15 Using Inquiries: General Information

FieldManager includes inquiries that are brief views of contract information you can print or view on screen to review contract activity. Inquiries are informal views of information grouped in several different and useful formats.

You can access Inquiries & Reports by selecting inquiries from the icons at the left side of the window, after selecting the contract you wish to view (Figure 15-1).

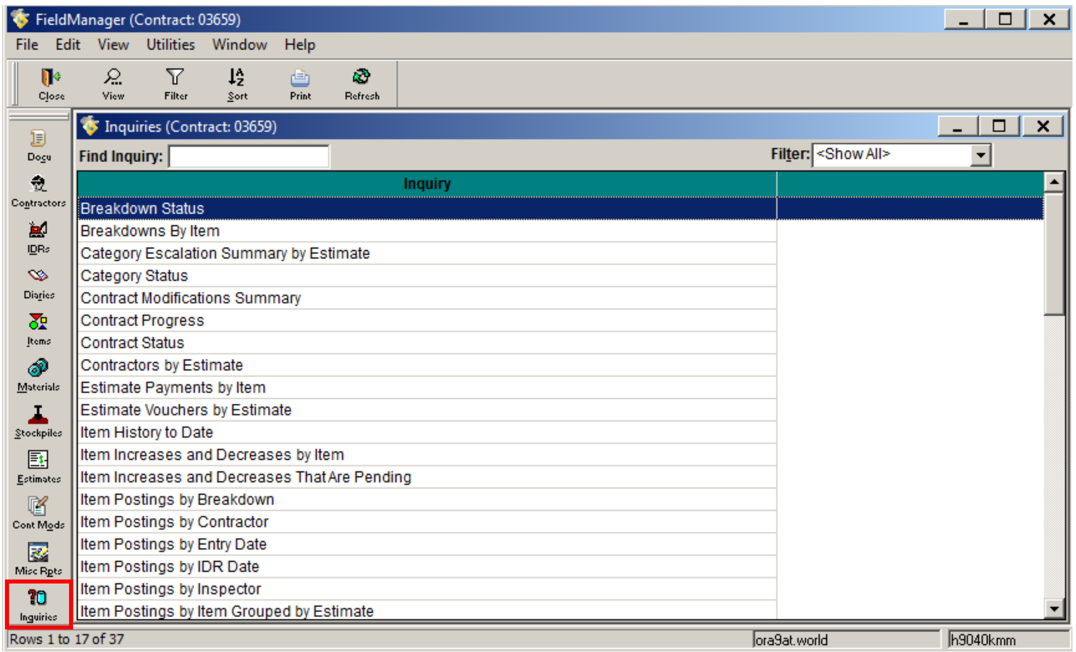


Figure 15-1. Inquiries List Window

15.1 Viewing and Printing Inquiries

Using Inquiries, you get brief views of contract information you can review contract activity, and print if needed. An added option is to set your preference on how the inquiry displays the information. In the Window Toolbar select Utilities > and User Preferences is the first option.

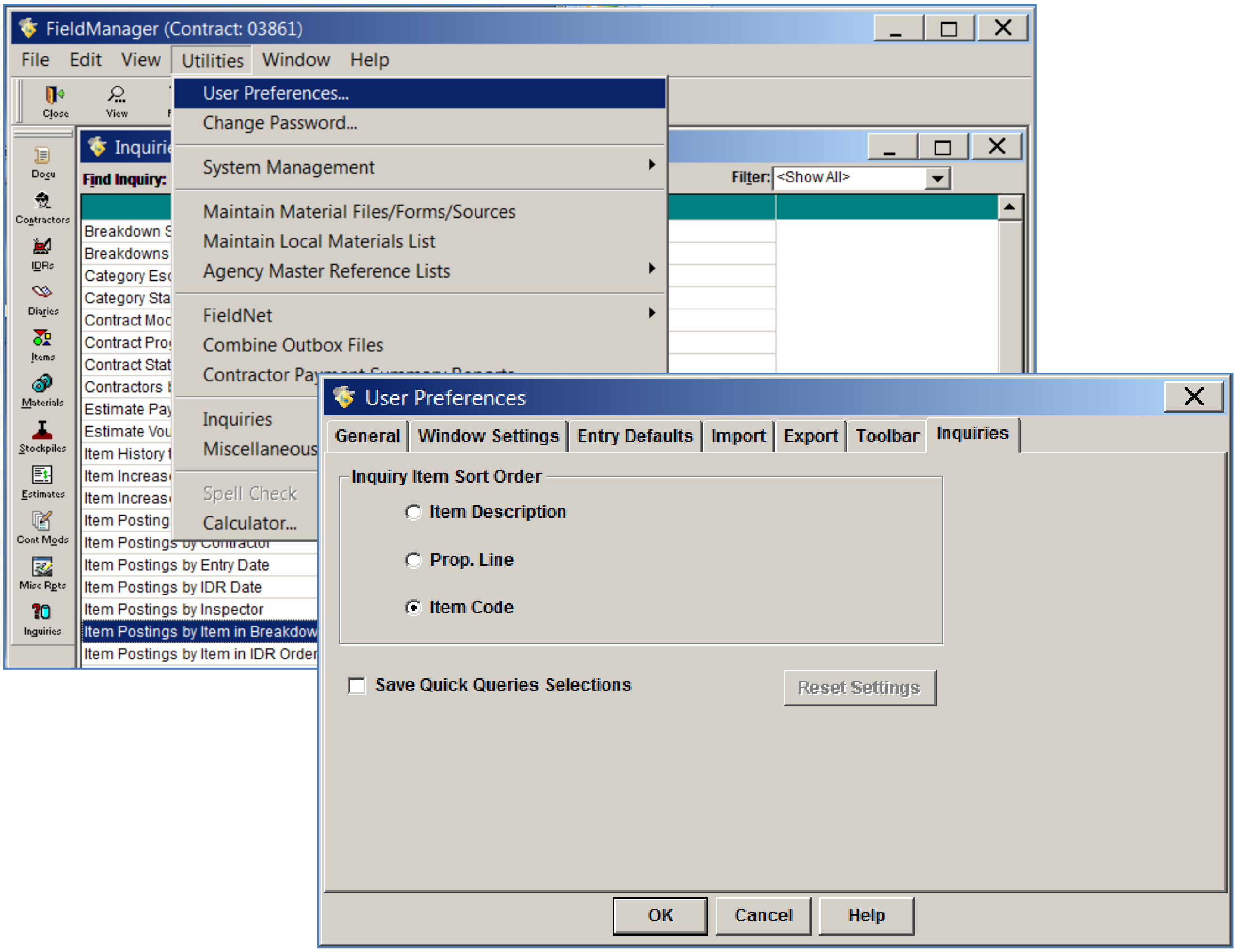


Figure 15-2. User preferences

Select the Inquiries Tab and you have the option of sorting the information in the order you want to see it, with the use of 3 radio buttons. You can also save these preference settings for future viewing.

Another helpful feature in locating an inquiry is the “Quick Query” button on the toolbar. Field Manager software displays a *fly-out* set of buttons, one for each type of inquiry you can view. To use, open the contract from the Contract list and click on the function you wish to query, for example Items. Click on the Cont Status “Quick Query” menu arrow, and the fly-out menu drops down with the available queries regarding items in general (Figure 15-3).

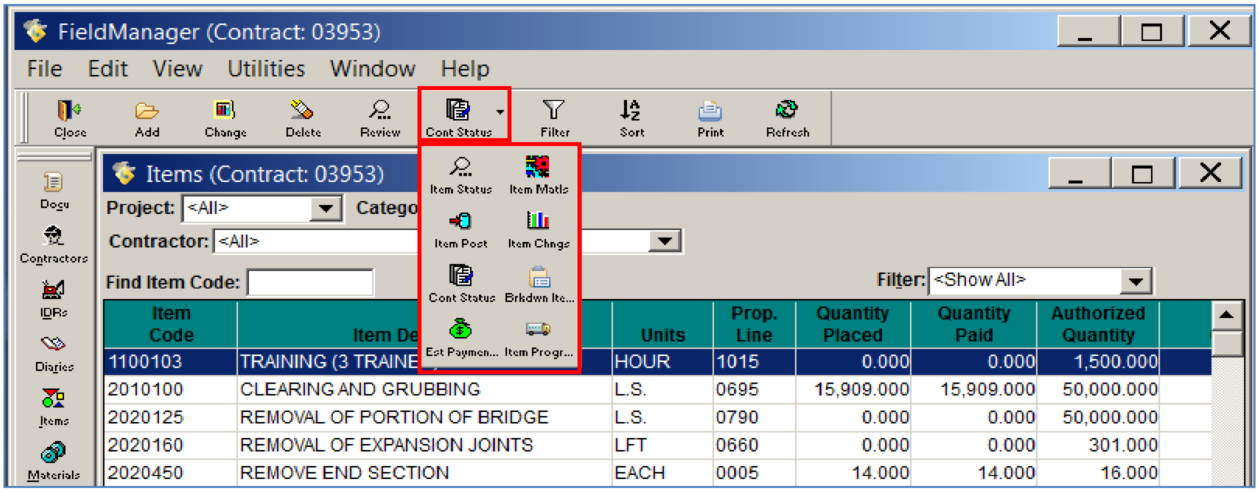


Figure 15-3. Items list window - Fly-out buttons

If you want to query a specific item, for example Hydro-seeding, double-click on the item, and click on the Quick Query fly-out menu and you will see the inquiries available for the item selected (Figure 15-4).

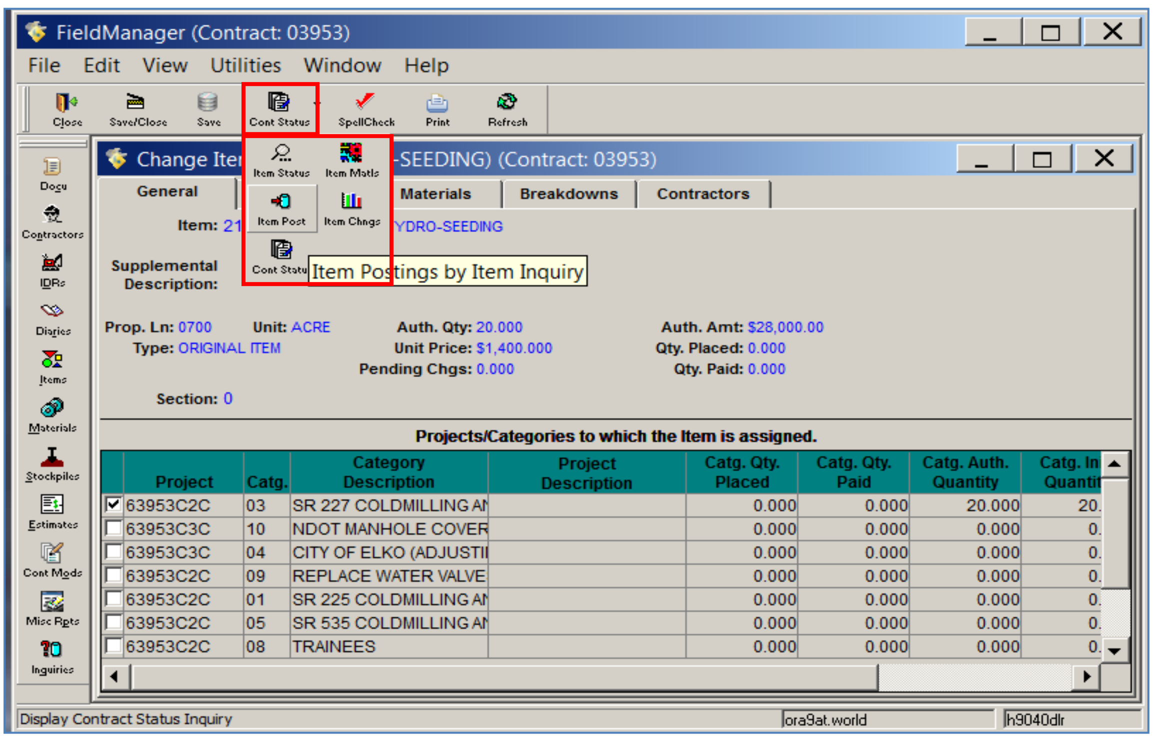


Figure 15- 4. Hydro-seeding - Available inquiries

You can choose to view the status of a single item or all items in one or more categories. By selecting Item Status and using the filter and sort functions. The Item Status Inquiry report opens (Figure 15-5).

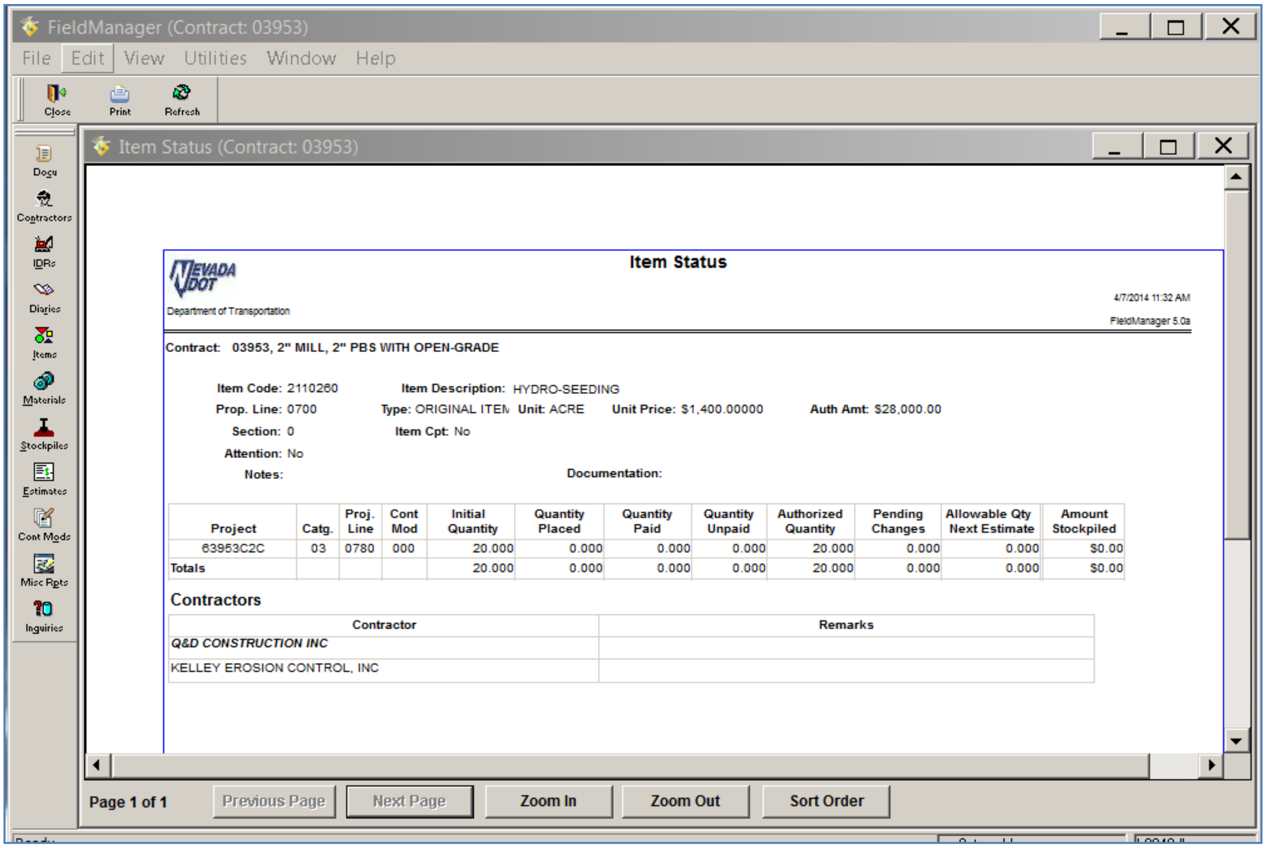
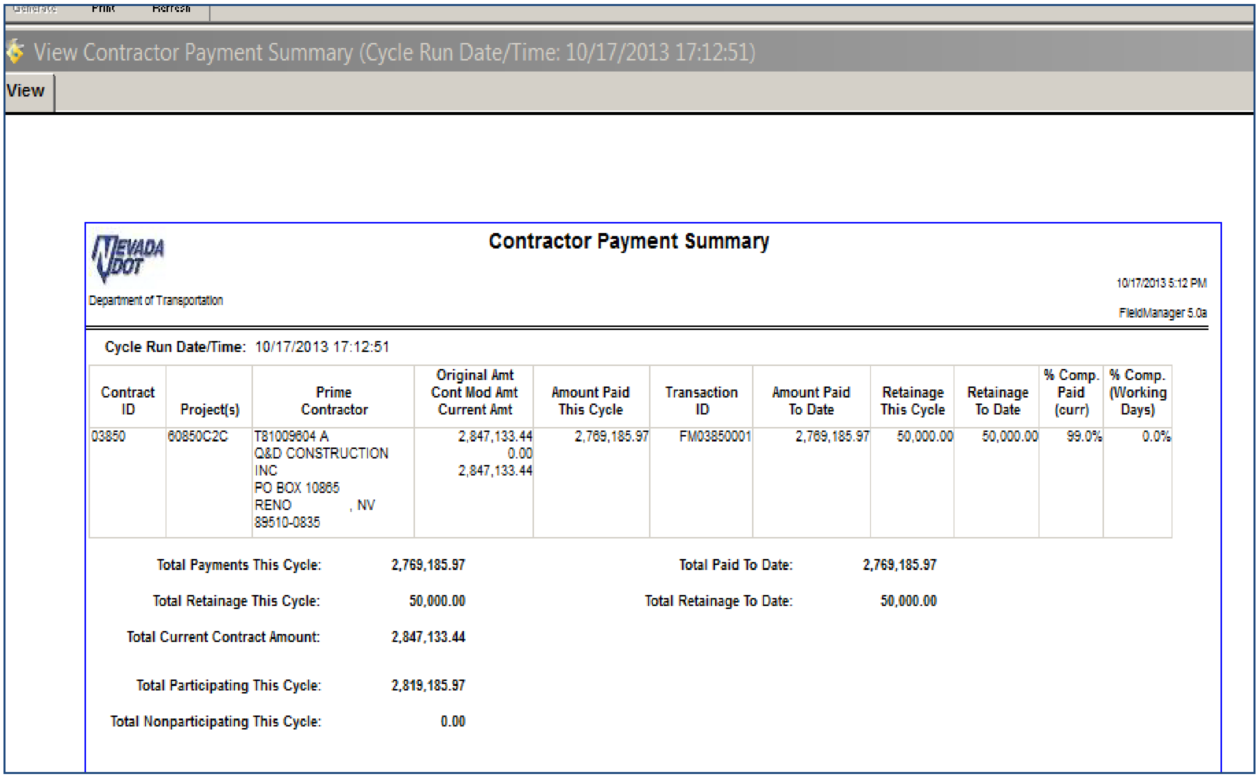


Figure 15-5. Item Status Inquiry Report

15.2 Viewing and Printing Inquiries from the Inquiries List

If a window associated with a contract is open, the Application Toolbar will always display an Inquiries button. Click to display the list of Inquiries to view and print for the selected contract. There are approximately 55 inquiries that show detailed information about item postings, items, contract modifications, stockpiles, estimates, and much more. Filter and sort is available just like any other window.

The Contractor Payment Summary report can be printed to view all activity to date per cutoff cycle much like the CM04 Report (Figure 15-6).



View Contractor Payment Summary (Cycle Run Date/Time: 10/17/2013 17:12:51)

View

NEVADA DOT

Department of Transportation

Contractor Payment Summary

10/17/2013 5:12 PM

FieldManager 5.0a

Cycle Run Date/Time: 10/17/2013 17:12:51

Contract ID	Project(s)	Prime Contractor	Original Amt Cont Mod Amt Current Amt	Amount Paid This Cycle	Transaction ID	Amount Paid To Date	Retainage This Cycle	Retainage To Date	% Comp. Paid (curr)	% Comp. (Working Days)
03850	60850C2C	T81009604 A Q&D CONSTRUCTION INC PO BOX 10865 RENO , NV 89510-0835	2,847,133.44 0.00 2,847,133.44	2,769,185.97	FM03850001	2,769,185.97	50,000.00	50,000.00	99.0%	0.0%

Total Payments This Cycle:	2,769,185.97	Total Paid To Date:	2,769,185.97
Total Retainage This Cycle:	50,000.00	Total Retainage To Date:	50,000.00
Total Current Contract Amount:	2,847,133.44		
Total Participating This Cycle:	2,819,185.97		
Total Nonparticipating This Cycle:	0.00		

Figure 15-6. Contractor Payment Summary (FM version of CM04 Report)

15.3 Inquiries Details

The following list is a sampling of the various Inquiries of which reports can be printed for review:

INQUIRIES	***COMMENTS***
Breakdown Status:	N/A -This inquiry refers to the 'Breakdown' tab but is not being utilized by NDOT at present.
Breakdowns By Item:	N/A – See Comment above.
Category Escalation Summary by Estimate:	This inquiry displays the Estimate Number & Date; Type- Semi-monthly, Semi-Final or Final; Total Dollar Amt. (does not include any 736 bid items, escalation or trainee hours); the % Completion (awarded); % Completion Currently.
Category Status:	The main screen of this inquiry simply displays the Project, Project Description, Category, & Category Description. You can view each category status separately, or collectively. ***Note:*** The last item on the report for this inquiry will state if the Feds are participating in this category. (The second page of this report has some fields which may partially populate, but which NDOT is not currently utilizing.)
Contract Modifications Summary:	The inquiry for Cont Mods summarizes each Cont Mod by Date, Status (shows approval date), the inc/dec amount of Cont Mod, Type # and description. In the header, it also states the contractors' name, the contract # and Award

	Amt, and Current Contract Amt. Quick overview of the status of each Cont Mod created.
Contract Progress:	This inquiry displays in graph format the Current/Awarded % of Contract Completed, Site Completion %, along with available working days and % of Time Used.
Contract Status:	This inquiry is helpful as it gives an overview of the contract, much as you would see in E-Bidding. It has all the who, what, where, and how much of the contract. The information here is basically what you would see in programming the contract in FieldBuilder.
Contractors by Estimate:	The purpose of this inquiry is to list the contractor/item associations that is originally entered by the Field Office. Depending on when the item associations are entered, you may need to open more than one estimate in the list to find the item posting you are looking for.
Estimates Payments by Item:	This inquiry is helpful as you can select one or more items and see what qty was paid in which estimates. It lists the Item Name & No, Estimate No, Est. Date, Voucher No, Project, Category, Qty Paid, Unit Price & Dollar Value, and Totals.
Estimate Vouchers by Estimate:	This report is in landscape format. 11 columns across the page gives the Project , Voucher No & Date, Transferred Out Date, Date Paid, % Complete (Earnings), % of Project Amt Paid, Gross Earnings, Current Retainage, Liquidated Damages & Net Payment.
Item History to Date:	This report is also in landscape format dividing the item history by Projects And Categories, Contractors, Postings, Payments and a section for Notes as well. You can select one or more items to view history on. Each of these headings report information pertaining to the heading. The report begins with the Item Description, Item No, UOM, Type, Price, Authorized Qty, Amt, Place, Paid and Unpaid, if the item is Completed, and if item has been marked for Attention. The Postings list all IDRs by Date, Insp, Seq No, Catg, Contractor, Location, Entry Date, Attn, & Remarks. The Payment section includes the Est No & Qty Paid along with the Dollar Value.
Item Increases and Decreases by Item:	By selecting one or more items the report will track any Pending Changes to the Qty in each category. It also lets you see what Qty has been placed and paid, with Dollar Amt. It gives other information as well, for example, Category Description, Project No. and Location.
Item Increases and Decreases That Are Pending:	In this inquiry you can view an item which has been increased/decreased, but qty has not been placed or paid. In order to increase/decrease

item qty a Contract Modification must be Added & Approved by the R.E and Construction. The report for this inquiry will track the Cont Mod No, Date, Status (Draft or Approved), the Inc/Dec Quantity, Unit Price, Inc/Dec Amount, Category Quantity and the Total Amount.

Item Postings by Breakdown: N/A -This inquiry refers to the 'Breakdown' tab in FieldManager, but is not being utilized by NDOT at present.

Item Postings by Contractor: The report for this inquiry pertains to prime & sub- contractors and the item/work which have been associated to them on the project. The Prime Contractor will be in bold, as usual, and includes Vendor Number. This report includes the IDR Date, Insp, Seq No, Project, Catg, Contractor, Qty Posted, Location, Entry Date, Attn, & Remarks.

Item Postings by Entry Date: Much like the report above, this report includes the same information. When you click on the inquiries icon the entry dates from the IDRs are listed. You can filter and sort, and select one or all of the dates. And the report leads off with the Item Description & No. The other column headings are the same as the above inquiry.

Item Postings by Inspector: Again, this report is formatted like the last two reports. Sorted by Inspector, which appears at the top of the report, this provides the same information. You can select one or all of the inspectors shown in the inquiry.

Item Postings by Item Grouped by Estimate: This inquiry creates an audit trail between an estimate and item postings. The inquiry is based on item postings and then groups the postings by estimate. It includes the item IDR Date, Inspector, Quantity Posted and Estimate number.

Item Postings by Item in Breakdown Order: N/A -This inquiry refers to the 'Breakdown' tab in FieldManager, but is not being utilized by NDOT at present.

Item Postings by Item in IDR Order (Does Not Include Material Usage): This inquiry opens a list of all Items (original or other). Select either one or more items. The report will be populated in IDR order, leading with the Item No & Description, UOM, Auth Qty, Qty Placed, Type, Price and Auth Amt and Qty Paid. Note: The important thing to remember when using this report, is that the item shown will not include Material Usage. The column heading reads Qty Posted, Qty Paid will be zero until sufficient material has been approved in house to cover the Posted Qty.

Item Postings by Item That Are Marked For Attention: This report is good way to track unattached items or items that were not a part of the original bid items, but were added later in a Contract Modification. When you click on this inquiry, and

	select all, if any of the items have been Marked for Attention by anyone, then they will show up here. It is a field that could be utilized by the R.E. for tracking purposes, or the inspector may use it to indicate something about that item to field office.
Item Postings Summary by Breakdown:	N/A -This inquiry refers to the 'Breakdown' tab in FieldManager, but is not being utilized by NDOT at present.
Item Postings Summary by Item in Breakdown Order:	N/A -This inquiry refers to the 'Breakdown' tab in FieldManager, but is not being utilized by NDOT at present.
Item Progress by Item	The report this inquiry displays has an Item Description, the bid Item Code (or Number), Prop. Line (used in Master Configuration List), Item Type, Item Complete, % Complete, Over 100% (of Plan Qty), and Pending Changes, if any.
Item Status:	Sorted by Item, the report contains the status of each item, including the Contractor with whom the item is associated with, & pertinent remarks are available. Auth Qtys and Pending Changes, if any are reported. The last column is Allowable Qty Next Estimate.
Item Type Change Amounts by Contract Modification:	After selecting this inquiry, a list appears with Contract Modification information. Starting with the Cont Mod Number, if it was Revised, Date, Status (Draft, Pending Approval or Approved) followed by Date of Approval. The next column is Short Description, Amount, and Cont Mod Description. Open up the Cont Mod you wish to view and the report will have similar columns, will also have Cont. Mod Amt, & Awarded Contract Amt, along with Current Contract Amt, the short description separates the $ amts from the Item Types, Other Chgs Amt (which is auth + pend), and the Other Chgs %, Cont Mod Amt, and Cont Mod %. Total Change Amt. & Total Chg %.
Items by Breakdown:	N/A -This inquiry refers to the 'Breakdown' tab in FieldManager, but is not being utilized by NDOT at present.
Items by Contractor:	This inquiry pertains to the prime and sub-contractors on the project. The Prime Contractor will be in bold type, and the totals given are in direct relation to the prime contractors progress on the project. There is an asterisked note at the top of the report, reminding us that the data given and item % is not broken down per sub-contractor, but reflects what the prime is doing.

Items by Material:	Items that are associated with material will need to be tracked as regard to an approved status, preferably before the material is placed. In this inquiry, a list of contract items appears, and you can select the item or items you wish to view. The report gives the material w/ bid item code. If the material has been placed, a grid lists the Item Description, Item Code, Usage Factor & Remarks. In bold, above the grid, is the Qty Available (or approved) that can be placed and paid.
Items by Project/Category in Item Order:	This inquiry opens to a list of all the projects on the Contract. Click on the one you wish to view, and the report view is a table of all items by category (at the top of the table), then the Item Description, Item Code (bid item number), and the Prop. Line in the Master List of items, in each Project.
Items by Project/Category in Project Line Number Order:	This inquiry opens to a list of all the projects on the Contract. Click on the one you wish to view, and the report view is a table of all items by category (at the top of the table), then Project Line No, Item Description, Item Code (bid item number), and the Prop. Line in the Master List of items, in each Project.
Items by Type:	This inquiry could be helpful in displaying the items authorized in the contract. When you click on the Inquiry, you see a small table of the different work types we have currently. They are Adjustment, Extra Work, Modified Original, Original Item, and Unattached. Click on the one you wish to view. If unsure of the item, you can select all, and the report view is a grid like table which separates the different work types into tables and then lists the items under that. There might only be one Work Type on your Contract.
Items Over Authorized Quantity at the Contract Level:	This inquiry proved to be a great help during our testing period. If you run this report prior to an estimate, and the item you wish to pay on is included on it, you might learn that there is material attached that needs approval, or certs needed. This report would be overall, and does not include the project/category, but the next inquiry is specific to a particular project/category.
Items Over Authorized Quantity at the Project/Category Level:	If you have more than one Project/Category, it would be helpful to use this report, rather than the report above.
Items That Are Completed:	While this inquiry can be helpful for other reasons, it will prove useful and potentially lighten the load during closeout. You don't have to wait until the end of the contract to mark each

	item complete. You can do this as you actually finish each item, which will save you time at the end, especially if there are a large amount of bid items. It will also let you know if you have missed paying 100% for an item, or if there is work left to do. The grid format has 10 columns which include the Item, item code, Item Cpt column, Pending Changes, Auth Qty, Qty Placed, & Qty Balance, Unit Price, and the Qty Balance $ Amt.
Items That Are Marked for Attention:	This inquiry can provide you with a record of an item you wish to track, for example some force acct, or extra work, or can use for your own purpose. The check box marking it for attention must be used in order for the item to show up in the report here. This box appears when posting items in IDRs, and also if you go to Items icon to the left of the window in the contract you are working in, you can activate the attention box in any item.
Items That Are Not Completed:	This inquiry has a report with grid format and 10 columns which include the Item, Item Code, Item Cpt column, Pending Changes, Auth Qty, Qty Placed, & Qty Balance, Unit Price, and the Qty Balance $ Amt.
Items That Are Pending:	This inquiry will report what items are pending, such as new items added that are still unattached by adding a Contract Modification. The Cont Mod Number will be blank, the Authorized Amount & Pending Changes Amount columns will remain at zero $ qty until a Cont Mod is approved.
Items with Insufficient Materials:	This inquiry is most helpful in providing the office person a record of what items associated with materials still require certs, or if the material still needs qty approvals. The report has only 5 columns, which include the Material Description, the Material Unit, Qty Approved, Qty Used, and Qty Available.
Items with Notes:	This report will keep you aware of issues with an item if the R.E., Office Person can make your own notes, or advise Inspectors to make certain the notes field is used when posting an item. Plantmix Surfacing, Type 2, as an example, is an item where you may want to track yield, oil, waste, or hours, whatever you might need notes on. This report will pull all those notes together in one place.
Items with Unbalanced Quantities at the Contract Level:	This inquiry and the next one down, will report the Items with Qtys which have over/under run. These Unbalanced Qtys will have to be addressed before the Contract can be closed. This report is for Unbalanced Qtys at the Contract Level. If you

have only one Category, this would be the report to use.

Items with Unbalanced Quantities at the Project/Category Level:	This report functions the same as the one above it, but is broken down at the Project/Category level. If you have more than one category this report will break them out for you.
Items with Unpaid Placed Quantities:	The report associated with this inquiry is in landscape format and 9 columns including the Item Description, Item Code, Auth Qty, Qty Placed Qty Paid & Unpaid, Unit Price, Qty Unpaid $ Amount.
Material Approvals by File/Form:	This report will help organize your Material Approvals, for example, rebar. The inquiry, when selected, reports all Materials that have been approved. The grid format is organized first by File (3 digits in the item code), File Description, Form (the form number in FieldManager used to track the UOM for the material selected), and the Form Description (which will be Default, as it is assigned to that material & form in the Master Materials File.) You can select one or more Materials File/Form to view. The report includes the File Number, Name, Form Number and then will track how many certs you have for that item, Approved Qty, if any, the Source of the material, Lot No, Remarks, & Entry Date.
Material Approvals by Material:	You begin by Selecting the Material you wish to view, or Select All. The report then populates a landscape view of the Material Description, Unit, Qty Approved, Qty Used, Qty Available. A table is below the header which displays 7 columns that include the Form Date, File/Form/Seq. No., Qty Approved, Source, Lot No., Remarks, & Entry Date. The information in this report is will be routinely entered in the appropriate fields in the Approvals tab when Material is approved for placement.
Material History to Date:	The Material History is a comprehensive report which collects all pertinent information on Materials placed on the project. The header across the top of this landscape report contains the Material Description along with the Item Code, Unit, Qty Approved, Qty Used, Qty Available, and Qualified by Master Materials List. Next follows sub headings; the first pertains to the Items the Material is Contained In. The Approvals subheading is next, (Date, Qty Apprvd, Source, Lot No, and Remarks). Last is Usage which has the IDR Date, Inspector, Item Description, Unit Item Code, Project, Catg, Item Qty Placed, Material Qty Usage, & Remarks.

Material Status:	This inquiry is perfect for giving a complete look at the any material place on the project and how much to date has been approved. The grid-like view reports the Material Description, Unit, Qty - Approved, -Used, -Available.
Material Usage by Material:	Very much like the inquiry above, this reports the IDR Date, Inspector, Seq No, Item -Description, -Unit, -Code, Prop.Line, Project, Catg, Location, Item Qty Placed, Material Used, & Material Usage Remarks. Useful in tracking material used for a particular location, or material, or activity.
Materials by Item:	This report list all the items, with the Unit, Auth -Qty, -Amt, -Placed, and -Paid, and any Pending Chgs. Then, if there was usage to report, a grid is included with 6 columns which report the Material Description, Material Units, Qty Avail, Usage Factor, and Remarks.
Material Summary:	This is a quick reference report of Materials used including the Material Description, Unit, Qty Approved, Qty Used and Qty Avail.
Material with Insufficient Quantities:	Materials that have not been approved for placement or payment are listed in this report. The Qty Available will show as a negative number until you approve the materials for use.
Project Status:	Selecting this inquiry will display a list of the projects numbers and description of the project. If you have multiple projects use care that you select the one you need. The header for the report for Project Status has a comprehensive collection of information on the project such as Awarded Project Amt, Current Project Amt, Project Amt Pd to Date (FM), Project Amt Pd to Date (CAS), % Project Complete (awrd), % Project Complete (curr), Net Change Amount (Auth), Net Change Amount (Pend), Total Net Change Amt, Net Change % (Auth), Net Change % (Pend), Total Net Change %. The next section pertains to Categories, followed by an Item Types heading, with a grid divided into with 7 columns, providing the Type of Work, Auth Amt, % of Project (auth), Pending Amt, % of Project (pend), Total Auth/Pend Amt, % of Project (auth+pend). The columns are totaled here also. Note: Pages 2 & 3 contain fields which are not currently being utilized by NDOT, but could possibly be included for future use.
Project/Categories by Item:	The report for this inquiry is broken into Project/Category by Item. The grid is separated into 8 columns including Project, Project Description, Catg, Category Description, Authorized Qty, Pending Changes, Qty Placed, Qty Paid.

Project/Categories in the Contract: In grid format, this report is simply a breakdown of the Projects & Categories in the Contract including a category description.

Site Time Status: This reports activity on the Overall Contract Site. The header of the report calls out the Site Number, Site Description, and if the work is a Completion Date job or Working Days. There is also a Days Allowed line w/ the Orig, Auth, and Pending Days; the next line is Days Charged providing the Daily Diary corresponding to the Days Charged and the Estimate the days were charged on.

Stockpile Summary by Stockpile: A landscape report, this summarizes the Stockpiles on the Contract. The header reports the Stockpile Description (Item), Stockpile Type, Stockpile Amount Remaining, Comments. The 10 column grid reports the Seq No, Action Date, Action, Total Transaction $ Amt, Transaction Comments, Recovery Factor, & Qty, Action Dollar Amount, the Estimate Number and Voucher No. This provides a detailed record of the item is stockpiled which can be useful in tracking the payments to it.

Subcontractors Assigned to the Contract: This reports the Prime Contractor and Vendor ID. It also includes a list of the Subcontractors Names, City, Vendor ID, Work Type, and Subcontract Amt.

Time Charges by Site: The inquiry opens to a list of the Overall Contract Site and you select the Overall or if the contract has multiple phases, select the one you wish to view. The report is a list of the Daily Diary Dates, Author, Est No, Est. Date, & Time Charged corresponding to days charged to contract.

Time Extensions by Site: This report helps track the Original/Authorized days and any days Pending. The Columns track the Cont Mod Number, Cont Mod Date, Additional No of Days added, New Completion Date/Days, and the Status of the Cont Mod.