

# Contents

1	Introduction to FieldManager® .....	1-1
1.1	FieldManager Workflow .....	1-1
1.2	FieldManager System Requirements .....	1-2
1.3	About this Manual.....	1-2
1.3.1	Overview .....	1-2
2	Getting Started.....	2-1
2.1	Logging on to FieldManager Software .....	2-1
2.2	Understanding the Application Window and Toolbar .....	2-2
2.3	Using the Menus to Invoke Commands .....	2-3
2.4	Shortcut Keys .....	2-3
2.5	Using List Windows .....	2-4
2.6	Using Tab Windows.....	2-5
2.7	Using Modal Windows .....	2-7
2.8	Changing the Way Windows Are Displayed.....	2-7
2.9	Changing Your Password.....	2-8
2.10	Using Spell Check .....	2-8
2.11	Finding Information .....	2-9
2.11.1	Using the Find Feature on List Windows .....	2-9
2.11.2	Sorting List Windows.....	2-10
2.11.3	Filtering List Windows.....	2-11
2.12	Refreshing Data in a Window .....	2-13
2.13	Using the Print Option .....	2-13
2.13.1	Printing Reports from List Windows .....	2-13
2.14	Using Online Help.....	2-15
2.14.1	Using the Using Help Menu Choice.....	2-15
2.14.2	Using the Contents and Index Menu Choice.....	2-15
2.14.3	Using the Keyboard Menu Choice.....	2-15
2.14.4	Using the Glossary Menu Choice .....	2-16
2.14.5	Using the Technical Support Menu Choice .....	2-16
2.14.6	Using the About FieldManager Menu Choice.....	2-16
3	FieldManager Contract Setup .....	3-1
3.1	Change Contract Documentation .....	3-1
3.1.1	General Tab .....	3-1
3.1.2	Administrators Tab.....	3-3

3.1.3	Site Times Tab .....	3-4
3.1.4	Users Tab.....	3-4
4	Working with Contractors.....	4-1
4.1	Adding New Subcontractors .....	4-1
5	Working with Items.....	5-1
5.1	Adding New Unattached Items .....	5-1
5.1.1	General Tab .....	5-2
5.1.2	Documentation Tab .....	5-3
5.1.3	Materials Tab .....	5-4
5.2	Changing Existing Items .....	5-6
5.2.1	Changing General Tab Information (Unattached Items Only) .....	5-6
5.2.2	Changing Documentation Tab Information .....	5-7
5.2.3	Changing Materials Tab Information .....	5-7
5.3	Deleting Items (Unattached Only) .....	5-8
5.4	Marking Items as Completed .....	5-9
5.5	Reviewing Items.....	5-10
6	Working with Materials .....	6-1
6.1	Adding New Materials to an Item.....	6-1
6.1.1	General Tab.....	6-2
6.1.2	Items Tab.....	6-3
6.2	Approving Materials.....	6-4
6.3	Changing an Existing Material.....	6-7
6.3.1	Changing Approvals Tab Information .....	6-7
6.3.2	Changing Item Tab Information .....	6-8
6.4	Deleting Approvals from an Existing Material .....	6-9
6.5	Deleting Materials.....	6-10
6.6	Reviewing Materials.....	6-12
7	Inspector Daily Report .....	7-1
7.1	Adding a New IDR.....	7-1
7.1.1	General Tab.....	7-2
7.1.2	Postings Tab .....	7-3
7.1.3	View Tab.....	7-5
7.2	Reviewing IDRs from Mobile Inspector/FieldBook Applications .....	7-6
7.3	Deleting IDRs.....	7-7
7.4	Generating IDRs .....	7-10

7.5	Copying IDR information to a new IDR .....	7-11
8	Daily Diaries.....	8-1
8.1	Adding a New Daily Diary Record .....	8-1
8.1.1	General Tab.....	8-2
8.1.2	Site Times Tab.....	8-3
8.1.3	View Tab.....	8-4
8.2	Changing an Existing Daily Diary Record.....	8-5
8.2.1	Changing General Tab Information.....	8-5
8.2.2	Changing/Deleting Site Time Tab Information .....	8-6
8.2.3	Site Time Adjustment.....	8-7
8.3	Deleting a Daily Diary.....	8-8
8.4	Generating a Daily Diary .....	8-9
8.5	Reviewing a Daily Diary.....	8-10
9	Working with Stockpiles.....	9-1
9.1	Adding Stockpiles Using the Wizard .....	9-1
9.1.1	Stockpile Wizard Setup – Single Category .....	9-2
9.1.2	Stockpile Wizard Setup – Multiple Categories.....	9-5
9.2	Deleting a Stockpile.....	9-11
9.3	Manually Balancing (Decrementing) Stockpiles.....	9-11
9.4	Viewing the Stockpile Summary Report .....	9-15
10	Contract Modifications .....	10-1
10.1	Adding a New Contract Modification.....	10-1
10.1.1	General Tab.....	10-2
10.1.2	Inc/Dec Tab .....	10-4
10.1.3	New Items Tab – Adding a New Item.....	10-6
10.1.4	New Item Tab – Adding an Unattached Item.....	10-8
10.1.5	Time Extensions Tab .....	10-10
10.1.6	Attachments Tab.....	10-12
10.1.7	View Tab.....	10-14
10.2	Changing an Existing Contract Modification.....	10-14
10.3	Generating and Printing a Contract Modification.....	10-15
10.4	Approving a Contract Modification.....	10-17
10.5	Reviewing a Contract Modification.....	10-20
10.6	Deleting a Contract Modification.....	10-21
10.6.1	Deleting a Draft Contract Modification.....	10-21

10.6.2	Deleting a Generated Contract Modification.....	10-22
10.7	Creating the Closeout (Balancing) Contract Modification .....	10-22
11	Estimates.....	11-1
11.1	Adding Estimates.....	11-1
11.1.1	General Tab.....	11-3
11.1.2	Item Usage Tab .....	11-3
11.1.3	Payments with Insufficient Materials .....	11-4
11.1.4	View Estimate Tab.....	11-5
11.1.5	View Amt Bal Tab .....	11-6
11.1.6	View Insuff Mtl Tab .....	11-7
11.1.7	Generating the Estimate .....	11-8
11.1.8	Reviewing an Estimate .....	11-10
12	Contract Retainage: General Information .....	12-1
12.1	Reviewing Contract Retainage in an Estimate .....	12-1
12.2	Reviewing Contract Retainage in the Contractor Payment Summary Report.....	12-3
12.3	Reducing Retainage Prior to Final Payment.....	12-4
13	Semi-Final Estimate Procedures .....	13-1
13.1	Creating the Semi-Final Estimate.....	13-1
13.2	Editing and Reviewing the Semi-Final Estimate.....	13-3
13.3	Contractor Item Quantity Review .....	13-3
13.4	Generating and Printing the Semi-Final.....	13-4
14	Importing and Exporting Information.....	14-1
14.1	Importing Inspector’s Daily Reports from FieldBook (laptops) .....	14-1
14.2	Exporting Contracts to FieldBook (Laptops) .....	14-1
14.3	Exporting Read-Only Contract File to FieldManager Read-Only (Prime Contractor).....	14-3
15	Using Inquiries: General Information.....	15-1
15.1	Viewing and Printing Inquiries .....	15-1
15.2	Viewing and Printing Inquiries from the Inquiries List.....	15-4
15.3	Inquiries Details.....	15-5
	Appendix A - FieldManager Glossary .....	A-1
	Appendix B - Contract Modification Types .....	B-1
	Appendix C – Contract Modification Step-By-Step Guidelines .....	C-1
C.1	Creating Contract Modifications.....	C-1
C.2	Generating Contract Modifications .....	C-3
C.3	Approving Executed Contract Modifications .....	C-3



