

# **FieldManager User's Guide Supplement**

*(For Michigan Local Agencies and Consultants)*

Release 4.4  
May 11, 2009



The instructions in this document apply to all construction contracts that are let by the Michigan Department Of Transportation (MDOT). If you have any questions regarding the information in this document, please call MDOT's FieldManager Help Desk at 517-322-1556 or send an email to [fieldmanager-admin@michigan.gov](mailto:fieldmanager-admin@michigan.gov). For all other FieldManager related questions, contact Info Tech, Inc. at 352-381-4400 or [info@infotechfl.com](mailto:info@infotechfl.com).

## MDOT's Web Site:

The most recent version of the files listed below can be obtained from MDOT's web site. This can be done by going to MDOT's home page at [www.michigan.gov/mdot](http://www.michigan.gov/mdot) and selecting **doing business** from the navigation options on the left. On the next screen under **Resources**, select **MDOT File Libraries**. On the next screen from the **Browse File Libraries** dropdown, select **FIELDMGR**.

fmconfig_44_external.acp	MDOT's Agency Configuration File - Release 4.4.
ugsuplc_44.pdf	FieldManager User's Guide Supplement For Michigan Local Agencies and Consultants - Release 4.4.

## Configuring FieldManager For Your Office:

1. When logging into FieldManager the first time:
  - A. Use the following login:
    - User ID: **admin**
    - Password: **password**
  - B. You will be required to load MDOT's Agency Configuration File (fmconfig\_44\_external.acp). This file can be downloaded from MDOT's web site.
2. Go to the Utilities (pull down) - System Management - Maintain Users screen and update as follows:
  - A. Add yourself to the user list with a Security Level of "System Administrator".
  - B. Remove the User ID "admin" from the user list.
  - C. Add the remaining staff in your office needing access to FieldManager to the user list. It is very important that you assign the proper security level to each individual (if you are not clear on which level is appropriate, contact MDOT's FieldManager Help Desk).
3. The use of FieldNet is required. FieldNet automates the transfer of data between your organization and MDOT. Internet access is required to use FieldNet. Activate FieldNet as follows:
  - A. Contact MDOT's FieldManager Help Desk to obtain the FieldNet ID and Password for your organization.
  - B. Make sure you have an internet connection.
  - C. Go to the Utilities (pull down) - System Management - System Configuration – FieldNet tab and update the following:
    - a. FieldNet ID: Indicate the ID assigned to your organization.
    - b. Password: Indicate the password assigned to your organization.
    - c. Verification: Indicate the password assigned to your organization.
    - d. FieldNet Archive Directory: Indicate where you wish to store your FieldNet archive files.
  - D. Click **Activate Account**. You should receive a message indicating that your FieldNet Account has been successfully activated. If you do not receive this message, contact MDOT's FieldManager Help Desk for assistance.
  - E. Click **OK**.
  - F. Run the Utilities (pull down) – FieldNet – Request FieldNet ID List from FieldNet

- option.
  - G. Run the Utilities (pull down) – FieldNet – Send Outbox to FieldNet option.
  - H. Wait a few minutes and then go to the Utilities (pull down) – FieldNet – Show Mailbox - Inbox tab, and click **Get Mail**. You should receive a message with a Message Type of “125: FieldNet ID List” (if you do not receive this message, wait a few more minutes and click **Get Mail** again). Process this message.
4. You must import MDOT’s Reference File before you can import any contracts into FieldManager. Import MDOT’s Reference File as follows (FieldNet must be activated):
- A. Run the Utilities (pull down) – FieldNet – Request Reference Files from FieldNet option.
  - B. Run the Utilities (pull down) – FieldNet – Send Outbox to FieldNet option.
  - C. Wait a few minutes and then go to the Utilities (pull down) – FieldNet – Show Mailbox - Inbox tab, and click **Get Mail**. You should receive a message with a Message Type of “102: Reference Data” (if you do not receive this message, wait a few more minutes and click **Get Mail** again). Process this message.

**Importing New Contracts:**

1. A message will arrive in your FieldNet Inbox for all new contracts. Process this message as soon as you receive it. If you do not receive this message, consultant organizations should contact the MDOT or Local Agency Project Engineer Manager, local agencies should contact MDOT’s Contract Services Division at 517-335-2318.
2. Perform the following for each new contract:
  - A. Select the new contract in the contract list.
  - B. Go to the Docu - General tab and update/confirm the following:
    - a. Project Engineer and Resident Engineer: Indicate the proper name in whichever fields are applicable.
    - b. Managing Office Manager: Indicate the name of the person in charge of the MDOT office which oversees the contract. This usually is an MDOT TSC Manager.
    - c. Managing Office: Indicate the name of your organization.
    - d. Create Electronic Files: Must be set to “Yes”.
    - e. StandAlone Contract: Must be set to “Yes”.

**Operating Procedures:**

1. **Sending FieldNet Messages.** Run the Utilities (pull down) – FieldNet – Send Outbox to FieldNet option at the end of each day when Pay Estimates have been generated.
 

**Note:** FieldManager can perform this task automatically if you have dedicated internet connectivity, and the Utilities (pull down) - System Management - System Configuration – FieldNet tab – Auto Send Messages option is **Checked**.
2. **Backing Up.** It is extremely important to backup the FieldManager database to a removable media at the end of the day whenever any work has been done in FieldManager other than inquiries.

3. **Adding Categories.** If you wish to add a new category to a project, send an email to [fieldmanager-admin@michigan.gov](mailto:fieldmanager-admin@michigan.gov) and supply the following information:

- A. Name of managing office.
- B. Name and telephone number of contact person at the managing office.
- C. Contract ID.
- D. Project Number.
- E. Name of each new funding source (agency, company, etc.). If multiple sources, indicate the participation percentage for each source.
- F. Total dollar amount for the new category.
- G. Short description of the type of work being done.

When adding a local agency as a new funding source to a category, there must be a signed local agreement on file.

When adding a utility as a new funding source to a category, there must be written correspondence which includes concurrence from the utility on file. Utility correspondence must also include the location, description of work, and the estimated cost. A copy of all utility correspondence must be sent to MDOT's Utility Coordination and Permits Section of the Lansing Real Estate Division, P.O. Box 30050, Lansing, MI 48909.

MDOT's Financial Operations Division will question whether the category can be added to the contract if the above correspondence is not available. The resident/project engineer may be required to request a new agreement, an amendment to an existing agreement, or provide a letter from the local agency or utility indicating their willingness to participate in the contract costs.

After MDOT has processed your request, someone from MDOT's FieldManager Help Desk will send your office a file containing the new category. This file must be imported into FieldManager by running the File (pull down) - Import - File option.

4. **Adding Subcontractors.** In the Contractors list, if you wish to add a subcontractor that is not in the Add Contractor selection window, you will need to import an update of MDOT's FieldManager Reference File. To import the update, follow the instructions for importing MDOT's Reference File in the **Configuring FieldManager For Your Office** section above.
5. **Archiving Contracts.** Run the File (pull down) - Archive Contract option after the following has occurred:
- A. You have generated a Construction Pay Estimate Report with an Estimate Type of "Final".
  - B. You have received and processed a message for the above final estimate in the FieldNet Inbox with a Message Type of "109: Estimate Reports".

The archive process will create an archive file with an extension of "fma". When asked if you wish to save to another location, answer yes and create two extra copies. The copies should be saved to a removable media (memory stick, diskette, CD, etc.). Label both removable media copies. One copy should be placed in the Contract History folder that is sent to the MDOT Project Engineer Manager, and the other copy should be stored at your office.

6. **Restoring Archived Contracts.** When restoring an archived contract that was archived prior to FieldManager release 4.0, perform the following before making any updates to the contract:
  - A. Contact MDOT's FieldManager Help Desk and request a FieldNet "101: In Progress Contract Notification" message for the restored contract.
  - B. Upon receiving the above message in your FieldNet Inbox, process the message.

**Estimate Processing Information:**

1. **Negative Vouchers.** When generating estimates, if you receive a warning that indicates there is a negative voucher, if at all possible, do not create a voucher for the project with the negative value until a positive payment can be made. The software in Lansing creates payment vouchers at the project level (not contract), and negative vouchers create a substantial amount of additional work in MDOT's Contract Services Division.
2. **Reducing/Increasing Retainage.** If you wish to reduce or increase the contractor's retainage, perform the following:
  - A. In the Estimates – General tab - Retainage Request drop down, select "Reduce" or "Increase".
  - B. In the Estimates - General tab - Estimate Comments field, specify the percent or amount of the retainage reduction or increase.
3. **Final Estimates.** If you wish to generate a final estimate, in the Select Estimate Date and Type screen - Estimate Type drop down, select "Final".