# FieldManager® User's Guide Supplement
## *(For Michigan Local Agencies and Consultants)*

**Release 5.2**
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**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. For all other FieldManager related questions, contact Info Tech, Inc. at 352-381-4400 or info@infotechfl.com.**

**FieldManager Overview:**

FieldManager is a software suite used to manage road, bridge and airport construction projects. The software is used by Michigan Department of Transportation (MDOT) field offices, local government agencies, engineering consultant firms, and construction contractor firms throughout Michigan.

**Licensing Information:**

Local agencies may obtain a copy of the FieldManager Full Suite software, new releases as they become available, and FieldManager software support directly from Info Tech, Inc. under MDOT's FieldManager Services to Locals contract.  To obtain these services, contact Info Tech, Inc. at 352-381-4400 or info@infotechfl.com.

Consultant firms may purchase a FieldManager license directly from Info Tech, Inc.  Licensing options include a Full Suite or FieldBook license.  Each license includes a copy of the FieldManager software, new releases as they become available, and FieldManager software support.  For prices and to order, go to [www.infotechfl.com/products/fieldmanager](www.infotechfl.com/products/fieldmanager) or contact Info Tech, Inc. at 352-381-4400 or info@infotechfl.com.

Qualified Disadvantaged Business Enterprise (DBE) consultant firms (must be certified by MDOT as a DBE in the types of work which utilize FieldManager) may obtain a FieldManager license through MDOT's DBE FieldManager Volume Purchase Agreement.  This agreement is funded by the Federal Highway Administration DBE Supportive Services funds.  Licensing options include a Full Suite or FieldBook license.  Each license includes a copy of the FieldManager software, new releases as they become available, and FieldManager software support.  For questions regarding DBE qualifications and to order, contact MDOT's Office of Business Development at 517-241-4806 or mdot-dbe@michigan.gov.

**Training Information:**

For local agencies, MDOT offers a one-day FieldManager class.  To sign up for a class, contact MDOT's Construction Field Services Division at 517-322-1741 or mdot-techtraining@michigan.gov.

For consultant firms, FieldManager training is available through Michigan Technological University (Michigan Tech) or the American Council of Engineering Companies (ACEC) of Michigan.  To sign up for a class, contact Michigan Tech's Center for Technology & Training (906-487-2102 or ctt@mtu.edu) or ACEC (517-332-2066 or mail@acecmi.org).

For qualified DBE consultant firms (must be certified by MDOT as a DBE in the types of work which utilize FieldManager), FieldManager training is reimbursable under the DBE Educational/Training Program.  To sign up for a class, contact MDOT's Office of Business Development at 517-241-4806 or mdot-dbe@michigan.gov.

**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 and selecting **Doing Business** from the navigation options on the left.  On the next screen under **Resources**, select **FieldManager**.  Files available include:

- Contact Information
- MDOT's Agency Configuration File
- FieldManager User's Guide Supplements
- FieldManager related Construction Advisories and Bureau of Highway Instructional Memorandums
- Software patches
- Other various FieldManager related correspondence


## 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.  This file can be downloaded from MDOT's Web site (see above).

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:
           1)     FieldNet ID:     Indicate the ID assigned to your organization.
           2)     Password:        Indicate the password assigned to your organization.
           3)     Verification:     Indicate the password assigned to your organization.

4) 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:
1) Managing Office: Indicate the name of your organization.
2) Create Electronic Files: Must be set to **Yes**.
3) StandAlone Contract: Must be set to **Yes**.

C. Go to the Docu – Administrators tab and update/confirm the following:
**1)** Managing Office Manager: Indicate the name of the person in charge of the MDOT office which oversees the contract. This is usually the Transportation Service Manager.
2) Construction Engineer: Indicate the proper person.
3) Project Engineer, Region Construction Engineer, Local Agency, Consultant Project Manager, Airports Division, and Airports Sponsor: Indicate the proper name in whichever field is applicable.
4) Bureau of Field Services: Indicate the name of the Construction Contracts Engineer at the MDOT Construction Field Services Division.

**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 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 that 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 Development Services 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 construction/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, 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 <u>before</u> 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. **Final Estimates.** If you wish to generate a final estimate, in the Select Estimate Date and Type screen – Estimate Type drop-down, select "Final."

## Mobile Inspector:

The Mobile Inspector app is used to create Inspector Daily Reports (IDRs) on smart phones and tablet computers. Mobile Inspector is free, but a SYNC Service license is required to use the app with FieldManager. The SYNC Service provides automatic synchronization of data between devices running the Mobile Inspector app and FieldManager.

Mobile Inspector can be used by consultant firms free of charge under MDOT's SYNC Service license for contracts where an MDOT facility is the managing office. Consultants that would like to use Mobile Inspector on these contracts should contact the MDOT Office Technician at the managing office, and request desired device(s) be entered into FieldManager.

For contracts where the managing office is a consultant firm or local agency, a separate SYNC Service license is required in order to use Mobile Inspector. For information, pricing, and to purchase, contact Info Tech, Inc. at 352-381-4400 or sales@infotechfl.com.