

# FieldManager Cookbook Table of Contents

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## **FieldManager Cookbook**

(Version 5.0a)

### Adding a New User

*You must be logged in as a system administrator to add a user*

1. Click Utilities > System Management > Maintain Users
2. Click the Add button
3. Enter the appropriate information
4. Click OK
5. Repeat Steps 2 through 4 for additional users

### Changing User Information

*You must be logged in as a system administrator to change user information*

1. Click Utilities > System Management > Maintain Users
2. Highlight the appropriate name
3. Click the Change button
4. Change the appropriate information
5. Click OK

### Deleting a User

*You must be logged in as a system administrator to delete a user*

1. Click Utilities > System Management > Maintain Users
2. Highlight the appropriate name
3. Click the Delete button
4. Answer Yes to the "Are you sure" question

### Changing Your Password

*Passwords must be a minimum of 5 characters*

*Passwords must be changed every 60 days.*

1. Click Utilities > Change Password
2. Type in your current password
3. Type in your new password
4. Type in your new password again
5. Click OK

### Setting Preferences

1. Click Utilities > User Preferences
2. General tab - Enter a default user ID if you desire and also determine whether you want a checkmark in the Warn User When Exiting Application option. Do not change the default backup location.
3. Window Settings tab - Put checkmarks in all 4 options
4. Entry Defaults tab - Remove checkmarks from all options
5. Make no changes on the Import, Export, and Toolbar tabs
6. Inquiries tab – Decide how you want to view inquiries. Proposal Line will probably be your choice.
7. Click OK

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### Loading (Importing) a Contract From **Your** Office

1. Click File > Import > File
2. Select the appropriate drive and folder
3. Switch List files of type to All Files(\*.\*) or Contract Files(\*.\*)
4. Highlight the file name
5. Click Open

### **DOCU BUTTON**

#### Entering the Managing Office

*This must be entered before generating a cont mod or creating an estimate*

1. Click the Docu button > General tab
2. Type in the Managing Office field  
(This will probably be the same or similar to the Resident Engineer field on the Administrators tab.)
3. Save or Save/Close after entering the information

#### Entering the Project Engineer

1. Click the Docu button > Administrators tab
2. Type in the project engineer's name
3. Save or Save/Close after entering the information

#### Entering Managing Office Comments

*This is an excellent location to enter an inspector's name and/or the status of an audit*

1. Click the Docu button > General tab
2. Type whatever you desire in the Managing Office Comments field  
Whatever is typed in this field will be displayed in that column on the Contracts screen
3. Save or Save/Close

#### Entering the date for All Contract Work Completed

*This must be entered before a semifinal estimate can be generated*

***This date is the last day physical work was done on the project, not when the last paperwork was submitted. This is NOT necessarily the project acceptance date.***

1. Click the Docu button > General tab  
(lower, left area of the screen)
2. Enter the date in the All Contract Work Completed field by typing it in or by clicking the button just to the right of the field and selecting the date
3. Save or Save/Close after entering the date

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Changing the number of IDR's that can be viewed in FieldBook

*This number reflects **calendar** days*

1. Click the Docu button > General tab  
(lower, right area of the screen)
2. Enter the desired number
3. Save or Save/Close

Changing the number of attachments that can be viewed in FieldBook

*This number reflects **calendar** days*

1. Click the Docu button > General tab  
(lower, right area of the screen)
2. Enter the desired number
2. Save or Save/Close after

To change settings for a specific contract only

Click the Docu button

Click the Contract Level Settings button on the General tab

General tab -

**DOT – do not change anything on this tab except the Report Item Sort Order and whether or not you select the Group Items By Project/Category**

**Counties/Cities/Consultants –** Change only the agency logo and name if you wish and the Report Item Sort Order and whether or not you select the Group Items By Project/Category

Estimates tab –

**DOT –** do not change anything on this tab

**Counties/Cities/Consultants –** Change only the signature label(s) if needed. Do not change the signature block text.

Cond Mod Signatures –

**DOT –** can add a signature block if the situation requires a signature in addition to those displayed. Do not change the signature block text.

**Counties/Cities/Consultants –** Change only the signature label(s) as needed. Do not change the signature block text.

To Enter the Date Final Quantities Are Sent to Contractor

1. Click the Docu > Administrators tab
2. Enter the date (any format) in the Final Quantities to Contractor field
3. Save/Close

Docu > Administrators Tab fields

There are additional fields that we have added to this tab. They are optional and can be in any format that you choose. In other words, you don't have to enter the date in a certain way, etc. Those new fields are –

Accounting ID

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Letting Date(LD)/Bid Order No. (BON)  
Late Start Date  
Wage Decision  
Liquidated Damages  
Status of Audit (eg 435 Date)  
Final Quantities to Contractor

#### Entering the First Day a Working Day is Charged

1. Click the Docu button > Site Times tab
2. Highlight the appropriate site
3. Enter the date in the Time Charges Start Date field by typing it in or by clicking the button just to the right of the field and selecting the date
4. Save or Save/Close after entering the date

#### Calendar Day Sites -

1. Click the Docu > Site Times tab
2. Enter the first day the time charges will begin in the Time Charges Start date field
3. Save/Close
4. Return to the Docu > Site Times tab  
The number displayed in the Days Used field is the number of days until the allowed number of calendar days is met or the number of days past the allowed number of calendar days.

#### Fixed Completion Date Sites –

1. Click the Docu > Site Times tab
2. Enter the completion date in the Time Charges Start date field
3. Save/Close
4. Return to the Docu > Site Times tab  
The number displayed in the Days Used field is the number of days until the completion date or the number of days past the completion date.

#### Add an Attachment

1. Click the Docu > Attachments tab
2. Click Add Attachment
3. Enter a Name for the attachment
4. Enter a description of the attachment
5. Browse to the location of the file to attach
6. Highlight the file and click Open
7. Click the Add button

#### Change an Attachment

1. Click the Docu > Attachments tab

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2. Click Change Attachment
3. Change whatever needs to be changed in any of the 3 fields
4. Click the Change button

#### Delete an Attachment

1. Click the Docu > Attachments tab
2. Click Delete Attachment
3. Be sure to read the warning carefully before continuing. If it is OK to delete, click Yes

#### View an Attachment

1. Click the Docu > Attachments tab
2. Highlight if more than 1 attachment
3. Click View Attachment

### **CONTRACTORS BUTTON**

All contractors are required to submit their subcontractor requests electronically. We get that information in a .CON file which we import into FieldManager. Once the import is complete, all subs are listed as well as the items that are associated to them.

#### To import subcontractors & their linked items using the SiteXchange (.CON) file

1. At the contracts list, click File > Import > File
2. Select the location of the file
3. Change Files of Type to SiteXchange Files (\*.con) and click Open

Subs added through the .CON file can be deleted only if their item(s) are deleted first. And that delete process can be done only if there are no postings for the item(s)

If the prime adds an ADDITIONAL subcontractor (one who is known to our system and is in our VENDOR.BIN file) to the contract AFTER the contract has been signed and you have received and imported the initial .CON file, they must submit a revised .CON file directly to your residency office. You should view and/or print the file, have the RCE authorize the change, then forward the .CON file to the Office of Contracts ([DOT.Contracts@dot.iowa.gov](mailto:DOT.Contracts@dot.iowa.gov)).

If the prime adds a NEW subcontractor (one who has never worked for the DOT before and is not in our VENDOR.BIN file) to the contract AFTER the contract has been signed, that contractor must be added to our system and then they can be selected by the prime to create a revised .CON file and send to the RCE for authorization.

The ONLY time you should receive a paper subcontract request is when an item that is added by contract modification is linked to a subcontractor. In that case

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the RCE authorizes the request and forwards the hard copy to the Office of Contracts ([DOT.Contracts@dot.iowa.gov](mailto:DOT.Contracts@dot.iowa.gov)). If the new item wasn't linked to the appropriate subcontractor at the time the contract modification was written, it should be done by hand now.

#### Linking a subcontractor(s) to an item by hand

1. Click the Contractors button
2. Highlight the contractor's name and double click or click the Change button
3. Click the Items tab then the Add button at the bottom of the screen
4. Highlight all the items to be linked to the subcontractor and click Select  
(To highlight multiple items, hold the CTRL key down and left click once on each item)
5. Leave the prime linked to the item
6. Remarks are optional
7. Save or Save/Close

#### To delete the link between an item and a contractor

*(This can be done only if no postings have been made to the item to be deleted)*

1. Click the Contractors button
2. Highlight the contractor's name and double click or click the Change button
3. Click the Items tab
4. Highlight the item to remove the link to the contractor and click Delete
5. Answer Yes to the "Are you sure..." question
6. Repeat for each additional item you wish to remove the link to the contractor
7. Save or Save/Close

#### To print a subcontract request(s) from the .CON file –

1. Copy the .CON file into your C:\SUBCON folder
2. Double click on the SubCon.exe file in the C:\SUBCON folder
3. Click on Run
4. Click on the Open icon
5. Highlight the appropriate .CON file and click Open
6. Click the Print icon
  - a. All subcontract requests will be printed as well as a cover summary sheet

### **IDR BUTTON**

#### Creating an IDR

1. Click the IDRs button
2. Click the Add button
3. Enter the appropriate information on each folder tab
4. Generate the IDR so it is included in the next estimate



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### Changing an IDR

1. Click the IDRs button
2. Highlight the appropriate IDR
3. Click the Change button
4. Make additions to or changes as desired  
*Changes can be made for item postings only until they have been included in an estimate.*
5. Save or Save/Close
6. Generate again if required

### Charging a Working Day in an IDR

1. Click the IDRs button
2. Click the Add button if it's a new IDR
3. Click the Site Times folder tab
4. Highlight the appropriate site in the upper portion of the screen if there is more than 1 site displayed
5. Enter either 0, .5, or 1 in the Time Charge field
6. Click in the Yes or No Contractor(s) Working field
7. Enter Hours Available and Hours Worked if desired
8. Enter the Controlling Operation
9. If the time charge is 0 or .5, enter the Reasons for Delays
10. Enter Comments
11. Save or Save/Close
12. Generate the IDR so it can be included in the diary for the same date  
*(What was entered in Steps 5-6-8-9 above will ultimately appear on the weekly report of working day report)*

### Item Posting for Mobilization

1. Do NOT make item postings for mobilization – the appropriate amount (based on the % of contract complete) will be paid automatically when an estimate is processed. You will see that \$ amount AFTER you import the estimate turn around file.

### Item Posting for Lump Sum Items

1. Tab past the field on the lump sum form that's titled Pay %  
*Remember, every lump sum item has a quantity of 1.*
2. In the Quantity field, enter the amount to pay in decimal form

### Marking an Item for Attention

1. Click in the Attention field on the item progress form so a checkmark appears
2. Enter comments in the Remarks field  
Entering remarks here will NOT alert anyone when they create an estimate

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### Correcting an Item Posting

*If the item has **not** been included in an estimate –*

1. Highlight the IDR where the original posting occurred
2. Click Change
3. Click the Posting folder tab
4. Highlight the appropriate item and click the Change Posting button
5. Make the appropriate quantity change on the form
6. Save or Save/Close
7. Generate (or re-generate)

*If the item **has** been included in an estimate –*

1. Create a new IDR (IDRs button > Add)
2. Enter the reason for the correcting entry in the Comments field of the General tab
3. Click the Postings tab and then Add Posting
4. Select the appropriate item
5. Make an entry in either the Sta or Location field (a zero will work)
6. Enter the appropriate correcting amount in the Quantity field
7. Make a comment in the Remarks field
8. Save or Save/Close
9. Generate

### Printing an IDR if you are still working in that IDR

1. Click the View tab
2. Click the Print button
3. Click OK at the Print Report screen

### Printing an IDR if you are not still working in the IDR area of FM

1. Click the IDRs button
2. Highlight the appropriate IDR(s) in the list
3. Click the Print button
4. Click so the dot is in front of "Print the x selected Inspector Daily Report"
5. Click OK
6. Click OK at the Print Report screen

### Attachments – See Pages 4 and 5

### **IMPORTING IDRS FROM FIELDBOOK**

*IDR's can be imported ONLY into the FieldManager computer that has the working copy for that contract. You CANNOT import an IDR into a FieldManager computer that has a read-only copy of the contract.*

#### ***Importing from Flash Drive -***

1. Put the flash drive in the FieldManager computer
2. At the contracts list, click the Import-FB button

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*You do NOT need to have a specific contract highlighted*

3. Either type in or select E:\ (or F:\) from the drop down list (depending on your computer setup) as the location of the file to be imported if it isn't already there.
  4. Click OK
  5. As a part of the import process from a flash drive, a turn-around-file that contains the latest contract information is created and put on that same flash drive for the inspector to import back into his/her FieldBook program.
1. Click OK when the import has been completed

***Importing from the W Drive -***

The same principle as the flashdrive – just a different file location

***If the import flash drive is lost, won't import, etc. –***

***In the FieldBook computer –***

1. Click Export – FM
2. Put a checkmark in the “Include Previously Exported IDR’s” field
3. Highlight the IDR’s to re-export
4. Click Select
5. Repeat the steps above to transfer the files

***In the FieldManager computer –***

1. Put the flash drive in the appropriate drive
2. Click the Import – FB button

If IDR’s are included in the import file that already existed in FM, the FM program will not allow them to import a second time and will create a FieldBook Import Report giving details

**DIARIES**

**Creating a Daily Diary**

1. Click the Diaries button
2. Click the Add button
3. Enter the appropriate date and author

*If there are generated IDR’s for that date (initials displayed on the screen to the right of the date) continue with Steps 4 - 9. If there are no IDR’s, you will need to enter the information on these 2 tabs yourself*
4. Click the Bring in Temperatures button
5. Click the Bring in Weather and Comments button
6. Click the Site Times tab
7. Highlight the appropriate site
8. Click the Bring in Site Data button
9. Repeat Steps 7 & 8 for other time charges for other sites in this contract
10. Save or Save/Close
11. Generate

**To Print a Daily Diary if you are no longer working in the diary area of FM**

1. Highlight the appropriate contract
2. Click the Diaries button

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3. Highlight the appropriate diary(ies) in the list
4. Click the Print button
5. Click so the dot is in front of the Print the x selected Daily Diary
6. Click OK
7. Click OK at the Print Report screen

To Print a Daily Diary if you are still working with that diary –

1. Click the View tab
2. Click the Print button
3. Click OK at the Print Screen

If No IDR's Show for Your Diary Date – and there should be one or more

1. Check to be sure you have the correct contract
2. Check to see you have the correct diary date in FieldManager  
(*Even ungenerated IDRs will be displayed*)

If Ungenerated IDR's Show for Your Diary Date – and they should be generated

1. Close back to the diaries list
2. Click the IDR's button
3. Highlight the ungenerated IDR(s) in the list
4. Click the Generate button
5. Answer Yes to the "Are you sure..." question
6. Click the Cancel button at the print option
7. Close the IDR list
8. Return to the diaries list if you're not already there
9. Click the Add button to create the diary
10. Enter the appropriate date – this time the IDR initials will show as generated and you can continue as usual

To Delete a Weekly Report of Time Charges

1. Click the Misc Reports button
2. Double click on the Weekly Report of Time Charges option or highlight it and click the View button
3. Highlight the appropriate report
4. Click the Delete button
5. Answer Yes to the "Are you sure..." question  
(If there are multiple sites the appropriate weekly report for EVERY site must be deleted before a time adjustment can be done for any site during that week.)

Changing a site time charge BEFORE it's been included in an estimate

1. Click the Diaries button
2. Highlight the appropriate diary in the list

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3. Click the Change button  
***If the date of this diary has already been included in a weekly report of working days, that week's report for every site must be deleted before the diary can be changed. See previous instructions to delete a weekly working day report.***
4. Click the Site Times tab
5. Highlight the appropriate site and make the change
6. Save or Save/Close
7. Generate
8. Cancel at the print option screen  
*If a weekly report was deleted in order for the diary change to occur, you may want to recreate that weekly report now, changing the report number so it is the same as the original*

#### Changing a site time charge AFTER it's been included in an estimate

1. Click the Diaries button
2. Highlight the appropriate diary in the list
3. Click the Change button  
***If the date of this diary has already been included in a weekly report of working days, that week's report for every site must be deleted before the diary can be changed. See previous instructions to delete a weekly working day report***
4. Click the Site Times tab
5. Highlight the appropriate site if there's more than one
6. Click the Adjust Time Records
7. Make the appropriate entry  
*To change from 1 day charged to 0 charged, enter a -1. To change from 1 day charged to ½ day charged, enter a -.5. (partial entries must be a decimal) To change from 0 day charged to 1 day charged, enter a 1, etc.*
8. Save or Save/Close
9. Generate
10. Cancel at the print option screen  
*If a weekly report was deleted in order for the diary change to occur, you may want to recreate that weekly report now, changing the report number so it is the same as the original.*

#### Deleting a Site Time Charge

*This can be done only BEFORE the diary has been included in an estimate*

1. Click the Diaries button
2. Highlight the appropriate diary in the list
3. Click the Change button  
***If the date of this diary has already been included in a weekly report of working days, that week's report for every site must be deleted***

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***before the diary can be changed. See previous instructions to delete a weekly working day report.***

4. Click the Site Times tab
5. Highlight the appropriate site if there's more than one
6. Click the Delete Diary Time Record
7. Save or Save/Close
8. Generate

*If a weekly report was deleted in order for the diary change to occur, you may want to recreate that weekly report now, changing the report number so it is the same as the original*

Attachments – See Pages 4 and 5

To See a List of Working Days Charged

1. Highlight the appropriate contract in the contracts list
2. Click the Inquiries button
3. Select the inquiry titled “Daily Diary Time Charges by Site”
4. Select the appropriate site or select all sites
5. Individual diary dates will be listed displaying the time charged for each  
*If time adjustments were made, the adjustment will be displayed directly above the original charge.*
6. The total number of days charged is displayed at the bottom of the list for each site

To Create & Print a Weekly Working Day Report

*Diaries for the days of the week included in the report must be generated to appear on the report.*

1. Highlight the appropriate contract in the contracts list
2. Click the Misc Rpts button
3. Highlight “Weekly Report of Time Charges” and double click or click the View button
4. Click the Add button
5. Select the appropriate site (A site MUST be selected)
6. Enter the appropriate week ending date (or any day in the week's report)
7. Press the Tab key (the correct week ending date will then be displayed)
8. Select the author if different than the name displayed
9. Enter remarks if desired (optional)
10. Click the View tab
11. Click the Print button if you want someone else to review a hard copy and give their approval to the report
12. Click the Save or Save/Close button if you must wait for approval
13. Click the Generate button once the report is approved and can be printed and mailed to the contractor

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To Make Changes to a Weekly Report **Other Than Time Charges**

1. Highlight the appropriate contract in the contracts list
2. Click the Misc Rpts button
3. Select "Weekly Report of Time Charges"
4. Highlight the appropriate weekly report
5. Click the Change button
6. Make any desired changes on the General tab
7. Click the View tab  
*The changes will now show*
8. Save or Save/Close
9. Click the Generate button and print if a hard copy is desired

To Print a Weekly Report

1. Highlight the appropriate contract in the contracts list
2. Click the Misc Rpts button
3. Highlight the appropriate weekly report(s)
4. Click the Print button
5. Click so the dot is in front of "Print the x selected Weekly Diary Report"
6. Click OK
7. Click OK at the Print Report screen  
OR
8. Highlight the appropriate weekly report (can highlight only 1)
9. Click the Review button
10. Click the View tab
11. Click the Print button
12. Click OK at the Print Report screen

**CONTRACT MODIFICATIONS**

To Create a Contract Modification for a New Item

1. Highlight the appropriate contract
2. Click the Cont Mods button
3. Click the Add button
4. Enter information in the 2 description fields on the General tab
5. Click the New Items tab
6. Click the Add Item button
7. Click OK with the default being Add a New Item
8. Click the down arrow beside the Item field to get the current master item list
9. Select the desired item
10. Enter a supplemental description if desired (highly recommended if you select a generic item)
11. Select Supplemental Agreement (the only choice!) for the Item Type
12. Enter the correct unit price – **must be a positive number**
13. Enter a reason for the new item
14. Select the appropriate contractor to be linked to this new item

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15. Select the correct Section if All is displayed in that field
  16. Double check to be sure you have the correct project/category
  17. Enter the correct quantity for each category desired – **can be a positive or a negative number – unless it's a lump sum item and then it must be a +1**
  18. Click OK
- If you wish to print a draft copy at this time –
1. Click the View tab
  2. Click the Print button
19. Save or Save/Close
  20. Generate and print
  21. Approve when all signatures have been obtained

To Add a Current Contract Item to a Category Where the Item Doesn't Exist –

1. Click the Cont Mods button
2. Click the Add button
3. Enter the information in the 2 description fields on the General tab
4. Click the New Items tab
5. Click the Add button
6. Click OK with the default being Add a New Item
7. Click the down arrow beside the Item field to display the current master item list
8. Select the desired item – This CAN be the same item as in the other category UNLESS it's mobilization. For mobilization, use a generic item such as Each or Lump Sum
9. Select Supplemental Agreement for the Item Type
10. Enter the correct unit price – in this case, it will be the same price as the same item in the other category
11. Select the appropriate contractor to be linked to this new item
12. Enter a reason for the new item
13. Select the appropriate Section if ALL is displayed in that field
14. Double check to be sure you have the correct project and category selected
15. Enter the correct quantity for the appropriate category – can be a negative or a positive number unless it's a lump sum item and then it must be a +1
16. Click OK
17. Save or Save/Close
18. Generate and print
19. Approve when appropriate to do so

To add an item to a non-existent category -

1. Call or e-mail Janet and give her the following information –
  - A. \*\*\*Contract ID
  - B. Project ID if different from the contract ID
  - C. Letting Date



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- D. Bid Order No
  - E. Prime Contractor
  - F. Number of categories in the PROJECT
  - G. \*\*\*Which project needs the new category if there are multiple projects
  - H. \*\*\*Funding source for the new category (e.g. 100% STATE, City of xxx, etc.)
2. Janet will get any of the information that you don't have but you must give her the \*\*\* items
  3. Janet will create a new download file and send to you
  4. Import the file into FieldManager that you receive
  5. Add the item to the new category as described above in "To Create a Contract Modification for a New Item"

To create a cont mod to increase or decrease a current contract item –

1. Highlight the appropriate contract
2. Click the Cont Mods button
3. Click the Add button
4. Enter the information in the 2 description fields on the General tab
5. Click the Inc/Dec tab
6. Click the Add Item button
7. Select the item you wish to increase or decrease  
*Be sure you select the correct item in the correct project*
8. If the item is in multiple categories, select the category (ies) you wish to increase or decrease
9. Enter the increase or decrease quantity in the Qty Change field
10. Enter a reason
11. To increase or decrease another item, click the Add Item button and repeat Steps 7 through 10
12. Save or Save/Close
13. If you wish to print a draft copy at this time –
  1. Click the View tab
  2. Click the Print button
14. Generate and then print
15. Approve when appropriate to do so

To Create a Time Extension Contract Modification –

1. Highlight the appropriate contract
2. Click the Cont Mods button
3. Click the Add button
4. Enter information in the 2 description fields on the General tab
5. Click the Time Extensions tab
6. Highlight the appropriate site in the upper portion of the screen
7. Enter the Additional No. of Days and press the Tab key
8. Enter a reason
9. Save or Save/Close

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If you wish to print a draft copy at this time –

1. Click the View tab
2. Click the Print button
10. Generate and print
11. Approve when appropriate to do so

To Create a Mutual Benefit Type Contract Modification –

1. Highlight the appropriate contract
2. Click the Cont Mods button
3. Click the Add button
4. Enter information in the 2 description fields on the General tab  
*That's it!!!*
5. Save or Save/Close

If you wish to print a draft copy at this time –

1. Click the View tab
2. Click the Print button
6. Generate and print
7. Approve when appropriate to do so

Attachments – See Pages 4 and 5

## **STOCKPILES**

Creating a new stockpile

1. Highlight the contract in the contracts list
2. Click the Stockpiles button
3. Click the Add button
4. Click Next
5. Select a Stockpile Description
6. Enter the invoice description in the Stockpile Comments
7. Click Next
8. Enter the **dollar amount** you want to pay the contractor in the Transaction Dollar Amount field
9. Enter a note in the Transaction Comments as to whether the dollar amount you're paying is 90% or 100% of the invoice, a 2<sup>nd</sup> shipment, etc.
10. Click Next
11. Click the Add Item button
12. Select the item(s) you are linking to the stockpile
13. In the Assigned Dollar Amount field, enter the **dollar amount** of the invoice you are linking to each highlighted item.
14. Click Next when the Dollar Amount Left to Distribute is zero
15. Tab to the Recovery **Quantity** field
16. Enter the **quantity** of the item that will be used for the stockpile

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*This must be between the slowest and fastest parameters displayed*

17. Press the Tab key. (The Recovery Factor field will then be calculated and displayed)

18. Click Finish

#### Adding Another Shipment to a Stockpile –

1. Highlight the contract
2. Click the Stockpiles button
3. Highlight the stockpile which will have another shipment
4. Click the Change button
5. Click Next
6. Click Next
7. Leave the date as is displayed
8. Enter the additional dollar amount of the invoice in the Transaction Dollar Amount field
9. Enter 2<sup>nd</sup> shipment in the Transaction Comments field
10. Click Next
11. Distribute the additional invoice dollar amount among the linked item(s)
12. Click Next
13. Change the Recovery Quantity field if needed. It must still be between the slowest and fastest parameters displayed.
14. Click Finish

#### Deleting a Stockpile

*A stockpile can be deleted up until it has been included in an estimate*

1. Highlight the contract
2. Click the Stockpiles button
3. Highlight the stockpile to delete
4. Click the Delete button
5. Answer Yes to the “Are you sure...” question

#### To Manually Reduce a Stockpile to Zero

1. Highlight the contract
2. Click the Stockpiles button
3. Highlight the stockpile you wish to reduce to zero
4. Click the Change button
5. Click Next
6. Click Next
7. Leave the Transaction Date as it is
8. In the Transaction Dollar Amount field enter a negative amount equal to the dollar amount shown in the Dollar Amount Remaining field
9. Enter “Zero Out Stockpile” in the Transaction Comments
10. Click Next

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11. In the Change In Dollar Amount field, enter a negative amount equal to the amount shown in the Current Dollar Amount for each item that has a quantity greater than zero
12. Click Next when the Dollar Amount Left to Distribute is zero
13. Click Next (The Recovery Quantity field should be zero)
14. You can also put a zero in the Recovery Factor field if you'd like although it's not required
15. Click Finish

#### Automatic Balancing of a Stockpile -

If you desire, when a semi-final estimate is created the program will reduce the stockpile balance to zero as a part of the estimate process.

1. Highlight the appropriate contract
2. Click the Estimates button
3. Select Semi-Final as the Estimate Type
4. Put a checkmark in the Balance Stockpiles field  
*If the Estimated Payment for any voucher displayed on the Vouchers tab of the Estimate screen is a negative number after the stockpile has been reduced to zero, you must either wait to balance the stockpile until either more items are paid resulting in a positive voucher amount or until the following estimate is a final.*
5. Generate the estimate

#### Viewing Stockpile Transactions –

1. Highlight the appropriate contract
2. Click the Inquiries button
3. Select the Stockpile Summary by Stockpile inquiry
4. Select one or more stockpiles to view
5. View at your leisure!!! This will display every transaction that has occurred for the selected stockpile(s).

### **CONTRACTOR PERFORMANCE EVALUATION (CPE)**

#### Creating a CPE –

1. Highlight the contract
2. Click the Misc Rpts button
3. Double click on Contractor's Performance Evaluation
4. Click the Add button
5. Select the contractor from the drop down list
6. Change the Report type to Final (we'll never use Interim)
7. Select the appropriate name in the Evaluator field
8. Change the Report Starting Date to the same date used in the Construction Started Date field on the Docu > General tab
9. Change the Report Ending Date to the same date used in the All Contract

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- Work Completed field on the Docu > General tab
10. Enter comments as desired
  11. Click the Ratings tab
  12. Enter a rating between 0 and 100 for EVERY category  
If the rating is 50 or below or 100, rating remarks are required  
If the category is not applicable, enter a rating of 80
  13. Save/Close

**IF YOU DELETE A SAVED OR GENERATED CPE, A FILE IS CREATED AND PUT IN THE OUTBOX. THE FILE THAT WAS CREATED WHEN THE CPE WAS DELETED CAN CAUSE MAJOR PROBLEMS WHEN WE SEND THE CPE TO THE OFFICE OF CONTRACTS. THAT FILE MUST BE DELETED. CALL JANET IF YOU'RE NOT SURE WHAT TO DO NEXT.**

Approving a CPE with a Pending Approval status

*You cannot approve a CPE with a Draft status*

1. Highlight the contract
2. Click the Misc Rpts button
3. Double click on Contractor's Performance Evaluation
4. Highlight the CPEs to approve and click the Approval button
5. The approval date should be the date the CPE is sent to the contractor  
*When a CPE is approved, a file is created and put in the FieldMgr/Outbox*
6. Save/Close

"Processing" the Electronically Created CPE Files -

1. Click Utilities > Combine Outbox Files  
*(This will combine all approved contractor evaluations into 1 file with a .CPE extension)*  
***If you are asked twice about combining files, you have 2 combined files – 1 for CPEs and 1 for EXPs. The combined UPD file must be processed or that information will be lost to CPS.***
2. The location of the combined CPE File is in your ProgramData\FieldManager\Outbox folder  
*The combined file will be similar to the combined file for estimates EXCEPT the extension is CPE rather than UPD*
3. Re-name the combined .CPE file to CPEINPUT.CPE
4. Either drag or Cut and Paste (NOT Copy) the newly named CPEINPUT.CPE file to the C:\CPEINPUT folder and, if asked, overwrite what is there already.
5. Double click on the CPEINPUT.XLS file that is also located in the CPEINPUT folder
6. Enable Macros
7. Click on the "Click to Create ExcelEvals.xls" button  
The macro will run (lots of jumping around!!!) and will display a message that the ExcelEvals.xls has been created when the macro is finished. (If

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you want to look at the new file, it will contain 1 row for each evaluation you approved.)

8. Close Excel

9. Attach the ExcelEvals.xls file to an e-mail and send to the

[DOT.Contracts@dot.iowa.gov](mailto:DOT.Contracts@dot.iowa.gov) with a subject line of CPE or Contractor Evaluation

10. If there was a .UPD file created when you combined files in Step 1, process it now just as you normally would using the FM Xfer program.

## **ESTIMATES -**

### Creating an Estimate –

1. Highlight the appropriate contract in the contracts list

2. Click the Estimates button

3. Click the Add button

4. Select the date for the estimate

*The estimate will include all generated IDR's and diaries up to and including that date.*

5. Select the Estimate Type if different than what is displayed

6. Click OK

7. Check the Item Usage and/or View Estimate for appropriate payment

*May need to print the View Estimate tab report if someone else must approve the estimate prior to payment*

8A. Once the estimate is reviewed for payment accuracy by the inspector or RCE, click the Generate button

***You CANNOT save an estimate to be generated at a later date***  
OR

8B. If the estimate cannot be reviewed immediately, jot down the estimate's date and dollar amount and do not generate it. When the estimate is OK'd for payment, re-do Steps 1 through 8A, using the same date as before. Check to verify that the dollar amounts are the same as before.

### To View Items Being Paid in an Estimate –

***When the estimate is first created, mobilization will not be displayed in FM even if it is going to be paid***

1. Create an estimate (as shown above)

2. Click the Item Usage tab

*This can be sorted by any column*  
OR

3. Click the View Estimate tab and review items displayed in that report

OR

4. Click the View Amt Bal tab and review items having a quantity in the Quantity This Estimate column

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#### To Change the Amount Paid for an Item in the Estimate

1. Create an estimate (as shown previously)
2. Click the Item Usage tab
3. Highlight the appropriate item
4. Click the Review/Change button
5. Change the Quantity This Estimate field to the quantity you wish to pay  
*This must be equal to or lower than the Allowable Quantity figure displayed*
6. Click OK  
*Anything held back this time will automatically be included when the next estimate is created*

#### To Create an Estimate to Make an Initial Mobilization Payment

*This should be done only if 1% of the PROJECT (not contract) value is \$1,000 or more AND 10% of the mobilization item is \$1,000 or more. If 1 or both are less than \$1,000, do not make an initial mobilization payment.*

1. Create an estimate (as shown previously)
2. Click the Vouchers tab
3. Put a checkmark in the Create Voucher column for each appropriate project (as described above) that contains a mobilization line item  
*This must be done because FieldManager will NOT create a zero voucher - when there are no items to pay - unless "forced" to do so.*
4. Click the Generate button

#### To Create an Estimate to Pay the Balance of Mobilization Due

If the mobilization item is more than 10% of the project value, 100% of the mobilization item will not be paid until there is a 435 date in CPS. This occurs after the project has been accepted and a 435 form completed, signed, and sent to Ames.

You will receive an e-mail Monday morning if you have a contract that needs to have this mobilization payment made.

To create this estimate, follow the same steps as when creating the initial mobilization payment. If there are items to pay on this estimate, that's fine.

#### To Create a Semi-Final Estimate

1. Highlight the appropriate contract in the contracts list
2. Click the Docu button
3. Enter a date in the All Contract Work Completed field if you haven't done so already  
*This should be the last day physical work was actually done on the contract. **This is NOT necessarily the project acceptance date.***
4. Save/Close
5. Create an estimate (as shown previously)
6. Change the Estimate Type field to Semi-Final

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7. If the Balance Stockpiles label is black, put a checkmark in that field  
*This will reduce all stockpile balances to zero on this estimate which could, (hopefully not!!), result in a negative Total Dollar Amount for either a voucher or the entire estimate*
8. **Click the Vouchers tab and check to be sure that all vouchers are a positive dollar amount. If they are not, do NOT generate and process this estimate unless you are absolutely sure the following estimate will be the final.** *(It is a good idea to wait until after the audits are completed to process a negative SF estimate)*
9. When you are sure the correct payment is being made, click the Generate button  
*Remember, if one or more of the vouchers is a negative, the next estimate MUST be a final.*

#### To Create a Negative Estimate

1. Create an estimate (as shown previously)
2. Click OK to the message stating there is at least 1 negative voucher
3. Change the Estimate Type to Semi-Final  
***An estimate with 1 or more negative vouchers MUST be a semi-final type and MUST be followed by a Final estimate. If a negative voucher is included in an estimate and the estimate is not a semi-final type, the processing for it will fail.***

#### To Create An Estimate Which Includes a Negative Voucher

*(For contracts with multiple projects only)*

1. Create an estimate (as shown previously)
2. Click OK to the message stating there is at least 1 negative voucher
3. Click the Vouchers tab
4. **Remove the checkmark from the Create Voucher field for the project(s) with a negative dollar amount**
5. Click the General tab
6. Check to be sure the total estimate dollar amount is still a positive amount
7. Generate the estimate  
*Any items withheld from the estimate (including all those items in the negative voucher) will be automatically included the next time an estimate for this contract is created. At that time they can be withheld again or paid.*

#### To Create a Final Estimate

1. Highlight the appropriate contract in the contracts list
2. Click the Docu button
3. Enter a date in the All Contract Work Completed field on the General tab if one isn't there already



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*This is the last day physical work was actually done on the project. **This is NOT necessarily the project acceptance date.***

4. Click the Site Time tab
5. Enter a date in the Time Charges Stop Date for **each** site if they haven't been entered already

*This is the last day a working day was charged for that site. You may need to review the working day reports to determine the date.*

6. Save/Close
7. Click the Misc Rpts button
8. Double click on Contractor 's Performance Evaluation
9. Be sure that there is an approved CPE for every contractor

***(A Final estimate cannot be created unless every contractor has an approved CPE)***

10. Click the Items button
11. Scroll to the right and be sure all items have been marked complete (Have Yes in the Item Cpt column)
12. If some items have not been marked complete, highlight those items and then click Edit > Mark Items Completed

*(If an item will not change to Yes, scroll to the right and see if it is a "unattached" type of item. If it is, call Janet!)*

13. Click OK then Yes at the "Are you sure..." question
14. Click Close

15. Create an estimate (as shown previously)

16. Change the Estimate Type field to Final

17. Put a checkmark in the Balance Stockpiles field

*There must be a zero Total Dollar Amt and zero Days Charged This Estimate for a Final Estimate. **If there is any payment or days charged or stockpile reduction shown on the General tab of the Estimates screen, the estimate type cannot be a Final. A Semi-Final will need to be created and processed prior to the Final being created.***

18. Click the Generate button

#### To Change the Type of Estimate Once It's Been Created

1. Close and do not generate the estimate created
2. Create an estimate again, being sure to select the correct type this time  
*You cannot change the type of an estimate after it has been created*

#### To Prevent Premature Payment of a Final Estimate

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Because a final estimate shouldn't be processed (sent to the mainframe) until the contractor, the RCE, the district engineer, and sometimes Central Construction have all signed the hard copy, the file created when the voucher is generated must be **removed** from the Outbox.

1. Open Windows Explorer

*If there is not a Final Vouchers folder we must create one –*

1. *Highlight Local Disk (C:)*
  2. *Click File > New > Folder*
  3. *Name the new folder Final Vouchers and press Enter*
2. Open the ProgramData\FieldManager\Outbox folder (click on the + to the left of it)
3. Highlight the VCHRxxx.EXP file created by the final estimate  
*If you're not sure which one it is, double click on the file and look at it using Notepad. The contract ID will be displayed in the first line following VOUCHER, UPDATE. This file should contain ONLY lines beginning with VOUCHER, UPDATE and SITETIME, UPDATE.*
4. Drag the file to the Final Vouchers folder OR right click and choose Cut and then highlight the Final Vouchers folder and right click and choose Paste.  
*The desired result – the file will be moved out of the Outbox folder to the Final Vouchers folder.*
5. Rename this file, changing only the file name and NOT the .EXP extension. The extension MUST remain as it
6. Copy this re-named file to a flash drive and/or a location on the W drive that your office has dedicated for this purpose  
*This is done simply as a safety net – in case the hard drive crashes and you would lose the files in the Final Vouchers folder*

When It's Time to Process a Final Estimate –

1. Open Windows Explorer and go to the ProgramData\FieldManager\Outbox
2. **Move** the appropriate file from the Final Vouchers folder to the Outbox folder (see Step 4 above)
3. Start the FieldManager program if it isn't running already
4. Click Utilities > Combine Outbox Files
5. The location for the combined file should also be the OUTBOX folder
6. Click OK
7. Switch back to Windows Explorer and jot down the newly created .UPD file name, checking to be sure it's the correct file by viewing the date and time it was created
8. Process the newly combined .UPD file using the FM Xfer program

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Printing a List of Final Quantities to Send to the Contractor

**REMEMBER, enter the date the final quantities are sent to the contractor in the Docu button > Administrators > Final Quantities to Contractor field.**

1. Highlight the appropriate contract in the contracts list
2. Click the Estimates button
3. Highlight the Final estimate
4. Click the Review button
5. Click the View Amt Bal tab  
*This list will be printed in proposal line number order*
6. Click the Print button

**OR**

1. Open the QtyTotals Excel query/spreadsheet  
*Directions for using any query are in the W:\Highway\Construction\FieldManagerInformation\FMFiles\Queries&Files folder in a file named Instructions for Queries and Spreadsheets.doc*
2. Refresh the spreadsheet, entering the appropriate contract ID in Cell A1 exactly as it is displayed in the FieldManager contract list and press Enter  
*(If the contract ID contains a letter, it must be typed in upper case for the spreadsheet to refresh)*
3. Click on the Copy Formulas macro button
4. Highlight the populated rows and columns

**The print will take legal size paper**

5. Print selected area only

To Find the Amount of Retainage Withheld to Date

1. Highlight the appropriate contract in the contracts list
2. Click the Inquiries button
3. Select the Estimate Vouchers by Estimate inquiry
4. Click the Select All button
5. Add the retainage figures displayed for each estimate

**OR**

1. Open the Retainage Excel query/spreadsheet  
*Directions for using any query is in the W:\Highway\Construction\FieldManagerInformation\FMFiles\Queries&Files folder in a file named Instructions for Queries and Spreadsheets.doc*
2. Refresh, entering the appropriate contract ID exactly as it is displayed in the FieldManager contracts list
3. Print if desired

To Know Where You Are in the Estimate Processing Steps –

If you have generated an estimate –

1. Exported will be the status of the estimate in the estimate list

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2. There will be a VCHRxxx.EXP file for that contract in your Outbox

If you have combined the files in the Outbox –

1. Exported will be the status of the estimate in the estimate list
2. There will **not** be a VCHRxxx.EXP file in your Outbox for that contract
3. There will be a .UPD combined file with the current date and time

If you have processed the estimate and received it back from the mainframe there will be –

1. the same combined file (.UPD) name you just processed but with a .TAF extension and current date in your Inbox

If you HAVE imported the .TAF file into FieldManager –

1. The status of the estimate (as displayed in the estimate list) will be Refreshed
2. The Cont Status button will have the same dollar amount in the Paid to Date (FM) and Paid to Date (CAS) fields.

If you HAVE received the TAF file but HAVE NOT imported it into FieldManager -

1. The status of the estimate (as displayed in the estimate list) will be Exported
2. The Cont Status button will NOT have the same dollar amount in the Paid to Date (FM) and Paid to Date (CAS) fields

## **Exporting Contracts to FieldBook**

### **Exporting a Contract to FieldBook –**

1. Click the Export-FB button
2. Highlight the appropriate contract
3. Put a checkmark in the Include Reference Files in the Export
4. Click the Select button
5. Browse to the correct location to place the file and then click OK
6. The filename is based on the contract(s) being exported and will have a .EBL extension – don't change it

## **Archiving a Contract**

**This process should be done ONLY after you receive an e-mail listing what contracts can be archived for your office**

1. When notified of the specific contract(s) that can be archived, click File > Archive Contracts
2. Answer Yes to the warning stating that this process will remove the contract from the list

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3. Highlight the appropriate contract(s) (*only contracts that have been finalized are in this list*)
4. Do NOT put a checkmark in the Print Final History box
5. Click Select
6. Once the contract has been archived (removed from the active contract list), it will be stored in the ProgramData\FieldManager\Archive folder
7. Copy the archived contract to a location on the W drive specifically designated for your office's archived contracts

### **Transferring Contracts from FieldManager to FieldManager**

#### **Transferring a Read-Only Copy of the Contract -**

1. Click File > Export > Transfer Contracts
2. Highlight the appropriate contract(s)
3. Click the Select button
4. Leave the dot in front of "Create a regular read-only copy of the contract"
5. If there are attachments and you want to include them, click so there is a checkmark in front of Include Attachments
6. Click the OK button
7. Select the drive (probably E if using a flash drive) where you want to put the file containing the contract
8. Click OK
9. The program will name the file FMCONTS.001 automatically. Do not change this name.

*As a part of this type of transfer, the working copy is left in the contracts list.*

#### **Transferring a Working Copy of the Contract -**

*You must be a System Administrator to transfer a working copy.*

1. Click File > Export > Transfer Contracts
2. Highlight the appropriate contract(s)
3. Click the Select button
4. Move the dot so it's in front of "Transfer the contract"
5. If there are attachments and you want to include them, click so there is a checkmark in front of Include Attachments.
6. Select the drive/location (probably E if using a flash drive) where you want to put the file containing the contract
7. Click OK
8. The program will name the file FMCONTS.001 automatically. Do not change this name.

*As a part of this transfer, a read only copy is left in the contracts list. Do NOT delete the read-only copy from the original computer until you know for sure the working copy has been successfully imported into the receiving FM machine and you know you will never need to receive it back.*

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### To Create and Send a Contractor Read-Only (CRO) Copy of the Contract

1. Click File > Export > Transfer Contracts
2. Highlight the contract(s) and press Select
3. Put the dot in front of "Create a contractor read-only copy of the contract" and press OK (Attachments are not included in this type of transfer)
4. Select the location for the CRO file to be saved
5. Create an e-mail to the contractor and send the CRO file as an attachment

### Deleting a Read-Only Copy of a Contract -

1. Highlight the appropriate contract in the contracts list
2. Click Edit > Delete
3. Answer Yes to the "Are you sure..." question

### Deleting a Working Copy of a Contract –

**This will rarely be done – might want to contact Janet first because once it's gone, it's gone!!!**

1. Click File > Export > Transfer Contracts
2. Highlight the appropriate contract and press Select
3. Put the dot in front of "Transfer the Contract" and press OK
4. Select the location for the file and re-name it "DELETE"  
This "delete" name is given simply so you know at a later date that it is a file that can be deleted
5. Click the Save button
6. A read only copy of the contract is now left in your list of contracts
7. Highlight the appropriate contract in that list
8. Click Edit > Delete
9. Answer Yes to the "Are you sure..." question
- 10. The contract is now gone – and really gone. There is no un-do!!**

## **Backup/Restore**

### Backing Up the Database

**Backing up FieldManager is critical. Do this every day information is added to or changed in the FM program. Without a backup, you lose everything if the computer crashes!**

**If you have multiple datasources in your FM program, the backup process backs up ONLY the datasource that is open at the time the backup is done. In other words, each datasource must be backed up individually.**

1. Close the contracts list
2. Click File > Backup Database

The default backup location is displayed on the Utilities > User Preferences > General tab

3. Click the Backup button

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4. Click OK to the completed successfully message

#### **RCE Offices -**

##### **EITHER.....**

5. Click Yes to the question asking if you want to copy the backup file to another location
6. Select the appropriate location on the W drive for your office's backup file **and WAIT. Do not continue until you receive the message that the copy was successful**
7. When asked again about copying the backup file to another location, answer No  
**OR.....**
8. Copy by hand (Copy/Paste) from the C drive to your W drive backup location
9. Click the Close button at the Backup Database screen
10. Click the Exit FieldMgr button and leave the program

#### **County Offices and Consultants - Use a USB Drive or Network**

*Use a flash drive if you don't have a network that is backed up daily*

Follow Steps 1 through 5 in the steps above for the RCE Offices

6. Select the appropriate location on your network or on a flash drive
7. When asked again about copying the backup file to another location, answer No
8. Click the Close button at the Backup Database screen
9. Click the Exit FieldMgr button and leave the program

#### Restoring the Database

1. Please call BEFORE starting this process

*The effect of restoring a database can either result in something very good and helpful or in something very ugly.*

#### **REFERENCE FILE**

##### Receiving a New Reference File –

**If you have multiple datasources in your FieldManager program, you must import the new reference file into each one.**

Once you receive an e-mail stating a new reference file is available –

1. Open the FieldManager program
2. Click File > Import > File
3. Select the drive where the reference file is located

*You can either detach it from the e-mail to a location of your choice and import it from there or import it from the*

*W:\Highway\FieldManager\FieldManager\Information\FMFiles folder*

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4. Change the List files of type to either Reference Files or All Files
5. Highlight the filename of FMGRREF.REF
6. Click OK

***Do NOT try to download a reference file using the FM Xfer program. That will NOT give you the correct reference file and will eventually cause problems.***