located on the Window Toolbar, this button activates FieldManager software’s spell check utility, which examines the current tab window for every modifiable text field that contains information.</td>
</tr>
<tr>
<td>Status Area</td>
<td>Various types of status areas detailing information on a selected record may display in FieldManager software depending on the functionality of the associated tab window (for example, Item Status Area, Stockpile Status Area, and so on). Text in blue within a status area cannot be modified.</td>
</tr>
<tr>
<td>Status Bar</td>
<td>Located in the lower portion of the Application Window, this bar changes as the user performs various tasks, displaying helpful information about FieldManager software’s various functionality.</td>
</tr>
<tr>
<td>Stockpile</td>
<td>Material stockpiled at an approved location for later incorporation into the work for which payment has been advanced to the contractor in accordance with agency specification. Such advanced payments must be recovered as work on the item is paid for.</td>
</tr>
<tr>
<td>STOCKPILES Button</td>
<td>Located on the Application Toolbar, this button opens the Stockpiles list window, accessing FieldManager software’s Stockpiles functionality.</td>
</tr>
<tr>
<td>Subcontractor</td>
<td>An individual, firm, or corporation to which the prime contractor sublets part of a contract. Any contractor who is not the prime contractor.</td>
</tr>
<tr>
<td>Supplemental Description</td>
<td>See Item Supplemental Description.</td>
</tr>
<tr>
<td><strong>System Configuration</strong></td>
<td>A menu option found within the Utilities menu and the System Management submenu that displays the System Configuration tab window, allowing you to adjust the system configuration settings.</td>
</tr>
<tr>
<td>-------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Tab Window</strong></td>
<td>A type of window that contains dividing tabs, and which provides details about a record, allows a record’s data to be changed, and allows new records to be created.</td>
</tr>
<tr>
<td><strong>TEST CONFIGURATION Button</strong></td>
<td>Located within the FIELDNET tab of the System Configuration window, which is accessed via the Utilities menu, this button allows the user to check to be sure a computer is properly set up to send and receive FieldNet messages.</td>
</tr>
<tr>
<td><strong>Threshold Percent</strong></td>
<td>The percentage of work completed for a contract at which a given event should occur.</td>
</tr>
<tr>
<td><strong>Time Charge</strong></td>
<td>For an available day contract, this is the time charged for a given pay period.</td>
</tr>
<tr>
<td><strong>Time Charges Start Date</strong></td>
<td>The date time charges began accruing. This value must be documented for each site specified in the contract so that liquidated damages may be properly computed.</td>
</tr>
<tr>
<td><strong>Time Charges Stop Date</strong></td>
<td>The date time charges were stopped. This value must be documented for each site specified in the contract so that liquidated damages may be properly computed.</td>
</tr>
<tr>
<td><strong>Time Extension</strong></td>
<td>A type of contract amendment modifying (usually increasing) the time a contractor can work on a contract without incurring a penalty. A time extension must be approved through the Contract Modification process.</td>
</tr>
<tr>
<td><strong>Title Bar</strong></td>
<td>Located in the upper portion of the Application Window, this bar contains standard Windows controls for minimizing, maximizing, and closing the current window.</td>
</tr>
<tr>
<td><strong>Type of Days</strong></td>
<td>An identifier indicating whether contract time is based on available days, calendar days, or a completion date.</td>
</tr>
<tr>
<td><strong>Type of Item</strong></td>
<td>An identifier indicating the kind of item being paid (for example, original item, force account, or supplemental agreement).</td>
</tr>
<tr>
<td><strong>Type of Vendor</strong></td>
<td>An identifier indicating the classification of the vendor.</td>
</tr>
<tr>
<td><strong>Unattached Item</strong></td>
<td>A new item that is available for day-to-day posting, but that has not yet been associated with a contract through a contract modification.</td>
</tr>
<tr>
<td>Term</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Unit of Measure</strong></td>
<td>An identifier indicating the type of measurement used to determine the units of the item.</td>
</tr>
<tr>
<td><strong>Vendor</strong></td>
<td>The vendor file of your agency’s central office contract administration system is used to maintain information about contractors, subcontractors, suppliers, surety companies, surety agents, and escrow agents. It can also be used to store information on counties, municipalities, and utilities that perform relevant work.</td>
</tr>
<tr>
<td><strong>Vendor Name (Long)</strong></td>
<td>The vendor name (long description).</td>
</tr>
<tr>
<td><strong>Vendor Name (Short)</strong></td>
<td>The vendor name (short description).</td>
</tr>
<tr>
<td><strong>Vendor Number</strong></td>
<td>A unique identifier for a vendor.</td>
</tr>
<tr>
<td><strong>VIEW Button</strong></td>
<td>Located on the Window Toolbar, this button allows you to view a selected inquiry.</td>
</tr>
<tr>
<td><strong>Voucher</strong></td>
<td>A project-level listing of item progress payments owed to the contractor. It is the vehicle for payment to the contractor. The voucher is produced by a central office voucher generation program based on the estimate data from FieldManager software.</td>
</tr>
<tr>
<td><strong>Voucher Number</strong></td>
<td>The sequential identifier for a progress payment voucher.</td>
</tr>
<tr>
<td><strong>Voucher Status</strong></td>
<td>An identifier indicating how often a voucher is produced (for example, semi-monthly, monthly, semi-final, or final).</td>
</tr>
<tr>
<td><strong>Window Toolbar</strong></td>
<td>Located in the upper portion of the Application Window, this toolbar shows the commands that may be invoked for the active window. The buttons available on this toolbar change depending on the window chosen.</td>
</tr>
<tr>
<td><strong>Working Contract</strong></td>
<td>A copy of a contract in FieldManager software that may be modified. Among all computers running FieldManager software, there may only be one working copy of a contract.</td>
</tr>
<tr>
<td><strong>ZOOM IN Button</strong></td>
<td>Located in certain view and inquiry windows, this button increases the size of the text in the window while decreasing the amount of the document displayed.</td>
</tr>
<tr>
<td><strong>ZOOM OUT Button</strong></td>
<td>Located in certain view and inquiry windows, this button increases the amount of the document displayed while decreasing the size of the text in the window.</td>
</tr>
</tbody>
</table>
Appendix B: Fields and Options Requiring a System Administrator Security Level

You must have been assigned a security level of System Administrator to change the values of these fields and options in FieldManager software.

<table>
<thead>
<tr>
<th>Field/Option</th>
<th>Menu Option</th>
<th>Window</th>
<th>Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restore</td>
<td>File</td>
<td>Restore Database from Backup</td>
<td>Backup List</td>
</tr>
<tr>
<td>Retrieve from Disks</td>
<td>File</td>
<td>Restore Database from Backup</td>
<td>Backup List</td>
</tr>
<tr>
<td>Cont Mod Signature Block Text</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>Cont Mod Signs</td>
</tr>
<tr>
<td>Cont Mod Signature Labels</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>Cont Mod Signs</td>
</tr>
<tr>
<td>Include FHWA Block</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>Cont Mod Signs</td>
</tr>
<tr>
<td>Amount Balance Report Sort</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>Estimates</td>
</tr>
<tr>
<td>Block Text</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>Estimates</td>
</tr>
<tr>
<td>Estimate Signature Block Text</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>Estimates</td>
</tr>
<tr>
<td>Estimate Signature Labels</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>Estimates</td>
</tr>
<tr>
<td>Pay Estimate Report Sort</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>Estimates</td>
</tr>
<tr>
<td>Archive Location</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>FieldNet Account</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>FieldNet Address</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>From Address</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>Password</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>POP3 Server Name</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>SMTP Server Name</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>Test FieldNet</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>Use FieldNet</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>Verification</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>Create Electronic Files</td>
<td>---</td>
<td>Change Contract Documentation</td>
<td>General</td>
</tr>
<tr>
<td>StandAlone Contract</td>
<td>---</td>
<td>Change Contract Documentation</td>
<td>General</td>
</tr>
<tr>
<td>Agency Logo</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>General</td>
</tr>
<tr>
<td>Field/Option</td>
<td>Menu Option</td>
<td>Window</td>
<td>Tab</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------------------------------</td>
<td>----------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Agency Name</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>General</td>
</tr>
<tr>
<td>Proposal Line Increment</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>General</td>
</tr>
<tr>
<td>Quantity Overruns</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>General</td>
</tr>
<tr>
<td>Report Format</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>General</td>
</tr>
<tr>
<td>Attachments Location</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>Contract Archive Location</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>District Number</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>Inbox Location</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>Outbox Location</td>
<td>Utilities</td>
<td>System Management</td>
<td>System Configuration</td>
</tr>
<tr>
<td>Reset Settings</td>
<td>Utilities</td>
<td>User Preferences</td>
<td>List Window</td>
</tr>
<tr>
<td>Remove Lock</td>
<td>Utilities</td>
<td>System Management</td>
<td>Contract Locks</td>
</tr>
<tr>
<td>Restore Default Options</td>
<td>Change Contract Documentation</td>
<td>Contract Level Settings</td>
<td>N/A</td>
</tr>
<tr>
<td>File Load</td>
<td>Utilities</td>
<td>System Management</td>
<td>Load Agency</td>
</tr>
<tr>
<td>Password</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>Phone No</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>Re-Enter Password</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>Security Level</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>User ID</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>User Initials</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>User Name (First)</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>User Name (Last)</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>User Name (MI)</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>Add</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>Change</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>Delete</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>Print</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
<tr>
<td>Review</td>
<td>Utilities</td>
<td>System Management</td>
<td>Maintain Users</td>
</tr>
</tbody>
</table>
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