# 3 FieldManager Contract Setup

This chapter provides information needed to set up a FieldManager contract after it has been loaded into the software by HQ Construction Admin Section. There are some fields that the Construction crew will be required to enter for all new contracts and some fields that are updated during the entire contract life cycle.

## 3.1 Change Contract Documentation

Log into FieldManager through Citrix (for more information on logging on to FieldManager, see Chapter/Section 2.1 in this user guide). This will open the Contracts list window (Figure 3-1).

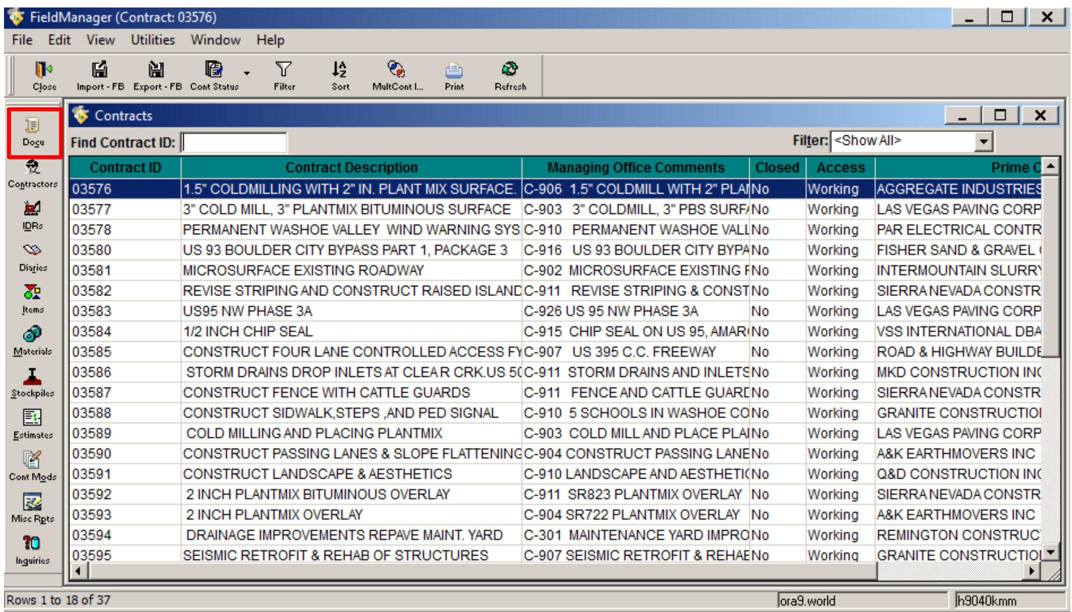


Figure 3-1. FieldManager Contracts List Window

### 3.1.1 General Tab

The **General** tab contains general contract information: Project ID(s), contract dollar amounts, location, Prime Contractor, important dates and the number of days to view IDRs.
HQ Construction Admin Section.

1. Select desired contract from the Contracts list window and click **Docu** on the Application Toolbar Window (Figure 3-1) or double-click on the contract ID. The Change Contract Documentation tab window opens with the **General** tab displayed (Figure 3-2).

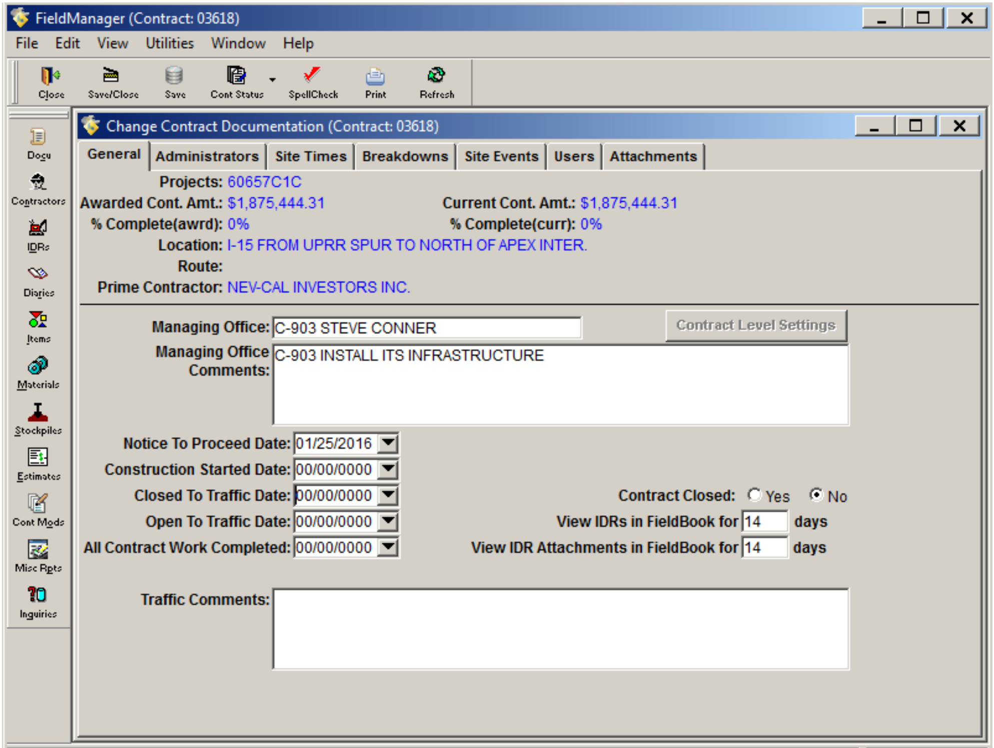


Figure 3-2. Change Contract Documentation Tab Window - General tab

2. Fill out the required fields:

- **Managing Office:** Crew number and RE name (*Example:* C-901 Joe Smith). **This is entered by HQ Construction Admin Section.**
- **Managing Office Comments:** Crew number and add short description of contract. This language will be displayed on the contracts list screen. **This is entered by HQ Construction Admin Section.**
- **Notice to Proceed Date:** **This is entered by HQ Construction Admin Section.**
- **Construction Started Date:** Enter date of first working day charged. **This is entered by RE (Required).**
- **Closed to Traffic Date:** This is <u>not</u> used at NDOT.
- **Open to Traffic Date:** This is <u>not</u> used at NDOT.
- **All Contract Work Completed:** The date when final cleanup phase was completed. **This is entered by RE** (**Required**).
- **Contract Closed:** This indicates whether or not the contract is closed. The radio button “NO” will be selected until final payment has been made; the status of the contract will then automatically update and the radio button will then reflect “YES”. **Completed by HQ Construction Admin staff.**
- **View IDRs & Attachments in FieldBook:** The number of days of IDRs that will be included in a refresh file passed from the FieldManager application to the Mobile Inspector application. We recommend 14 days for each to reduce

risk of large file size but can be extended for viewing if needed. **This is entered by RE.**

- **Traffic Comments:** Comments detailing specifics on the Traffic data entered in this window. **This is entered by RE, not required.**

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

### 3.1.2 Administrators Tab

The **Administrators** tab lists the administrators assigned to the contract including the Managing Office Manager, Resident Engineer, and Project Engineer for the contract.

1. Click on the **Administrators** tab (Figure 3-3).

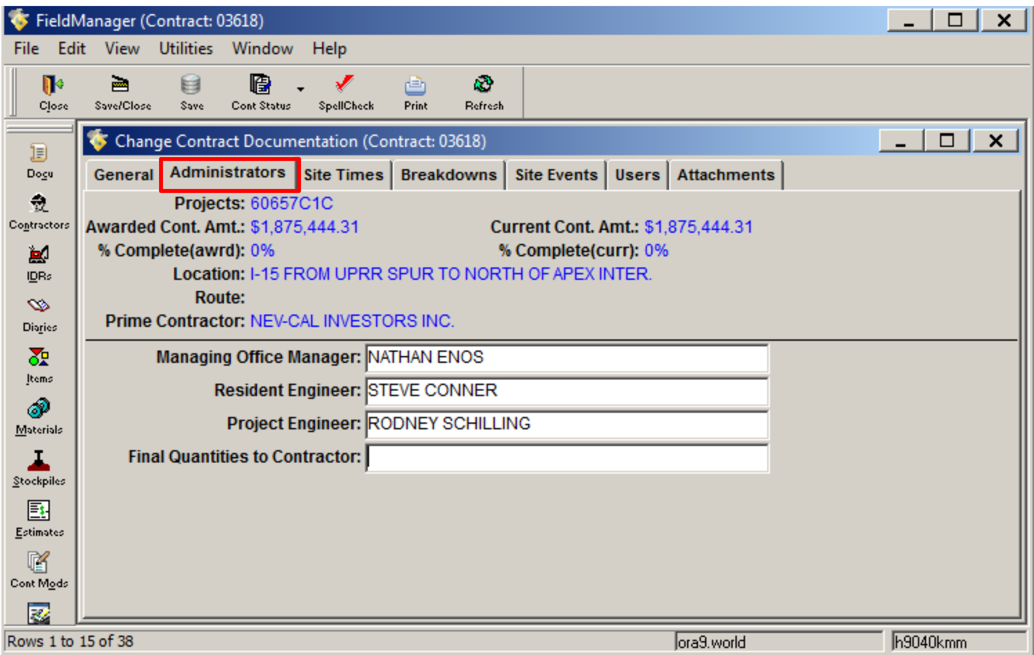

Figure 3-3. Change Contractors Documentation Window - Administrators Tab

2. Fill out the required fields:

- **Managing Office Manager:** Enter the office person's name. **This is entered by RE (Required).**
- **Resident Engineer:** RE assigned to the contract. **Entered by HQ Construction Admin**.
- **Project Engineer:** Project Engineer assigned to the contract. **Entered by HQ Construction Admin.**
- **Final Quantities to Contractor:** Date when final quantity information is sent to the contractor. **Entered by HQ Construction Admin.**

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

### 3.1.3 Site Times Tab

The **Site Times** tab identifies the amount of time allotted and completed for your contract. It is also where you start and stop charging days.

1. Click on the **Site Times** tab (Figure 3-4).

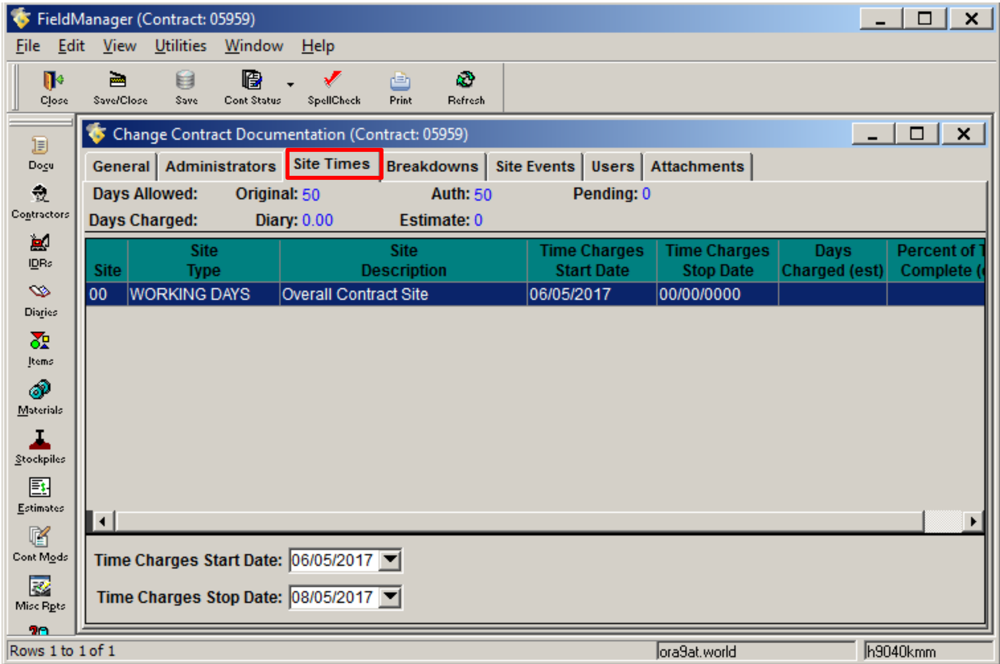


Figure 3-4. Change Contract Documentation Window-Site Times Tab

2. Enter the Time Charges Start Date by using the drop-down menu to select the first working day of the contract. **This is entered by RE.** (**Required**)
3. Enter the Time Charges Stop Date at the end of the contract by using the drop-down menu. **This is entered by RE.** (**Required**)
4. Click **Save** or **Save/Close** on the Window Toolbar, depending on how you would like to proceed.

   - **Note: NDOT will not be using the Breakdowns, Site Event and Attachments tabs.**

### 3.1.4 Users Tab

The **Users** tab is where you will set up the various users who will work on this contract. It is important to add all your Mobile Inspector users so that the Mobile Inspector application, installed on NDOT EDOC iPads, will be able to send and receive contract data from the FieldManager application.

1. Click on the **Users** tab (Figure 3-5).

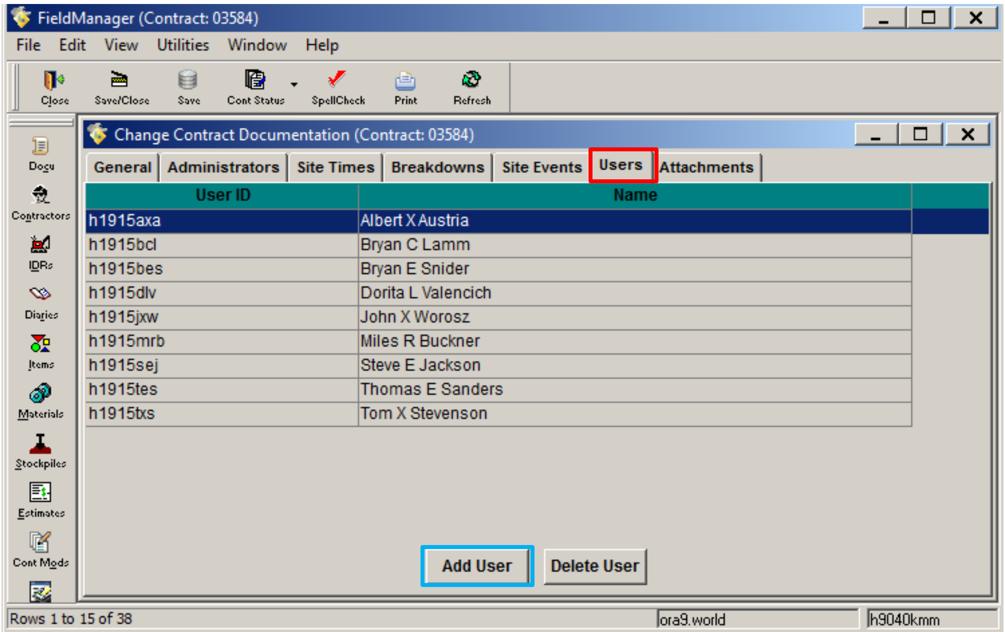

Figure 3-5. Change Contract Documentation Window - Users Tab

2. Click the **Add User** button (See blue box in Figure 3-5). The Select Users list window opens (Figure 3-6).

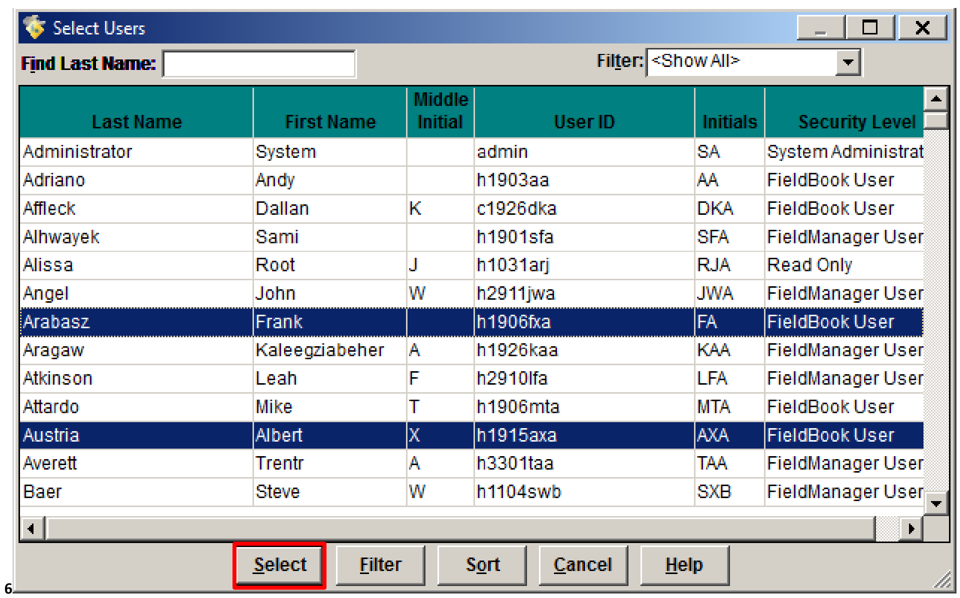

Figure 3-6. Users Tab – Select Users List Window

3. Select the user(s) from the master users list. You can select more than one user at a time to add to the users list. Click on the **Select** button to add the user(s) (Figure 3-6).

4. If you wish to delete a user select the **Delete User** button remove them from list (Figure 3-5).

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

   - **Note:** If a desired user isn't available for selection please call **HQ Admin Section Helpdesk at 775.888.7460** to have the user added.