December, 2013

FieldBook Cookbook
(Version 5.0a)

Changing Your Password

Passwords must be a minimum of 5 characters

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

Setting Preferences (***recommended suggestions only***)

1. Click Utilities > User Preferences
2. General tab – Enter a default user ID if you desire and also determine whether you want a checkmark in the Warn User When Exiting Application option. Do NOT change the default backup location.
3. List Window tab – Be sure a checkmark is in all 4 options
4. Entry Defaults – Remove both checkmarks
5. FieldNet, Import, Export, Toolbar, and Inquiries – No changes to these - leave them as they are
6. Click OK

Importing a Contract from **Your** Regular FieldManager Machine

1. Login to the program, selecting your office's datasource if there is an option
2. Click Import - FM
3. Select the appropriate location of the file (probably E if using a flash drive)
4. Click OK

If this is the first contract to be imported, a datasource name will be suggested. Shorten the length of the suggested name to just the city, (e.g. Mt Pleasant rather than Mt Pleasant Construction Residency).

Importing a Contract from a **Different** FM Machine Than Your Regular One

1. Double click on the FieldBook icon to start the program
2. Click the button to the right of the Datasource field
3. Click Add
4. Select the appropriate location where the contract file is, highlight the file, and click Open
5. Enter the new datasource name – 1 will be suggested
   Shorten the length of the suggested name to just the city, (e.g. Mt Pleasant rather than Mt Pleasant Construction Residency)
6. Press OK
7. Click Close
8. Continue the log on to FB, selecting the new datasource from the list that is displayed when you click the drop down arrow beside the Datasource field

TO LINK AN ADDITIONAL ITEM TO A CONTRACTOR

1. Highlight the appropriate contract
2. Click the Contractors button
3. Highlight the appropriate contractor
4. Click the Change button
5. Click the Items folder tab
6. Click the Add button
7. Highlight the item(s) you wish to link to this contractor
   If it isn't in the list, it's already linked to this contractor
8. Click the Select button
9. Save/Close

IDR BUTTON

Creating an IDR

1. Click the IDRs button
2. Click the Add button
3. Enter the appropriate information on each folder tab
4. Save to keep the information
5. Generate the IDR so it can be passed to FieldManager

Changing an IDR

1. Click the IDRs button
2. Highlight the appropriate IDR
3. Click the Change button
4. Make additions to or changes as desired
   Changes can be made only until the IDR is exported to FieldManager.
5. Save or Save/Close
6. Generate

Charging a Working Day

1. Click the IDRs button
2. Click the Add button if it's a new IDR
3. Click the Site Times folder tab
4. Highlight the appropriate site in the upper portion of the screen if there is more than 1 site displayed
5. Enter either 0, .5, or 1 in the Time Charge field
6. Click in the Yes or No Contractor(s) Working field
7. Enter Hours Available and Hours Worked if desired
8. Enter the Controlling Operation
9. If less than 1 day is charged, enter the Reasons for Delays
10. Enter Comments
11. Save or Save/Close
12. Generate the IDR so it can be passed to FieldManager
    Entries in Steps 5, 6, 8, and 9 are ultimately displayed in the Weekly Report of Time Charges.

Item Posting for Mobilization

1. Do NOT make item postings for mobilization – it will be paid automatically at the appropriate time when an estimate is processed

Item Posting for Lump Sum Items

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

Marking an Item for Attention

1. Click in the Attention field on the form when posting item progress so a checkmark appears
2. Enter comments in the Remarks field
   Don't depend on this for someone in the office to see. Verbal communication is much safer.

To Create a Filter to Find a Specific Word in the IDR Comments field

1. Click the IDR button & remain at the IDR list
2. Click the Filter button
3. Select a choice in the Column field (e.g. Comments)
4. Select a choice in the Operator field (e.g. Contains)
5. Type the word you want to find in the Value field (This is not case sensitive) (e.g. Accident)
6. Click OK
   Only the IDRs containing the word in the selected field you typed in Step 5 will be displayed. In our example, only IDRs containing the word accident in the Comments field will be displayed
7. To see all the IDRs again, select Show All in the Filter field (top, right of Screen

To Sort the Items list

1. Put the cursor in the header of the column you wish to sort
2. Double click to sort first in ascending order (repeat the double click if you wish to sort in descending order)
   (The "Find" field is based on the sort – if the list is sorted by proposal number, the find field will be Find Prop Line, if the list is sorted by item description, the find field will be Find Item Description, etc.)

To See Previous Item Postings While Entering IDR Information

1. Click the Inquiries button
2. Select Item History to Date
3. Select the item
4. To return to the item posting screen –
   a. Click Window

b. Click Add IDR so the checkmark moves there (it's currently in front of the Item History to Date inquiry)

Correcting an Item Posting

If the IDR including the item has not been exported to FieldManager –

1. Highlight the IDR where the original posting occurred
2. Click Change
3. Make the appropriate change on the Posting tab
4. Save/Close
5. Generate

If the IDR including the item has been exported to FieldManager –

1. Create a new IDR
2. Make an entry in either the Sta or Location field (a zero will work if you don't know the original entry information)
3. Tab to the quantity field
4. Enter the appropriate correcting amount in the Quantity field
5. Make a comment in the Remarks field to explain the correction
6. Save/Close
7. Generate

Printing an IDR

1. Click the IDR button
2. Highlight the appropriate IDR(s) in the list
3. Click the Print button
4. Select the option to print the number of IDR's you highlighted

OR

1. Click the IDR button
2. Highlight the appropriate IDR
3. Click the Review button
4. Click the View tab
5. Click the Print button
6. Repeat for any other IDR's

(the first print option shown is much easier and faster)

Exporting IDR's to FieldManager – (using a flash drive)

1. Click the Export – FM button
2. Leave highlighted all the IDR's you want to export
   (IDR's not originally highlighted are not generated)
3. Click Select
4. Insert a flash drive if you haven't already
5. Click OK at the appropriate location (probably E for flash drive)
6. Give the flash drive to whomever will import it into the FieldManager machine

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Exporting IDR’s to FieldManager – (using the server)

1. Click the Export – FM button
2. Leave highlighted all the IDR’s you want to export
   (If an IDR is not highlighted, it is not generated)
3. Click Select
4. Click OK at the appropriate location (A folder that your office created for you to use for FB files)

(The IDRs you just exported will now be in a file on the W drive in your folder, and ready to be imported into FieldManager)

Re-exporting IDR’s

1. Click the Export – FM button
2. Put a checkmark in the Include Previously Exported IDR’s in List field
3. Highlight all the IDRs you wish to re-send to FieldManager
4. Click Select
5. Click OK at the appropriate location

Importing the IDR turn-around-file from FieldManager – (using a flash drive)

1. Click the Import - FM button
2. Insert a flash drive
3. Click OK at the appropriate location (probably E for flash drive)
4. Once the import is finished, your contract information will be as current as the FieldManager information was at the time your IDR’s turn-around-file was created

Importing the turn-around-file from FieldManager – (using the server)

1. Click the Import – FM button
2. Select your folder on the W drive that has been created by your office for your FB files
3. Click OK at the appropriate location
4. Once the import is finished, your contract information will be as current as the FieldManager information was at the time your IDR’s turn-around-file was created

Backing Up the Database

1. Close the contracts list
2. Click File > Backup Database
3. Click the Backup button
4. Click OK to the completed successfully message
5. Click Yes to the question concerning copying the backup to another location
6. Select the folder on the W drive created specifically for you by your office for your FB files. Each inspector should have their own sub-folder.
7. When the copy is finished, click No to copying to yet another location
8. Close out of the FB program

Restoring the Database

1, Please call BEFORE starting this process

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