5   Working with Items

FieldManager contracts contain three types of items: original, unattached and attached items.

Original items are those that were included in contract documents at time of award.

Unattached items are items that are added to the contract so they can be tracked and postings made. These items are not eligible for payment until they have been added and approved through the contract modification process. Refer to Chapter/Section 10.1.4 in this user guide for details on adding an unattached item to a contact modification.

Once unattached items are approved by a contract modification they are considered an attached item.

5.1   Adding New Unattached Items

Log into FieldManager through Citrix (for more information on logging on to FieldManager, see Chapter/Section 2.1 in this user guide). The Contracts list window opens (Figure 5-1).

Figure 5-1 - FieldManager Contracts List Window

1. Select desired contract, and click **Items** on the Application Toolbar (Figure 5-1). The Items list window opens (Figure 5-2). The Items list window lists all the items in the contract, and it shows whether an item is an original item, an attached item (added by a contact modification), or an unattached item.

Figure 5-2. Items List Window

2. Click **Add** on the Window Toolbar (Figure 5-2). The Add Item window opens with the **General** tab displayed (Figure 5-3).

Figure 5-3. Add Item Tab Window - General Tab

5.1.1 General Tab

1. To complete the General tab item record, enter the following information in the appropriate fields:

- **Item:** Enter the item number or Click the drop-down arrow next to the Item number box and NDOT's Master Item list opens (Figure 5-4) Select the item to add and click on the **Select** button.

    ➢ **Note:** Check for the correct unit of measure on items that have multiple units of measure.
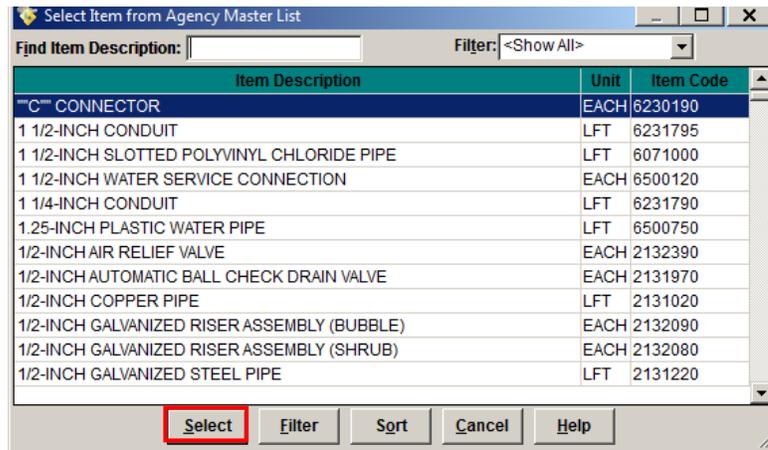
Figure 5-4. Agency Master Item List – General Tab

- **Supplemental Description:**   Enter when applicable.

- **Section:**   Always 0.

- **Project Category:**   Check the box for each category with which to associate the item to (See blue box in Figure 5-3).

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

5.1.2 Documentation Tab

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

Figure 5-5. Add Item Tab Window - Documentation Tab

2. Enter the following information in the appropriate fields:

- **Item Completed:**   This step should be performed as items are completed. All items

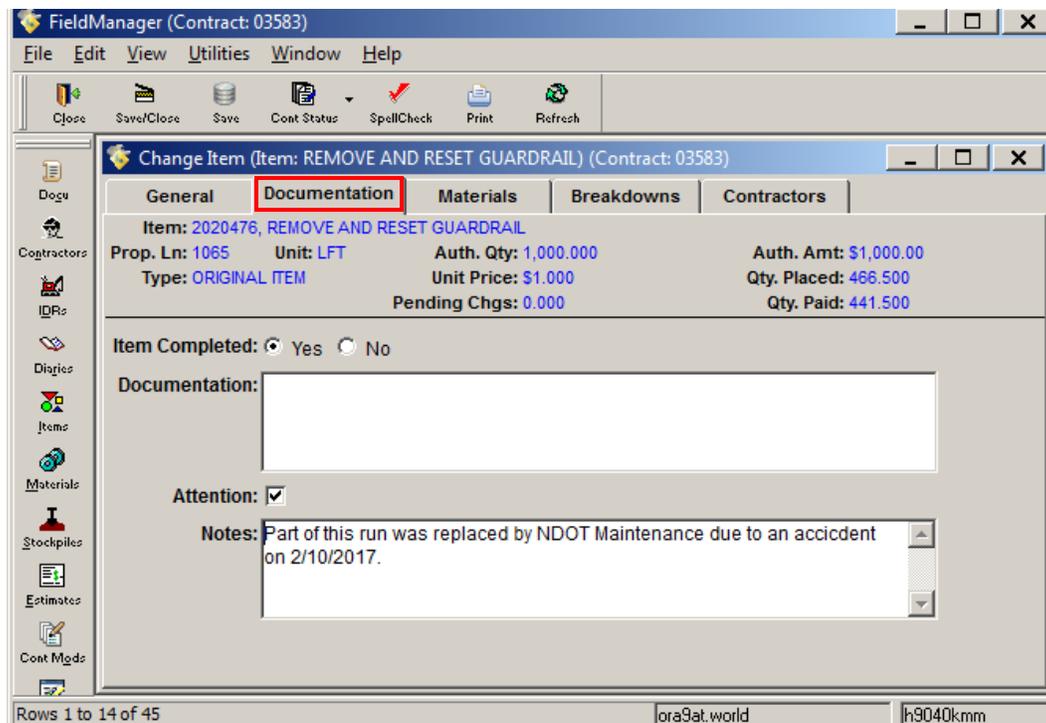must be marked complete to complete the Semi-Final process (See Chapter 13 in this user guide). Only attached items may be marked complete to prevent an unapproved item from being marked by mistake, this option is disabled when you are adding a new unattached item (See Chapter/Section 5.2 in this user guide.

- **Documentation:** You may add documentation to this item to indicate the location of any supporting files. Not required.

- **Attention:** Check the box if this item needs attention (by the RE or Office Person). This flag will appear in the Item Usage tab in an Estimate (See Chapter/Section 11.2.2 in this user guide). If selected a reason must be provided in the Notes field before saving.

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

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

5.1.3 Materials Tab

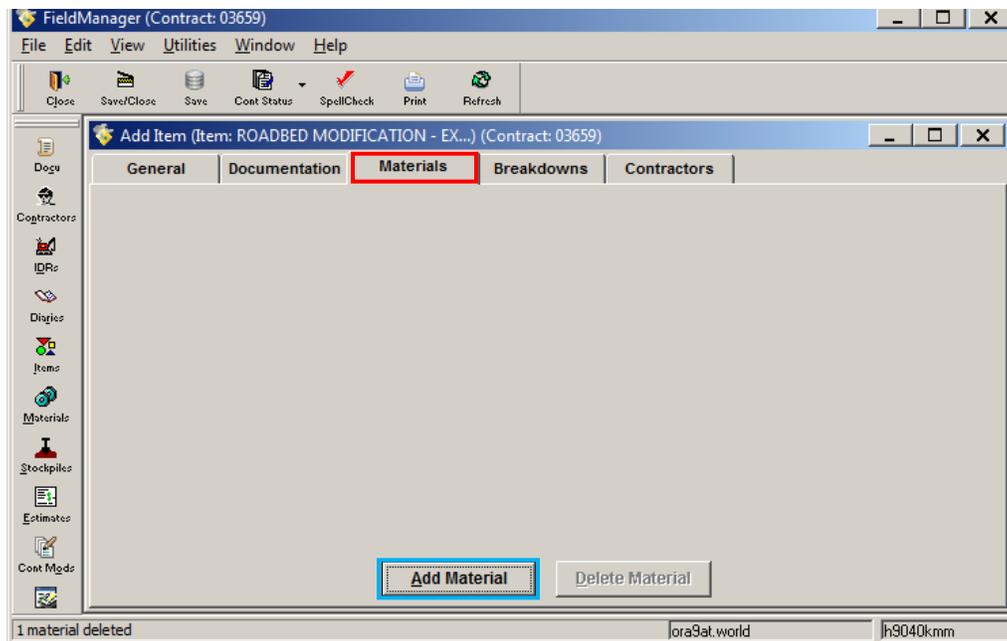1. Click on the **Materials** tab (Figure 5-6).

Figure 5-6. Add Item Tab Window - Materials Tab

2. Click the **Add Material** button (See blue box in Figure 5-6). The Select Materials list window opens (Figure 5-7). This lists all the materials requiring certification that are associated with the items of this contract
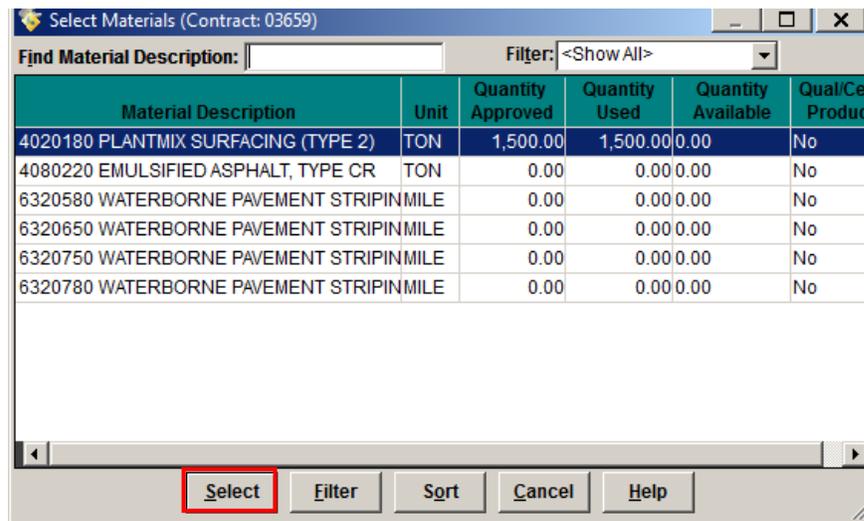
Figure 5-7. Materials Tab - Select Materials Window

3. Select the material from the list and click on the **Select** button**.** (Figure 5-7). The Add Item Materials tab opens (Figure 5-8).
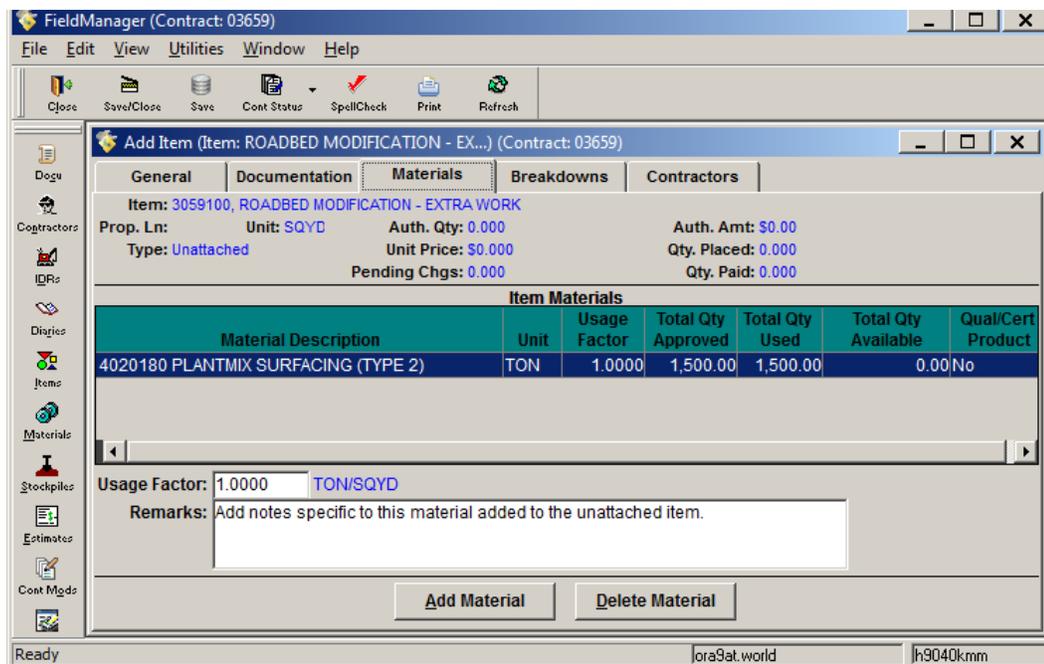

Figure 5-8. Add Item Tab Window - Materials Tab

4. Enter the following information in the appropriate fields:

  • **Usage Factor:**   Always 1. (**Required**)

  • **Remarks:**   Enter additional specific information about the material added to the unattached item. (**Required**)

   ➢ **Note: NDOT does not utilize the Breakdowns or Contractors tabs of the software**.

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

   ➢ **Note**: Refer to Chapter/Section 6.1 in this user guide for additional information.

5.2 Changing Existing Items

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

5.2.1 Changing General Tab Information (Unattached Items Only)

1. Select the contract in the Contracts list window, and click **Items** on the Application Toolbar. The Items list window opens (Figure 5-9).

Figure 5-9. Items List Window

2. Select the Unattached item, and click **Change** on the Window Toolbar (Figure 5-9) or double-click on the item. The Change Item tab window opens in the **General** tab (Figure 5-10).

Figure 5-10. Change Item Tab Window - General Tab (Unattached Item)

3. Make desired changes.

4. Click **Save** or **Save/Close** on the Window Toolbar, depending on how you want to proceed.

5.2.2 Changing Documentation Tab Information

1. Click on the **Documentation** tab (Figure 5-11). You can change any of the information except the blue fields in the header at the top of the tab window.
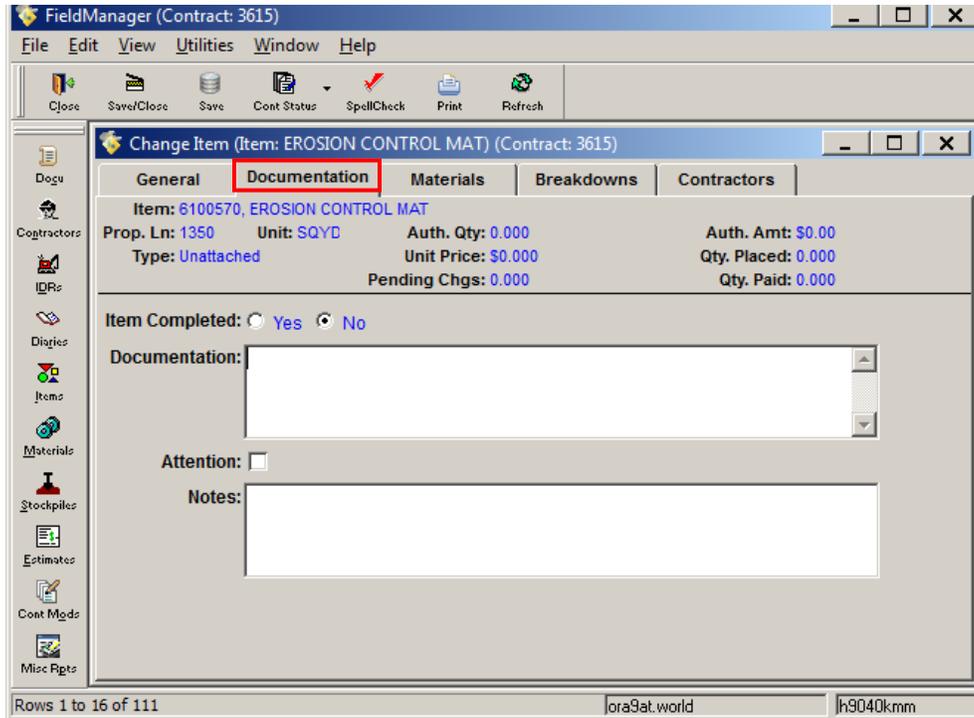

Figure 5-11. Change Item Tab Window – Documentation Tab

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

5.2.3 Changing Materials Tab Information
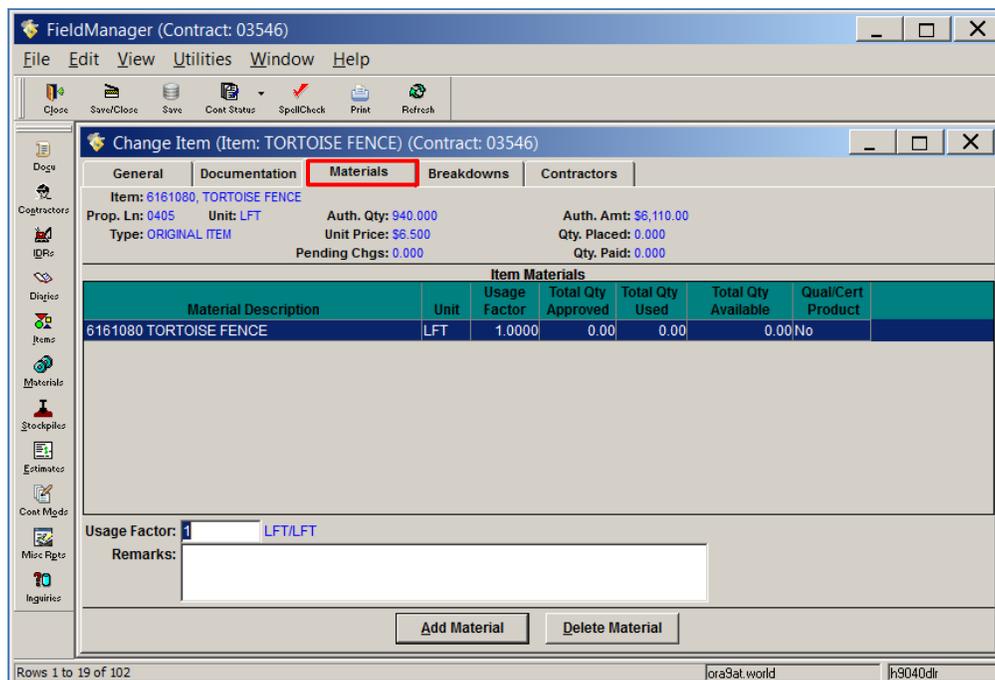
1. Click on the **Materials** tab (Figure 5-12).

Figure 5-12. Change Item Tab Window - Materials Tab

2. The only information on this tab that you would change is the Remarks field.

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

5.3 Deleting Items (Unattached Only)

Only Unattached items that have no item postings or payment made against them may be deleted.

1. Select the contract in the Contracts list window, and click **Items** on the Application Toolbar. The Items list window opens (Figure 5-13).

Figure 5-13. Items List Window

2. Select the Unattached item and click **Delete** on the Window Toolbar (Figure 5-13). A Delete Warning window opens (Figure 5-14).
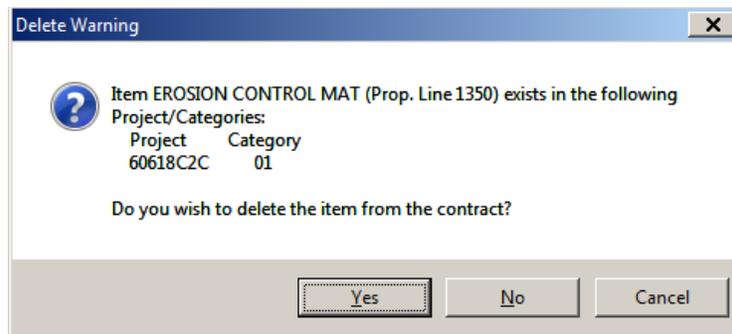

Figure 5-14. Delete Warning Window - Delete Unattached Item

3. Click **YES** to complete the deletion.
   - ➢ **Note:** If you attempt to delete an Unattached item that has IDR postings a Warning window opens (Figure 5-15) indicating the item cannot be deleted unless the posting is deleted (See Chapter/Section 7.3 in this user guide).
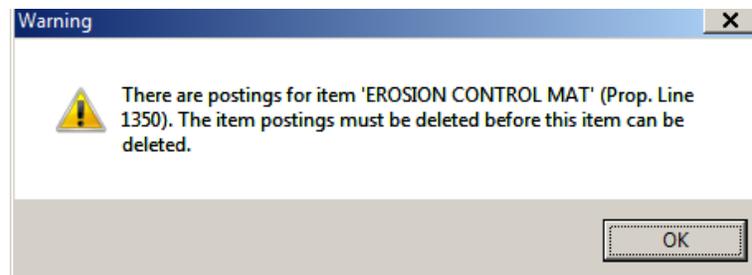

Figure 5-15. Warning Window – Delete Unattached Item

➢ **Note:** If you attempt to delete an original bid item or an item added by a contract modification you will receive an error message indicating that the item CANNOT be deleted (Figure 5-16).
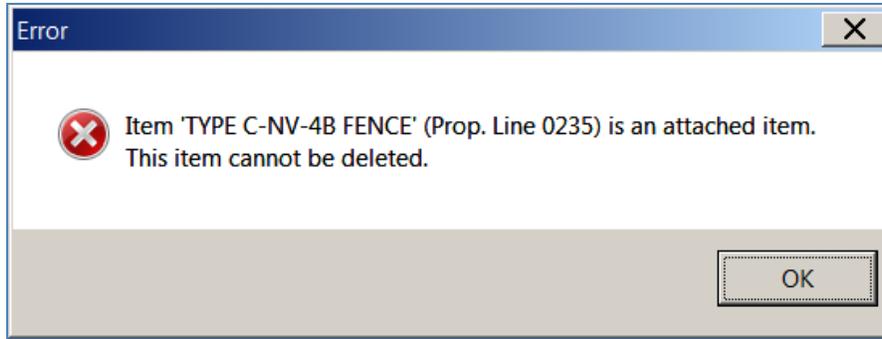

Figure 5-16. Error Window - Delete Attached Item

5.4 Marking Items as Completed

As items are completed they must be manually marked as completed. This step is applicable to the Semi-Final process (see Chapter 13 in this user guide). All items must be marked as completed before the Semi-Final estimate can be created.

➢ **Note:** Only attached items can be marked as completed.

1. Select the contract in the Contracts list window and click **Items** on the Application Toolbar. The Items list window opens (Figure 5-17).

Figure 5-17. Items List Window

2. Select the completed item and click **Change** on the Application Toolbar (Figure 5-17). Click the **Documentation** tab (Figure 5-18).
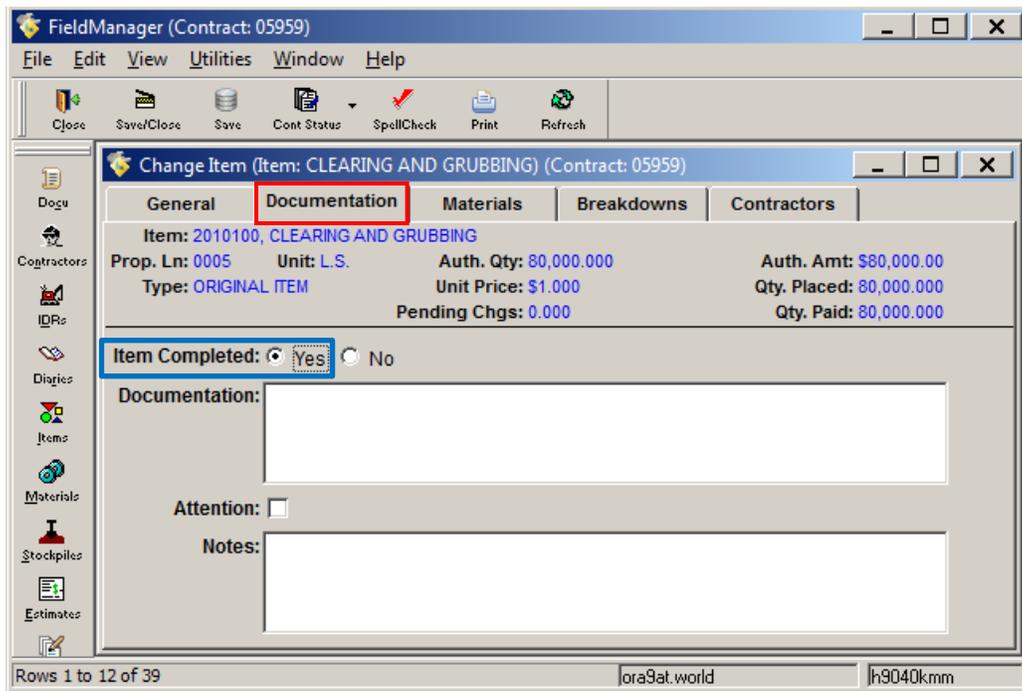
Figure 5-18. Change Item Tab Window – Documentation Tab

4. Click the **Item Completed Yes** radio button. (Figure 5-18).

5. Enter **Notes** as needed.

6. Click **Save/Close** on the Window Toolbar.

5.5 Reviewing Items

If you are interested in information regarding an item but not wishing to change you can simply review the item.

1. Select the contract in the Contracts list window and click **Items** on the Application Toolbar. The Items list window opens (Figure 5-19).

Figure 5-19. Items List Window

2. Select the item and click **Review** on the Window Toolbar (Figure 5-19). The Review Item tab window opens in the **General** tab in a mode in which you can view, but not change information (Figure 5-20).
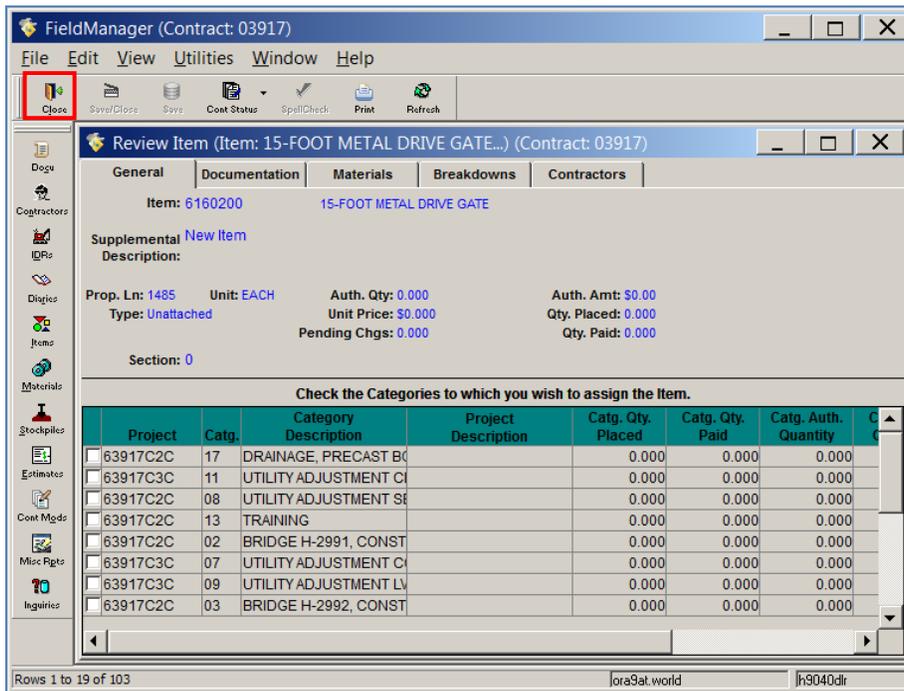
Figure 5-20. Review Item Tab Window – General Tab

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

4. Click **Close** on the Application Toolbar to close the Review Item tab window and return to the Items list window.