

# FIELDBOOK

## USERS GUIDE IOWA STYLE



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# FIELDBOOK USERS GUIDE - IOWA STYLE

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## FieldManager - FieldBook

**FieldManager** is the program which the office manager uses to document all activities pertaining to the contract. *Office Manager is simply a term to designate the individual(s) who make entries in the FieldManager program, probably the RCE, the CT Supervisor, and/or the Secretary. This is NOT a newly created position dedicated to these functions.* The functions of the office manager involve, among other things, contract documentation changes, IDR's (inspector daily reports), daily diaries (where working days are charged), contract modifications, stockpiles, estimates, and a multitude of inquiries and reports.

### *Terminology Change -*

*IDR's include temperatures, weather, daily comments, time charges, and item postings.*

*Daily Diaries combine temperatures, weather, comments, and item postings from all IDR's for a given day and is also the location where working days are charged and sunrise/sunset information is entered.*

The office manager creates a daily diary for each day desired on the contract. This diary is made up of any and all IDR's (Inspectors Daily Reports) which have been created by inspectors using FieldBook or the office manager using FieldManager. There can be many IDR's for a day because each inspector and office manager involved can create one or more for any given day. There can, however, be only ONE diary per day per contract and that is created by the office manager in the FieldManager program.

Besides creating a diary and importing IDRs from inspectors, it is also the office manager's responsibility through the FieldManager program to create the stockpiles, change orders, and estimates. These functions CANNOT be done in the FieldBook program.

**THERE CAN BE ONLY ONE WORKING FIELDMANAGER CONTRACT - IF THE SAME CONTRACT IS IN ANOTHER FIELDMANAGER COMPUTER, IT MUST BE READ-ONLY.**

**FieldBook** is the program that field inspectors use in laptops to create IDR's to document activities pertaining to the contract. This program provides several inquiries but no reports. Any IDR's created here are exported to FieldManager by flash drive or by using the server. FieldBook users CANNOT create daily diaries (meaning they cannot compile IDRs for the same date), contract modifications, stockpiles, or estimates. They do, however, enter the working day charge and make all item postings which ultimately is the basis for the contractor's time charge, weekly working day report and payment.

Once IDR's have been created and exported from FieldBook and imported into FieldManager a turn-around-file (TAF) is automatically created which is given to the field inspector to import back into FieldBook. This turn-around-file will update FieldBook so the item progress is as current as possible. Work can continue on all machines during the interim period between exporting and importing.

The following chart might be helpful in showing exactly which functions each program can perform.

	FieldManager	FieldBook
IDR's	X	X
Daily Diaries	X	
Cont Mods	X	
Stockpiles	X	
Estimates	X	
Inquiries	X	X
Reports	X	

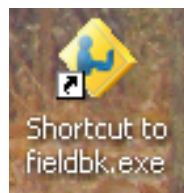
***GENERATE - A mighty important word***

Unless an IDR has been generated, the data cannot be exported from FieldBook to FieldManager so, ultimately, cannot be included in an estimate or a weekly report of working days.

In FieldManager, the diary, IDR, and estimate each must be generated before the data can be included in a payment or time can be charged.

**Starting FieldBook -**

Find the gold and blue icon for the shortcut to FieldBk and double click it.



The very first time you login to FieldBook, you won't have any contracts. That also means the program won't know about you as a user. In order to use the program, import a contract(s) so the program also gets your user information. It is critical that your name, ID, and password had been entered in FieldManager BEFORE the contract is exported for you to use in FieldBook.

When importing a contract(s), the program will ask for the location of the file you wish to import. Since you'll probably receive the contract on flash drive, type in E:\ if it doesn't show already and press the OK button.



Your user ID is imported along with the contract so if you had to log in as someone else in order to import your contract, once the import is complete, you should then exit the program and then login using your own user ID and password. During this training, however, you will be Inspector Sammy Smith rather than yourself.

The user ID and password is as follows -

<u>Inspector</u>	<u>User ID</u>	<u>Password</u>
Sammy Smith	smith	smith

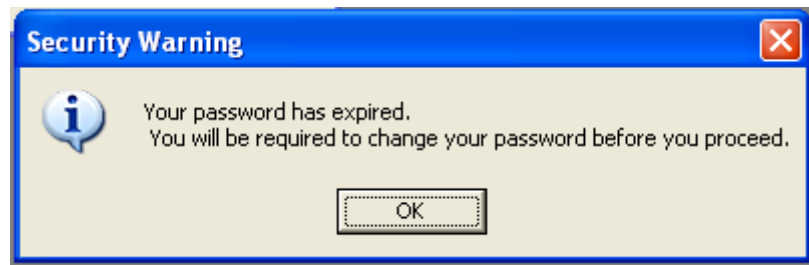
The contracts we will to use for this training are combined in one file called

**50aFBTrainingContracts.EBL** which is on your flash drive.

(This file is also located on the server in the following location -

W:\Highway\Construction\FieldManagerInformation\50a Training)

1. Double click on the FB icon
2. Select the location of the import file and click OK
3. Change the name in the datasource field from what is there to Training
4. Once the file has been imported, you'll get a message stating that the import was a success
5. Training will be the datasource displayed.
6. Type in smith for the user ID and smith for the password  
*(The user Sammy Smith is known in this datasource only. If you imported other contracts into a different datasource and then tried to log in with this ID in that datasource, you would get an "Invalid User ID/Password" error.)*  
*(The user ID must have been entered in the FieldManager computer prior to exporting the contract for FieldBook from that computer. User IDs and passwords are included with the contract information when they are exported from FM and imported into FB.)*
7. If you receive a warning that your password has expired as shown below, you must change your password before you continue the login process. You will not be required to change the password again if you are listed as a FieldBook user.



8. Once you are in the program, you should see 3 contracts in your list and in the bottom right corner of the screen, you'll see that you are logged into the Training datasource as smith.

## **IF YOU HAVE PREVIOUSLY MPORTED CONTRACTS (NOT THE TRAINING CONTRACTS) INTO FB -**

Click Import – FM

Select the location of the contract and click OK

Once the import is complete, you should see 3 contracts in your list

As you probably noticed, the program does NOT ask for a specific contract name - just where the file containing the contract is located. The name is assigned automatically by

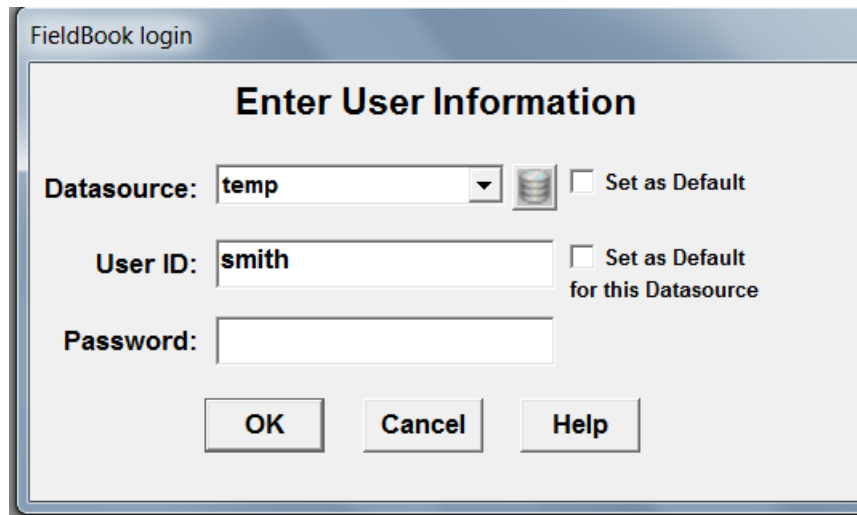


the FieldManager program when it is exported to FieldBook and is based on 1 of the contracts being exported.

Once the contract file is imported into FieldBook, it is automatically deleted from the source (in our example, the flash drive). If for some reason the import process fails, you can get another contract file from FieldManager and repeat the process without a problem.

**Notice -**

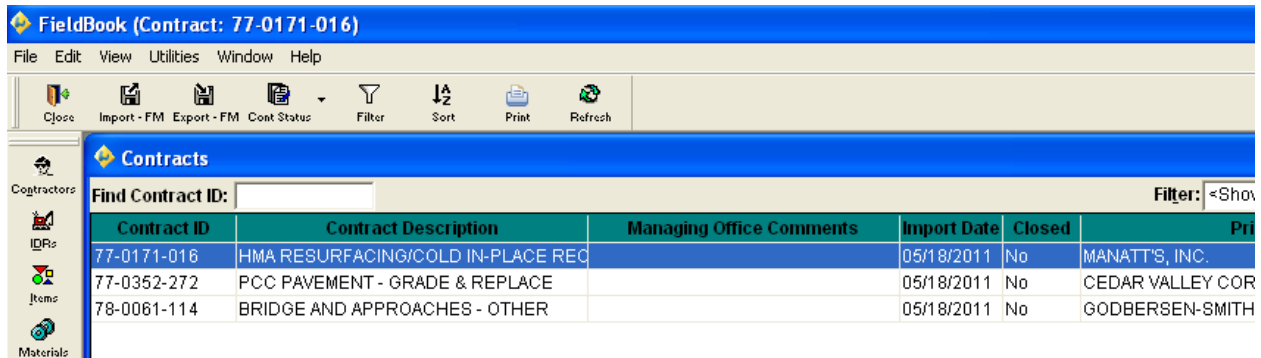
**In order to follow the examples in this users guide, you must be logged in as user Sammy Smith in the datasource containing your training contracts.**



The image shows a Windows-style dialog box titled "FieldBook login". Inside the dialog, the main heading is "Enter User Information". There are three input fields: "Datasource:" with a dropdown menu showing "temp" and a small database icon to its right; "User ID:" with a text box containing "smith"; and "Password:" with an empty text box. To the right of the "Datasource:" field is a checkbox labeled "Set as Default". To the right of the "User ID:" field is a checkbox labeled "Set as Default for this Datasource". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

Put a checkmark in the Set as Default for this Datasource (just to the right of the User ID field) in order to have your user ID automatically displayed each time you log in to the FieldBook program. You can enter anyone in this field that you wish but in order for this to work, of course, that user ID must have been entered in the users list in the FieldManager machine prior to when the contract was exported to FB. The users IDs and passwords are imported into FB along with the contract information.

# Janitorial Issues –



## Contracts Screen

The contracts screen is always the first screen to appear when you login to FieldBook. This is a list of all contracts available for your use on your laptop in the datasource that is shown in the bottom right area of the screen (just to the left of the use's name who is logged into the program.. A contract CAN be in more than one FieldBook computer so many inspectors working on the same large contract can create IDR's (Inspector's Daily Reports) on their own laptops. Each IDR can include item progress entries (postings), weather information, comments, and the working day charge for a given day. The entries from all inspectors are "compiled" when the office personnel imports the IDRs into FieldManager and then creates the daily diary.

## Bars

This program, like many Windows programs, has a menu bar but it also has two button toolbars. The menu bar has the same choices as other Windows programs. It is located above the top button bar and contains File, Edit, View, Utilities, Window, and Help.

By default the Window toolbar is just under the menu bar across the top of the screen. (This is called a Window toolbar because the buttons available are dependent on the window that's open.) The Close button is always in the far left corner no matter which window is open. The other buttons, as mentioned before, will change depending upon the window that is active at the time.

The Application toolbar is by default along the left side of the screen. These buttons all remain the same no matter what window is active.

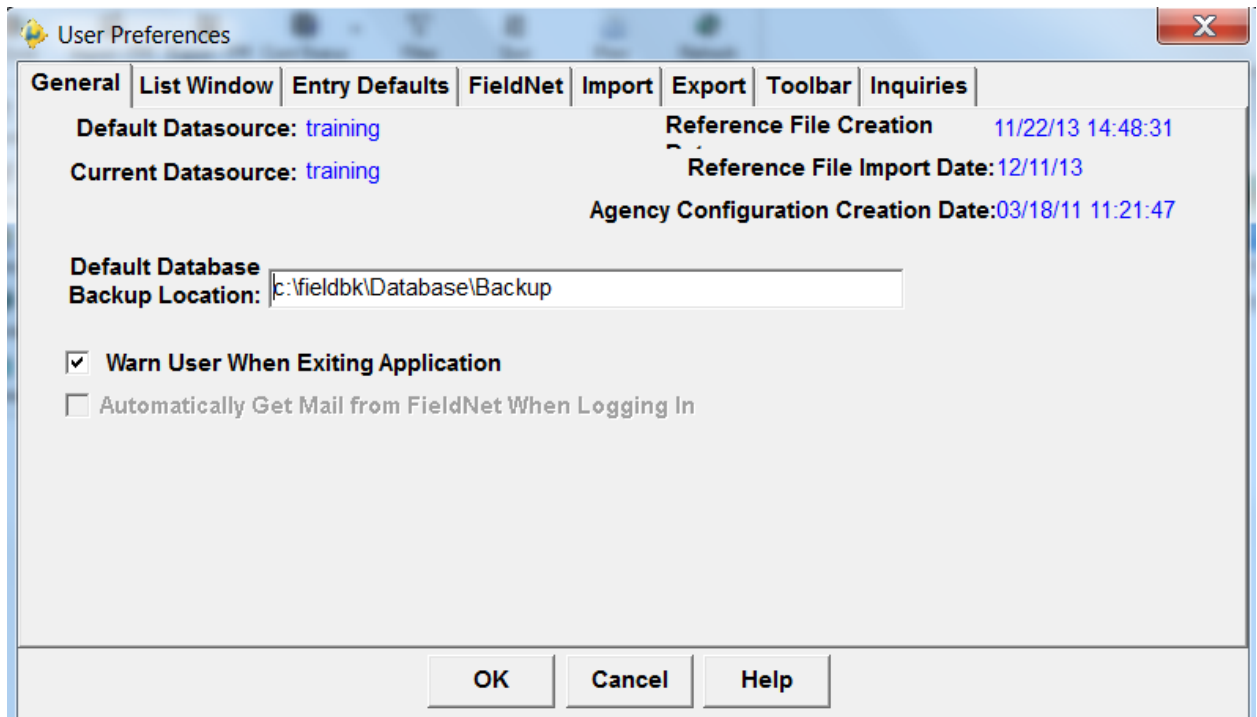
You can change the position of either button bar by choosing Utilities > User Preferences and clicking on the Toolbar tab. Here you can also choose whether or not to have the text of the button bar shown and whether or not to have the tips shown when you place your cursor over a button. I would suggest leaving them "as is" at least until you are quite familiar with the program

## Setting Preferences -

From the menu bar select Utilities > User Preferences. A screen with multiple folder tabs appears. You will notice folder tabs being used throughout the program to separate and organize. We'll check out each folder tab on this screen before we quit!!

**Be aware that the preferences you set are strictly for the user who is logged in. In our case, the preferences we set will be for Sam Smith only. Any other user who logs in to the program can select different preferences.**

### General Folder Tab -



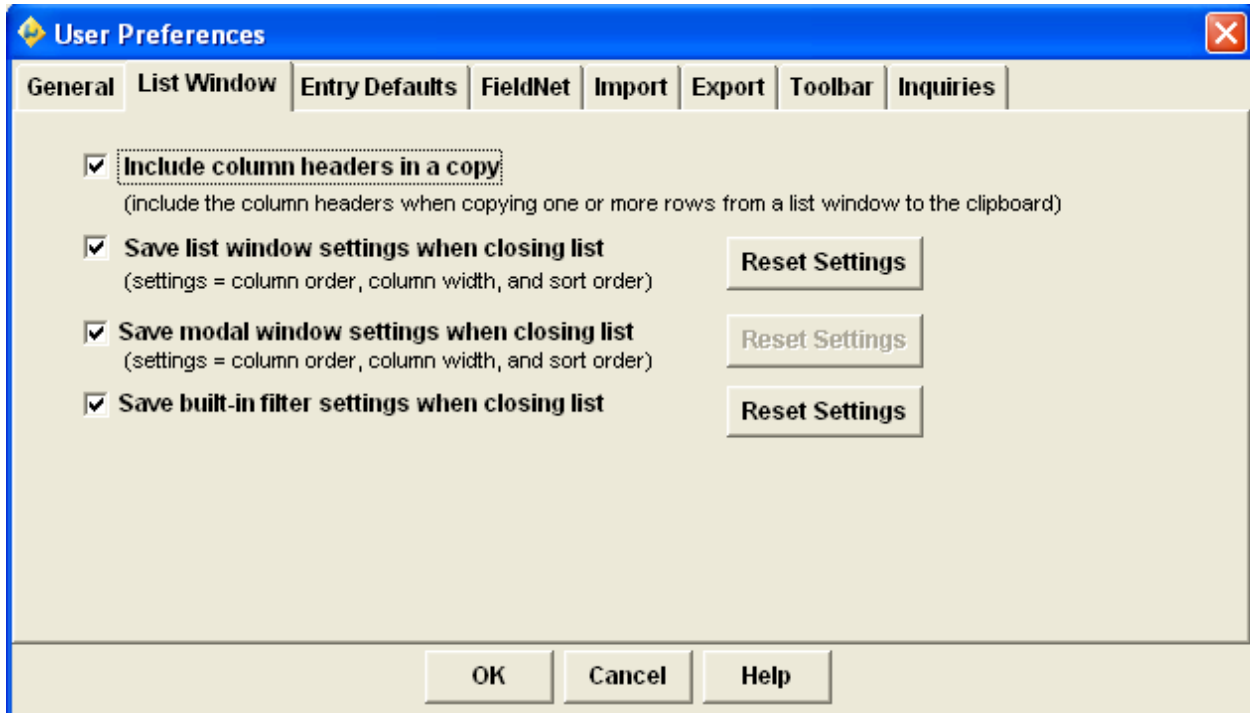
Notice in the above graphic that both the default datasource and the current datasource are training. Note also, that the reference file was last imported 12/11/13 (shown in upper right of screen).

The Default Database Backup Location should be C:\ProgramData\FieldBook\Database\Backup. **It is not a good idea to change this path to backup directly to the W drive.** We have had problems trying to restore a database when the program was backed up directly to the W drive. Instead, let the program backup first to the C drive and then it will ask if you want to copy that backup information. We'll work on this one later!!

If you wish the laptop to confirm that you really want to exit the FieldBook program, click so a checkmark appears in the Warn User When Exiting Application. If you do not wish this confirmation, leave the box blank.

Click the List Window folder tab.

### List Window Folder Tab –



#### Include column headers in a copy

Leave a checkmark in this box and any time you copy and paste information from columns, the column headers will automatically copy as well.

#### Save list window settings when closing list

Be sure a checkmark is in this box and anytime you change the size of a column, sort a list, etc. those preferences will stay until you change them again.

#### Save modal window settings when closing list

A modal window is a “window within a window” such as when you currently view a second smaller version of the items list. Be sure a checkmark is in this box and anytime you change the size of a column, sort a list, etc. those preferences will stay until you change them again.

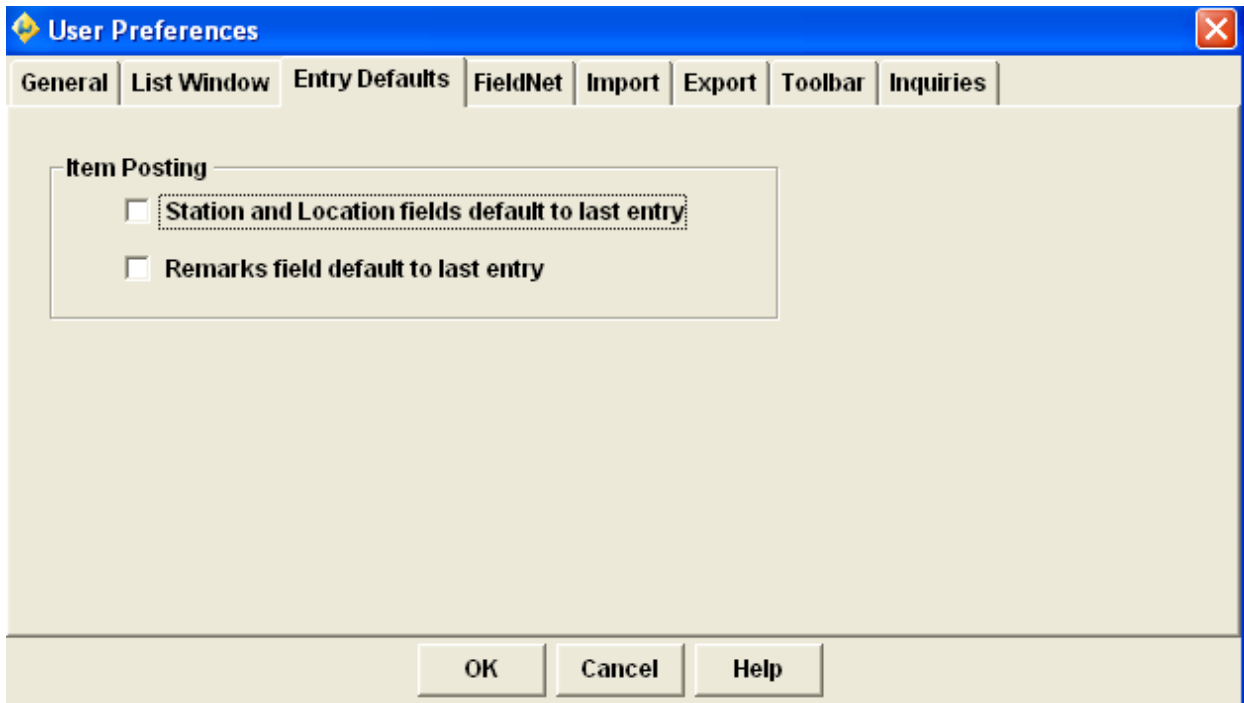
#### Save built-in filter settings when closing list.

This would be good to have checked under certain conditions. For example, if you’re working on only certain items on a contract (e.g. only items in a specific project and/or category) and you filter the lists so you see only those items, this option will keep that filter until you remove it.

Be sure there is a checkmark in all 4 boxes. (They're each a good thing to have!!)

Click the Entry Defaults folder tab.

### Entry Defaults Folder Tab -



If you prefer that the last entered station and location fields in your item posting entries remain in those fields for the next entry (whether it's the same item or not), you should have a checkmark in the box. If you want those fields to be blank each time, leave the box without a checkmark. *(There MUST be an entry in either the Station or Location field before you can save an IDR.)*

This option can be turned on and off at will. I have found it can be very helpful when making entries for bridge work. It is also helpful to see the last Station entered when posting several entries for the same item – if you get interrupted, you can see the last Sta and posting you made. But I have also found it to be a real pain when making entries for other types of contracts. When it works to my advantage, I turn on the option and when it is not to my advantage, I turn off the option.

For now, let's have a checkmark in the Station and Location option – we'll see the results of doing so a bit later.

There is a Remarks field on every item form and it is a very good idea to enter a remark for EVERY entry but I doubt that you'd want the very same remarks entered for

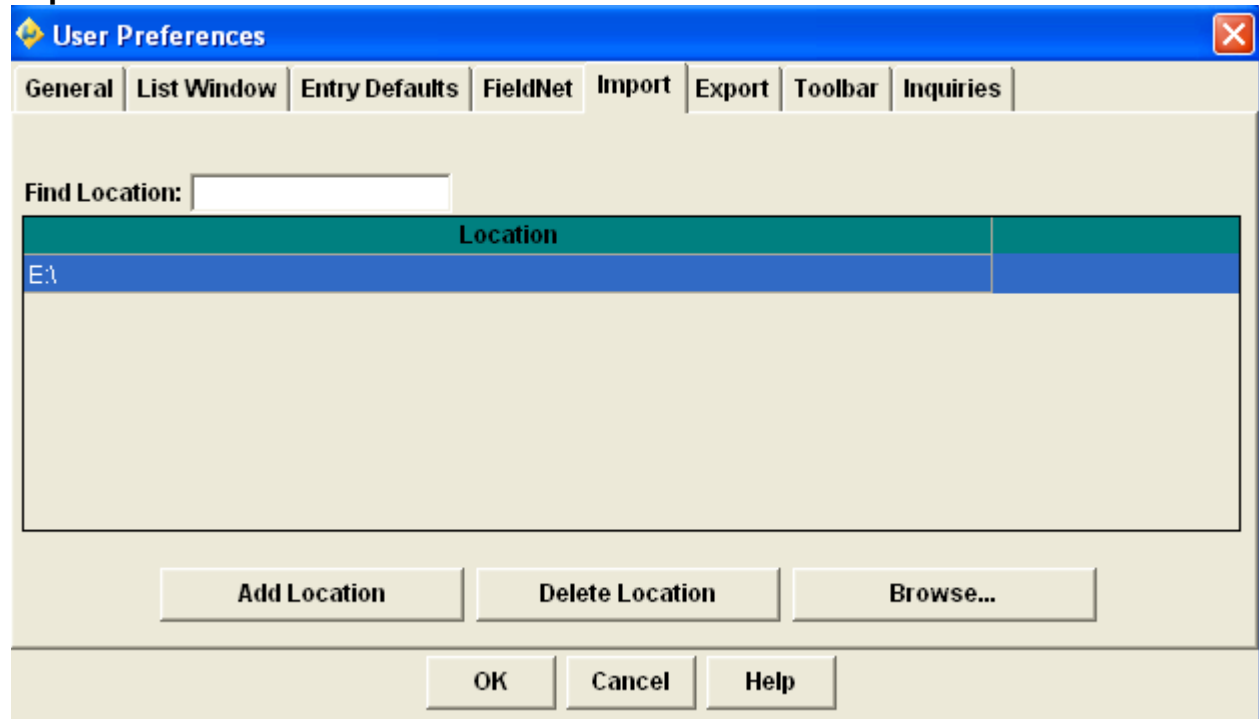
every item so I would not put a checkmark in this field. If a checkmark is there, remove it.

Once again, however, these options can be changed at any time and will continue on with the new selections until changed again.

### FieldNet Folder Tab –

We won't be using FieldNet which is an e-mail type system within FieldManager and FieldBook.

### Import Folder Tab –



There is a default location for importing IDR's from FieldBook. If you want a different location to automatically appear in your drop down list, that location can be added here. This list of locations is automatically updated when a user types in a new location while performing an IDR import. We're not going to do it now but if you need to add a new location -

- Click the Add Location button
- Enter the new location
- Click OK

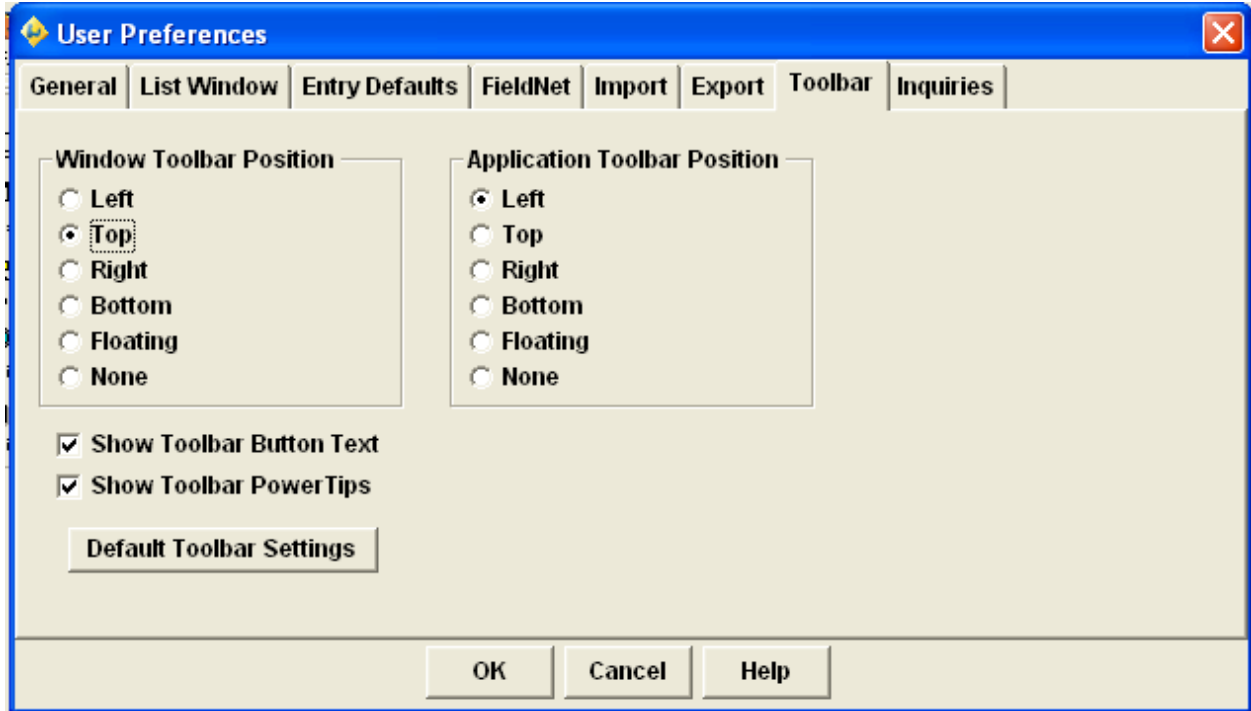
### Export Folder Tab –

There is a default location for exporting contracts to FieldBook. If you want a different location to automatically appear in your drop down list, that location can be

added here. This list of locations is automatically updated when a user types in a new location while performing an export to FB. We're not going to do it now but if you need to add a new location -

- Click the Add Location button
- Enter the new location
- Click OK

### Toolbar Folder Tab –



This tab gives you the option to locate the toolbars other than where they currently are shown. By default the application toolbar is in a vertical position on the left side of the screen and the windows toolbar is in a horizontal position across the top of the screen.

By default there is a checkmark in each of the 2 options, 1 to display the button text and the other to display the power tips. If you remove the checkmark to display the button text, only the “picture” will remain in the button – no words. If you remove the checkmark to display the power tips, when you move the cursor over top of a button, it will not display what that button is used for.

It is an extremely good idea to leave this tab as is – at least until you become very familiar with the program

Click OK to return to the contracts list

## **To Change Your Password -**

If you have a FieldBook security level, you are not required to change your password every 60 days. If, however, you have the security level of FieldManager, you will still be required to change your password every 60 days even though you are in the FieldBook program. (To know which level of security you have – you have FM security if you can login to the FM program and create diaries, weekly working day reports, estimates. If those icons are grayed out when you login to the FieldManager program, you have FieldBook security.

Your user ID and password as entered in the FM program are imported into FieldBook with the contract. It's up to you to change your password after you import the contract. You should NOT share this password with anyone else since this is the tracking record for making entries.

If you and another person are sharing a laptop for either the same or a different contract, you should be sure to log in with your own ID before making your entries.



If you wish to change your password, click Utilities in the menu bar then Change Password. If the new password isn't exactly the same each time it's typed, you'll be given an error message stating so. If that happens, simply start the process again - and type it in correctly both times!!!!

**Passwords must be a minimum of 5 characters.**

We don't want to change the password now so click Cancel.

## **FieldBook Cruisin'**

Let's get acquainted with some of the buttons now that we have some contracts loaded. Remember, the buttons in the Application toolbar (along the left side) will always remain the same but the buttons in the Window toolbar (top) will be completely dependent upon which screen is active.



Some screens will be divided into areas through the use of folder tabs.

Highlight Contract 78-0061-114 in the contracts list  
We'll explore the Application toolbar (left side) first

Click the Contractors button

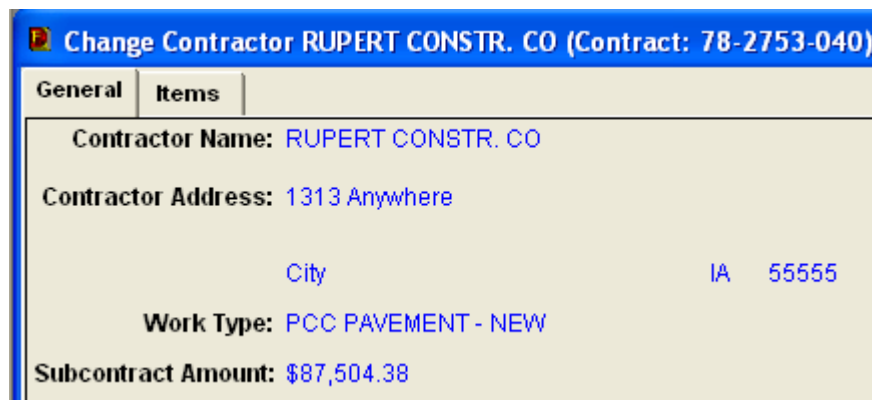
## Contractors -



Contractor Name	Vendor Number
<b><i>GODBERSEN-SMITH CONSTRUCTION CO. &amp; SUBSID.</i></b>	<b><i>GO020</i></b>
LANDMARK ENGINEERING GROUP, INC.	LA125
MANATT'S, INC.	MA225
NEXT PHASE ENVIRONMENTAL, INC.	NE430
PAR ELECTRICAL CONTRACTORS, INC.	PA060
RIVER CITY BARRICADE CO.	RI346
WEST CENTRAL CONSTRUCTION, INC.	WE455
WESTERN ENGINEERING CO., INC.	WE540

A list of the prime and all subs that were associated to this contract in the FM program are displayed. The prime contractor is displayed in bold, italicized print.

To see more details about a contractor, highlight the contractor's name and then click the Review button or the Change button (or double click on the contractor's name)



**Change Contractor RUPERT CONSTR. CO (Contract: 78-2753-040)**

**General** | **Items**

**Contractor Name:** RUPERT CONSTR. CO

**Contractor Address:** 1313 Anywhere

City IA 55555

**Work Type:** PCC PAVEMENT - NEW

**Subcontract Amount:** \$87,504.38

The contractors' addresses and work types will be displayed only if that information was entered in the FM program prior to the contract being exported to FieldBook.

Click on the Items tab - -

All items that have been linked to the highlighted contractor are listed in the Items tab of the Contractors button. By default, every line item is linked to the prime contractor and will remain so unless that link is removed in the FM program (**NOT ADVISED**). Multiple contractors CAN be linked to the same item. In other words, the prime and 1 or more subs can be linked to the same item.

If you need to link an additional item(s) to a subcontractor, you can do that here.

Click the Close button twice to return to the Contracts list

Contract 78-0016-114 should still be highlighted.

Click the IDR's button

## IDR's (Inspector's Daily Reports) -

Inspector's Daily Reports (Contract: 78-0061-114)								
Find Date: <input type="text"/>								Filter
Date	Initials	Inspector	Seq	Gen	Attach	Comments	Status	
03/21/2011	jw	Janet Wastenev	1	No	<input type="checkbox"/>	IDR to correct item posting for River City Barricade	New	
05/22/2011	jw	Janet Wastenev	1	Yes	<input type="checkbox"/>	Abnormally warm and wet for this time of year. Too	New	
03/21/2011	jw	Janet Wastenev	1	Yes	<input type="checkbox"/>	IDR strictly for purpose of having a placed quantity p	Refreshed	
03/21/2011	jw	Janet Wastenev	2	Yes	<input type="checkbox"/>	incorrect placed and paid item posting to correct dui	Refreshed	

Unless the default has been changed, all IDRs created in the last 9999 calendar days by every inspector will be listed. The far right column will indicate the status of the IDR. This screen also displays the date the IDR was created and who created it.

Let's check out the columns -

Date = The date the IDR was created

Initials = The initials of the person who created this IDR. The same initials cannot be used for more than one inspector in the same office. (This information is entered in the FieldManager program.)

Inspector = The name of the inspector who created this IDR. Only this FieldBook person can change, generate, and/or delete this IDR.

Seq = The number of IDR's created for a contract for the same day by the same inspector. (Seq 1 is the first IDR, Seq 2 is the second IDR, etc.)

Gen = No is the default which means the IDR has not been generated. Once you generate the IDR, it will have Yes in the generate column. *The IDR MUST be generated before it can be exported to FieldManager.*

Attach = If an IDR contains attachments, the number of them in that IDR will be displayed in this column. If no attachments, a 0 will be displayed

Comments = The first few words of the comments section

Status = The status column will have one of the three following shown -

**New** - The IDR has been created but has not been exported to FieldManager. It may or may not have been generated. The user who created the IDR can change anything about the IDR or delete it. *A FieldBook user cannot change, generate, or delete an IDR created by another user*

**Exported** - The IDR has been exported to FieldManager but the turn-around-file that was created in that process has not yet been imported. You can view the IDR in FB but cannot make changes. If changes must be made at this time to this IDR, they must be done in the FieldManager program.

**Refreshed** - The IDR has been exported to FieldManager AND the turn-around-file that was created during that process has been imported into FieldBook. Changes cannot be made to the IDR in the FieldBook program. If changes must be made, they can be done in the FieldManager machine up until that IDR is included in an estimate.

We'll use this information a LOT more later but for now click the Close button to return to the contracts list.

Highlight the 78-0061-114 contract

## **Items** –

Click the Items button

By default, this shows a list of all items in the contract, both original items and those added by contract modification. If a new item was added by cont mod, the cont mod number will be displayed in the far right column titled Cont Mod Number. By default, the Initial Quantity will be just to the right of the Authorized Quantity. Those 2

numbers will be the same unless the item's quantity has been increased or decreased by contract modification.

Items (Contract: 78-0061-114)								
Project: 78-0061-114		Category: <All>						
Contractor: <All>								
Find Prop. Line: <input type="text"/>			Filter: <Show All>					
Item Description	Units	Item Code	Prop. Line	Quantity Placed	Quantity Paid	Authorized Quantity	Initial Quantity	Pending Changes
EXCAVATION, CL 10, CHANNEL	CY	2104-2710020	0010	0.000	0.000	10,977.000	10,977.000	0.00
RMVL OF EXISTING BRIDGE	LS	2401-6745625	0020	0.000	0.000	1.000	1.000	0.00
EXCAVATION, CL 20	CY	2402-2720000	0030	3,040.000	0.000	304.000	304.000	0.00
REINFORC STEEL	LB	2404-7775000	0040	0.000	0.000	46,594.000	46,594.000	0.00
REINFORC STEEL, EPOXY COATED	LB	2404-7775005	0050	0.000	0.000	3,754.000	3,754.000	0.00
LONGITUDINAL GROOVING IN CONC	SY	2412-0000100	0060	0.000	0.000	1,300.000	1,300.000	0.00
CONC DRILLED SHAFT, 72" DIA	LF	2433-0001072	0070	150.000	0.000	300.000	300.000	0.00
DEMONSTRATION SHAFT	LF	2433-0003000	0080	15.000	0.000	75.000	75.000	0.00
PILE, STEEL, HP 10X57	LF	2501-0201057	0090	500.000	0.000	1,920.000	1,920.000	0.00
ENGINEER FABRIC	SY	2507-3250005	0100	0.000	0.000	3,295.000	3,295.000	0.00
REVTMENT, CLASS E	TON	2507-6800061	0110	0.000	0.000	3,209.000	3,209.000	0.00
CONSTRUCTION SURVEY	LS	2526-8285000	0120	0.000	0.000	1.000	1.000	0.00
MOBILIZATION	LS	2533-4980005	0130	0.000	0.100	1.000	1.000	0.00
(EACH' ITEM) ABUTMENT STEM	EACH	2599-9999005	0140	0.000	0.000	2.000	2.000	0.00

The list of items viewed can be limited based on the selection in the Project, Category, and/or Contractor fields near the top of the screen. The information in the items screen is updated automatically by the program and is as current as the last entry saved or the last IDR turn-around-file imported, depending on the column you're viewing.

**If you ever see "unattached" in the Item Type column, notify your office and Janet or Jen in the Creston Const Office (641-782-4518) immediately and do NOT post any progress to that item.**

### Viewing Item Selection

If the contract has more than 1 project, All will appear in the Project field. If there is only 1 project, that project number will automatically be in the Project field. Notice our contract shows 78-0061-114 in the Project field so we know there is only one project involved.

If there is more than 1 category, All will appear in the Category field. If there is only 1 category, the Category field will show 001. Notice that with our contract selected the Category field shows All. That indicates to us that there is more than one category associated with that particular project. Click the arrow by the Category column and a list of all categories associated with the selected project will be shown. Click anywhere outside that drop down box and it will disappear.

If you select a specific project from a multiple project contract and a specific category, only those items associated with both will appear in the list. Similarly, if there is only one project in the contract and you have All in the Category field, the list will show every item on the contract.

“All” will be displayed in the Contractor field whether or not there are subcontractors associated to the contract. By default all items are linked to the prime contractor. Unless a subcontractor is linked to an item and the prime’s link is deleted **(NOT ADVISED)**, all items remain linked to the prime contractor. Once subs have been linked to specific items, you can select a subcontractor from the Contractor drop down list in the Items list - and only those items linked to that subcontractor will be displayed.

Change the Contractor field back to All if it isn’t already.

### Changing Columns

The width of the columns can be increased or decreased by placing the cursor in the header on a solid vertical line. Once the cursor turns to a crossbar you can drag the line to either increase or decrease the width of the column. Columns can be moved from one location to another by clicking once in the header of the desired column, holding the left mouse key down, dragging the column to the new location, and letting go.

If you have a checkmark in the Save List Window Settings When Closing List option of the Utilities > User Preferences > List Window folder tab, the changes you make to the columns will remain that way until you change them again or click the Reset Settings button in the List Window tab.

### Sorting

If this is the first time you are viewing this list, the items will be in alphabetical order since that is the program default.

Items can be sorted in any column by double clicking in the header of that column. The sort will be done first in ascending order. If you double click again in the same header the order will be reversed (descending). If you chose Save List Window Settings When Closing List as an option when you were in the Utilities >User Preferences> List Window folder tab area the changes you made will remain until you change them again or request they return to the default.

### Searching (Find)

If the item list is lengthy the Find field can be helpful. If the items are sorted according to Item Description the Find Item Description will be available and you type in the item name. If the items are sorted by Proposal Line, the Find Prop. Line, will be available and you’d type in the proposal line number. In other words, whichever column is used for the sort, that’s the Find field available.

The search will begin as soon as you type in the first digit or letter and will continue the search each time you add another digit or letter.

## Filter

Filters can be used in IDRs as well as the Items. We'll create a filter for the Items list so only items meeting certain conditions will be shown. This filter can be kept permanently or used only temporarily, whichever you prefer. (You can change the project and/or category choices with the filter left on.)

We'll create a temporary filter for practice so you can see how it's done

You should still be at the Items list

Click the Filter button.

In the Column field, select Item Description from the drop down list  
*or with the Column field blue, click the letter I four times.*

In the Operator field, select Contains from the drop down list  
*or with the Operator field blue, type the letter C*

In the Value field, type SILT (This is NOT case sensitive)

Click the OK button and a list of only the items containing the word silt in the description will be shown

Click the arrow beside the Filter field (just to the right and above the list of items) and select <Show All> to see the entire list of items again

## To see details about a line item -

Highlight Line No. 0420 and click the Change button or double click on the item. This will bring up more detailed information about this specific line item. These screens are read-only but have some helpful information. That information is divided by folder tabs.

## General Folder Tab -

There will be a checkmark in each category line containing the specified item displayed in the top portion of the screen. The top portion of this screen shows information for that line item based on the entire contract rather than a specific category.

Project	Catg.	Category Description	Project Description	Catg. Qty. Placed	Catg. Qty. Paid	Catg. Auth. Quantity	Catg. Init. Quantity	Catg. Pend. Changes	Catg. Auth. Amount
<input checked="" type="checkbox"/> 78-0061-114	0003	P:ROADWAY ITEMS	110215 058 KGE	0.000	0.000	4.290	4.290	0.000	\$1,072.50

**Documentation Folder Tab -**

There is an area for documentation and another for notes on this tab. If information was entered in these fields in FM, you will see it here.

By default the Item Completed field is “No” but you have the option to change that to “Yes” by clicking in that field. If you do mark an item complete but then discover that more payment must be made for it, that can be done. When you post progress for the item, a message will be displayed stating that the item has been marked complete and asking if you want to continue.

', and 'Notes:'."/>

General	Documentation	Materials	Breakdowns	Contractors
<b>Item: 2123-7450000, SHLD CONSTRUCTION, EARTH</b>				
Prop. Ln: 0420	Unit: STA	Auth. Qty: 4.290	Auth. Amt: \$1,072.50	
Type: ORIGINAL ITEM / PITYPE T/A	Unit Price: \$250.000		Qty. Placed: 0.000	
Pending Chgs: 0.000			Qty. Paid: 0.000	
Item Completed: <input type="radio"/> Yes <input checked="" type="radio"/> No				
Documentation:				
Attention: <input type="checkbox"/>				
Notes:				

If the item is marked for Attention in the FieldManager program, that item will be so noted when the item is included in an estimate. It will not stop payment – will just be marked for attention. All fields except Item Completed on this screen are read only in the FieldBook program.

**Materials Folder Tab & Breakdowns Folder Tab -**

We are not using these folder tabs

**Contractors Folder Tab –**

By default, all line items are linked to the prime contractor. If the item you’re looking at has been linked to subcontractor(s) in the FieldManager program, it will be displayed as such here.

**You can add an item link to an existing subcontractor but you cannot add a new subcontractor to the list in FB.**

**You can only delete an item that you linked to a subcontractor in the FB program. You cannot delete any item links or any subcontractors that were entered in the FieldManager program and passed to you.**

### **Materials -**

Although there is a materials section available with FieldBook, we are not using it at this time.

Close back to the Contracts list

### **Inquiries –**

Click the Inquiries button. It doesn't matter which contract is highlighted, the same list of inquiries is available for every contract. The details displayed in the inquiries is dependent on the contract highlighted when the Inquiries button was activated.

This lists over 45 inquiries available in FieldBook. An inquiry is actually a snapshot of the database at the time of the request. If you request an inquiry today and request the same inquiry tomorrow, chances are the information will be different since work has been done and entries have been made in FieldBook between the two times. The inquiry reflects the information in the database as of the moment of the request.

Any inquiry can be both viewed and printed but cannot be saved.





Shown above are just a few of the inquiries available.

Close back to the contracts list

## **Windows Toolbar -**

Let's explore the Window toolbar -

### **Import - FM**

Click the Import-FM button

Use this button to import new contracts into FieldBook or to import the IDR turn-around-file you receive back from the FieldManager machine



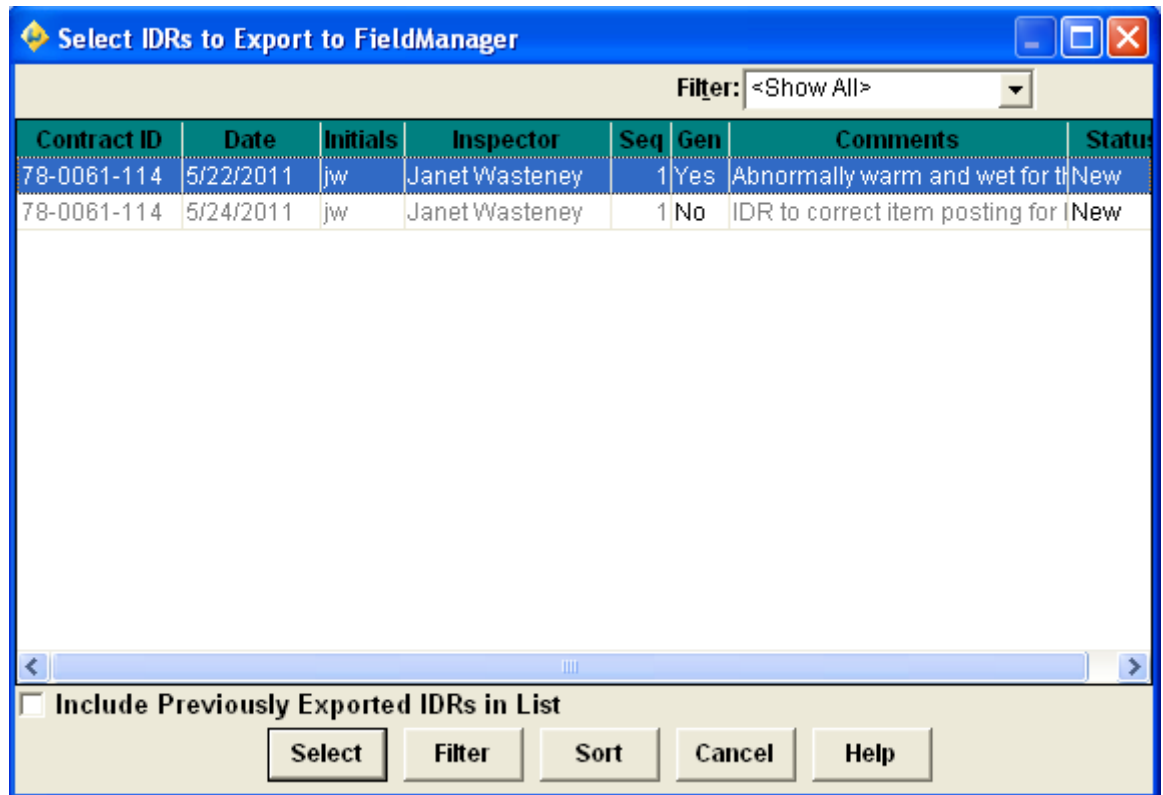
This is the same screen you used to import the contracts. No file names are required - The program will find all the appropriate files with the extension .EBL in the location you designate and import them into the program. Once the import process is complete, the .EBL files will be deleted from the original source.

Click the Cancel button and return to the contracts list

### **Export - FM**

Click the Export-FM button

Use this button to export generated IDR's to the FieldManager machine.




A list of all non-exported IDR's created in all contracts by all users in this laptop will be listed. (See the sample above) If the IDR has NOT been generated, it will be gray and cannot be selected to export to FieldManager. If the IDR has been generated, it will be black and will be highlighted. If you don't want to export all that are highlighted, click on each so only those of your choice are highlighted and press the Select button.

If you have already exported an IDR but something happened and the FM program never received it, you have the option to "re-export" the IDR again by putting a checkmark in the Include Previously Exported IDRs in List. Only those IDRs that have not been refreshed will be additionally displayed. Select (by highlighting) all the IDRs you wish to export and then click the Select button.

We'll do much more with this screen later but for now click the Cancel button to close back to the contracts list.

### **Cont Status -**

This is a view only screen which gives basic information concerning the contracts. The information is updated automatically as the turn-around-files are imported into FieldBook. Total working days charged to date in each site are shown near the bottom of the page.

Contract Status	
	6/13/2011 1:49 PM
Iowa Department of Transportation	File Workbook 4.8a
Contract: 78-0061-114, BRIDGE AND APPROACHES - OTHER	
Contract ID: 78-0061-114	Spec Year: 84
Contract Description: BRIDGE AND APPROACHES - OTHER	
Awarded Contract Amount: \$2,658,823.35	
Current Contract Amount: \$2,658,823.35	
Amount Paid To Date (FM): \$0.00	
Amount Paid To Date (CAS): \$24,250.00	
Total Unpaid Placed Dollar Amt: \$116,613.78	
% Complete (awrd): 0.00%	
% Complete (curr): 0.00%	
Location: POTTAWATTAMIE BRF-006-1(114)-38-78	
Route: HWY 6	
Project Engineer:	
Resident Engineer: COUNCIL BLUFFS RCE	
Managing Office Manager:	
Managing Office: Council Bluffs	
Managing Office Comments:	
Prime Contractor: GODBERSEN-SMITH CONSTRUCTION CO. & SUBSID.	
Prime Contractor Vendor Id: G0020	
Contractor Address: 5784 HIGHWAY 175	

Close back to the contracts list.

### **The Quick Query Fly-Out Toolbar Button**

There is a narrow "button" just to the right of the Cont Status button. If you click the down arrow in that area, depending on the screen that is active at the time, inquiry options will be available immediately. These same inquiries plus more are available through the Inquiries button - this is just a quick and easy way to access some of them.

Highlight Contract 78-0061-114

Click the fly-out button while you're at the contracts list screen and see the option  
Click the Items button (on the left) and then the fly-out button and see all the  
options!

Close back to the contracts list

## **Filter** -

If you do not want to see the entire list, you may want to create a filter so only items meeting certain conditions will be shown. This filter can be kept permanently or used only temporarily, whichever you prefer.

Another use for a temporary filter is to find a certain remark in the Comments field of an IDR. Perhaps you know a comment or word was entered but you have no idea which IDR had that entry. You can filter out every IDR unless it meets your requirements. For instance, if you wanted to find every IDR with information concerning stop lights in the comments field you would filter for the words "stop lights".

This can be a very, very helpful tool and save a lot of time. A specific example of how to use the filter is on Pages 18 and 19. Any screen with a list can have that list filtered.

## **Sort** -

As described previously, lists can be sorted in any column by double clicking in the header of that column. The sort will be done first in ascending order. If you double click again in the same header, the order will be reversed (descending). If you have Save List Window Settings When Closing List selected as an option (Utilities>User Preferences>List Window) the changes you make will remain until you change them again.

The Find field just below the Project field when viewing the list of items will be dependent on which column you use to sort. In other words, if you sort the Items list by Item Description, it will be Find Item Description. If you sort the list by Proposal Line Item No., it will be Find Prop. Line.

Close back to the contracts list

Contract 78-0061-114 should still be highlighted  
Click on the IDRs button if that list isn't already displayed.

## **Print** -

If you click the Print button at the IDRs list, you will be given a printing option –

1. Print List of Inspector Daily Reports
- or
2. Print the x selected Inspector Daily Report  
(the x represents the number of IDRs that are highlighted)

Cancel at the print option

Let's check out another set of buttons you'll be using a great deal.

With the 78-0061-114 contract still highlighted and the IDR's list still displayed, you'll notice that some of the buttons in the Window toolbar have changed. Let's take a closer look at the new ones.

Add = This will allow you to create a new IDR for any given date (except a future one!)  
 Change = This will allow you to change or add information to an existing IDR. The IDR must have a status of New and must have been created by yourself. **You CANNOT change an IDR that was created by another FieldBook or FieldManager user.**

Delete = This allows you to delete an IDR you created providing that IDR does not have item postings. If it does have item postings and you must delete the IDR, you must delete every item posting in that IDR first. **You cannot delete an IDR that someone else created.**

Review = A view only look at the IDR whether it is one you created, one created by someone else, or has a status of New, Exported, or Refreshed. This is a good place to go if you want to look at an old IDR.

Generate = This generates the IDR so it can be exported to FieldManager. You CAN make changes to an IDR that's been generated if you wish. Once you save those changes, the generated status will be changed back to un-generated so it will be necessary to generate it again before it can be exported.

Cont Status =

Quick Query =

Filter = These 5 functions were discussed on previous pages

Sort =

Print =

Now that we have explored both toolbars, let's start making some entries!

First, though, close back to the Contracts list

## Working with the Contractors button

Contractors (Contract: 78-0061-114)	
Find Contractor Name: <input type="text"/>	
Contractor Name	Vendor Number
<b>GODBERSEN-SMITH CONSTRUCTION CO. &amp; SUBSID.</b>	<b>G0020</b>
LANDMARK ENGINEERING GROUP, INC.	LA125
MANATT'S, INC.	MA225
NEXT PHASE ENVIRONMENTAL, INC.	NE430
PAR ELECTRICAL CONTRACTORS, INC.	PA060
RIVER CITY BARRICADE CO.	RI346
WEST CENTRAL CONSTRUCTION, INC.	WE455
WESTERN ENGINEERING CO., INC.	WE540

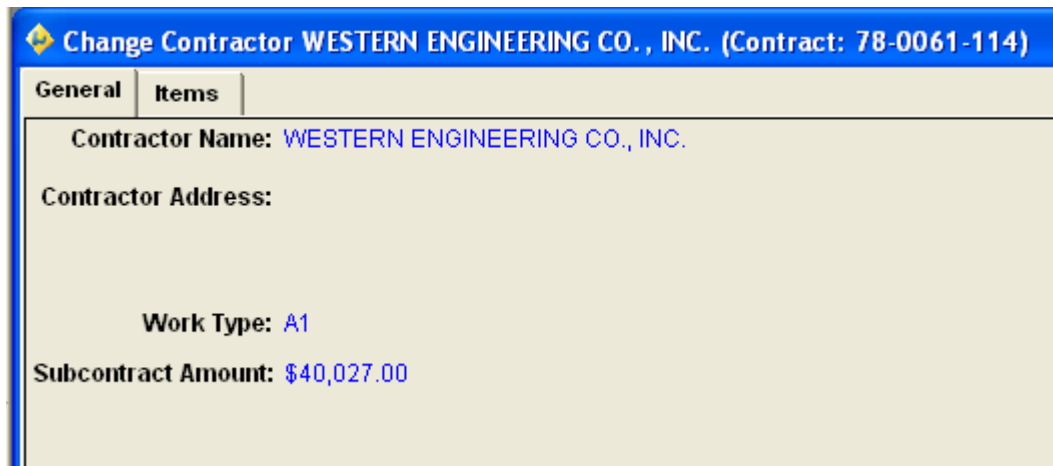
Contract 78-0061-114 should still be highlighted

Click on the Contractors button

A list of the prime and all subs that were associated to this contract in the FM program are displayed. The prime contractor is displayed in bold, italicized print.

Subcontractors cannot be added to this list in the FB program but FB users can link additional items to existing subs.

To see more details about a contractor, highlight the contractor's name and then click the Change button (or double click on the contractor's name)



Change Contractor WESTERN ENGINEERING CO., INC. (Contract: 78-0061-114)

General Items

Contractor Name: WESTERN ENGINEERING CO., INC.

Contractor Address:

Work Type: A1

Subcontract Amount: \$40,027.00

If the contractor's address, work type, and subcontract amount were entered in the FM program, they will be displayed in the General tab.

All items that have been linked to the contractor in FM are listed in the Items tab of the Contractors button. By default, every line item is linked to the prime contractor and will remain so unless that link is removed in the FM program. Multiple contractors CAN be linked to the same item. In other words, the prime and 1 or more subs can be linked to the same item.

Change Contractor WESTERN ENGINEERING CO., INC. (Contract: 78-0061-114)

Item Description	Unit	Item Code	Prop. Line	Quantity Placed	Quantity Paid	Authorized Quantity	Initial Quantity	Pending Changes	Price
PAVED SHLD, HMA, 6"	SY	2122-55000	0410	0.000	0.000	484.800	484.800	0.000	\$
HMA (1M ESAL) SURF, 1/2", FRIC L-4	TON	2303-00335	0450	0.000	0.000	22.300	22.300	0.000	\$3
ASPH BINDER, PG 64-22	TON	2303-02464	0460	0.000	0.000	1.400	1.400	0.000	\$6
PAVT, SCARIFICATION	SY	2214-51451	0430	0.000	0.000	206.000	206.000	0.000	\$
MOBILIZATION	LS	2533-49800	0130	0.000	0.100	1.000	1.000	0.000	\$250.0

Remarks: Imported from SiteXchange

The quantities displayed are not necessarily the quantities specific to only the contractor being viewed. In other words, if an item is linked to 2 subs and both are doing work on that item, the quantity placed will show the total placed by both subs, not for only the sub being viewed.

Although most item/contractor links are done in the FM program, sometimes work is done on an item by a different contractor than any choices you have when posting item progress. You can, in FB, link the item to the appropriate sub so that contractor's name will be displayed in the drop down list of the Contractor field on that item's form when you are documenting work that was done. By doing so, the correct contractor will be credited with doing the work for the quantity posted on a certain day.

As shown in the previous graphic, Western Engineering had 5 items linked to them in the FM. We can, however, link some here. And, guess what, we're going to do just that!!!!

To Link Items to the Subs –

Highlight Western Engineering Co if it isn't already and click the Change button

Click the Items tab and then the Add button

Highlight the Traffic Control item (Line 0590)

*(Now, what sort would be the easiest to use to find the item if you knew the description but not the proposal line number?? sort by item description)*

Click the Select button (or press Enter since Select is the default)



Change Contractor WESTERN ENGINEERING CO., INC. (Contract: 78-0061-114)									
General		Items							
Item Description	Unit	Item Code	Prop. Line	Quantity Placed	Quantity Paid	Authorized Quantity	Initial Quantity	Pending Changes	
PAVED SHLD, HMA, 6"	SY	2122-55000	0410	0.000	0.000	484.800	484.800	0.	
HMA (1M ESAL) SURF, 1/2", FRIC L-4	TON	2303-00335	0450	0.000	0.000	22.300	22.300	0.	
ASPH BINDER, PG 64-22	TON	2303-02464	0460	0.000	0.000	1.400	1.400	0.	
PAVT, SCARIFICATION	SY	2214-51451	0430	0.000	0.000	206.000	206.000	0.	
TRAFFIC CONTROL	LS	2528-84451	0590	0.100	0.000	1.000	1.000	0.	
MOBILIZATION	LS	2533-49800	0130	0.000	0.100	1.000	1.000	0.	

Remarks: Item added to this sub as per prime's instruction

The new item is now displayed along with the other items that were linked in FieldManager. Enter a remark explaining why the linked item was added late.

If you want to link more items to this contractor, click the Add button. If you want to delete one of the linked items that you just made (*you can't delete a link that was made in the FM program*), highlight the item and click the Delete button. If all is well, click the Save/Close button. That's what we'll do – click Save/Close which returns you to the list of contractors.

When your next IDR is imported into FieldManager, a report will automatically be created in that program that alerts the FM user that a new contractor/item link was made in the FB program and has now been imported into FM.

- Click the Close button
- Click the IDRs button

## Entering IDR (Inspector's Daily Report) Information

IDR's (Inspector's Daily Reports) may be created using either the FieldManager or the FieldBook program.

As a FieldBook user (inspector), you can change anything in any IDR you create until you export it to FieldManager. A FieldManager user (office) can change anything in ANY IDR until that IDR is included in an estimate.

There can be one or more IDR's per inspector per day on a contract. Any IDR created by the same inspector after the original one created for the day is given a sequence number. If an IDR has been generated and then changed, it will be given a revision number and will also log who did the revision and the date of that revision. If the IDR is revised more than 1 time, only the latest revision information will be displayed. All this information shows in the upper portion of the screen when viewing the General folder tab.

IDR's keep track of all daily activity on a contract and are compiled by the office person in the FieldManager program when they create a diary. We will create an IDR for Contract 78-0061-114

You should still be at the IDRs list for Contract 78-0061-114. If not, go there!

Click the Add button and we will get ready to create an IDR for yesterday

### General Folder Tab -

The General folder tab opens with today's date (the date the computer shows as today) as the default date for the IDR. You may change this to any **past** date. If you had already created one IDR for that date, this IDR would become Sequence #2.

### AN IDR CANNOT BE CREATED FOR A FUTURE DATE!!!

Some fields in the top portion of the screen are completed already. Some fields are blank since this is your first IDR for the date and it hasn't been revised! Notice it does show the date this IDR was actually created (Date/Time Entered), the date of the IDR (IDR Date), and the individual who created it.

General	Contractors	Site Times	Postings	Attachments	View
Date/Time Entered: 06/13/2011		Revised By:			
Entered By: Janet Wastenev		Revision Date:			
Sequence Number:		Revision Number:			
Generated: No					
IDR Date: 06/12/2011					
Inspector: jw Janet Wastenev					
Weather: scattered showers					
Low Temperature: 43° F 6° C					
High Temperature: 65° F 18° C					
Comments: Abnormally wet and warm for this time of year. Too wet to do much.					

Enter yesterday's date in the IDR Date field by either typing it in OR by clicking the drop down arrow and selecting the date..

The Inspector field is filled in already based on the user who logged in to the program. If someone else is logged in to FieldBook and you want to create an IDR, exit the program and login under your own ID so the tracking record is correct.

*Being able to select the inspector rather than having that name entered already is the only difference between creating an IDR in the FieldManager program and creating it in the FieldBook program.*

REMEMBER, ONLY THOSE PEOPLE WHO HAVE BEEN ADDED AS USERS IN THE FIELDMANAGER PROGRAM BEFORE THE CONTRACT WAS EXPORTED TO FIELDBOOK WILL HAVE ACCESS TO ANYTHING IN THE FB PROGRAM, INCLUDING IDR'S.

Press the Tab key

Type Scattered Showers in the weather field - brief information is best!

If you prefer you can select a previous weather entry from the drop down list. This drop down list contains the last 20 weather entries saved in previous IDR's for all contracts.

Press the Tab key

Enter 43 in the Low Temp field

If the contract is in metric units, the temperature must be entered in Celsius and will then be converted to Fahrenheit. If the contract is in English measurements, the temperature must be entered in Fahrenheit and will be converted to Celsius.

Press the Tab key

Enter 65 in the High Temp field

If the low temperature entered is higher than the high temperature or vice versa, the program will display a warning. In other words, the low temperature cannot be higher than the high and the high temperature cannot be lower than the low!

*If more than one inspector creates an IDR for the same date, it is not important that they all have the same temperatures. That difference is taken care of by the FieldManager program in the Diary function.*

Press the Tab key again

Comments may be the equivalent of 3 single typed pages or 32,000 characters.

For our practice, simply type "Abnormally warm and wet for this time of year. Too wet to do much".

If this were a "real" contract you'd type many more comments but since this is just for practice, feel free to type more only if you wish to do so. Like anybody's going to do that, huh!!!!!!

*If it's easier to view the information in a larger area, double click in the Comments field to enlarge that area. Spell check can still be done while working in this format. Click OK to return to the original format.*

If you use a word that Spell Check doesn't recognize, click the Add to Custom button so it will be included in your custom dictionary and won't be flagged as "Not Found" in the future.

REMEMBER, AT LEAST ONE OF THE FOLLOWING FIELDS MUST BE COMPLETED BEFORE THE IDR CAN BE SAVED: WEATHER, TEMPERATURE, OR COMMENTS.

If there are no item postings in the IDR, there must be something entered in the Comments field.

Nothing saves automatically when changing screens. You must click the Save or the Save/Close button to save information.

Click the Save button if you haven't already.

### Contractors Folder Tab -

Click the Contractors folder tab to reveal the prime contractor in the top portion of the screen as well as any subcontractors that have been added to the contract. These contractors are listed in alphabetical order. The lower left area reveals personnel, if any, that has been associated with whichever contractor is highlighted in the top portion. The lower right area reveals equipment, if any, that has been associated with the contractor highlighted in the top portion. The prime contractor is shown in bold, italicized print to distinguish it from the subcontractors.

You may add or delete personnel and/or equipment at any time. Once you either add or delete that information, future days will also reflect those changes.

Click so there is a checkmark in the On Site box in front of Landmark Engineering Group, Inc. and River City Barricade (you will need to scroll down)

**Add IDR (IDR: 06/12/2011, Janet Wastenev) (Contract: 78-0061-114)**

General	Contractors	Site Times	Postings	Attachments	View
<b>On Site</b>	<b>Contractors</b> (Prime Contractor is in Italicized Bold)				
<input type="checkbox"/>	<i>GODBERSEN-SMITH CONSTRUCTION CO. &amp; SUBSID.</i>			G0020	
<input checked="" type="checkbox"/>	<b>LANDMARK ENGINEERING GROUP, INC.</b>			LA125	
<input type="checkbox"/>	MANATT'S, INC.			MA225	
<input type="checkbox"/>	NEXT PHASE ENVIRONMENTAL, INC.			NE430	

Personnel	Number	Hours	Equipment	Number	Hours
surveyor	2	18.00			

As previously stated, when the contractor's name is highlighted, any personnel and/or equipment previously associated will appear in the lower portion of the screen.

There can be a checkmark designating that the contractor was on site even though a working day charge was not made.

If you want to include entries for the number and hours in either the personnel or the equipment area, do so here. If you do not want to include a particular worker and/or equipment in the list for a given day, simply do not enter any number or hours in those fields and that particular personnel or equipment will not be included in that day's IDR report. **Do NOT enter a 0, just leave the number field blank.** Making entries for equipment and personnel are optional.

We'll add the following entries in the Personnel and Equipment fields -  
 Highlight Landmark Engineering Group, Inc. -

Click the Add Personnel button

Type in Surveyor - Enter 2 in the Number field and 18 in the Hours field

Highlight River City Barricade -

Click the Add Personnel button

Type Flagger – Enter 2 in the Number field and 16 in the Hours field

Click the Add Personnel button again

Type Laborer - Enter 4 in the Number field and 40 in the Hours field

*The last 2 entries can be made by either entering the total number of hours worked or the number of hours each classification worked. The program does NO calculations - it completely depends upon how you wish to interpret the information as to how you should enter the number of hours. BE CONSISTENT as to how you enter the information.*

Click the Add Equipment button

Type in Pilot Car – Enter 1 in the Number field and 16 in the Hours field

The program does not like random order lists so FieldBook will always arrange lists in alphabetical or numerical order once the list is saved.

Add IDR (IDR: 06/14/2011 , jw, #1) (Contract: 78-0061-114)						
General		Contractors		Site Times		
Postings		Attachments		View		
<b>On Site</b>	<b>Contractors</b> (Prime Contractor is in Italicized Bold)				<b>Vendor No.</b>	
<input type="checkbox"/>	MANATT'S, INC.				MA225	
<input type="checkbox"/>	NEXT PHASE ENVIRONMENTAL, INC.				NE430	
<input type="checkbox"/>	PAR ELECTRICAL CONTRACTORS, INC				PA060	
<input checked="" type="checkbox"/>	RIVER CITY BARRICADE CO.				RI346	
<b>Personnel</b>			<b>Number</b>	<b>Hours</b>	<b>Equipment</b>	
flagger			2	16.00	pilot car	
laborer			4	40.00		

What you have typed in the list for each contractor becomes the master list for that contractor for all future days. If you delete one of these work classifications, it will be removed from that contractor's list for today AND all future days. If there is a work classification in the list but that worker wasn't on the project, simply leave the Number and Hours fields blank and that work classification will not print out on the report but will still be available to have numbers and hours entered for future days.

If you have a classification that will never be back on the project it can be deleted.

River City Barricade should still be highlighted

Highlight the Flagger in the personnel column

Click the Delete Personnel button

Answer Yes to the "Are you sure?" question.

*If you accidentally created an extra blank line, it can either be deleted or left there for an entry at a later date. Either way is OK.*

If you deleted an entry and then realize you shouldn't have, no worries!! Just add it back in –

Add Personnel

Type in Flaggers and enter the appropriate Number and Hours.

If the personnel or equipment isn't on the project or being used that day, simply do not enter a number of hours for that day.

Entries are not automatically saved in this program when you switch screens and/or folder tabs. You must physically save them by clicking the Save button or the Save/Close button when you leave a screen. If you forget to save, you'll be prompted to do so before leaving the IDR if you made any additions or changes.

*Remember, the Save button saves the information and leaves you at the same screen. The Save/Close button saves the information AND returns you to the previous screen - it doesn't save the information and close you out of the program.*

### **Site Times Folder Tab –**

This folder tab gives you some information concerning site time(s) and is also where you charge working days to the contract.

The top portion of this screen shows every site for this contract (every contract has Site 00), the Site Description (it could just be a period or a double quote sign or it could be a lengthy description), and the type of days being charged on this contract. Work Days is the choice most of the time although there are some Fixed Completion Date and some Calendar Day sites also. Time is charged to the contract NOT to individual projects within the contract.

**Add IDR (IDR: 06/12/2011, Janet Wasteny) (Contract: 78-0061-114)**

General	Contractors	Site Times	Postings	Attachments	View
Site	Site Description	Site Type	Charge		
00		WORK DAYS			
01	CONSTRUCT STAGE 1 DRILLED SHAFTS	WORK DAYS	0		
02	WHEN DETOUR IS IN EFFECT	CALENDAR DAYS			
03	COMPLETE STAGE 3 GRADING AND REVETMENT	WORK DAYS			

Time Charge:

Contractor(s) Working:  Yes  No      Hours Available:       Hours Worked:

Controlling Operation:

Reasons for Delays:

Comments:

The information entered in the lower portion of the screen will be reflected in the diary and ultimately the weekly working day report.

Some or all of the following fields should be populated with data -

Time Charged - An entry of 0, +.5, or +1.0 is valid

Contractor Working - Click in the Yes or No radio button, depending on the correct answer for the day.

Hours Available

Hours Worked - These two fields are excellent (and highly recommended) supporting documentation for charging or not charging a working day but neither field is required.

Controlling Operation - The controlling operation for this day's work

Reason for Delays - If less than 1 is charged, a reason should be given.

Comments - The information entered here will appear in the Daily Diary when you either view it or print it. Optional.

The Time Charged, Contractor Working, Controlling Operation, and Reason for Delay fields will ultimately populate the Weekly Report of Time Charges.

OK, so I've now talked you goofy in this area, huh!!! So let's make some entries and use this new found knowledge!!!!

We're still working with the IDR for Contract 78-0061-114

Highlight Site 01 in the middle portion of the screen. (The information we enter now will be for this site only, no others.)

Click so the cursor is in the Time Charge field

Type in 1

Press the Tab key

*Notice the updated info. in the middle portion of the screen.*

Click in the Yes radio button for the Contractor Working line

Press the Tab key so the cursor is in the Hours Available field

Enter 8 in the Hours Available field

Press the Tab key

Enter 2 in the Hours Worked field

Press the Tab key

In the Controlling Operation type in "Shaft"

Press the Tab key

In the Reason for Delays field, type "Weather"

Press the Tab key

Type "Started out fine, then broken piece on equipment" in the Comments field.

(You can type in this entire line and then some but it is intended to be a short comment.)

Highlight Site 03 in the middle portion of the screen and we'll make entries for it also.

Follow the process you just finished and enter the following information in the correct fields.

Time Charge = 1

Contractor Working = Yes

Hours Available = 4

Hours Worked = 4

Controlling Operation = Excavation

Reason for Delays = leave blank

Comments = leave this blank

Click the Save button.



### **CHANGING a Site Time Entry BEFORE the IDR has been exported -**

If you wish to change a site time record, you can do so easily AS LONG AS that IDR has not been exported to FieldManager. Do so by opening the correct IDR > Site Times tab and highlighting the site needing the change. Change the information in the field. **If the IDR has already been exported to FieldManager, changes must be made there rather than in the FieldBook program.**

You should still be at the Site Times tab of the IDR we created for Contract 78-0061-114

Highlight Site 03 if it isn't highlighted already

Click in the Time Charge field and change the 1.0 to .5

Press the Tab key and notice the change in the upper portion of the screen for this field.

Since you didn't charge a full day, a reason for delays should be given. Enter a reason of your choice.

Click the Save button

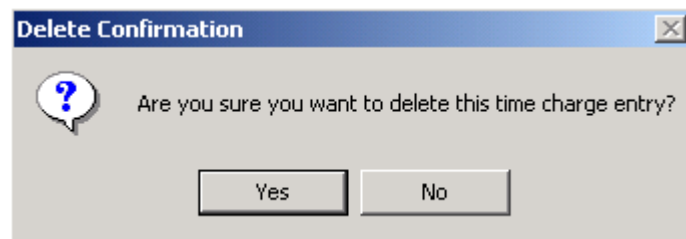
### **DELETING a Site Time Entry BEFORE the IDR has been exported -**

By using the Delete IDR Time Record button at the bottom of the screen, you can delete a site time entry for any IDR as long as it has not been exported from Fieldbook. Even if the IDR has been generated, the site time entry can still be deleted as long as the IDR has not been exported.

Highlight Site 03 if it isn't already

Click the Delete IDR Time Record button

This will delete the information for ONLY the site highlighted in the middle portion of the screen.



We really don't want to delete the time charge entry, so answer No.

If you didn't already, click the Save button to save everything entered to date in this IDR.

### **Postings Folder Tab -**

Click the Postings folder tab.

Item progress for all items on the contract are made here. Since we have not made any item progress yet for this IDR, our screen is blank.

**ALL ITEM PROGRESS ENTRIES ARE MADE AT THE CATEGORY LEVEL - NOT THE CONTRACT LEVEL.**

\*\*\*\*\*

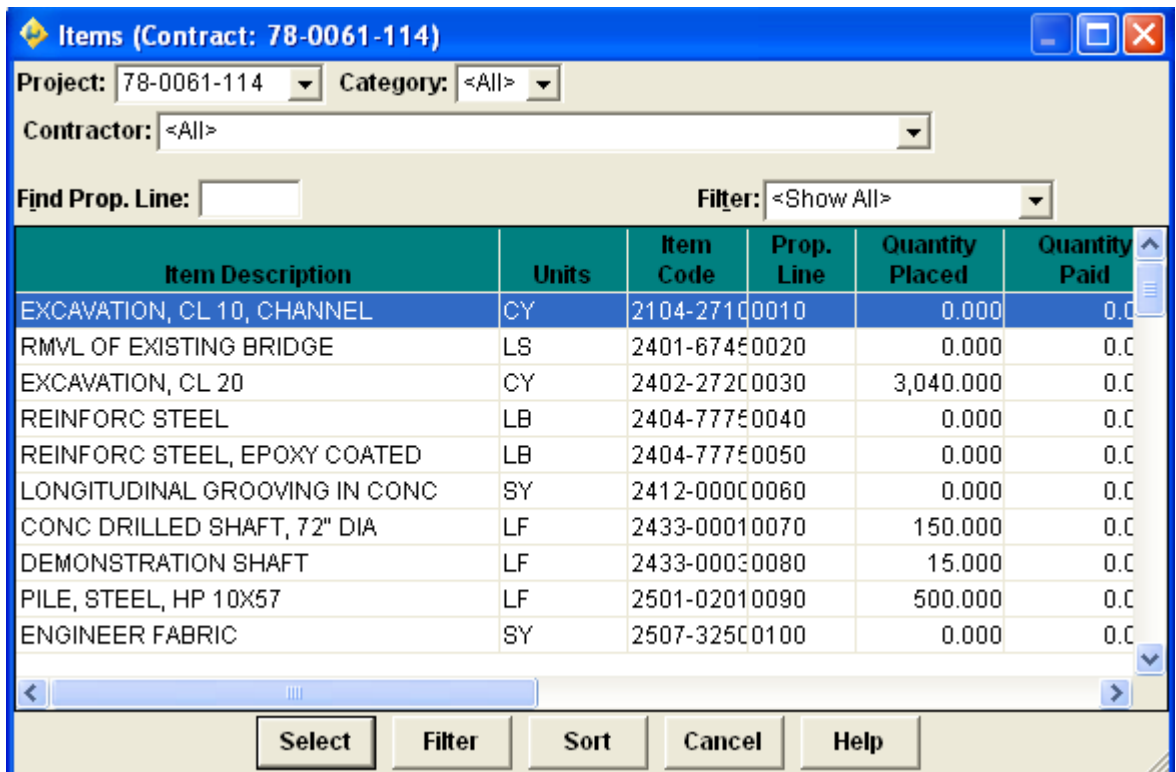
A reminder now – and there will be another one again later !!

Mobilization shows as one of the regular line items but an entry should NEVER be made. This item is called an autopay item which means the appropriate amount is automatically included in the estimate by the mainframe when the estimate is processed. Once the estimate is processed and you receive the next IDR turn around file from FieldManager, the mobilization will be updated in the Cat. Qty. Paid field when viewing that item. The Cat. Qty. Placed field should always be zero for mobilization.

\*\*\*\*\*

Once you select an item for posting progress, you will be required to select the appropriate project and/or category (if it's in more than one category) before you leave the posting screen and also to select the appropriate contractor if the item is linked to more than one contractor.

Click the Add Posting button so we can soon make our first entry.



The entire list of current contract items is shown. By default, the list is displayed in alphabetical order. If desired, you can change the list order to Proposal Line Number by double clicking in the header of that column. If there is only 1 project in the contract, that project number will be shown in the Project box. If there is more than 1

project, the word All will be shown. If there is only 1 category, 0001 will be shown in the Category box. If there are multiple categories the word All will be shown.

If you wish to see every item in the contract, leave the default as it is but if, for example, you wish to see only items in a certain category of a certain project select those choices in the appropriate fields and the list of items displayed will be adjusted accordingly. Whatever selection you make at this screen will affect your selection choices in the next step.

Our contract has only 1 project so that ID is in the Project field. We are going to leave the default choice of All in the Category field.

If the list of items is in alphabetical order by Item Description, double click in the Prop Line header to sort by Proposal Line for our exercise.

Highlight Line No. 0030, Excavation, CI 20

Click the Select button

OR

Since Select is the default button, you can just press the Enter key once the item is highlighted.

The top portion of the screen shows category information concerning that line item. If an item was in more than one category, no totals would be shown yet. As soon as you select the category in the bottom portion of the screen, the authorized quantity, pending changes, dollar authorized amount, quantity placed, and quantity paid to date totals for this category are displayed in the top portion of the screen. You make NO entries in the top portion of this screen. The entries you make in the lower portion are reflected there.

The bottom portion of the screen is where you make daily entries for items. The form (the blue number in the lower left area of the screen is the form number) used is dependent on the item selected. Some forms have both location and station fields while others have only one of the two. There MUST be an entry made in either the location field or the first station field if both show on the form. If neither field is part of the form, there will probably be another field such as Hauled From that will require an entry.

Change IDR (IDR: 6/12/2011, Janet Wastenev, 1) (Contract: 78-0061-114)					
General	Contractors	Site Times	Postings	Attachments	View
Item: 2402-2720000, EXCAVATION, CL 20					
Prop. Ln: 0030	Unit: CY	Catg. Auth. Qty: 304.000	Catg. Auth. Amt: \$7,600.00		
Type: ORIGINAL ITEM / PITYPE TABLE	Unit Price: \$25.000	Catg. Qty. Placed: 3,040.000			Catg. Qty. Paid: 0.000
Catg. Pending Chgs: 0.000					
Item Posting					
Project: 78-0061-114 110215 058 KGE					
Category: 0001	P:DESIGN NO. 0111; 204'-6 X 44'-0 STEEL, MODULAR E				
Contractor: GODBERSEN-SMITH CONSTRUCTION CO. & SUBS					
Station From:		Station To:		Side:	
Length:		ft	Width:		ft
Depth:			ft		
Quantity: 0		CY	Attention: <input type="checkbox"/>		
Remarks:					

*If you enter a number in a number field, you must have one in there before you can leave the screen. You can't enter a number, then blank it out, and leave the screen - once you enter a number in a number field, you must have one in there, even if it's a zero.*

Project/Category Box - If the item is in only one category, that category will be displayed in the Project/Category field. We know this item is in only one category since this field has 0001 displayed. Any time the line item is in more than one category you must select a category choice before you can see totals in the top portion of the screen and also before you can leave and/or save this screen.

*To select a category you may click the down arrow and select one from the list OR you may click the zero key until the category of your choice is shown OR you may click the down arrow on your keyboard until you reach the category of your choice. The zero key will take you through the list, over and over again. The down arrow will take you to the bottom of the list and once you're there, click the up arrow to move up the list.*

No matter what the form is, the first field after the Contractor field must be populated. This is the case whether that field is Station From, Location, Hauled From or anything else. If the first field after the Contractor field is not populated, you will not be able to save the posting until it is.

The Attention Box - If this box is checked it is simply an alert that the item should be noticed, probably BEFORE the estimate is generated. A checkmark in the Attention box does NOT stop anything – it's just a notice for attention. If you mark an item for attention, you are REQUIRED to enter remarks for that item.

*You can put the checkmark in the Attention field by either clicking in the field or tabbing to it and pressing the Space Bar on your keyboard.*

**If you put a checkmark in the Attention field, press the Tab key to move to the Remarks field.**

The Remarks Field – Once the cursor is in the Remarks field, a scroll bar appears. **It is highly recommended to make an entry in the Remarks field for EVERY posting to serve as additional documentation.**

If you double click in this Remarks field, the viewable area will increase dramatically. There's also a spell check button available for use within that field. Click OK to return to the original field size.

The Materials Button (bottom left area of the screen) - We will not be using this.

OK, let's make some item progress entries. We'll make several since this is something that someone will be doing or helping with on a daily basis whether they're an inspector using FB or in the office using FM. In other words, there's no getting away from learning this part!!

As you will probably notice, the entries made here are for practice only - they do NOT necessarily reflect reality on a project!!

We're NOT going to make an entry for Line 0030 at this time so -  
Click the Cancel button at the bottom of the screen

Click the Add Posting button  
Highlight Line 0080, Demonstration Shaft  
Click the Select button

*You can just press the Enter button since Select is the default.*  
Notice the information in the top portion of the screen is complete.  
Also the Category field in the entry area displays 0001 letting us know this item is in only Category 1 of the Project shown directly above the category field.

Select Par Electrical Contractors in the Contractor field.  
*You must select an entry in the Contractor field only if the item is linked to more than 1 contractor.*

Change IDR (IDR: 6/12/2011, Janet Wastenev, 1) (Contract: 78-0061-114)					
General	Contractors	Site Times	Postings	Attachments	View
Item: 2433-0003000, DEMONSTRATION SHAFT					
Prop. Ln: 0080	Unit: LF	Catg. Auth. Qty: 75.000	Catg. Auth. Amt: \$41,250.00		
Type: ORIGINAL ITEM / PITYPE TABLE	Unit Price: \$550.000	Catg. Qty. Placed: 30.000			Catg. Qty. Paid: 0.000
Catg. Pending Chgs: 0.000					
Item Posting					
Project:	78-0061-114 110215 058 KGE				
Category:	0001	P:DESIGN NO. 0111; 204'-6 X 44'-0 STEEL, MODULAR E			
Contractor:	PAR ELECTRICAL CONTRACTORS,INC				
Station From:	2652+70				
Quantity:	15.000	LF	Attention: <input type="checkbox"/>		
Remarks:	worked on demo shaft until equipment broke				

039

Sta From = Enter 2652+70

To save key strokes you can press either the = sign or the space bar instead of the + sign. Either the = or the space will convert to the + sign as soon as you tab out of the field.

*In all forms, press the Tab key after each entry to advance to the next field.*

Quantity = 15

Remarks = worked on shaft until weather delay

Click the Add More button which will return you to the item list to select the same or a different item. If you want to make another entry for the same item, you must still return to the item list and select the item again.

If you had clicked OK by mistake instead of Add More, you would have been taken to a screen that shows all item entries made thus far for this IDR. From there you could click the Add Posting button once again to get the item list.

If you're going to be making several entries for the same line item, once you click the Add More button, simply press the Enter key since the correct item will already be highlighted in the items list and that will bring in the form for data entry.

Select Line 0310, Clear & Grubb

Notice that the Station From field is already populated with the same data as the last entry. This is due to the option we selected in the Utilities > User Preferences, Entry Defaults Posting tab. Although this can be a very helpful tool, it can also be a very big pain!!! This option can be “turned on and turned off” at any time – and it’s time we “turned it off” so go there and take the checkmark out of the “Station and Location fields default to last entry” option. (Utilities > User Preferences > Entry Defaults Posting folder tab)

Enter the following for Line 0310 -

Contractor = already populated so we know that this contractor is the only one linked to this item

Sta From = 2652+40

Tab to the Quantity field

Quantity = .4

Remarks = clearing first day

*If you got “kicked out” of this form as soon as you began to type the remarks, odds are you forgot to press the Tab key first to put the cursor in the Remarks field. Notice the Cancel button at the bottom of the screen - the keystroke for canceling is the letter C. With the cursor sitting in the Attention field and typing a letter C, you are telling the program to cancel the entry!! That’s why it’s crucial to tab to the Remarks field before typing.*

Click the Add More button

Highlight Line 0270, Excavation, CI 20

Since this is in only 1 category and is linked to only 1 contractor, those fields are populated for us.

Station From field = 2655+00

Station To field = 2656+00

Tab to the Side

*This field is blue and blank and has a drop down arrow. That means you can type in the first letter of the selection and the first instance of an item beginning with that letter will automatically appear in that field. If that is not the correct one, press the letter again and the next choice beginning with that same letter will be displayed.*

Press the letter R or click the arrow beside the Side field and choose Both Length = 100 (populated for you based on the Station fields you entered)

Width = 12

Depth = 2

Quantity = 88.889 (calculated for you)

*If the number is shown in red beside the Quantity field, you will need to enter it in the Quantity field. Once you do that, the red number will disappear.*

Remarks = enter a remark of your choice (watch it now!!!!)

Click the Add More button

You've done fine so far – let's make some more entries just for fun!! OK, OK, so it might not be all that much fun – but there are some more things I want you to see and learn!

Select Proposal Line No. 0580, Painted Pav't Mark, Waterborne/Solvent  
Note that this item is in only 1 category since the  
Project/Category field displays 0003.

Contractor = River City Barricade

Station From = 2164+04

Station To = 2168+06

Side = Right

Length = 402 – is already calculated and completed for you  
based on the data you entered in the Sta From and Sta To  
fields. You CAN overwrite this if you desire. We won't!!

Plan Ident =

Meas Factor = 1

Permanent = put the dot in front of permanent

Change IDR (IDR: 12/8/2013, Janet Wastenev, 1) (Contract: 78-0061-114)

General | Contractors | Site Times | Postings | Attachments | View

Item: 2527-9263109, PAINTED PAVT MARK, WATERBORNE/SOLVENT  
Prop. Ln: 0580 Unit: STA Catg. Auth. Qty: 7.470 Catg. Auth. Amt: \$634.95  
Type: ORIGINAL ITEM / PITYPE TABLE Unit Price: \$85.000 Catg. Qty. Placed: 4.000  
Catg. Pending Chgs: 0.000 Catg. Qty. Paid: 0.000

**Item Posting**

Project: 78-0061-114 110215 058 KGE  
Category: 0003 P:ROADWAY ITEMS  
Contractor: RIVER CITY BARRICADE CO.  
Station From: 2164+04 Station To: 2168+06 Side: RT  
Length: 402.00 ft Plan Ident: ELW4 Meas Factor: 1.00  
Quantity: 4.000 STA (4.02)  Temporary  Permanent Attention:   
Remarks: pay only 4

026

Quantity = 4.02 – (Calculated for you)  
Change the 4.02 to 4



Any time the program calculates a different quantity than what you enter in the quantity field, the program calculated quantity will be displayed in red just to the right of the Quantity field. (see above graphic)

*Any time a number is shown in red anywhere on the form, an explanation should be entered in the Remarks field. By doing so, everyone knows that you are aware of the difference in the program calculated and the entered amount and intend it to be that way.*

Remarks = Pay only 4

Click OK to return to the item posting list

We haven't saved any entries for awhile so let's click the SAVE button. That will save all entries in every folder tab for this IDR and will remain at this folder tab.

The Postings folder tab lists all item progress entered thus far for this IDR. The item that is highlighted will be detailed in the top portion of the screen. Remember, the top portion displays ONLY CATEGORY information for the item. If the item is in more than one category, it does NOT show totals for all categories, just the one involved in the line item highlighted. (See the following graphic)

**Change IDR (IDR: 6/12/2011, Janet Wastenev, 1) (Contract: 78-0061-114)**

General | Contractors | Site Times | **Postings** | Attachments | View

Item: 2527-9263109, PAINTED PAV'T MARK, WATERBORNE/SOLVENT  
 Prop. Ln: 0580 Unit: STA Catg. Auth. Qty: 7.470 Catg. Auth. Amt: \$634.95  
 Type: ORIGINAL ITEM / PITYPE TABLE Unit Price: \$85.000 Catg. Qty. Placed: 8.000  
 Catg. Pending Chgs: 0.000 Catg. Qty. Paid: 0.000  
 Project: 78-0061-114, 110215 058 KGE  
 Category: 0003, P:ROADWAY ITEMS  
 Find Item Description:

Item Description	Item Code	Prop Line	Location	Quantity Posted	Project	Catg	Breakdown	Contractor
CLEAR+GRUBB	2101-0850001	0310	Sta 2652+40	0.400	78-0061-114	0003		GODBERSEN-SMITH CONS
DEMONSTRATION SHAFT	2433-0003000	0080	Sta 2652+70	15.000	78-0061-114	0001		PAR ELECTRICAL CONTRA
EXCAVATION, CL 20	2402-2720000	0270	Sta 2655+00 to Sta 2	88.889	78-0061-114	0002		GODBERSEN-SMITH CONS
PAINTED PAV'T MARK, WATERBOR	2527-9263109	0580	Sta 2164+04 to Sta 2	4.000	78-0061-114	0003		RIVER CITY BARRICADE CC

To see the total quantity placed for the entire contract -

Click the Items button and view the quantity placed column. BUT, only quantities in IDRs that have been saved or generated are reflected in this field.

Items with postings in our IDR are 0080, 0270, 0310, and 0580. You can see placed quantities by clicking on the Items button and viewing the 4 items just mentioned. **Once the IDR with these postings is saved or generated, the amounts**

**posted will be reflected in the Qty Placed field in the Items list. Until then they are in a sort of limbo state – they’re posted but they don’t count!!!**

If you’re at the Items list, click the Close button and return to the Postings tab of the IDR.

Since we want to add another item, click the Add Posting button

Select 0560, Rmvl of Pavt  
Category = populated for you  
Sta From = enter something of your choice  
Tab to the Quantity field  
Quantity = 72  
Remarks = enter something of your choice

Click Add More

Select Line 0070  
Category = populated for you  
Contractor = Par Electrical Contractors  
Sta From = enter something of your choice  
Tab to the Quantity field  
Quantity = 150  
Remarks = enter something of your choice

Since that was so much fun, let’s post progress to another item!!!

Click the Add More button

### **Lump Sum Item Posting -**

Select 0590, Traffic Control  
Category = populated for you  
Contractor = River City Barricade Co  
Location = beginning of project or BOP  
Pay % = leave this field blank - it is not a field to be used  
Quantity = 1.0

Since this is a lump sum item, the progress must be entered as a decimal.

Remarks = initial payment

Click OK to return to view the postings for this IDR

Click the Save/Close button and close back to the Contracts list.

It’s a good idea to save your information every few entries since it sure doesn’t take long to do so. This saves not only the item

postings but everything in this IDR you have entered in the other folder tabs as well.

Now that you've made a lump sum item entry, let's review a few lump sum rules:

- \* Quantities must be entered in decimal form
- \* If a lump sum item is in more than one category, EACH category will have a total quantity of 1.0.
- \* The total quantity for all categories for a lump sum is also 1.0
- \* The lump sum quantity of 1.0 CANNOT be overrun at all
- \* **You do NOT have to place and/or pay 100% of a lump sum item**
- \* You cannot increase or decrease a lump sum contract item
- \* If you need to increase a lump sum item, you must do so by creating another 'LUMP SUM' or 'EACH' item and adding it in a cont mod. (You can use the same item number EXCEPT FOR THE MOBILIZATION LINE ITEM.) You MUST NOT use the mobilization line number for additional mobilization to be paid to the contractor. If you do, it can cause irreparable damage to the contract.

*If you need to pay additional mobilization, use a generic LUMP SUM or EACH item and enter additional mobilization in the supplemental description.*

**At the Item Posting folder tab -**

**If you wish to add another item**, click the Add Posting button.

**If you wish to change one of the existing items**, highlight it and click the Change Posting button.

**If you wish to delete one of the items**, highlight it and click the Delete Posting button.

You should now be at the Contracts list.

Highlight Contract 77-0171-016

Let's post progress to another Lump Sum item

With Contract 77-0171-016 highlighted, click the IDRs button

Click Add

Today's date is fine for the IDR

Enter something of your choice in 1 or more fields on the General tab

Click the Postings tab

Click Add Posting

Select Item 0280, HMA Pav't Sample

Category = 2

Contractor = populated for you

Location = Urban area

Pay % = leave blank

Quantity = 1.0

Remarks = pay 100%

Click OK

Generate the IDR (Generating the IDR will save it first and then generate it)

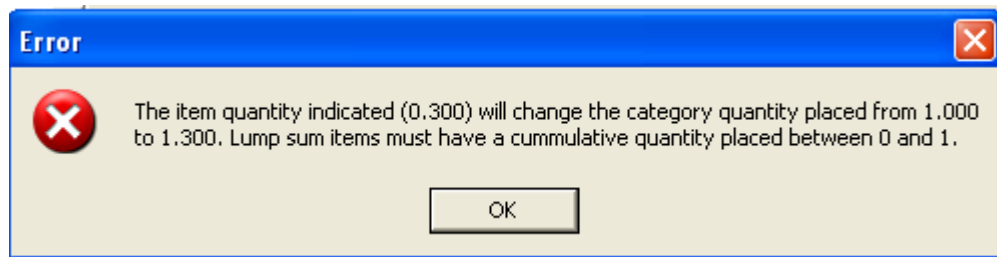
We posted progress showing that the entire quantity of Line 0280 for Category 2 was placed and then we saved the IDR. Click now on the Items button and let's see what is displayed in the Quantity Placed field for Line 0280, HMA Pav't Sample

Item Description	Units	Item Code	Prop. Line	Quantity Placed	Quantity Paid	Authorized Quantity	Initial Quantity	Pend Chan
HMA (3M ESAL) INTERMEDIATE, 1/2"	TON	2303-0042500	0250	0.000	0.000	37,497.000	37,497.000	
HMA (3M ESAL) SURF, 1/2", FRIC L-3	TON	2303-0043503	0260	0.000	0.000	19,130.000	19,130.000	
ASPH BINDER, PG 58-28	TON	2303-0245828	0270	0.000	0.000	3,965.000	3,965.000	
HMA PAVT SAMPLE	LS	2303-6911000	0280	0.200	0.000	1.000	1.000	
SURF, DRIVEWAY, CLA CR STONE	TON	2315-8275025	0290	0.000	0.000	68.000	68.000	
COLD IN-PLACE RECYCLED ASPH PAVT	SY	2318-1001100	0300	0.000	0.000	141,072.000	141,072.000	
ASPH STABILIZING AGENT (FOAMED ASPHTON		2318-1001220	0310	0.000	0.000	466.000	466.000	

Why does the Quantity Placed show .2 when we made an entry of 1.0 in the IDR? Remember that HMA Pav't Sample is in 2 categories. The total dollar amount for both of those categories is \$12,000. Of that total, .2 (or \$2,400) of it is in Category 2 and that entire amount has been placed.

If you limited the view to only items in Category 2 of Project 77-0171-016, you would see a placed quantity of 1.0. Likewise, if you changed from Category 2 to Category 1, you would see a placed quantity of 0.

The error message shown below is a sample of what is displayed when more than 1.0 is posted to a lump sum item in any category. If you receive this message, simply adjust the posting for the lump sum item.



Remember, lump sums must range from 0 to 1.0 and cannot overrun. You cannot increase or decrease a lump sum item through an increase/decrease contract modification. To increase, create a contract modification for a new item (it can be the

same description unless the item is mobilization). To decrease a lump sum, you can't – plain and simple!!!!!! Lump sum items must remain a unit of 1.

Below is your second reminder concerning the mobilization item -

\*\*\*\*\*

Mobilization shows as one of the regular line items but an entry should NEVER be made. This item is called an autopay item which means the appropriate amount is automatically included in the estimate by the mainframe when the estimate is processed. Once the estimate is processed and you receive the next IDR turn around file from FieldManager, the mobilization will be updated in the Cat. Qty. Paid field when viewing that item. The Cat. Qty. Placed field should always be zero for mobilization.

\*\*\*\*\*

Click the Close button until you return to the contracts list.  
Highlight Contract 78-0061-114  
Click the IDRs button

### **Generating the IDR -**

If you are still working in the IDR, you CAN generate it without previously saving it. When you generate an IDR it will automatically save it as part of the generate process.

Since we're at the IDR list and see the IDR we created, we know that it has been Saved. We're now going to generate this IDR so the information can be exported to the FieldManager program and be included in a diary and an estimate. The IDR can be generated from any folder tab or the IDR list, whichever is most convenient.

Highlight the IDR to generate (the one dated yesterday)

Click the Generate button

Answer Yes to the "Are you sure" question

**It is NOT recommended to print the IDR before exporting to FieldManager.**

*If you do want to print the IDR -*

*At the IDR list highlight the appropriate IDR*

*Click the Print button*

*Select the option to print the selected IDR*

Notice the Gen column now has a Yes instead of a No for this IDR.

Click the Close button to return to the contracts list.

### **Quantity Overruns**

Before we look at how to correct posting errors and overpayments for a line item, let's look when items overrun the authorized quantity, why they are sometimes paid in

full while other times they are not. **Remember, everything is based on the category quantities, not the total contract quantity.**

\*\*\* If an item overruns more than \$50,000 in a **category**, the estimate will pay only up to that \$50,000 amount for the item. Any quantity above that will be held until a contract modification to increase the authorized quantity is written and approved. Some hints when looking at the item list –

\*\*\* **For items displaying equal placed and paid quantities, it could be that –**

1. The item placed and paid quantities are equal to or less than the authorized quantity

OR

2. The item quantity hasn't overrun the authorized quantity

OR

3. The item hasn't overrun more than \$50,000 in a category

\*\*\* **For items displaying more quantity placed than paid, it could be that –**

1. An estimate has not been created since the posting(s) was made

OR

2. The dollar amount of the item overrun in a category exceeds \$50,000

**If you don't know if you've already made a specific entry for a line item - and don't want to shut down the IDR you're working on -**

You can do the following and won't have to close out of the IDR to do so -

Click the Inquiries button in the Application toolbar

Select the inquiry titled Item History to Date by either double clicking it or by highlighting it and then clicking the View button.

Select the item in question

This will show all posting entries that have been SAVED for the item.

To leave this inquiry open and return to the IDR posting screen -

Click Window (the word Window above the top toolbar)

Click Add IDR in the drop down list so the checkmark moves there (the checkmark is now in front of the Item History to Date inquiry)

If you wish to go back to the inquiry and select a different item, simple click on Window and move the checkmark (click) so it's in front of Item History to Date, and click the Change Select button. You can easily and quickly jump between the 2 screens by using this method.

## Overpayment of a Line Item

Mistakes happen!! If you goofed and incorrectly posted progress to a line item, there are a couple ways to correct it. If that entry HAS already been exported to FieldManager, you will need to make an offsetting (correcting) entry in a different IDR to take care of it. If that entry HAS NOT been exported to FieldManager, you can simply correct it in the IDR where it was entered or make an offsetting (correcting) entry in a following IDR, whichever you prefer! What a deal, huh!!!

### **IF THE IDR WITH THE ERROR HAS NOT BEEN EXPORTED TO FIELDMANAGER**

If you don't know which IDR was involved or if there were several item progress entries in the IDR, the simplest and probably easiest method is as follows -

Highlight Contract 78-0061-114

Click the IDRs button

Click the Add button

General folder tab – today's date is OK

Comment – IDR to correct item posting for River City Barricade Co

Click the Postings folder tab

Click the Add Posting button to bring up the item list

Select Item No. 0590, Traffic Control

Category 3 is selected for you

The item progress in the top portion of the screen shows 1 but should really be .1 so..

Contractor = River City Barricade Co

Location = correction

Quantity = -.9 (minus decimal 9)

Remarks = Correction for previous entry error (you would also include the date of the IDR where the error occurred if you knew that as well as any other details that would help explain this posting)

Click OK

Since the correction has taken place, even though the IDR with the incorrect amount might have already been exported to FieldManager, once this IDR with the correcting entry is exported, the total placed will be correct in FM and the next estimate.

A correcting entry had to be made because we could not go back in the FieldBook program to the IDR with the original entry and simply change the quantity field.

Click the Save/Close button

Close back to the contracts list

If you DO know which IDR was involved and it has not been exported to FM, a simple way to correct the problem is as follows:

Highlight Contract 78-0061-114

Click the IDRs button

Highlight the first IDR you created – the one for yesterday

Click the Change button

Click the Postings folder tab

Highlight Line No. 0310, Clear & Grubb

Click the Change Posting button

Tab until the cursor is in the Quantity field or click so the cursor is there

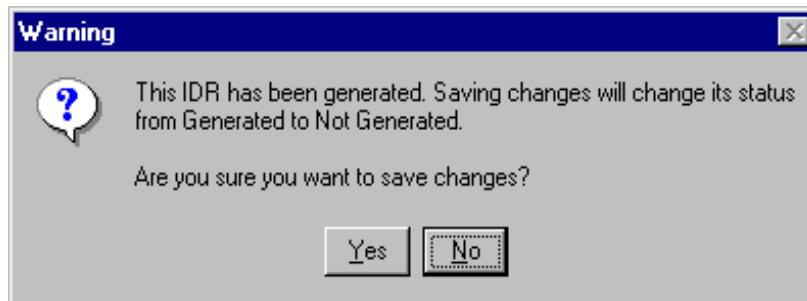
Enter .2 in the Quantity field and press the Tab key

*The original entry of .4 was wrong - it should have been .2. You do not enter -.2 (minus .2) as a correcting entry since the number .4 has not been exported to FieldManager. You are in the IDR where the number 1.0 had been incorrectly entered originally - and you're changing it there. You simply enter the correct number so when the IDR is exported it will use that correct number.*

If needed, change the remarks to reflect that you are paying only .2 of the quantity.

Click OK

Click the Save/Close button



*If the IDR has already been generated you will get a message stating that if you save it the status for the IDR will change and you will need to re-generate it before it can be included in an estimate.*

Answer Yes to the above warning

At the IDR list screen notice this IDR is listed as NOT being generated.

Highlight the IDR if it isn't already

Click the Generate button

Answer Yes to the "Are you sure" question and the status in the Generate column will change from No to Yes

Once the IDR is generated, it will be available to be exported to FieldManager.

*Remember, if you want to print the IDR either now or at a later date -  
At the IDR list highlight the appropriate IDR*



*Click the Print button*  
*Select the option to print the selected IDR*  
Close back to the contracts list

**IF THE OVERPAYMENT HAS ALREADY BEEN EXPORTED TO FIELDMANAGER AND INCLUDED IN AN ESTIMATE -**

Since the incorrect quantity has already been exported to FieldManager and included in a voucher, our only choice is to make a correcting entry in another IDR as soon as the error is discovered. You must make a correcting entry to reduce the quantity of the item that has already been paid. Once the IDR is exported to FM, the next estimate may include a negative amount for this line item if the correction is the only posting for the item.

Highlight the 78-0061-114 contract

Click the IDR's button

Highlight the IDR we created for today (it's not generated)

Click the Change button (or double click the IDR)

Click the Postings folder tab

Click the Add Posting button to bring up the item list

*You must do this because the line item we want to correct isn't included in the list of items having postings in this IDR*

Highlight Line No. 0250, ('Square Yards' Item) Pavement Surface Repair  
(Grinding Limestone or Gravel)

Click the Select button

Category = populated already

Contractor = Godbersen –Smith Const

Sta From = Enter a 0 if you don't know the exact information

Tab to the Quantity field, leaving the other fields blank

Quantity = -11880 (The incorrect amount that was already exported and paid for this category was 12,000 It should have been 120. You can see the 12000 in the Cat. Qty. Paid field in the top portion of the screen. Once you make the posting and then click the Tab key, the Cat. Qty Placed field will be 120 rather than 12000)

Remarks = Correction for previous overpayment to contractor

*Anytime you make a correcting entry you should make some remarks and mark the item for attention*

Click the OK button

Click the Generate button

*This will both save and generate the IDR*

Once this IDR is generated and exported to FM, the item quantity will reflect the -11880 in the total for this item.

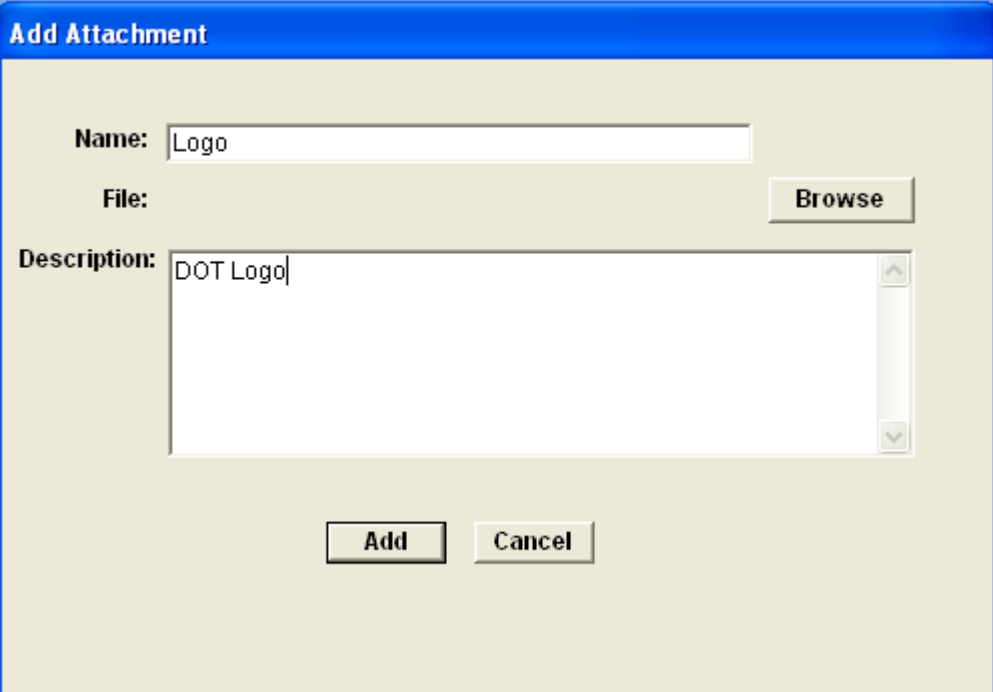
## Attachments Folder Tab

You should still be working in today's IDR for Contract 78-0061-114  
Click the Attachments folder tab

Photos, drawings, etc. can be attached to the FB program. Beware, however, that the size of the contract (and export files) can increase dramatically depending on the attachments.

To create a new file and attach it -

Click the Add Attachment button



The screenshot shows a dialog box titled "Add Attachment". It contains the following fields and buttons:

- Name:** A text input field containing the text "Logo".
- File:** A label followed by a "Browse" button.
- Description:** A text area containing the text "DOT Logo".
- Buttons:** "Add" and "Cancel" buttons at the bottom center.

Enter the name and then Browse to locate the attachment  
Enter a short description of the attachment  
Click the Add button

To see the attachment in FB, highlight and then click on the View Attachment button  
Click the red X to exit the view screen  
Save

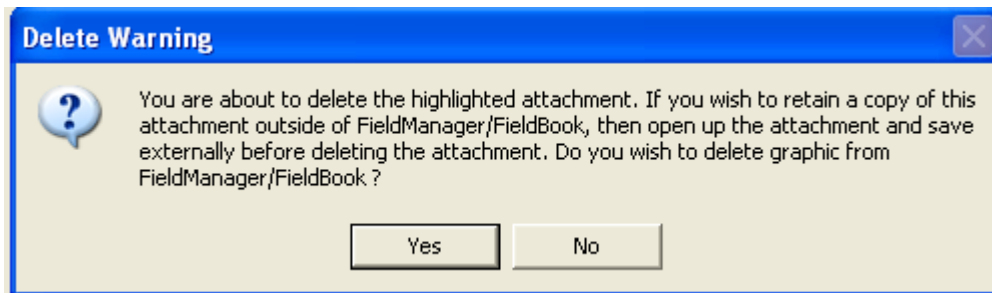
To change an attachment in the list -

Highlight the attachment name and click the Change Attachment button  
Make the appropriate changes in the name or description fields  
Save

### To delete an attachment in the list -

Highlight the attachment name

Click the Delete Attachment button



### **Be cautious here....**

Answer Yes to the “Are you sure...” question to delete.

This could delete the attachment everywhere. To save it externally from FieldBook, follow the directions in the Delete Warning message as shown in the above graphic.

By default, FieldBook users can view attachments created during the last 14 days. That number can be changed on a contract by contract basis. Remember, the number of attachments can dramatically increase the size of the IDR and contract. All attachments, whether created in FB or FM, will remain in the FieldManager program for the entire length of the contract.

To determine which IDR’s contain attachments, note the column titled Attach. The number of attachments in the IDR will be displayed.

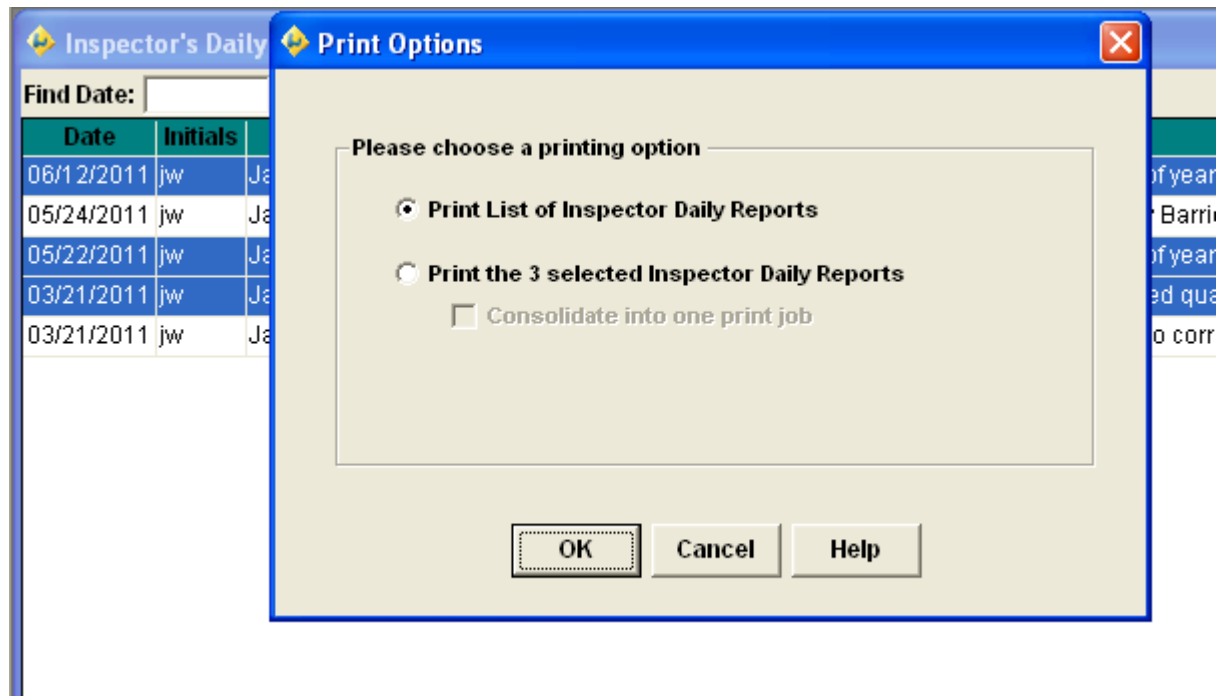
### **The View Folder Tab -**

Click this folder tab to see the IDR as it would be if it were printed. Attachments are not printed as part of the IDR report but the number of attachments, if any, are displayed in the upper, right portion of the report. Use either the scroll bar on the right to move up and down or click the mouse in the text area and then use the up and down arrow keys. Zoom in and out buttons are available for your convenience.

If you wish to print the IDR now, click the Print button. The word Draft will print over the top area of the first page since this IDR has not been generated.

Click the Save/Close button and return to the IDR list.

If you didn’t print while you were in the View tab of the IDR, you can print 1 or many IDRs from the IDR list. Highlight the IDR(s) you would like to print and then click the Print button. You’ll be given an option –

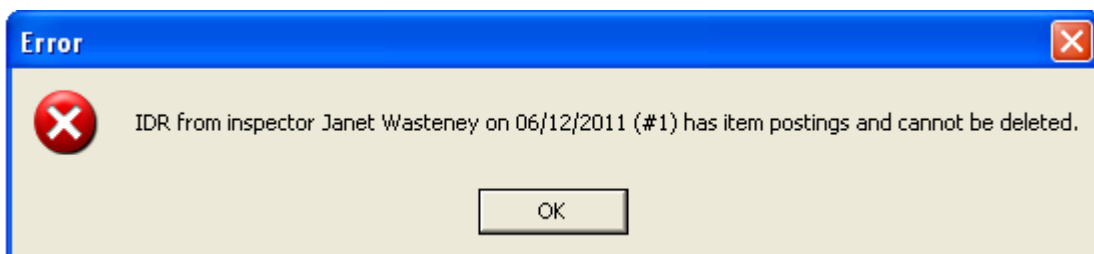


You can either print the list of IDRs (the option shown above) or print a report for each of the IDRs that are highlighted in the list. In the above graphic, the 3 IDRs that are highlighted in the background will have their reports printed if you choose the Print the 3 selected Inspector Daily Reports option. These would be the same reports you would get if you went into each IDR, clicked on the View folder tab, and then clicked the Print button. It's just a much quicker and easier method.

Click Cancel for now and return to the IDR list.

### Deleting an IDR

If you have an IDR in your list that you want to delete so it is no longer a part of the record you can do so - maybe!!! Highlight the most current IDR in the list that you created (you should still be in Contract 78-0061-114) then click the Delete button.



If the IDR has item postings included in it, you CANNOT delete the IDR. But, if you go into that IDR and delete each one of those item postings individually first, then save the IDR, you will be allowed to delete the IDR.

If, however, the IDR has a status of Exported (it's been passed to FieldManager), you can no longer delete that IDR in FieldBook.

Click the OK button at the error message to return to the IDR list

Remain at the IDR list

## **Searches –**

You sometimes need to go back through many IDRs to find specific information. You can either look through each individual IDR or let the program do the searching. I vote for the easy way so let's create a filter!

We're going to create a filter for an IDR which will filter out every IDR except the ones that meet our requirements. In this example, we want to find every IDR with "overrun" mentioned in the comments field so....

You should still be at the IDR list for Contract 78-0061-114

Click the Filter button

Select Comments in the Column field

Select CONTAINS in the Operator field

Type WET in the Value field

*This is not case sensitive*

Click OK

Only those IDRs with the word WET in the Comments field will be listed.

To see all the IDRs once again, select Show All in the Filter field (top, right of screen)

Close back to the contracts list

## **Exporting IDR's to FieldManager -**

On a regular basis you must export IDR's to the FieldManager machine. During the same process when the FieldManager program is being updated with information from your IDR's, a turn-around-file is being created to import back into the FieldBook laptop. This updates your contract(s) so your items and item quantities are as current as possible.

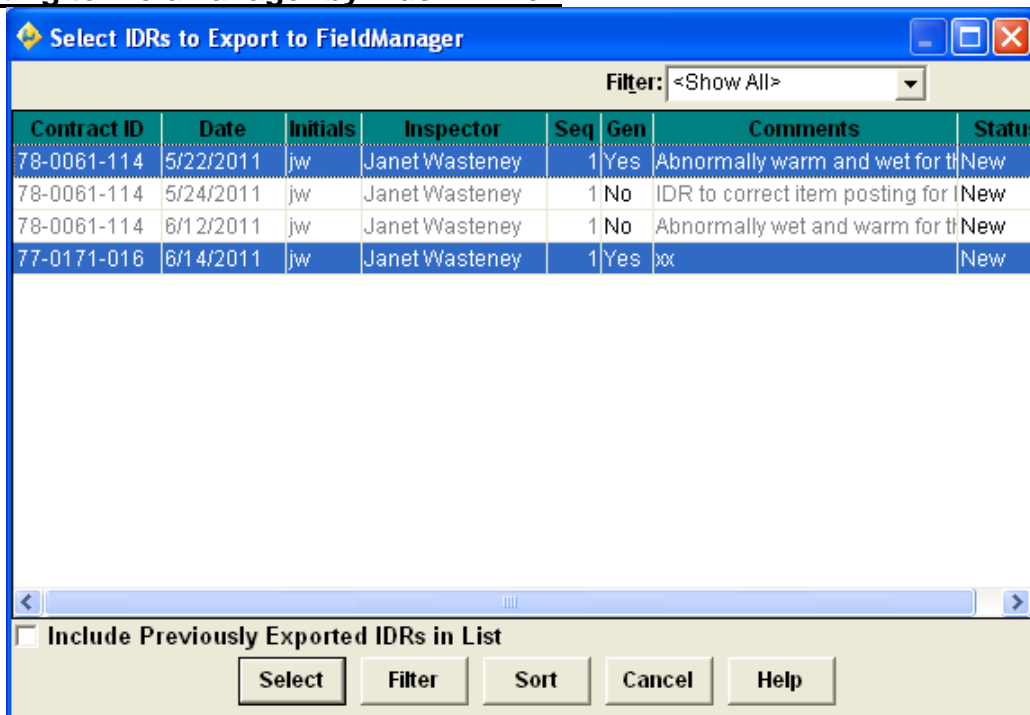
The export process can take place more than once a day, daily, or whatever time period works best in your office. Although it is HIGHLY RECOMMENDED that you export to the FieldManager machine daily, it is also a well known fact that this isn't always possible. In order to keep your information as current as possible, export as

often as possible - but **exporting IDRs to FieldManager at least once a week is a must**. You can export by use of either a flash drive or the server - we'll go over both methods in a bit.

An IDR must be generated before it can be exported to FieldManager. If more than one inspector uses the same laptop for the same and/or different contracts and each contract has generated IDR's ready to export, they can all be combined into one file during the export process. In other words, Inspector A can include Inspector B's IDRs in his file when he exports to FM. This can be a good thing - but this can be a confusing thing unless there is communication between the inspectors involved.

The name of the file that contains the IDRs being exported is based on the initials of the person who is logged into the program at the time of the export.

### **Exporting to FieldManager by Flash Drive -**



Click the Export-FM button and a list of all IDR's (created by any inspector) that have not been exported already are listed

- \*\* If the IDR has been generated, it will be highlighted.
- \*\* If the IDR has not been generated, it will be gray and will not be eligible to be selected for export.
- \*\* If there is more than one contract on this laptop, every contract's IDR's will be displayed in this list.

By default, all generated IDR's for all contracts will be highlighted. If you don't wish to export all that are highlighted, select (highlight) only the IDR's you wish to export to the FieldManager machine. *(Hold the Ctrl key down & left click on each one)*

Click the Select button

*Remember, it will not allow you to select an ungenerated IDR for export.*

Because we're exporting this time by flash drive, the default of E:\ at the next screen is good for us! If E:\ is not the default, type it in and it will become the default.

Put the flash drive in if it isn't already.



A file will be created based on the user ID logged in at the time the export takes place. Since this is the first export for Sammy Smith on this flash drive, the name of the file will reflect that. This filename is SS\_IDR1.EBL.

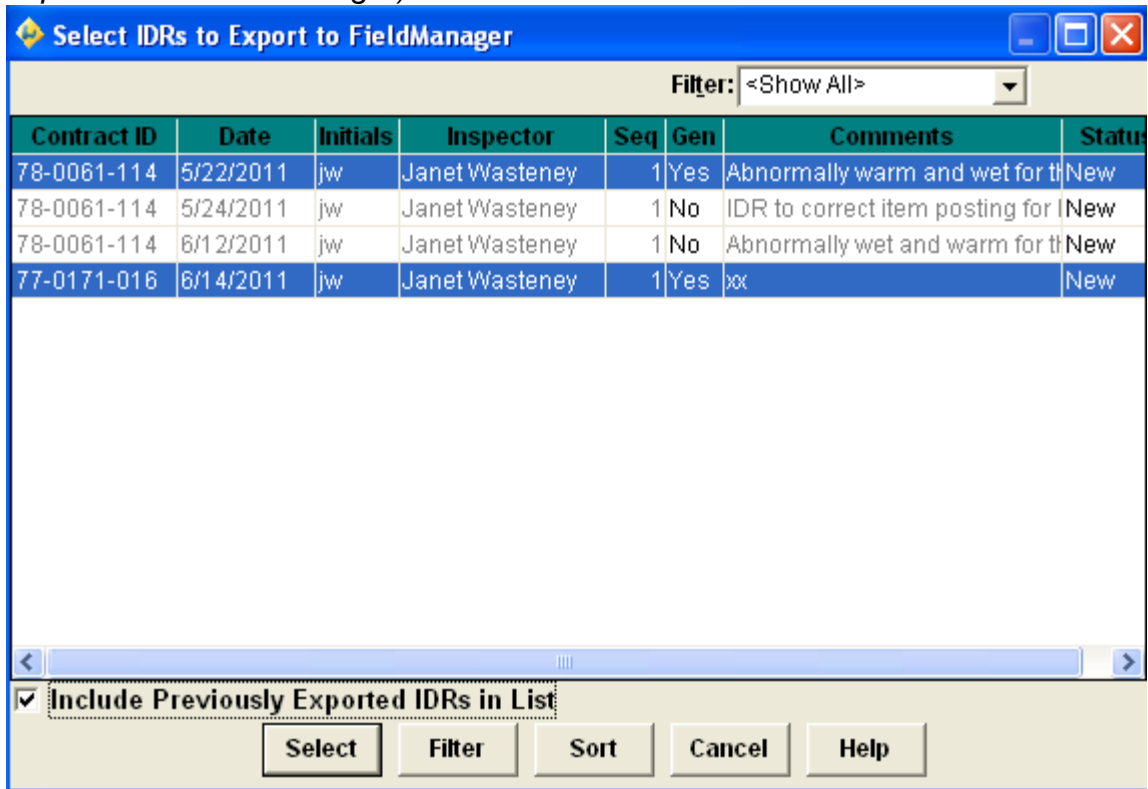
Once the export process is complete, you'll receive a message saying the export was successful.

Just for curiosity, click on the E:\ drive in Windows Explorer to see the file name on the flash drive.

*(As part of the import process into FM, this SS\_IDR1.EBL file will disappear and will be replaced by a turn-around-file, SS\_AUTO.EBL, that should be imported into FB)*

### Re-exporting IDR's that have a status of Exported -

If you need to re-export an IDR(s) that have already been exported (*perhaps the flash drive was lost or for some other reason the files were lost so they couldn't be imported into FieldManager*) there is a method to do so.



Click the Export-FM button as usual

Click so there is a checkmark in the Include Previously Exported IDR's in List field and all IDR's that have a status of either New or Exported will be displayed.

Highlight the IDR's you wish to export or re-export

Click the Select button and continue the export as usual

### Check the appropriate IDR lists to see the status of the IDR's we just exported

Notice that the status of the IDR's we just exported has been changed from New to Exported. You can no longer make changes to them but you can view and/or print them.

If you need to change something, you can go to the FieldManager machine and make the changes in the IDR on that machine or you can request that a FieldManager user make the necessary changes for you.



## **Exporting to FieldManager by using the Server -**

***BEFORE importing and exporting directly from the W drive, each and every inspector who will be passing files using this method must have their own unique folder.***

Click the Export-FM button and a list of all IDR's that have not been exported already are listed.

- \*\* If the IDR has been generated, it will be highlighted.
- \*\* If the IDR has not been generated, it will be gray and will not be eligible to be selected for export.
- \*\* If there is more than one contract on this laptop, each contract's IDR's will be displayed in this list.

Highlight the IDRs you wish to export or re-export  
Click the Select button

**Export the IDRs to the folder specifically created on the W drive for the inspector. Once the export has occurred, notify the office that IDRs are ready for them to import into FieldManager.**

**The office will import the IDR files into FM directly from the W drive and the IDR turn around file that is created during the IDR import process will automatically be placed in that same folder on the W drive. The inspector can import the IDR turn around file directly from the W drive into the FB program.**

**(Because the file disappears from the source location during the import process, there is no need to do a clean up of the folder on the W drive.)**

## **Importing the Turn-Around-File From FieldManager Into FieldBook -**

Once the IDR's you exported from FieldBook have been imported into FieldManager, that program will automatically create a turn-around-file that should be imported back into the FieldBook program. This updates all items and item quantities and is as current as the time your turn-around-file was created. Once again, you do not have to worry about a name for the file - it is named automatically based on the initials of the original export file from FieldBook - you just tell the program where the file is located and it will do the rest.

For our practice here, we'll assume we are importing the turn around file from a flash drive

If the turn-around-file is on a flash drive -  
Put the flash drive in

Click the Import-FM button



Select E:\ from the drop down list if it isn't displayed already  
Click the OK button

*The turn-around-file that was created as a result of exporting your IDR's to FieldManager is named according to the original export file. In our case the original export file name was ss\_idr1.ebl. The turn-around-file is named ss\_auto.ebl.*

Sometimes it takes a bit before the importing actually starts - so don't panic. Relax, be happy!!  
Once the import is finished you'll get a message stating it was successful imported.  
Click OK.

If the IDR turn-around-file is on the server -

If the turn-around-file is on the W drive in the inspector's folder, import it directly into FieldBook from there.

Click the Import-FM button  
Select the appropriate location  
Click the OK button

Once the IDR turn-around-file is imported into FieldBook, it disappears from the source location – so it will no longer be in the folder on the W drive. The good news is that you won't need to delete old files.

If something happens and the file won't import into FieldBook but disappears from the W drive location, simply contact the FieldManager user and ask them to export your contract(s) to you again.

## **Backup and Restore - Backups should be done daily.**

FieldBook backs up by default to the C drive and then offers you the option to copy that backup file to another location. The backup file is written in a condensed format so is not readable if you try to look at it using, for instance, Notepad.

The backup process makes a copy of the entire FieldBook datasource that you are logged in to. This not only includes the contract information, it also includes users, passwords, preferences, etc. If you have three contracts in your contracts list but only worked with one of them, the backup will not only back up that one but the other two as well. You do NOT have to back up each contract individually.

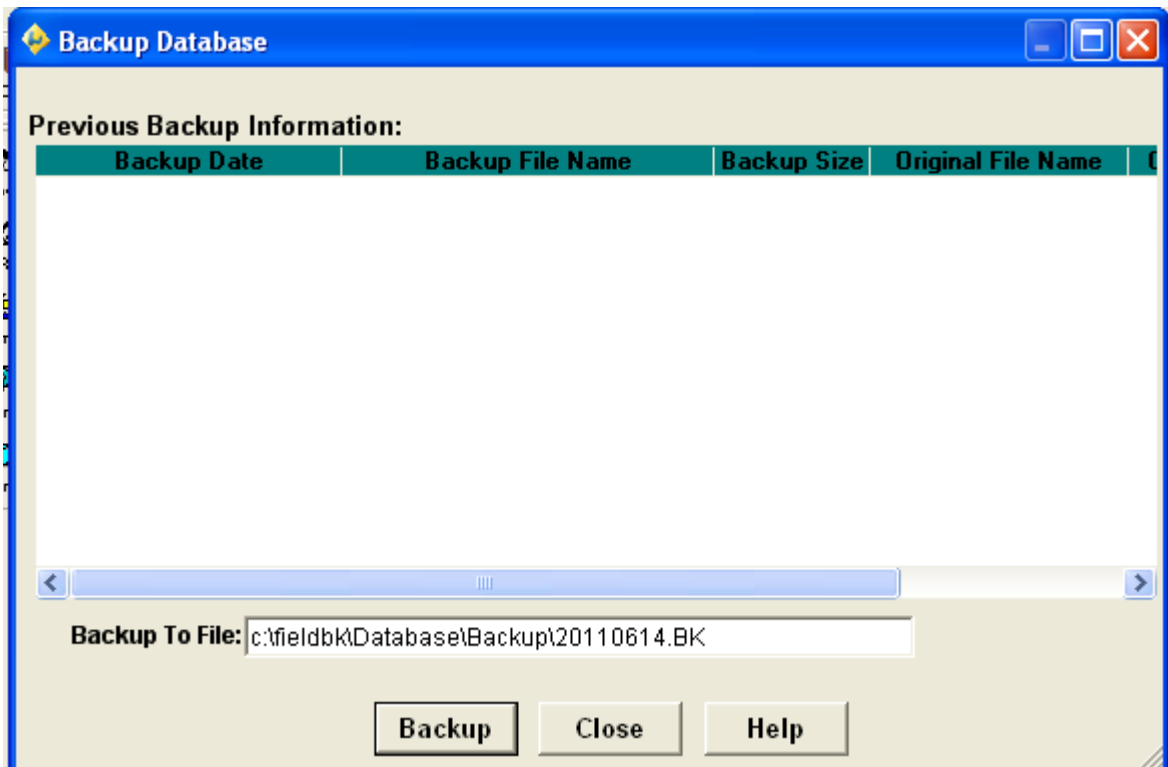
If you have more than 1 datasource (e.g. 1 for Sioux City and 1 for Cherokee), **each datasource must be backed up individually**. In other words, if you're logged into the Sioux City datasource, the Cherokee datasource is not included in that backup. If work was done in one of the Cherokee contracts, you must log into that datasource and back it up separately.

## **Backup Policy -**

1. Backups are to be done each day when entries were made in the program
2. During the backup process, when asked, the backup file should be copied to a location specifically for your backups on the W drive that is accessible to you. This can be the same folder where you export your IDRs.
3. Two or three days of your backup files should be kept in your backup folder on the W drive
4. Delete all but the latest 2 or 3 backup files on the W drive since you wouldn't want to restore something older than that anyway.

**All windows in FieldBook must be closed before the backup process will occur. If you forget to do so, you will be warned when you click the Backup button and can continue from there.**

Let's do a backup of the database just as you would on a daily basis.  
If you're not already at the contracts list, go there  
Click File  
Click Backup Database

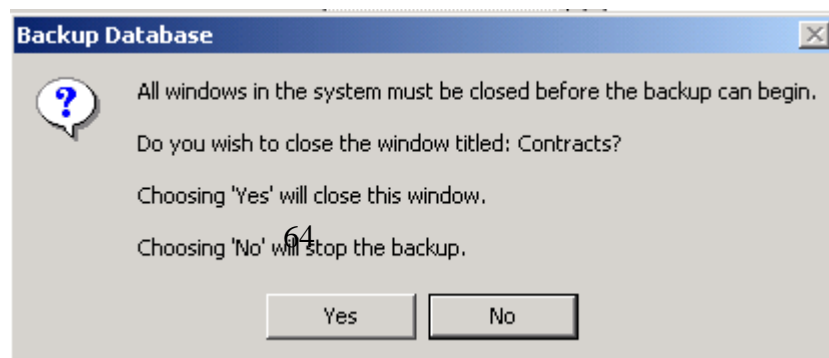


The upper portion of the screen will show the previous backups, if any, and the dates they were done. The Backup to File area will default to C:\PROGRAMDATA\FIELDBOOK\DATABASE\BACKUP\today's date.BK

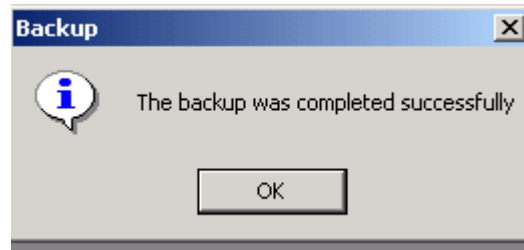
**Do NOT change this path or name.** (Today's date will be listed year-month-day.) If it's the second backup for the day, the extension will be BK2 rather than BK.

Click the Backup button.

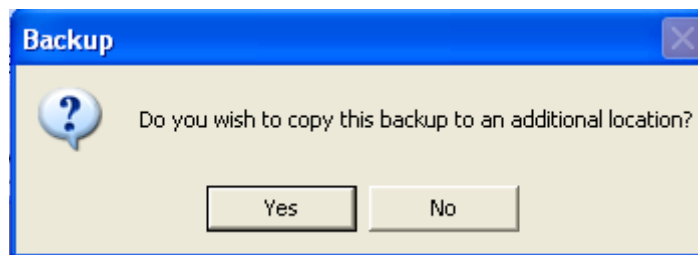
If you forget to close a window, you'll get a warning giving you the option to do so before the backup process can begin.



Click Yes  
Once the windows are closed, the backup will begin.



You'll get a notice when the back up is complete  
Click OK



When the backup to the C drive is complete you'll be asked if you want to copy the backup to another location

Answer Yes!

Select the location on the W drive for your backup files (it can be the same location where you export your IDRs) and the program will copy the backup file to that location for you.

**Keep only the latest 2 or 3 backup files – we wouldn't want to restore from anything older and that would just use up space on the W drive foolishly.**

## **Restore a Database -**

The restore process ELIMINATES whatever is in the FieldBook database (contract information, user ID's, passwords, etc.) on the laptop you are restoring to and REPLACES it with the information in the backup file.

If, for some reason, the restore process fails, FieldBook will reconnect to the original database.

**Do not restore if you have anything in the FB datasource you wish saved on the laptop you are restoring to.**

**PLEASE CALL BEFORE beginning.** It's much easier to take a bit of time and help than to have a problem to solve after the fact.

Let's go through the steps to restore - just so they're familiar.

Click File

Click Restore Database From Backup

Now you have a choice - great, more confusion, huh!!!!

**To restore from the backup that's on the hard drive of the same laptop**

select the backup from the middle area of the screen to restore from.

***You would rarely ever use this option*** I won't continue showing the steps for this process since it will rarely be used.

**To restore from a location on the W drive**

Copy the backup file from the server to a flash drive or to a location on your C drive (We do this to shorten the length of time during the actual restore process and, hopefully, prevent a time out situation)

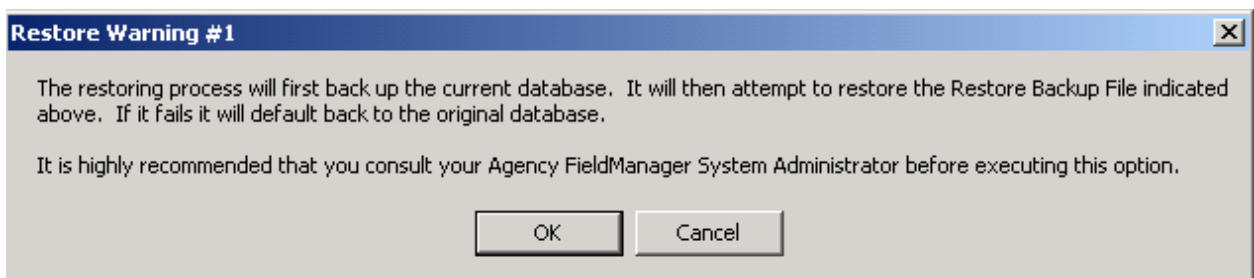
Click File

Click Restore Database From Backup

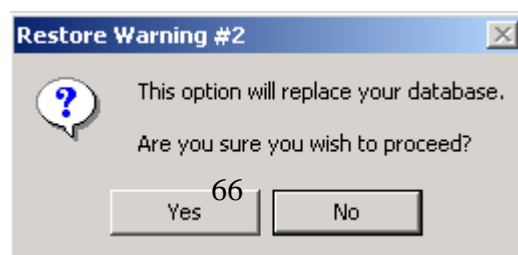
Click the Browse button

Select the file in the location where you copied it from the W drive in the first step explained above

Click Open



Click OK to continue – but if you do this without help, at least feel a bit guilty for not calling first!

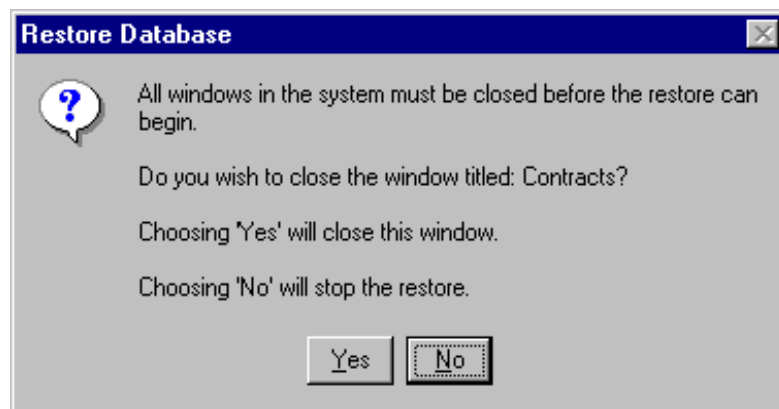


The second of the two warnings appears.

*Based on the number of warnings during the restore process, you should be very aware of the risks involved.*

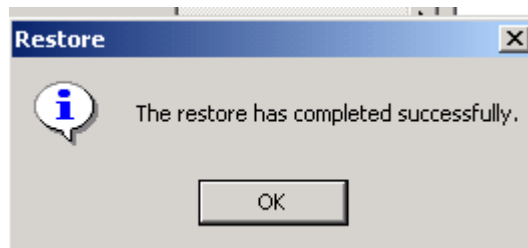
This warning advises you that this option will replace the current database and asks if you wish to continue.

Answer Yes to continue



Another message is displayed stating that all windows must be closed before the process of restoring can continue. If the windows are not closed already, the program will close them if you answer Yes to continue.

The final message – that the restore was successful – will appear when the process is complete.



Click OK

Click Close at the Restore screen

**Inquiries -**

Inquiries are simply a “snapshot” of the specific area requested at the specific time it was requested. If you did an item inquiry first thing in the morning, made item postings, exported IDR(s), imported the TAF and then did another item inquiry later that same day, the two inquiries would be different. You could no longer go back and get an inquiry like the one created in the morning. It is always an up to the minute snapshot. There is no Save option for inquiries but you can print them.

Click the Inquiries button

A list appears that offers over 40 different inquiries.

Highlight an inquiry of your choice.

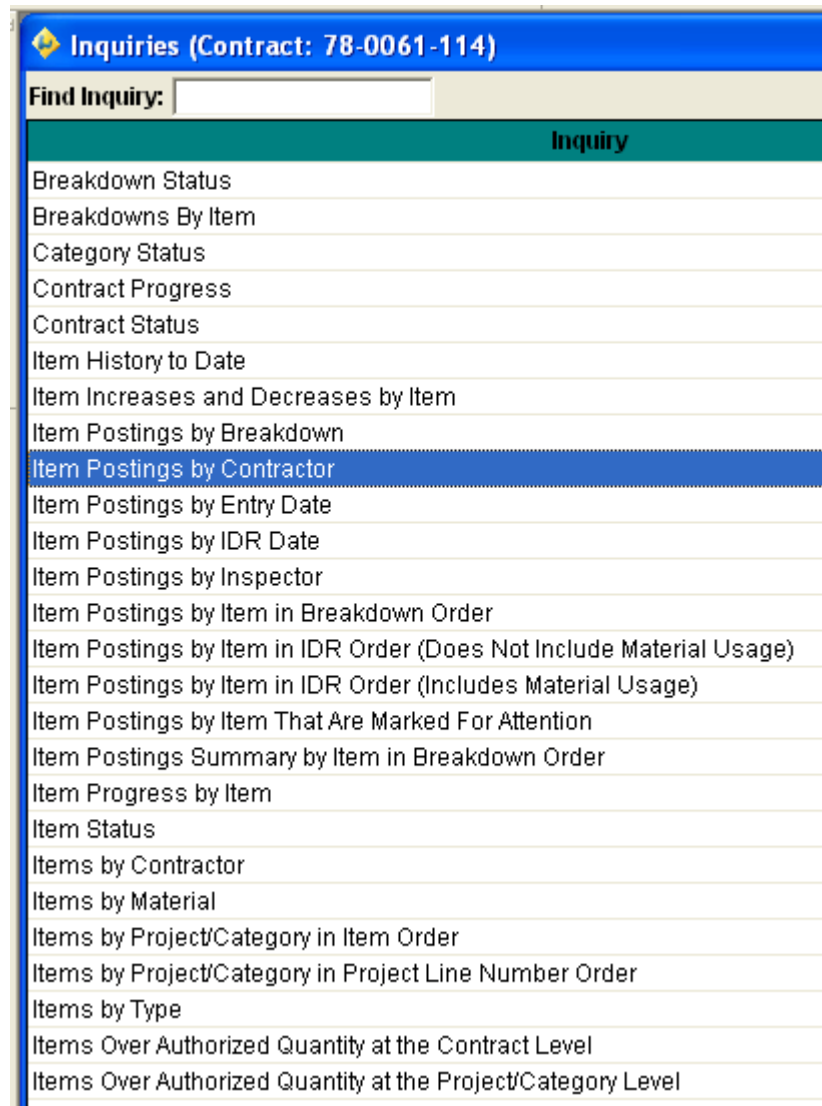
Either double click the highlighted choice or click the View button.

The zoom buttons are available for your viewing convenience

Click the print option if you wish

Notice there is neither a Save nor a Save/Close button since inquiries cannot be saved. Close back to the contracts list when finished viewing inquiries.





Ignore any inquiries that have the word Material in the title since we're not using that portion of the program.

**The best way to learn about the inquiries is to open one, see what it has to offer, decide if that's something that might be helpful to your needs, and repeat for a different inquiry.**

### **Deleting a Contract -**

Deleting a contract in FieldBook is a very simple process - if all conditions are right!!!

Highlight the contract you wish to delete

Click Edit

Click Delete

If all IDR's have been exported, the contract will be deleted from your

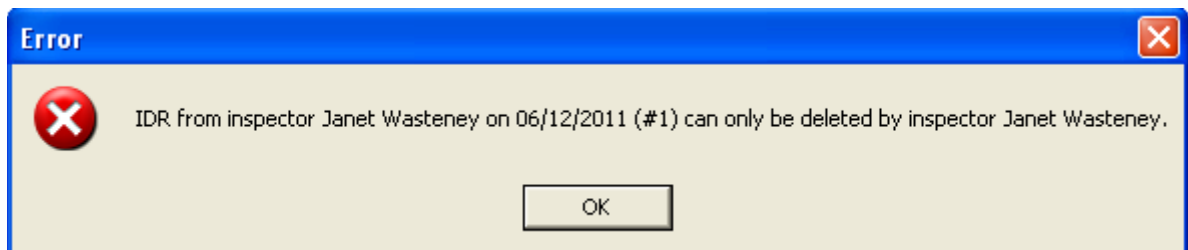
contracts list.

Sometimes this simple delete will not work -

If your contract has IDR's that have not been exported, you will not be allowed to delete the contract. It doesn't matter if the IDR's are generated or not generated, as long as they have a status of New, you cannot delete the contract.

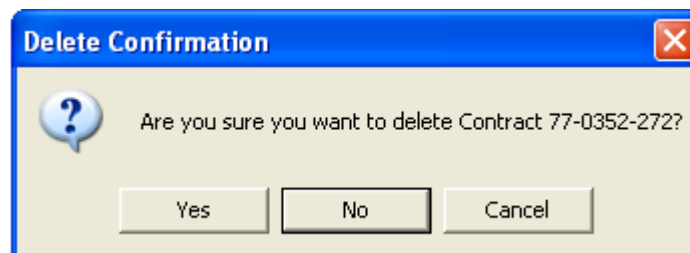


If you created the IDR, you do have the option to first delete the IDR(s) with New status and then delete the contract. If the IDR contained item postings, those would have to be deleted before the IDR could be deleted. If you did not create the IDR and try to delete it, you'll get a message similar to the following



If all IDR's have been exported to FieldManager (have a status of exported or refreshed), the contract can be deleted even though the IDR's turn-around-file might not have been imported back into FieldBook.

Once a contract no longer has IDR's with a New status, you will be allowed to delete the contract. You will be given a second chance to change your mind with the following message.



Answer Yes to the “Are you sure?” question and the contract will be deleted.

If you made a terrible mistake and really shouldn't have deleted the contract, there is no undo!! The safest method to get the contract back on your machine again is to have a FieldManager user create an export file of that contract for you to import into FieldBook once again. That will give you updated information and be far safer and faster than any other method.