2016 Field Software User's Guide For Construction Staff






Wisconsin Department of Transportation
Division of Transportation System Development
Bureau of Project Development

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General information

The purpose of the 2016 Field Software User's Guide is to provide Project Leaders and support staff a data entry guide for FieldManager, FieldBook, Field Information Tracking (FIT), and Materials Information Tracking (MIT). The guide also covers the backup process and provides a list of support contacts.

Remember that each region and the local program may have their own processes to follow for the creation and processing of contract modifications, estimates, adding projects or categories, etc. Please refer to the region specific or local program construction administration guide for more information. Guides can be found in the corresponding Pantry\RegionSpecific folder.

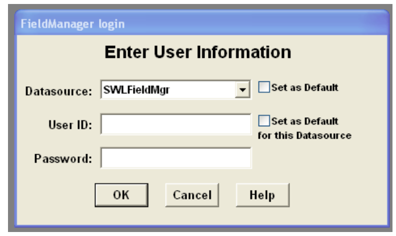
Computer equipment protection:
To protect computer equipment, make sure that the field computer is turned off and the power strip/surge protector is unplugged each night prior to leaving the field office. It is a good idea to disconnect the laptop from the field office network too. To avoid the possibility of theft, it is recommended that laptops not be left in the field office overnight or are stored in a locked room in the field office.

WisDOTShortcuts folder information:
Shortcuts to several WisDOT construction applications and programs are located in the WisDOTShortcuts folder on the desktop.

Shortcut	Description
ACM Support Portal	Shortcut to the WisDOT ACM Support Portal that field staff use to start a Bomgar support session with WisDOT support staff.
Construction & Materials Manual (CMM)	Construction and Materials Manual (CMM)
FieldBook	Optional software that allows a construction inspector to record IDR information on a separate computer. The IDRs are imported into FieldManager.
FieldManager	Automated construction management contract software used to enter contract status information, IDRs, daily diaries, contract modifications, stockpiles and estimates.
FIIPS Application	Local Program Management Consultants only
FIT	Field Information Tracking System used to enter field office and staff information, ECIP information, structure data, and design quality index reports. This information, along with data merged from FieldManager, is uploaded into the Project Tracking System that WisDOT staff use to track the progress of a contract.
Highway Construction Contract Info (HCCI)	WisDOT Highway Construction Contract Information web site
HODv11	Local Program Management Consultants only
MIT	Materials Information Tracking System used to create test reports in the field. Data is uploaded to the Internet and the MIT LAN system and is accessible by WisDOT staff.
MRS – Atwood Systems	Shortcut to the Highway Quality Management System web site
MTS (MITLAN)	Local Program Management Consultants only
Pantry2016	English and metric pantry software shells, DTSD forms, FieldManager User's Guide, and region or local program specific forms.
Project Tracking	Local Program Management Consultants only
AASHTOWare Project CAS	Local Program Management Consultants only
AASHTOWare Project PES	Local Program Management Consultants only
Cisco AnyConnect Client	Local Program Management Consultants AND WisDOT staff only Secure client for remote WisDOT network access.
Wisconsin Lane Closure System	Shortcut to the Wisconsin Lane Closure System (LCS) web site for tracking closures and restrictions on Wisconsin highways.

FieldManager - Logging on and selecting the appropriate database

FieldManager supports the use of multiple databases (databases) on one field PC. If field staff are working in multiple regions, contracts from different regions must be stored in separate database. These instructions explain how to log onto FieldManager and select the appropriate database (database).



1. Double click the FieldManager shortcut in the WisDOTShortcuts folder OR Select Start | All Programs | FieldManager | FieldManager V5.1a

2. On the FieldManager login window, select the appropriate database where region contracts are stored using the pulldown menu. To set the selected database as the default, check the “Set as Default” checkbox.

NWfieldmgr	Northwest region contracts	NWLfieldmgr	Northwest region local program contracts
NCfieldmgr	North Central region contracts	NCLfieldmgr	North Central region local program contracts
NEfieldmgr	Northeast region contracts	NELfieldmgr	Northeast region local program contracts
SWfieldmgr	Southwest region contracts	SWLfieldmgr	Southwest region local program contracts
SEfieldmgr	Southeast region contracts	SELfieldmgr	Southeast region local program contracts

3. Enter your User ID and password that was provided by BITS Level 2 ACM support staff or the Project Leader. The User ID is normally your WisDOT logon ID (dot??? or msc???).
   Users can set the default user ID for each database with the “Set as Default for this Datasource” checkbox.

4. Click <OK> to logon.

Northwest Region
IH 94, Osseo – Black River Falls, Jackson County
Contractor – Hoffman Construction Company
Project Leader – Brian Danielsen, QUEST Civil Engineers
Project Manager – Stacie Lambele
Project Supervisor – Rick Shermo

FieldManager - Contract setup

There are some fields that are required for all new contracts and updated during the entire contract life cycle. This data is merged into FIT (Field Information Tracking system) and sent to WisDOT. The data is then accessible by WisDOT staff using the Project Tracking System. Please refer to the region specific or local program construction administration guide for more information. Guides can be found in the corresponding Pantry\RegionSpecific folder.

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. Select the <Docu> button or double click on the contract ID.

3. **General** tab - all required fields
   - **Managing Office**:
     State contracts – Prefix for the region office overseeing the construction efforts. (Examples – Northeast Region, Northeast Region I41, Northeast Region STH 441, NW Region-Eau Claire, NW Region-Superior, RHI, WIS, SE Region, SWR Mad, SWR Edg, or SWR Lax)
     Local Program contracts – Project Leader's consultant firm (e.g. Graef, REI Engineering, or R.A. Smith)
   - **Managing Office Comments**: This is not a required field at this time. In some regions, Project Leaders are directed to enter the contract's project ID(s) here.
   - **Notice to Proceed Date:** Entered in AASHTOWare Project CAS and imported into FieldManager through a contract refresh. It must appear prior to creating first estimate.
     - Utilities | FieldNet | Request Contract Refresh From FieldNet
     - Click <Send Outbox>
     - Click <Get Mail> and process the message.
     - Check the contract documentation tab for the Notice To Proceed Date. If it does not appear, contact Annette Czerneski or David Castleberg, the AASHTOWare Project Administrators, for assistance.
   - **Construction Started Date**: When work actually starts. Either click Calendar button or enter date manually. This date is entered at the beginning of the contract.
   - **Closed to Traffic Date**: If required by the region.
   - **Open to Traffic Date:** The date the project is open to traffic.
   - **All Contract Work Completed:** Date when work is completed after punch list items and clean up are done. This date must be entered before the region or local program Contract Specialist can issue the conditional final acceptance. Either click Calendar button or enter date manually.
     ***NOTE*:** Don't forget to enter the Punch List Complete Date in FIT too.
   - **Contract Closed**: This field is updated by the system to <Yes> after the final estimate is created. If there are problems with the final estimate, field staff can select <No> to reopen the contract, make changes to the contract, and send another final estimate.
     ***REMINDER*:** Once the final estimate is sent, approved, and the CAS contract refresh received in FieldManager, don't forget to follow the region or local program guidelines for contract archival.
   - **Traffic Comments**: If required by the region.

4. **Administrators** tab – all required fields
Names MUST be entered consistently for reporting purposes. Enter *complete FirstName* and *LastName* using the Outlook Global Address List (GAL) when possible.
State contracts:
   - **Project Manager:** Civil Engineer Advanced (CEA)/Project Manager
   - **Supervisor**: Region Supervisor
   - **Project Leader**: Project Leader
     NOTE: These fields are filled in by the Southwest Region Contract Specialist prior to sending the FieldManager contract to the Project Leader.

Local Program contracts:
   - **Project Manager:** Management Consultant Area Construction Supervisor or Oversight Specialist
   - **Supervisor**: Local Program Project Manager

- **Project Leader**: Project Leader

5. **Site Times** tab - required fields / if changes are made to either of these dates, send FIT data!
   - **Time Charges Start Date:** Either click Calendar button or enter date manually.
     - ➢ Completion Date contract - When time starts on contract.
     - ➢ Working Day contract - Time starts within ten (10) days of the notice to start.
   - **Time Charges Stop Date:** Either click the Calendar button or enter date manually.
     - ➢ When work is completed (last day for men and hours).
     - ➢ This field controls Liquidated Damages.

   Caution: DO NOT send an estimate before you enter this date if you are past the completion date or over the allowable calendar or working days. See *Creating Estimates* on page 16 for more information and guidance.

6. **Breakdowns** tab – not used by WisDOT

7. **Site Events** tab – Site events are used to suspend time and work. WisDOT only uses the TS:Time Suspended / TR:Time Resumed OR WS:Work Suspended / WR:Work Resumed events. Remember that the entry of a suspend event REQUIRES the entry of a resume event.
   - <Add Event>
   - Enter the following information:
     - ➢ Site: Select from pull down list
     - ➢ Action: Select from pull down list (usually Time Suspended or Time Resumed)
     - ➢ Date: Either click Calendar button or enter date manually
     - ➢ Remarks: Explanation

   Important Note: If you need to add additional sites, contact your region or local program management consultant Contract Specialist for assistance. Additional sites may be added for new interim completion dates or for special sites to charge liquidated damages. See *Creating Estimates* on page 16 for more information and guidance.

8. **R/O Distribution** tab – Used by WisDOT to send read only copies of the contract automatically to selected contractors and subcontractors when an estimate is generated and sent. See *Read-Only Distribution to a Contractor at Estimate Generation* on page 6 for more details.

9. **Users** tab – The Project Leader selects the Mobile Inspectors for this specific contract. All users are entered under the Maintain Users section. Mobile device IDs are assigned to the users in that section.
   - <Add User>
   - Highlight the Mobile Inspector user from the Select Users window. Click <Select> to add the user.
   - Repeat the above steps if you have multiple Mobile Inspector users.

10. **Attachments** tab – field staff can use this tab to attach files or link web URLs to a contract.

11. Click the <Save/Close> button to save any changes that were made.

12. Field staff ***MUST*** send the messages in their FieldManager outbox. Select the <FN Mailbox> button followed by the <Send Outbox> button.

13. Field staff ***MUST*** merge and send their FIT data if changes were made within the contract documentation section. See the Field Information Tracking System Steps to Follow to Send FIT data on page 41 for details.

FieldManager - Read-only distribution to the contractor at estimate generation

Contractors have the option to purchase a FieldManager license and obtain a FieldNet ID from the AASHTOWare Project Administrators. The Project Leader sets up FieldManager to automatically send a contractor read-only copy of the contract each time an estimate is submitted providing the contractor the ability to view contract information.

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. See page 23, *Requesting a FieldNet ID List*, to request and process an updated FieldNet ID list.

3. Select the <Docu> button or double click on the contract ID.

4. **R/O Distribution** tab
   Contractor Read-Only List
   - <Add Recipient>
   - The *Select FieldNet Ids – Contractor Read-Only* window appears. Search for the contractor by FieldNet ID or FieldNet ID Description. Highlight the contractor. <Select>

   Regular Read-Only List – Project Managers and Supervisors may use this feature to have field staff send a regular read-only copy of the contract to selected FieldNet IDs at estimate generation.
   - <Add Recipient>
   - The *Select FieldNet Ids – Regular Read-Only* window appears. Search for the Project Manager or Supervisor by FieldNet ID or FieldNet ID Description. Highlight the contractor. <Select>

5. Each time an estimate is generated, three items will be placed in the FieldManager Outbox - the voucher, regular read-only copy of the contract plus the contractor read-only copy of the contract. Items included in contractor read-only contract - Item details, IDR posting and general information, daily diaries, contract modifications, reports and estimate. Items excluded from contractor read-only contract - Item documentation and notes, IDR general comments, and daily diary comments.

Southwest Region
Siggelkow Road Bridge, Illinois State Line – Madison, Dane County
Contractor – Lunda Construction Co.
Project Leader – Jason Schrandt, Strand Associates, Inc.
Project Manager – Emmanuel Yartey
Project Supervisor – Wayne Chase

FieldManager - Subcontractors

Subcontractors are entered in FieldManager, merged into FIT (Field Information Tracking system) and sent to WisDOT so that the data is accessible by WisDOT staff using the Project Tracking System. Please refer to the region specific or local program construction administration guide for more information. Guides can be found in the corresponding Pantry\RegionSpecific folder.

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. Select the <Contractors> button.

3. Any subcontractors that have been previously selected, appear on this screen. To add more subcontractors, select the <Add> button.

4. Highlight the contractor in the list. <Select>
   NOTE: Only one subcontractor can be added at a time.

5. The entry of the contractor address, work type, subcontractor amount and associated items is not required. Select <Save/Close>. The subcontractor will appear in the Contractors list.
   NOTE: This information can be found on the Approved Sublet Request.

6. Select the <Add> button to add another subcontractor.

If a subcontractor does not appear in the Add Contractor list, complete the following steps:
All subcontractors are required to register with WisDOT using an on-line process.

1. Have the subcontractor register in the Civil Rights Compliance System (CRCS), http://wisconsindot.gov/Pages/doing-bus/civil-rights/dbe/certified-firms.aspx .
   - Required information includes:
     - Company name and address
     - Company's Federal Employer ID #
     - Vendor ID: use id "****" (four asterisks) for all new registrations.
     - Date the company was established.
       Use January 1 if only the year is known.
     - Provide a Payroll and/or Bidding contact. Include an e-mail address for the person who would be contacted by a firm seeking a bid quote or as the primary contact for our department.
   - Direct questions regarding CRCS registration can be directed to Paul Ndon, paul.ndon@dot.wi.gov

2. Once the registration process is complete, project staff should contact Annette Czerneski or David Castleberg, the AASHTOWare Project Administrators, for assistance and ask her to update and regenerate the FieldManager reference file in CAS because a new subcontractor has just completed the registration process.
   NOTE: A new FieldManager reference file is generated every Friday for staff to request and download.

3. Project staff request and process the new reference file within FieldManager
   - Log into the correct FieldManager database if more than one exists.
   - Select the <FN Mailbox> button
   - Select Utilities | FieldNet | Request Reference Files from FieldNet.
   - Select the <Send Outbox> button. Minimally one message should be sent.
   - Wait a few minutes.
   - Select the <Get Mail> button.
   - When the *FieldNet Mail Box* window appears process "unprocessed" messages in message ID order starting with the lowest number.
   - Repeat steps 2-5 above to add the subcontractor to the Contractors list.

FieldManager - Inspector's Daily Reports

Inspector's Daily Reports (IDRs) are REQUIRED for each day that a contractor works at the job site. Input must include the following required fields:

- weather
- inspector's comments
- men & hours for the contractors present at the job site

Please refer to the region specific or local program construction administration guide for more information. Guides can be found in the corresponding Pantry\RegionSpecific folder.

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. Select the <IDRs> button to access the IDR list window.

3. Select the <Add> button to access the Add IDR window.

4. **General** tab
   - Header information:
     - ⇒ Generated: Yes or No
     - ⇒ Revised by, Revision date and Revision Number – Saved modifications to the original IDR
     - ⇒ Origin – FieldManager, FieldBook or External (Mobile Inspector)
   - Required fields:
     - ⇒ IDR date - automatically displays the current date.
     - ⇒ Inspector - Select from pull down list.
     - ⇒ Inspector's comments are required if there are no item postings.
     - ⇒ Weather
     - ⇒ High and low temperatures
   - Optional fields:
     - ⇒ Comments - inspector's comments if there are item postings.

5. **Contractors** tab
   - Men and hour entries are required for each contractor, subcontractor, and trucking company that worked at the job site on the date of the IDR.
   - Put a ✓ by each contractor that worked and was present at the job site. Enter the appropriate information for personnel (personnel, number and hours) and equipment (type, number and hours). Repeat for each subcontractor.

6. **Site Times** tab
   - Highlight the site (if there is more than one site for this contract).
   - Enter the information for charging time. This data is required for working day contracts and is recommended for calendar day and completion date contracts:
     - ⇒ Enter the time charge
     - ⇒ Select the appropriate radio button for "Contractor(s) working" <Yes> or <No>
     - ⇒ Hours available
     - ⇒ Hours worked
     - ⇒ Controlling operation
     - ⇒ Reason for delays
     - ⇒ Comments

   NOTE: Inspectors may now enter time charges and this data may be imported by the Project Leader into the corresponding Daily Diary.

7. **Postings** tab
   - Click the <Add Posting> button to access the Items list.
   - Double click on an item or highlight the item and click <Select>.

- A window appears for entering specific posting information.
  Required fields:
  - ⇒ Select the correct project ID and category
  - ⇒ Quantity
  - ⇒ Station from/to and/or location
  - ⇒ Remarks - may cross-reference information referring to other field documentation
    NOTE: For items designated with a **P** in the item description, refer to the plan sheet number.
- Click the <OK> button if there are no more items to post or the <Add More> button to post more items.

8. **Attachments** tab – Can be used to attach supporting documents to an IDR. This includes files and web URLs.

9. **View** tab - Used to view the Inspector's Daily Report. This report can be printed.

10. Postings are saved by clicking the <Save/Close> or <Save> buttons.

11. Once an IDR is correct and complete, generate it so that the item postings can be paid on the next estimate created in FieldManager. To generate an IDR, select the <Generate> button. The system will ask for confirmation concerning the generation of the selected IDR. The system will also ask if you want to print a copy of the IDR.
NOTE: Staff can generate multiple IDRs at one time by selecting several from the IDR list using the <Ctrl> or <Shift> keys. <Ctrl> to select IDRs that are not grouped together. <Shift> to select IDRs in a group/range.

Important information:

- The Federal government requires daily tracking of men and hour entries for labor compliance.
- Items may be posted daily on each IDR or accumulated and entered onto one IDR prior to submitting an estimate.
- IDR's do not have to be input on each individual day, but they are to be up-to-date at time of estimate submittal.
- Every time you change an IDR that has already been generated, the IDR must be regenerated.
- Once you change and resave an IDR, a revision number appears in the Revision Number field.
- Inspectors CANNOT edit/change other inspectors' IDRs.
- IDRs can also be created using FieldBook or Mobile Inspector. See page 35 for FieldBook and page 37 for Mobile Inspector.

FieldManager - Daily Diaries

Project Leaders MUST have a Daily Diary entry for each day of the week including Saturdays, Sundays, and holidays unless time has been suspended. If no work is done by the contractor/subcontractor, this should be noted in the diary. Input must include time charges, the controlling item of work, contractor forces and hours worked. Weather and inspector comments can be imported from the corresponding IDR(s). The corresponding IDRs MUST be generated prior to importing IDR information into the Daily Diary. Please refer to the region specific or local program construction administration guide for more information. Guides can be found in the corresponding Pantry\RegionSpecific folder.

IMPORTANT NOTES:

- ***If daily diaries at not entered on a regular basis and the FIT merge/send process completed, the Labor Compliance unit cannot accurately monitor and correct possible discrepancies for the contractor and subcontractors working on the project on a weekly or bi-weekly basis.***
- ***On a carryover project, you may state in your diary on the last day worked "No worked will be performed on this project until date." Then resume your diary in the spring with the first diary page stating "First day worked since date."***

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. Click the <Diaries> button to access the Daily Diaries window.

3. Click the <Add> button to access the Add Diary window.

4. **General** tab
   - Required fields:
     - ⇒ Diary date - automatically displays the current date.
     - ⇒ Author - defaults to the current FieldManager user.
   - Project Leaders are required to import IDR weather and comments into their daily dairies if this information is not entered manually:
     - ⇒ Low and high temperature - may be entered manually or imported from the generated IDR for the same date by selecting the <Bring in Temperatures> button.
     - ⇒ Sunrise and sunset - local time of sunrise and sunset
     - ⇒ Weather - may be entered manually or imported from the generated IDR for the same date by selecting the <Bring in Weather and Comments> button.
     - ⇒ Comments - may be entered manually or imported from the generated IDR for the same date by selecting the <Bring in Weather and Comments> button.

       NOTE: ALWAYS import IDR weather and comments prior to the Project Leader entering their comments in the daily diary.

5. **Site Times** tab
   - Highlight the site (if there is more than one site for this contract).
   - Enter the information for charging time or import the data from the generated IDR for the same date by selecting the <Bring in Site Times> button.
   - This data is required for working day contracts and is recommended for calendar day and completion date contracts:
     - ⇒ Enter the time charge
     - ⇒ Select the appropriate radio button for "Contractor(s) working" <Yes> or <No>
     - ⇒ Enter Hours available and Hours worked
     - ⇒ Controlling operation
     - ⇒ Reason for delays
     - ⇒ Comments
   - The <Delete Diary Time Record> button is used to delete site time records.

6. **Attachments** tab – Can be used to attach supporting documents to an IDR.

7. **View** tab - Used to view the Daily Diary Report. This report can be printed.

8. Daily diary information is saved by clicking the <Save/Close> or <Save> buttons.

9. Once a Daily Diary is correct and complete, generate it so that it can be included on the next estimate created in FieldManager. To generate a Daily Diary, select the <Generate> button. The system will ask for confirmation concerning the generation of the selected Daily Diary. The system will also ask if you want to print a copy of the Daily Diary.
   NOTE: Staff can generate multiple daily diaries at one time using the <Ctrl> or <Shift> keys. <Ctrl> is used to select daily diaries that are not grouped together. <Shift> is used to select daily diaries in a group.

Important information:
FieldManager is designed for working day, calendar day, and completion date contracts. ***However, the FieldManager report, Weekly Report of Time Charges, is only for working day contracts.*** The reason there is no report for calendar and completion date contracts is that by definition days are automatically charged for these contract types once time has started.
For working day contracts, create and print the Weekly Report of Time Charges (found under FieldManager Utilities/Miscellaneous Reports). The report is signed by the Project Leader and filed in the field office with the project records. It is recommended that the contractor also sign the report. A copy is posted in the field office. It is not necessary to send a copy of the report to region offices.

North Central Region
STH 21, Necedah – Coloma, Adams County
Contractor – DL Grasser
Project Leader – Martin Alekna, MSA Professional Services
Project Manager – Jeff Stewart
Project Supervisor – Michael Kretschmer

FieldManager - Contract Modifications

Contract modifications are generated using FieldManager to add new items, move items from one project or category to another, increase/decrease items quantities, or add a time extension on a contract. Contact your region or local program management consultant Contract Specialist if you need to add a project, category, contract site, change a contract site time or change the retainer. It is recommended that project staff review CMM 2-42 prior to creating Contract Modifications. Please refer to the region specific or local program construction administration manual for guidance. Most manuals can be found in the corresponding Pantry \RegionSpecific folder.

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. Click the <Cont Mods> button to access the Contract Modifications window.

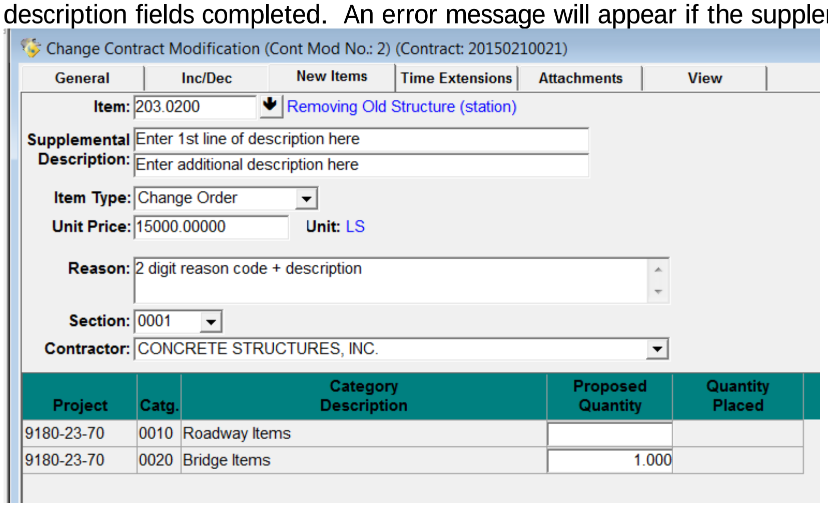
3. Click the <Add> button to access the Add Contract Modifications window.

4. **General** tab
   - Short Description - Brief summary of the contract modification.
   - Description of Changes - For non-standard bid items include a description of the items added, method of measurement, basis of payment, etc. Time extensions are listed here.

5. **Inc/Dec** tab (increase/decrease contract quantities for items already under contract)
   - Click the <Add Item> button
   - <Select> an item from the Items window.
   - Enter the Qty Change (+/-)
   - Enter the Reason – required entry (2 digit reason code + the description)

CR (Cost Reduction)	PC (Plan Change)	RO (Request by Others)
SS (Change / Credit Standards & Specs)	MI (Miscellaneous)	PI (Plan Inadequacy or Omissions)
SE (Safety Enhancement)		

6. **New Items** tab
   - Click the <Add Item> button.
   - **ALWAYS** select "Add a New Item" followed by <OK>
   - **ALWAYS** select an item from the dropdown list and complete the following fields:
     - ➢ Supplemental description – required for some items (all SPV Items, ASP items, and any items with parentheses in their item description.)
       ALWAYS enter the description beginning on the first line of this field.
       NOTE: FieldManager has a built-in feature that automatically determines if the item needs the supplemental description fields completed. An error message will appear if the supplemental description is not entered.



     - ➢ Item type – select change order or supplemental agreement depending upon need

- **Reason – required entry (2 digit reason code + the description)**
  CR (Cost Reduction) PC (Plan Change) RO (Request by Others)
  SS (Change / Credit Standards & Specs) MI (Miscellaneous) PI (Plan Inadequacy or Omissions)
  SE (Safety Enhancement)
- Unit price
- Section
- Contractor – select from pull down list
- Enter the proposed quantity for each project/category affected.
- Click <OK> to save.

7. **Time Extensions** tab - For a Working Day or a Calendar Day contract, enter the number of days to extend the contract. For a completion date contract, enter the new completion date. Enter the reason for the time extension.
   IMPORTANT NOTE:
   - Special consideration should be given if you are extending time into the next calendar year in conjunction with suspending time over the winter. Since each contract is unique, please contact your region or local program management consultant Contract Specialist or Project Manager for assistance.

8. **Attachments** tab – Can be used to attach supporting documents to a contract modification. This includes files and web URLs.

9. Click <Save> to save changes and continue with entry or click <Save/Close> to save changes and close the window. This will place the contract modification in "Draft" status. ***Send your FieldManager outbox and merge/send FIT data after changed the status of a contract modification to ensure that both CAS and Project Tracking are up-to-date and reflects the current status of the contract modification.***

10. After all entries and updates have been made to the contract modification, click the <Generate> button. This will place the contract modification in "Pending Approval" status and remove the word "DRAFT" from the printed copy/view. ***Send your FieldManager outbox and merge/send FIT data after changed the status of a contract modification to ensure that both CAS and Project Tracking are up-to-date and reflects the current status of the contract modification.***

11. Respond <Yes> to the question regarding "Are you sure you want to generate Contract Modification No. ?".

12. Respond **<No>** to the question regarding "Does this require your supervisor's approval?" to use FieldNet for the contract modification approval process. Project Leaders MUST follow their region or local program contract modification approval process.
    IMPORTANT NOTE: The DTSD Northeast region follows a different process for contract modification approvals. Please refer to their construction administration manual for details about this process.

13. Select <OK> to print out the contract modification. This is the document that will be used to obtain all the necessary signatures to approve the contract modification.

Contract Modification Approval process:
Once all the necessary signatures have been obtained and the contract modification is ready for approval, complete the steps below.

Important Notes:
- Approvals are requested based on the dollar amount of the contract modification and the level of authority guidelines established by the local program or the region the Project Leader is working for. Please refer to the region specific or local program construction administration guide for more information. Guides can be found in the corresponding Pantry\RegionSpecific folder.
- In some regions, you will receive an email from the region or local program master consultant Contract Specialist stating that the contract modification has been executed. Then you can complete the steps below to change the status from Pending Approval to Approved. Remember that once it is approved, no further changes can be made. If errors were made on the contract modification, a new one will be required to correct the errors.

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. Select the <Cont Mods> button to access the Contract Modifications window.

3. Highlight/select the contract modification to approve followed by the <Approve> button.

4. Enter an approval date followed by <OK>.
   Respond <Yes> that you have obtained all the necessary approvals.
   Respond <Yes> that you will no longer be able to edit or change this contract modification.
   Payment can now be made on the items that have been added or changed.

5. Send your FieldManager outbox and merge/send FIT data after changed the status of a contract modification to ensure that both CAS and Project Tracking are up-to-date and reflects the current status of the contract modification.

Additional information:

- Contract modification generation will make the quantities and time extensions a part of your contract and can be used for estimation purposes; however, payment on items is not allowed until the contract modification is approved.
- Saving a contract modification creates a "DRAFT" contract modification. Generating creates a pending approval contract modification. The document used to obtain signatures should not be in "DRAFT" status.
- Project staff obtain the appropriate signatures and send signed contract modifications to your Contract Specialist.
- After the contract modification is generated, changes can be made. If any changes are made, make sure that they are saved, and the contract modification is generated again (see steps 9-13 above).
- Sometimes when contract revisions are made, the total dollar amount of the contract modification may not match the total for the items added or increased/decreased items. To correct this, contact Annette Czerneski or David Castleberg, the AASHTOWare Project Administrators, for assistance. They will update the total $ amount in CAS. Field staff will request a contract refresh from CAS to update the contract modification $ amount in FieldManager.

Local Program
CTH CC, Chippewa Flowage Bridge, Sawyer County
Contractor – Edward Kraemer and Sons
Project Leader – Dale Butkowski, NWBE Inc.
Project Manager – Jim Bednar, KL Engineering
Project Supervisor – Dan Kopacz, WisDOT

FieldManager - Stockpiles

Before creating stockpiles, contact region or local program management consultant Contract Specialist and the AASHTOWare Project administrators for guidance.

The preferred method to create and administer stockpiles is to create a stockpile for each item – 1 item per project per stockpile. This prevents confusion between the stockpile and the associated item.

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. Click the <Stockpiles> button to access the Stockpiles window.

3. Click the <Add> button to access the Stockpile Wizard.

4. <Next>

5. Select a stockpile description from the dropdown list. Enter the subcontractor's name in the comment field.

6. <Next>

7. Select a transaction date. Enter a transaction amount - total amount of all stockpiles on the delivered invoice. Enter transaction comments (e.g. See invoice #).

8. <Next>

9. Click the <Add Items> button, highlight the item, and click the <Select> button.
   NOTES:
   - Enter only 1 item per project for each stockpile
   - Highlight an item and click the <Delete Item> button to remove it.

10. <Next>

11. Assign dollars for the stockpile item. Since there is only 1 item, assign the entire transaction amount entered in step 7.

12. <Next>

13. Identify the recovery factor or quantity for the item. This will determine the time it takes for DOT to recover the already paid stockpile amount. By applying at a fast rate, the initial payments to contractor can be greatly reduced. By applying at a slower rate, the payments to contractor can be more balanced.
    Detailed explanation of the Recovery factor:
    - Item quantity = 40,000 units
    - Stockpile amount = $500
    - Recovery factor = $0.025/unit
    - Recovery quantity = ½ x authorized quantity = 20,000 units

    In this case, the contractor's payment for the first 20,000 units would equal $500. The stockpiled amount would be completely recovered.

14. Select <Finish> to save the stockpile.
15. Repeat the above steps for additional items.

Important information:
- When you are finished with your stockpile, make sure that the recovery factor is set to 0 (zero).
- More information can be found in the FieldManager User's Guide, Chapter 10 – Working with Stockpiles.

FieldManager - Estimates

An estimate should be sent twice a month for any contract that has a payment due of $1,000 or more. After sending an estimate, project staff are required to send FIT (Field Information Tracking System) data. Please refer to the region specific or local program construction administration guide for more information. Guides can be found in the corresponding Pantry\RegionSpecific folder.

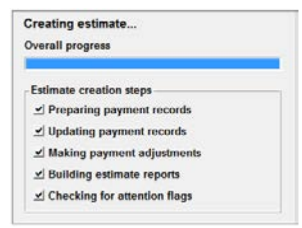
Here are some things that Project Leaders should consider before creating an estimate:

- The “Notice to Proceed” date must appear on the contract Documentation General tab prior to submitting the 1st estimate. Request and process a Contract Refresh from FieldNet if this date is missing.
- All the IDRs and Daily Diaries that are to be included with this estimate **MUST** be generated prior to creating the estimate.
- If retainer needs to be reduced, contact the region or local program master consultant Contract Specialist prior to creating an estimate.
- Confirm that the contract does not require a site event to suspend or resume time prior to estimate creation.
- Project Leaders may create a contract modification to extend contract time and avoid liquidated damages.
- The “Time Charges Stop” date must appear on the contract Documentation Site Times tab if time has stopped on this contract AND to avoid liquidated damages.
- If the total dollar amount of the estimate is a negative amount, DO NOT generate the estimate. Do not save the estimate and contact your Project Manager or Supervisor immediately for guidance.
- Each contract is unique and Project Leaders should communicate with their Project Manager and Contract Specialist if the estimate may involve something out of the ordinary.

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. If this is your first estimate, skip to the next step; otherwise receive and process FieldManager mail (select the <FN Mailbox> button followed by the <Get Mail> button. The FieldNet Mail Box will appear. Process all the “unprocessed” messages in your Inbox .

3. Highlight the contract ID that you wish to create an estimate for.



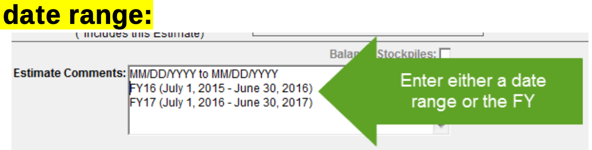
4. Click the <Estimates> button to access the Estimates window.

5. Click the <Add> button

6. On the Estimate data and type window, select
   Estimate date for this estimate AND Estimate type – intermediate, semi final or final
   Click <OK> to create the estimate.

7. If you have ungenerated IDRs, a warning message will appear. You can choose <Yes> to continue with the estimate creation process or choose <No> to cancel the process and generate these IDRs.

8. **General** tab and **Item Usage** tab – Ensure the amount of the estimate and the items to be paid are correct.
   Required Estimate Comments – enter one of these for the date range:
   MM/DD/YY to MM/DD/YY
   FY16 (July 1, 2015 – June 30, 2016)
   FY 17 (July 1, 2016 – June 30, 2017)



   - There is a 60 character limit on the voucher report for estimate comments. Comments that exceed 60 characters will be truncated on the voucher report.
   - Project Leaders may enter additional estimate comments may be entered as directed by region specific or local program construction administration Contract Specialists.

   NOTES:

   - If the quantities are incorrect, do not generate the estimate! Close the estimate and make the corrections in the IDRs. Regenerate the IDRs and recreate the estimate.

- If the total dollar amount of the estimate is a negative amount, contact your Project Manager or Supervisor ***prior*** to generating and sending the estimate. Discuss how to handle this estimate with a negative payment.

9. **Vouchers** tab – Verify that all the voucher boxes for each project under the contract are checked. By default, all projects should be checked.

10. **View Estimate** tab - can view and/or print the Construction Pay Estimate report.

11. **View Amt Bal** tab - can view and/or print the Construction Pay Estimate Amount Balance report.

12. Click the <Generate> button to generate the estimate for submittal and save the files created to the FieldManager outbox. The Construction Payment Estimate Report and the Construction Payment Estimate Amount Balance Report are printed and placed in the project files. These reports should be reviewed for accuracy prior to submitting the estimate.

13. Field staff ***MUST*** send their FieldManager outbox at this time. Select the <FN Mailbox> button followed by the <Send Outbox> button. Make sure that all the messages are sent - minimally 2 messages – an Estimate (Vouchers) and a Regular Read-Only Copy of the contract. An additional contractor read-only copy will also be sent if this feature is being used.

14. Field staff ***MUST*** merge and send their FIT data if changes were made within the contract documentation section. See the Field Information Tracking System Steps to Follow to Send FIT data on page 39 for details.

15. Notify the staff member who approves your estimates that it is ready for their review (e.g. Contract Specialist, Project Manager or Supervisor). Please refer to the region specific or local program construction administration guide for more information. Guides can be found in the corresponding Pantry\RegionSpecific folder.

Northeast Region
STH 32, Green Bay Street – S. Chase Road, Brown County
Contractor – Northeast Asphalt
Project Leader – Mick Magalski, McMahon
Project Manager – Andy Fulcer
Project Supervisor – Dan Segerstrom

FieldManager - Estimate rollbacks (deleting and recreating estimates)

Occasionally an estimate needs to be deleted and recreated within FieldManager. This may occur when supervisors or contract administration staff deny an estimate approval or if a problem occurs processing the estimate. If you are notified that your estimate approval has been denied, complete these steps.

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. Select the <FN Mailbox> button followed by the <Get Mail> button (at least 1 message should be received). The FieldNet Mail Box will appear. Process the “Estimate Denial Warning” message by highlighting the message and either clicking <Process msg> button or double clicking on the message.

3. Close the FieldNet mailbox.

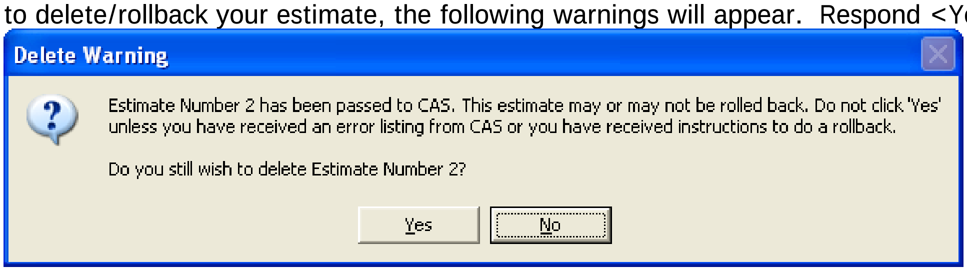
4. Highlight the contract ID that you want to create an estimate for.

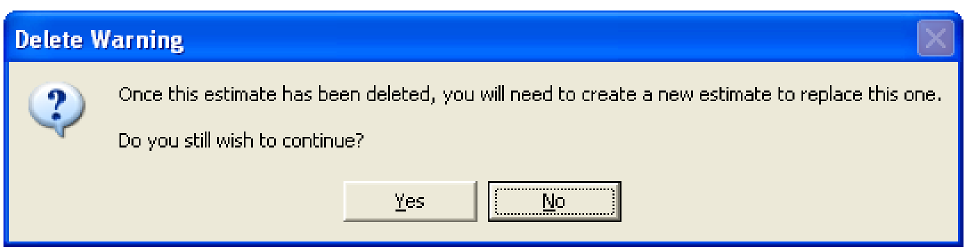
5. Click the <Estimates> button to access the Estimates window.

6. Highlight the estimate you wish to delete.
   NOTE: The estimate MUST BE in “Exported” status. If the status is “Refreshed”, contact Annette Czerneski or David Castleberg, the AASHTOWare Project Administrators, for assistance.

7. Select <Delete>

8. Because the estimate has already been sent to CAS and region or central office support staff have contacted you to delete/rollback your estimate, the following warnings will appear. Respond <Yes> to both of them:





9. On the Estimate data and type window, select an estimate date for this estimate, an estimate type – intermediate, tentative final or final. Do not use the monthly estimate type. <OK>

10. **General** tab and **Item Usage** tab -
    Please review these tabs to ensure the amount of the estimate and the items to be paid are correct. No entries are made on these tabs by North Central Region Wisconsin Rapids office staff. If item quantities or the estimate amount is incorrect, please cancel the estimate creation process and make the corrections in the IDRs.

11. **Vouchers** tab –
    Verify that all the voucher boxes for each project under the contract are checked – whether you are paying on that project or not. By default, all projects should be checked.

12. **View Estimate** tab - can view and/or print the Construction Pay Estimate report.

13. **View Amt Bal** tab - can view and/or print the Construction Pay Estimate Amount Balance report.

14. Click the <Generate> button to generate the estimate for submittal and save the files created to the FieldManager outbox. The Construction Payment Estimate Report and the Construction Payment Estimate Amount Balance Report are printed and placed in the project files. These reports should be reviewed for accuracy prior to submitting the estimate.

15. Select the <FN Mailbox> button followed by the <Send Outbox> button. Make sure that all the messages are sent - minimally 2 messages – an Estimate (Vouchers) and a Regular Read-Only Copy of the contract). An additional contractor read-only copy will also be sent if this feature is being used.

16. Exit FieldManager.

Important information about deleting final estimates:

If the final estimate has been submitted and must be deleted, you must unlock the contract before proceeding:

1. Highlight the contract ID that you want to work with.
2. Select the <Docu> button or double click on the contract ID.
3. On the **General** tab for the **Contract Closed** field, select <No> to reopen a contract and create a new final estimate.
4. Select <Save/Close> to save changes.
5. Complete the steps above to delete and recreate the final estimate.

Local Program
Janesville Road (CTH L), CTH Y – Lannon Drive, Waukesha County
Contractor – Payne & Dolan, Inc.
Project Leader – Bret Swenson, Community Engineering & Building Services LLC
Project Manager – Joe Klarkowski, DAAR
Project Manager – Kathy Kramer, WisDOT

FieldManager - Adding users

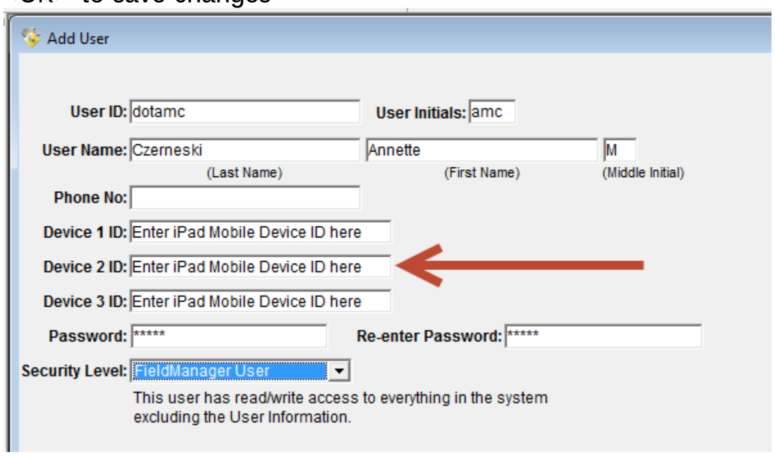
Project Leaders add inspectors and support staff within FieldManager under the Users option.

1. Log into the appropriate FieldManager database (if more than one exists).

2. Select Utilities | System Management | Maintain Users from the FieldManager main menu.

3. Select <Add> to add a user. Complete the following fields (required fields are highlighted):
   - User ID – required (e.g. dot??? or msc???)
   - User Initials – optional (e.g. amc)
   - User Name – Last Name (e.g. Czerneski), First Name (e.g. Annette), Middle Initial (e.g. M)
   - Phone No – optional
   - Device # ID – The Device ID appears on the Mobile Inspector *About* screen within the app. Up to 3 iPad, iPhone, or Android mobile device IDs can be associated to a user; however, WisDOT is only authorizing one device per user because of the number of licenses purchased.
   - Password (enter twice to confirm entry)
   - Security Level

FieldManager User	Full read/write access except for user information (project staff/inspectors) Minimum security level for Mobile Inspectors
FieldBook User	Full read/write access to FieldBook and read only access to FieldManager Minimum security level for FieldBook Inspectors
Read Only	Read only access to FieldManager
System Administrator	Full access to all FieldManager functionality (Project Leaders)
   - <OK> to save changes



4. Select <Add> to add additional users and repeat step 3. Repeat steps 1-3 to add users to other FieldManager databases.

IMPORTANT NOTES:
- DO NOT delete or alter the FieldManager System Administrator account.

Last Name	First Name	Middle Initial	User ID	Initials	Security Level
Administrator	System		admin	SA	System Administrator

- DO NOT create an ID with a duplicate User ID.
- Select <Change> to edit existing users or select <Delete> to delete users.
- Project staff set the default database and the default user ID for each database on the FieldManager logon screen.

FieldManager - Requesting reference files

Occasionally project staff will need to request a new reference file. This file includes any new subcontractors that were just added to CAS or any changes to the master item list.

1. Log into the appropriate FieldManager database.
2. Select <FN Mailbox>.
3. Select Utilities | FieldNet | Request Reference Files from FieldNet.
4. Select <Send Outbox>. Make sure that all messages are sent (minimally 1 message).
5. See page 24, *Managing the FieldNet Mailbox* for instructions on retrieving and processing files.

Important information:

- Contact Annette Czerneski, the AASHTOWare Project Administrator, and ask her to update the FieldManager reference file in AASHTOWare Project CAS if a subcontractor has recently registered with WisDOT using CRCS.
- The reference file downloaded pertains only to the FieldManager database you are logged into. To update the reference file for another FieldManager database (if more than one exists), repeat the steps above.

Northwest Region
STH 77, Clam Lake – STH 13, Ashland County
Contractor – Northwoods Paving, A Division of Mathy
Project Leader – Cheryl Lowney
Project Manager – Matthew Dickenson
Project Supervisor – David Ostrowski

FieldManager - Requesting a contract refresh

A request for a contract refresh from the AASHTOWare Project CAS system can be done manually. This is normally done if your Contract Specialist makes changes to your contract in the AASHTOWare Project CAS system and the changes need to be imported into your FieldManager contract prior to making additional entries or creating an estimate.

1. Log into the appropriate FieldManager database.

2. Select <FN Mailbox>.

3. Select Utilities | FieldNet | Request Contract Refresh from FieldNet.

4. Select the contract from the pulldown list.

5. Select <Send Request>

6. Select <Send Outbox>. Make sure that all messages are sent (minimally 1 message).

7. This request takes a few minutes to process. Please be patient. See page 24, *Managing the FieldNet Mailbox* for instructions on retrieving and processing files.

Southwest Region
STH 35, Mooney Street – Washington Street, Crawford County
Contractor – Augelli Concrete & Excavating LLC
Project Leader – Jay Adams
Project Manager – Tim Maedke
Project Supervisor – Reiny Yahnke

FieldManager - Requesting a FieldNet ID list

The FieldNet ID list contains all the FieldNet Ids assigned to staff across the state and is constantly changing. An updated list is required on your computer prior to sending read only or transferring working copies of contracts to another FieldManager PC.

1. Log into the appropriate FieldManager database.

2. Select <FN Mailbox>.

3. Select Utilities | FieldNet | Request FieldNet ID List from FieldNet.

4. Select <Send Outbox>. Make sure that all messages are sent (minimally 1 message).

5. See page 24, *Managing the FieldNet Mailbox* for instructions on retrieving and processing files.

Southeast Region
IH 94, N-S Freeway – STH 50, Kenosha County
Contractor – Zignego Company Inc.
Project Leader – Nathan Schlegel, CH2M Hill
Project Manager – Steven Kuhl
Project Supervisor – Clement Abongwa

FieldManager - Managing the FieldNet mailbox

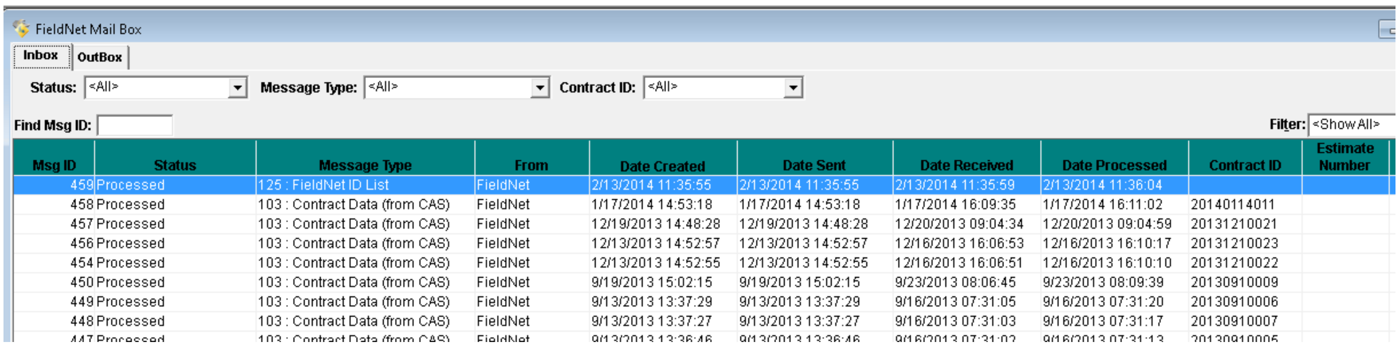
The FieldNet server in Madison will automatically send all information concerning contracts and any information requested by the FieldNet ID to the appropriate FieldNet account assigned to your field database. The FieldNet Ids and associated FieldManager contracts are tracked in the FieldNet Administration system by BITS Level 2 ACM and Contract Specialist support staff.

1. Log into the appropriate FieldManager database.

2. Select the <Get Mail> button. A message box will appear stating “Receiving Messages from FieldNet”.

3. Select The FieldNet Mail Box will appear. The mailbox has two tabs.
   The Inbox displays all the incoming processed and unprocessed messages.
   The Outbox displays all the sent and unsent messages.

4. Inbox tab - Process all the “unprocessed” messages in numeric order by highlighting each message and either clicking <Process M…> or double clicking on the message.



FieldNet Mail Box

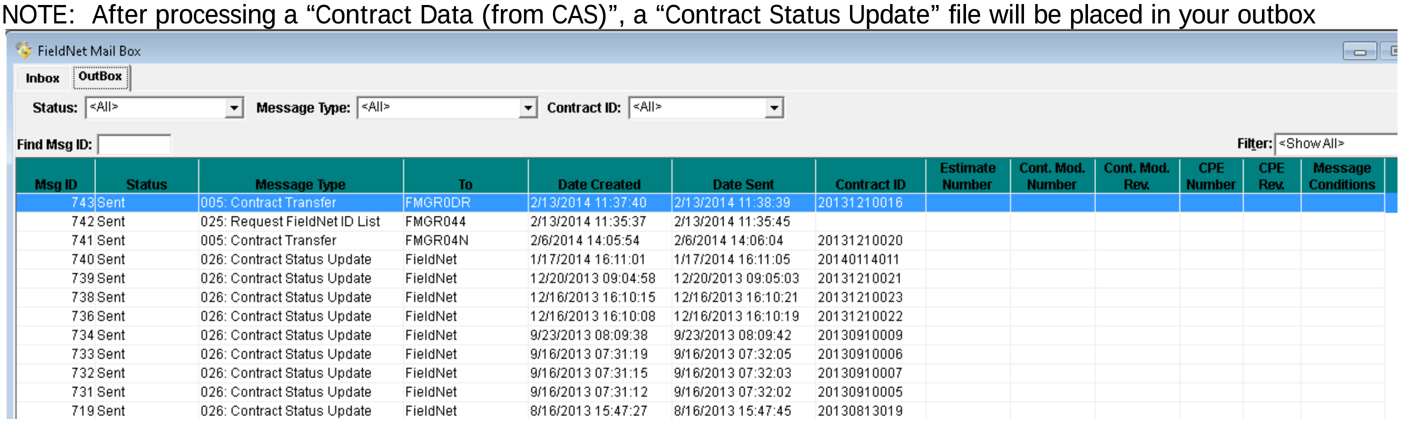
Inbox | OutBox

Status: <All> Message Type: <All> Contract ID: <All>

Find Msg ID: Filter: <Show All>

Msg ID	Status	Message Type	From	Date Created	Date Sent	Date Received	Date Processed	Contract ID	Estimate Number
459	Processed	125 : FieldNet ID List	FieldNet	2/13/2014 11:35:55	2/13/2014 11:35:55	2/13/2014 11:35:59	2/13/2014 11:36:04		
458	Processed	103 : Contract Data (from CAS)	FieldNet	1/17/2014 14:53:18	1/17/2014 14:53:18	1/17/2014 16:09:35	1/17/2014 16:11:02	20140114011	
457	Processed	103 : Contract Data (from CAS)	FieldNet	12/19/2013 14:48:28	12/19/2013 14:48:28	12/20/2013 09:04:34	12/20/2013 09:04:59	20131210021	
456	Processed	103 : Contract Data (from CAS)	FieldNet	12/13/2013 14:52:57	12/13/2013 14:52:57	12/16/2013 16:06:53	12/16/2013 16:10:17	20131210023	
454	Processed	103 : Contract Data (from CAS)	FieldNet	12/13/2013 14:52:55	12/13/2013 14:52:55	12/16/2013 16:06:51	12/16/2013 16:10:10	20131210022	
450	Processed	103 : Contract Data (from CAS)	FieldNet	9/19/2013 15:02:15	9/19/2013 15:02:15	9/23/2013 08:06:45	9/23/2013 08:09:39	20130910009	
449	Processed	103 : Contract Data (from CAS)	FieldNet	9/13/2013 13:37:29	9/13/2013 13:37:29	9/16/2013 07:31:05	9/16/2013 07:31:20	20130910006	
448	Processed	103 : Contract Data (from CAS)	FieldNet	9/13/2013 13:37:27	9/13/2013 13:37:27	9/16/2013 07:31:03	9/16/2013 07:31:17	20130910007	
447	Processed	103 : Contract Data (from CAS)	FieldNet	9/13/2013 13:36:46	9/13/2013 13:36:46	9/16/2013 07:31:02	9/16/2013 07:31:13	20130910005	

5. Outbox tab - If any messages appear in “Not Sent” status, select <Send Outbox>.
   NOTE: After processing a “Contract Data (from CAS)”, a “Contract Status Update” file will be placed in your outbox



FieldNet Mail Box

Inbox | OutBox

Status: <All> Message Type: <All> Contract ID: <All>

Find Msg ID: Filter: <Show All>

Msg ID	Status	Message Type	To	Date Created	Date Sent	Contract ID	Estimate Number	Cont. Mod. Number	Cont. Mod. Rev.	CPE Number	CPE Rev.	Message Conditions
743	Sent	005: Contract Transfer	FMGR0DR	2/13/2014 11:37:40	2/13/2014 11:38:39	20131210016						
742	Sent	025: Request FieldNet ID List	FMGR044	2/13/2014 11:35:37	2/13/2014 11:35:45							
741	Sent	005: Contract Transfer	FMGR04N	2/6/2014 14:05:54	2/6/2014 14:06:04	20131210020						
740	Sent	026: Contract Status Update	FieldNet	1/17/2014 16:11:01	1/17/2014 16:11:05	20140114011						
739	Sent	026: Contract Status Update	FieldNet	12/20/2013 09:04:58	12/20/2013 09:05:03	20131210021						
738	Sent	026: Contract Status Update	FieldNet	12/16/2013 16:10:15	12/16/2013 16:10:21	20131210023						
736	Sent	026: Contract Status Update	FieldNet	12/16/2013 16:10:08	12/16/2013 16:10:19	20131210022						
734	Sent	026: Contract Status Update	FieldNet	9/23/2013 08:09:38	9/23/2013 08:09:42	20130910009						
733	Sent	026: Contract Status Update	FieldNet	9/16/2013 07:31:19	9/16/2013 07:32:05	20130910006						
732	Sent	026: Contract Status Update	FieldNet	9/16/2013 07:31:15	9/16/2013 07:32:03	20130910007						
731	Sent	026: Contract Status Update	FieldNet	9/16/2013 07:31:12	9/16/2013 07:32:02	20130910005						
719	Sent	026: Contract Status Update	FieldNet	8/16/2013 15:47:27	8/16/2013 15:47:45	20130813019						

6. Close the FieldNet Mailbox.

FieldManager – Contract Transfers
Transferring a contract to another FieldManager computer

Project Leaders may transfer a contract to another field computer or to a region Finals computer. This is done if another Project Leader is taking over contract work OR the Project Leader does not submit the semi-final or final estimate for this region or local program office. ALL contract transfers ***MUST*** be coordinated with the region or local program management consultant Contract Specialist. They will provide you with the FieldNet ID of the computer you are transferring the contract too.

Important Notes:

- Do not follow this process to send your working contract to the region or local program management consultant Contract Specialist for contract archives. Separate instructions can be found on page 32.
- Remember – You must transfer contracts to FieldManager computer databases with the same region designation.

Step 1 – Send and receive FieldManager mail

1. Log into the appropriate FieldManager database.
2. Click <Get Mail>. A message box will appear stating “Receiving Messages from FieldNet”.
3. Inbox tab - Process all the “unprocessed” messages in numeric order by highlighting each message and either clicking <Process M…> or double clicking on the message.
4. Outbox tab - If any messages appear in “Not Sent” status, click <Send Outbox>.
5. Close FieldManager.

Step 2 – Backup FieldManager and Field Information Tracking (FIT) databases on both computers.

1. Open Windows Explorer
2. Run C:\ACMApplications\Backup\ACMBackup.bat.
   A folder will appear with the current date and time under c:\ACMApplications\Backup with a copy of the FieldManager database(s), FIT database and MIT database.

Step 3 – Export Field Information Tracking (FIT) contract from the origin computer.

1. Open FIT
2. Click <Yes, Merge> on the *Merge FieldManager with Field Information Tracking* window.
3. Click <System Info>
4. Click <Export FIT Contract>
5. Click <Save to a file>
6. Select the contract. <Continue>
7. Select “Export the contract and keep a read-only copy”. <Continue>
8. On the *Enter the Export File* window, enter the file name without the path. <Continue>
   Recommendation: Enter the contract ID with no extension (the .zip extension will be added automatically).
9. The *FIT Data* Export window will appear. <Close>
10. The FIT export file will need to be provided / sent to the person you are transferring the contract to.
    C:\ProgramData\AtwoodSystems\FIT\export\FITexport_??????????.zip

Step 4 – Transfer FieldManager contract from the origin computer

1. Open FieldManager and log into the appropriate FieldManager database if more than one exists.
2. Select Utilities | FieldNet | Request FieldNet ID list from Fieldnet.
3. Click <FN Mailbox>.
4. Click <Send Outbox>.
5. After a few minutes, click <Get Mail>. A message box will appear stating “Receiving Messages from FieldNet”.
   See page 24, *Managing the FieldNet Mailbox* for instructions on retrieving and processing files
6. Select File | Export | Transfer Contract
7. Respond <Yes> to the question “Do you wish to use FieldNet for this export?”
   REMEMBER - Contracts must be transferred using FieldNet! Failure to use FieldNet to transfer contracts may lead to FieldNet contract ownership issues.
8. Within the *Select FieldNet Ids – Transfer Contracts* window, use the SORT or FILTER options to locate the FieldNet ID that you would like to send the contract to.

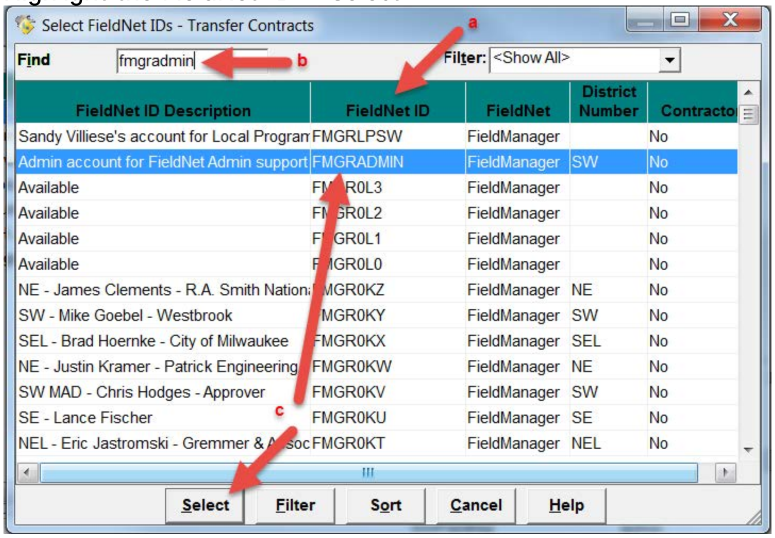
NOTE: Be very careful so you don't accidently send the contract to the wrong FieldNet ID.

SORT:

a. Double click on the "FieldNet ID" header to sort the FieldNet IDs in numeric order.

b. Type the FieldNet ID in the "Find FieldNet ID" field and that ID should automatically be found.

c. Highlight the FieldNet ID. <Select>.



FILTER:

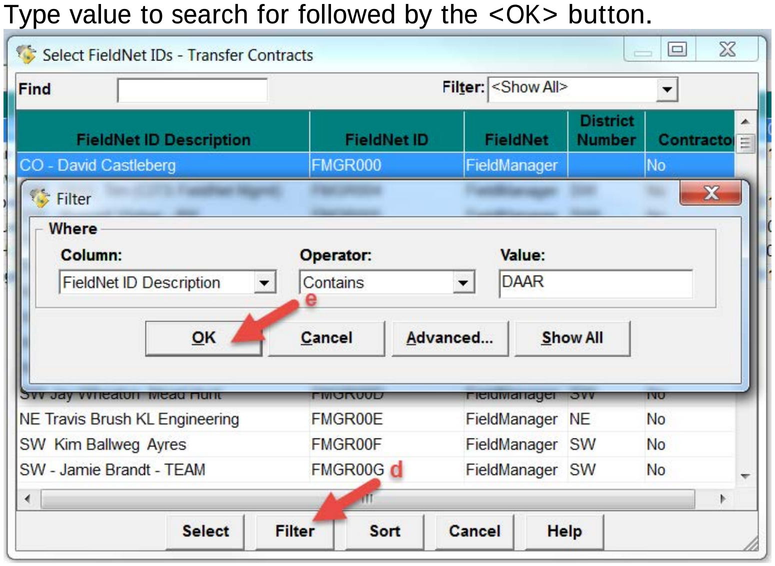
d. Select the <Filter> button.

e. Setup the filter:

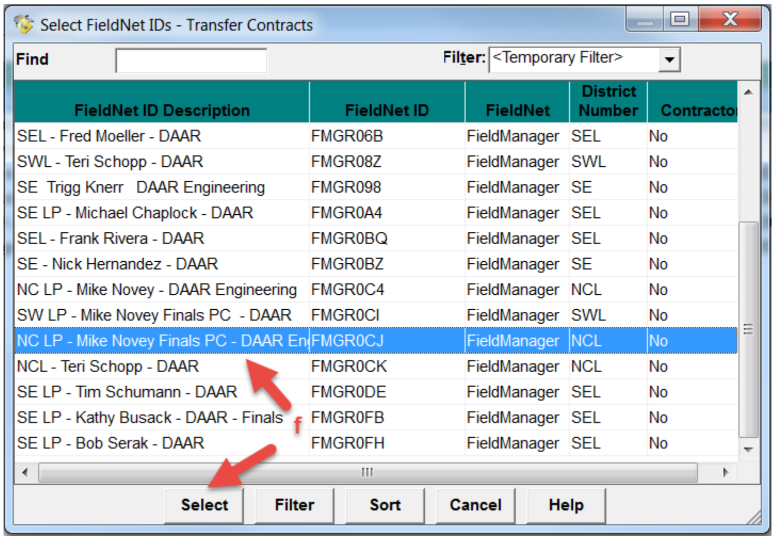
FieldNet ID Description

Contains

Type value to search for followed by the <OK> button.



f. From the filtered list, highlight the FieldNet ID you wish to send the contract to and click the <Select> button.



9. Select <Send Outbox>.
   NOTE: If you accidently send your contract to an incorrect FieldNet ID, contact Annette Czerneski or David Castleberg, the AASHTOWare Project Administrators, f. Provide the following information: Contract ID, FieldNet ID contract was transferred from, FieldNet ID the contract was transferred to AND the FieldNet ID the contract SHOULD be transferred to.

Step 5 – Import FieldManager contract on destination computer

1. Log into the appropriate FieldManager database.
   NOTE: The database names MUST match between the origin and destination computers.
2. Click <Get Mail>. A message box will appear stating "Receiving Messages from FieldNet".
3. Inbox tab – Process all the "unprocessed" messages in numeric order by highlighting each message and either clicking <Process Msg> or double clicking on the message.
4. Outbox tab – If any messages appear in "Not Sent" status, select <Send Outbox>.
5. Close FieldManager.

Step 6 – Field Information Tracking (FIT) import on destination computer

1. Open FIT and <Bypass Merge>
   NOTE: If you complete the FIT merge by accident, you will need to repeat Step #3 above to export and delete the contract from FIT. You cannot import a FIT contract if it already exists.
   Contact Annette Czerneski, the AASHTOWare Project Administrator, for assistance.
2. Click <System Info>
3. Click <Import FIT contract>
4. Click <Locate Contract file and start importing>
5. Browse for the file. <Open> Wait for the import to complete.

If you have any questions or concerns about this process, please contact Annette Czerneski, the AASHTOWare Project Administrator.

FieldManager – Contract Transfers
Transferring a contract to the AASHTOWare Project Administrator

Project Leaders may need to transfer their contract to the AASHTOWare Project Administrator when contract problems cannot be resolved remotely. Project Leaders will work directly with Annette Czerneski in these instances.

1. Close FieldManager, if necessary.

2. Open Windows Explorer and run the ACM Backup process:
   - Run C:\ACMApplications\Backup\ACMBackup.bat.
   - A folder will appear with the current date and time under c:\ACMApplications\Backup with a copy of the FieldManager database(s), FIT database and MIT database.

3. Open FieldManager and log into the appropriate FieldManager database is more than one exists.

4. Select Utilities | FieldNet | Request FieldNet ID list from Fieldnet.

5. Select <Send Outbox>.

6. Wait a few minutes and then select <Get Mail>. A window appears stating “Receiving Messages from FieldNet”.

7. See page 24, *Managing the FieldNet Mailbox* for instructions on retrieving and processing files.

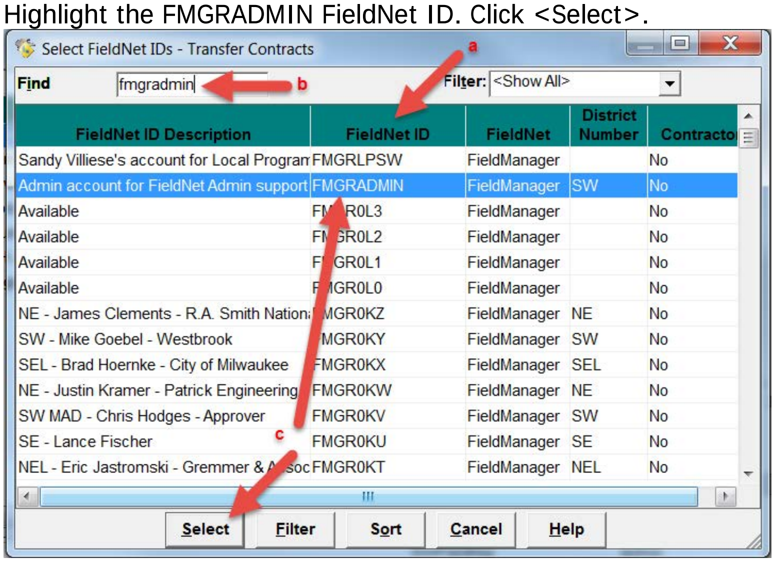
8. Select File | Export | Transfer Contract

9. Respond <Yes> to the question “Do you wish to use FieldNet for this export?”

10. Highlight the contract and click the <Select> button.

11. On the *Transfer the contract to another FieldManager* window, select “Transfer the contract”. <OK>

12. Within the *Select FieldNet Ids – Transfer Contracts* window
    - Double click on the “FieldNet ID” header to sort the FieldNet IDs in numeric order.
    - Type the “FMGRADMIN” in the “Find FieldNet ID” field and that ID should automatically be found.
    - Highlight the FMGRADMIN FieldNet ID. Click <Select>.



   - Click <Send Outbox>.
   - Notify Annette Czerneski, the AASHTOWare Project Administrator, that the transfer is complete.

FieldManager – Contract Transfers
Sending a readonly contract to another FieldManager computer

These instructions are for field staff to use to send read only contracts to another FieldManager computer. If you do not know the FieldNet ID of the computer you wish to send the contract to, please contact your region or local program management consultant Contract Specialist for assistance.

13. Log into the appropriate FieldManager database

14. Select Utilities | FieldNet | Request FieldNet ID list from Fieldnet.

15. Select <FN Mailbox>.

16. Select <Send Outbox> button.

17. Wait a few minutes and then select <Get Mail>. A message box will appear stating “Receiving Messages from FieldNet”.

18. See page 24, *Managing the FieldNet Mailbox* for instructions on retrieving and processing files.

19. Select File | Export | Transfer Contract

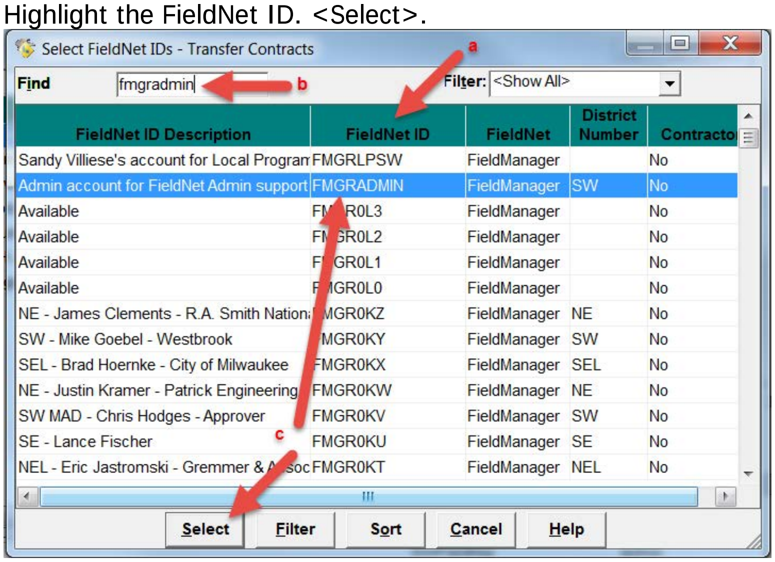
20. Respond <Yes> to the question “Do you wish to use FieldNet for this export?”
REMEMBER - Contracts must be transferred using FieldNet! Failure to use FieldNet to transfer contracts may lead to FieldNet contract ownership issues.

21. Highlight the contract and click the <Select> button.

22. On the *Transfer the contract to another FieldManager* window, select “Create a regular read-only copy of the contract”. <OK>

23. Within the *Select FieldNet Ids – Transfer Contracts* window, use the SORT or FILTER options to locate the FieldNet ID that you would like to send the contract to.
NOTE: Be very careful so you don’t accidently send the contract to the wrong FieldNet ID.

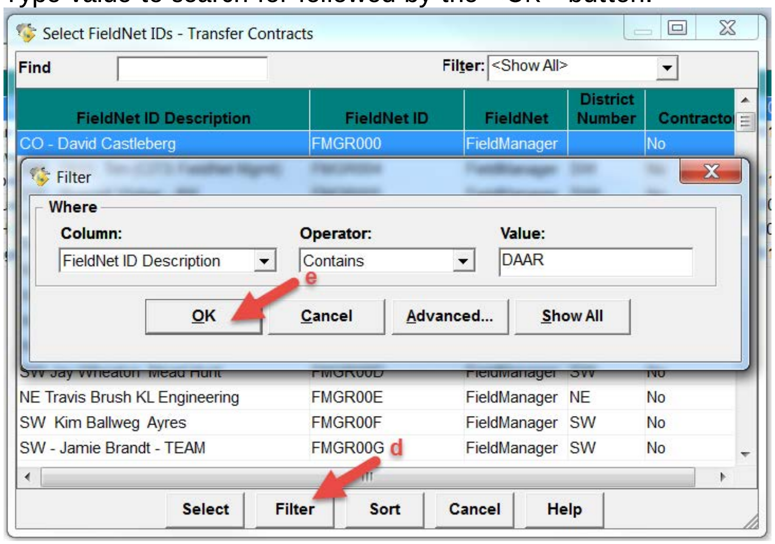
SORT:
a. Double click on the “FieldNet ID” header to sort the FieldNet IDs in numeric order.
b. Type the FieldNet ID in the “Find FieldNet ID” field and that ID should automatically be found.
c. Highlight the FieldNet ID. <Select>.



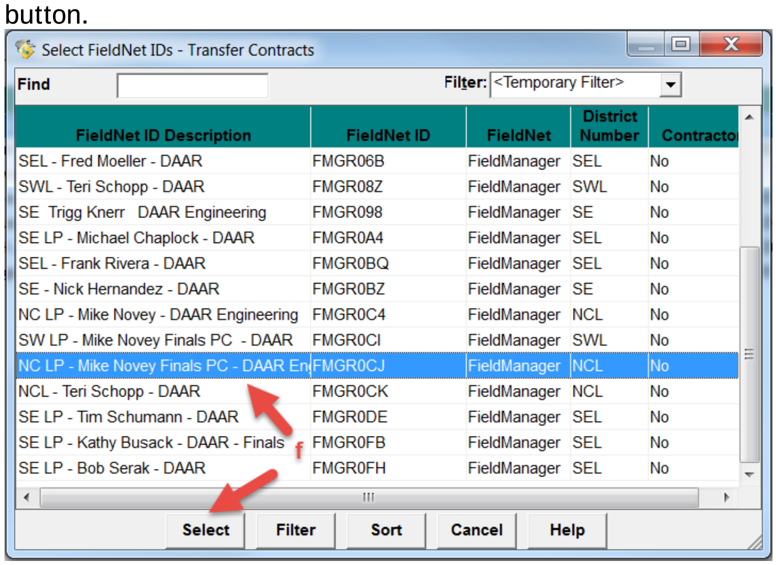
FILTER:

d. Select the <Filter> button.

e. Setup the filter:
FieldNet ID Description
Contains
Type value to search for followed by the <OK> button.



f. From the filtered list, highlight the FieldNet ID you wish to send the contract to and click the <Select> button.



24. Select <Send Outbox>.
25. Notify the recipient that you have sent a read only copy of the FieldManager contract to their associated FieldNet ID.

FieldManager – Contract Transfers
Archiving and removing finaled contracts

Processes different between the region and local program offices on the project archival process. Some region offices have the Project Leader or Project Manager send the final estimate and archive the FieldManager contract. Other region offices have the Project Leader or Project Manager send the working copy of the contract to the region office prior to creation of the final estimate.

The steps below fall under two (2) categories –

Project Leader / Project Manager Archival instructions
Contract Specialist Archival instructions

Complete the appropriate set of instructions below if directed by the region or local program management consultant Contract Specialist to archive a finaled FieldManager contract.

Project Leader / Project Manager Archival instructions (Project Leader or Project Manager completes ALL steps below):

After all the steps are completed for the finals process including the creation and approval of the final estimate and the records are archived with contract administration staff, the Project Leader or Project Manager can complete the archival process.

FieldManager

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.
2. Select <Send Outbox> followed by <Get Mail> to send and receive pending messages.
3. Process all the “unprocessed” messages in numeric order by highlighting each message and either clicking <Process Msg> or double clicking on the message. Close the FieldNet Mailbox.
   NOTE*: *DO NOT archive your contract until your final estimate is approved AND you receive and process an estimate approval, an estimate report and a CAS contract refresh.
4. Close FieldManager.

Field Information Tracking (FIT)

1. Open FIT.
2. Wait for database connection and click <Yes, Merge>
3. Click <Send Data> <Start Processing Send Data>
4. Close FIT.

FieldManager

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.
2. Select File | Archive Contract. The *Archive* message window will appear. Click <Yes> to continue with the archival process.
3. Highlight the contract in the *Select Contract to Archive* window and click the <Select> button. The contract will be saved (archived) to C:\ProgramData\FieldManager\Archive.
   NOTE: If the final estimate has not been sent and the contract is not ready to be archived, the contract will not appear in the *Select Contract to Archive* window.
4. On the *Archive* window, select <Yes> to save another copy of the archived contract to a different location (CD, diskette, USB drive, etc.) Label the media with the contract ID, project ID, highway name, location, county and the FieldManager version. Send the labeled media to the region or local program master consultant Contract Specialist so it may be filed in the finals box.

Contract Specialist Archival instructions (Project Leaders / Project Managers complete SOME steps below):

FieldManager – Project Leader/Project Manager completes these steps

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.
2. Select <Send Outbox> followed by <Get Mail> to send and receive pending messages.
3. Process all the “unprocessed” messages in numeric order by highlighting each message and either clicking <Process Msg> or double clicking on the message. Close the FieldNet Mailbox.
4. Close FieldManager.

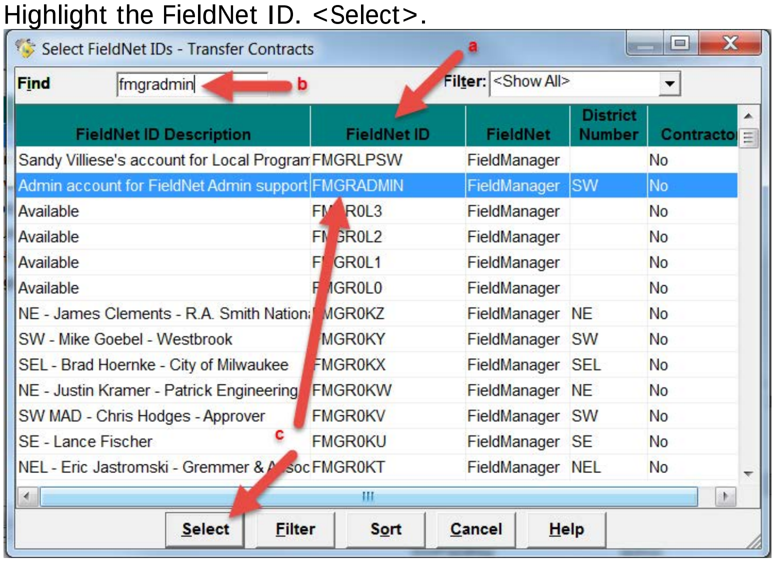
Field Information Tracking (FIT) – Project Leader/Project Manager completes these steps

1. Open FIT.
2. Wait for database connection and click <Yes, Merge>
3. Click <Send Data> <Start Processing Send Data>
4. Close FIT.

FieldManager -– Project Leader/Project Manager completes these steps

1. Contact the region or local program management consultant Contract Specialist for the FieldNet logon ID that the contract should be sent to.
2. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.
3. Select Utilities | FieldNet | Request FieldNet ID list from Fieldnet.
4. Click <FN Mailbox>.
5. Click <Send Outbox>.
6. After a few minutes, click <Get Mail>. A message box will appear stating “Receiving Messages from FieldNet”.
   See page 24, *Managing the FieldNet Mailbox* for instructions on retrieving and processing files
7. Select File | Export | Transfer Contract
8. Respond <Yes> to the question “Do you wish to use FieldNet for this export?”
   REMEMBER - Contracts must be transferred using FieldNet! Failure to use FieldNet to transfer contracts may lead to FieldNet contract ownership issues.
9. Within the *Select FieldNet Ids – Transfer Contracts* window, use the SORT or FILTER options to locate the FieldNet ID that you would like to send the contract to.
   NOTE: Be very careful so you don’t accidently send the contract to the wrong FieldNet ID.

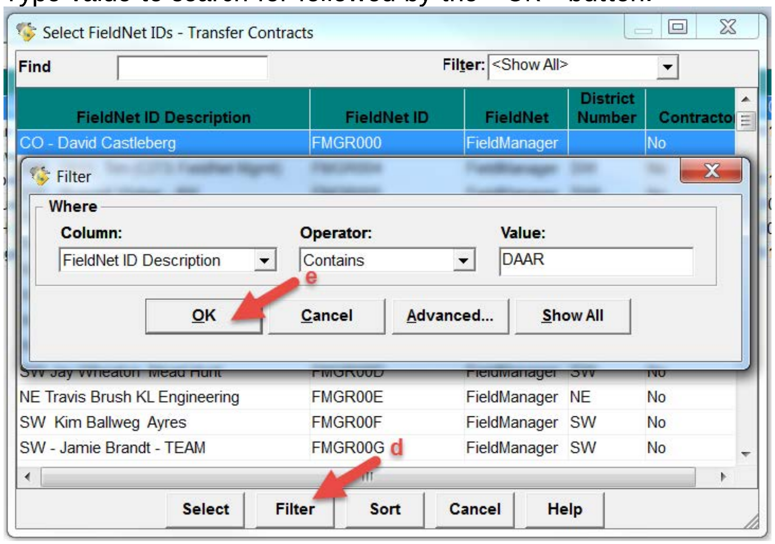
   SORT:
   a. Double click on the “FieldNet ID” header to sort the FieldNet IDs in numeric order.
   b. Type the FieldNet ID in the “Find FieldNet ID” field and that ID should automatically be found.
   c. Highlight the FieldNet ID. <Select>.



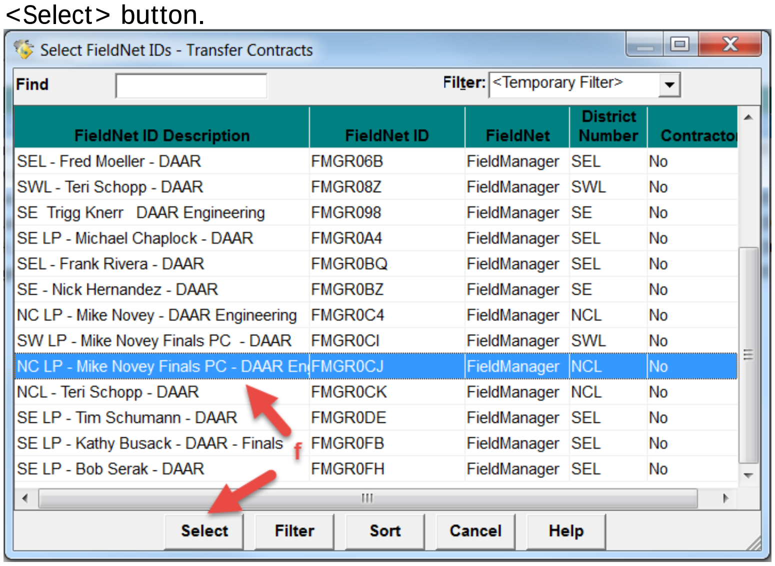
FILTER:

d. Select the <Filter> button.

e. Setup the filter:
FieldNet ID Description
Contains
Type value to search for followed by the <OK> button. Setup the filter:
FieldNet ID Description
Contains
Type value to search for followed by the <OK> button.



f. From the filtered list, highlight the FieldNet ID you wish to send the contract to and click the <Select> button.



10. Select <Send Outbox>.
NOTE: If you accidently send your contract to an incorrect FieldNet ID, contact Annette Czerneski or David Castleberg, the AASHTOWare Project Administrators, immediately. Provide the following information: Contract ID, FieldNet ID contract was transferred from, FieldNet ID the contract was transferred to AND the FieldNet ID the contract SHOULD be transferred to

FieldManager – Contract Specialist completes these steps

1. Log into the appropriate FieldManager database.
NOTE: The database names MUST match between the origin and destination computers.
2. Click <Get Mail>. A message box will appear stating “Receiving Messages from FieldNet”.

3. Inbox tab – Process all the “unprocessed” messages in numeric order by highlighting each message and either clicking <Process Msg> or double clicking on the message.
4. Outbox tab – If any messages appear in “Not Sent” status, select <Send Outbox>.
5. Select File | Archive Contract. The *Archive* message window will appear. Click <Yes> to continue with the archival process.
6. Highlight the contract in the *Select Contract to Archive* window and click the <Select> button. The contract will be saved (archived) to C:\ProgramData\FieldManager\Archive.
   NOTE: If the final estimate has not been sent and the contract is not ready to be archived, the contract will not appear in the *Select Contract to Archive* window.
7. On the *Archive* window, select <Yes> to save another copy of the archived contract to a different location. Browse to the location where to save the additional contract archive file.

Northwest Region
IH 94, STH 95 – CTH F, Jackson County
Contractor – Mpave, a Division of Michels Corporation
Project Leader – Brian Danielsen, QUEST Civil Engineers
Project Manager – Stacie Lambele
Project Supervisor – Rick Shermo

FieldBook

FieldBook is designed to automate the construction inspector's task of documenting the progress of construction using a different computer. With FieldBook, inspectors can record construction progress in Inspector's Daily Reports (IDRs), upload the IDRs to FieldManager in the field office, download updates from FieldManager and access contract status information. More information can be found in the *FieldManager User's Guide, Chapter 16 – Using FieldBook* found in the Pantry\Manual folder.

Exporting contract(s) from FieldManager:

1. Log into the appropriate FieldManager database (if more than one exists) and highlight the contract.

2. Select File | Export | Contracts to FieldBook or select <Export - FB> from the toolbar.

3. On the *Export Contracts to FieldBook* window, select <No> to the question "Do you wish to use Fieldnet for this export?"

4. On the *Select Contracts to Export to FieldBook* window
   - Highlight the contract
   - ✓ "Include reference files in the export" if this is the first time you are exporting the contract OR if you have recently updated reference files for this Fieldmanager database.
   - <Select>

5. On the *Export Contracts to FieldBook* window, browse to the location to save the export file. <OK>

6. After a successful export, an *Export* window will appear stating the location and name of the export file. <OK>

Importing contract(s) into FieldBook

Double click on the FieldBook shortcut in the WisDOTShortcuts folder or desktop OR select Start | All Programs | FieldBook | FieldBook 5.1a. Then select from one of the three situations outlined below.

1. If this is the first time you are importing a contract into FieldBook, you will need to create a FieldBook database:
   - Browse and select the FieldManager export file.
   - On the *Add FieldBook Database* window, enter a database name:
     Examples: NWFieldBook, NCI39, NEFieldBook, SWLacrosse, or SEFieldBook
     The name entered MUST relate to the FieldManager database that you are exporting the contract from.
   - Log into FieldBook using one of the user IDs from the FieldManager database that the contract was exported from.

2. If you are importing a new contract into FieldBook and need to create a new database (and already have an existing FieldBook database:
   - Select the "Database Management" button next to the Database dropdown menu on the logon screen.
   - Select <Add>
   - Browse to the location of the FieldManager export file. <Open>
   - <OK>
   - On the *Add FieldBook Database* window, enter a database name:
     Examples: NWFieldBook, NCI39, NEFieldBook, SWLacrosse, or SEFieldBook
     The name entered MUST relate to the FieldManager database that you are exporting the contract from.
   - Select the FieldBook database and log into FieldBook using the same logon credentials you would use to access this contract in FieldManager

3. If you are importing contract data into an existing FieldBook database.
   - Log into the appropriate FieldBook database using the same logon credentials you would use to access this contract in FieldManager.
   - Select File | Import | Contract from FieldManager or the <Import – FM> button from the toolbar

- Browse to the location of the FieldManager export file. <OK> to import and <OK> to confirm import

Entering IDRs:
IDRS are entered into FieldBook the same way they are entered into FieldManager. See page 8, *FieldManager, Inspector's Daily Reports*, for detailed information.

Exporting IDRs from FieldBook
NOTE: The IDRs must be generated prior to transferring to FieldManager.

1. Select File | Export | IDRs to FieldManager or the <Export – FM> button from the toolbar.
2. Select the generated IDRs to be exported to FieldManager.
3. On the *Select IDRs to Export to FieldManager* window
    - Select the IDRS that you wish to export.
    - <Select>

1. On the *Export IDRs to FieldManager* window, browse to the location to place the export file. (e.g. diskette, USB drive, network drive, etc.) <OK> to export and <OK> to confirm export

Importing IDRs into FieldManager

1. Log into the appropriate FieldManager database.
2. Select File | Import | IDRs from FieldBook or the <Import – FB> button from the toolbar
3. On the *Import IDRs* window, browse to the location of the import file. <OK> to select import location followed by <OK> to begin import process.
4. After a successful import, the *Print* window appears. Select <OK> to print the IDRs. Select <Cancel> if printed copies are not needed.

Northeast Region
STH 29/54/57, Cass Street – Main Street, Brown County
Contractor – Vinton Construction Company
Project Leader – Brett Vissers, Mead & Hunt, Inc.
Project Manager – Jeremy Ashauer
Project Supervisor – Daniel Segerstrom

Mobile Inspector

The Mobile Inspector app is designed to automate the construction inspector's task of documenting the progress of construction using an Apple or Android mobile device. With the Mobile Inspector app, inspectors can record construction progress in Inspector's Daily Reports (IDRs) and once the IDRs are generated, they will automatically be sent to the associated FieldManager contract PC.

Project Leaders interested in using this new app should complete the steps below:

1. Ensure the device is supported:
    a. Apple iOS 7 and 8 smartphones and tablets
    b. Android 4.x and 5.x smartphones and tablets
    c. WisDOT staff use Apple iPhones and iPads purchased by the division. Please contact your supervisor about device availability.
2. Contact Annette Czerneski and David Castleberg, the AASHTOWare Project Administrators, to confirm that there is an available Mobile Inspector license. They will provide the Project Leader with an installation and user guide.
    a. The Project Leader can download the Mobile Inspector app onto their Apple or Android mobile device.
    b. Follow the instructions in the *InfoTech Bridge to FieldManager Installation Guide* to register the device with InfoTech, configure FieldManager to communicate with the device, setup the mobile inspector users, and associate a contract between the device and FieldManager.
    c. The Project Leader can use the *Using Mobile Inspector* instruction guide to become familiar with using this app.

Southeast Region
STH 100, IH 94 – Watertown Plank Road, Milwaukee County
Contractor – Trierweiler Construction & Supply Co.
Project Leader – Jason Zembroski, CGC Inc.
Project Manager – Mike Burns
Project Supervisor – Jason Roselle

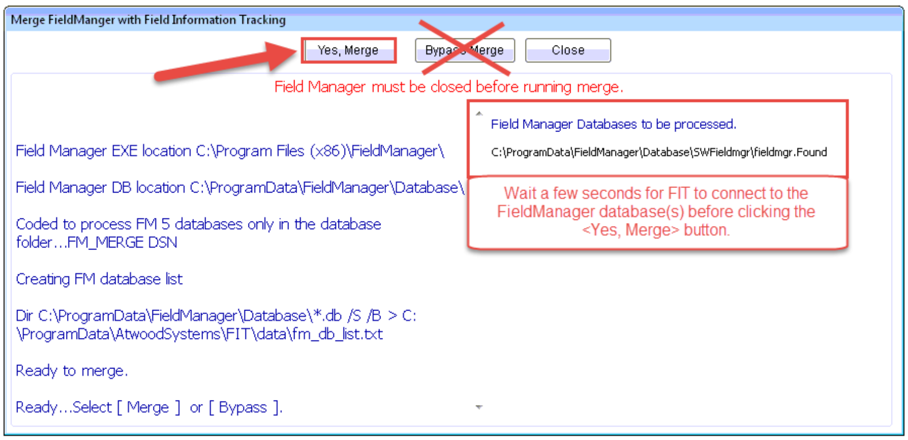
Field Information Tracking System (FIT)

The Field Information Tracking (FIT) and Project Tracking (PT) systems are supplemental FieldManager programs, developed by Atwood Systems.

- Field Information Tracking System (FIT) – Field staff use this system to remotely enter Design Quality Index reports (DQIs), acceptance information, warranty information, field office location and staff information, and structure information.
- Project Tracking System (PT) – FIT data sent by field staff is imported into Project Tracking and accessible by WisDOT region staff, DOT central office staff, DMV, and State Patrol staff.

Opening FIT AND merging data

Close FieldManager before proceeding. Then when you open Field Information Tracking, the *Merge FieldManager with Field Information Tracking* window will appear. Wait for FIT to connect to the FieldManager databases. Then Project Leaders **MUST** click on <Yes, Merge>. This needs to be done to ensure that FieldManager AND FIT data is merged and ready to be sent to Project Tracking.

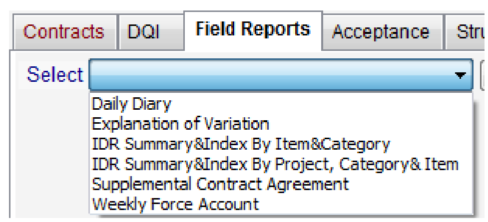


DQI tab

NOTE: A Design Quality Index (DQI) report is REQUIRED for each PROJECT within the contract.

Design Quality Index reports for construction projects are entered within FIT. Factors are rated on a scale of 1-7. Comments may also be included.

Field Reports tab



More information regarding reports required for your region may be found in the region specific or local program construction administration manual. Most manuals can be found in the corresponding Pantry \RegionSpecific folder.

- *Daily Diary* – Daily diary report for the selected date range can be viewed or printed.
- *Explanation of Variation Report* – Lists all items with quantities that are 10% over or 10% under authorized quantity. This report is required for your finals records. Variation information is entered in FieldManager and the report is generated using FIT. It is recommended that the entry of the variation information take place as items are marked complete in FieldManager prior to sending your final estimate.
  1. Log into the correct FieldManager database.
  2. Select the contract
  3. Select <Items>
  4. Double click on an item OR Highlight an item and select <Change>
  5. Select the Documentation tab
  6. Compare the authorized quantity to the quantity placed and quantity paid.
     - Notes field - Enter an explanation for the variation between the quantities.
     - Documentation field – Some regions require an entry as to who checked this item.
       Example: All postings checked as of MM/DD/YYYY Initials

7. Select "Yes" for the Item Completed prompt.
8. <Save>
9. Enter variation information as needed and mark all contract items as complete by repeating steps 3-8
10. Close FieldManager
11. Open FIT and select <Yes, Merge>.
12. Select the contract
13. Select the Field Reports tab
14. Select Explanation of Variation Report followed by <View>. Select <Print> to create a hardcopy report.

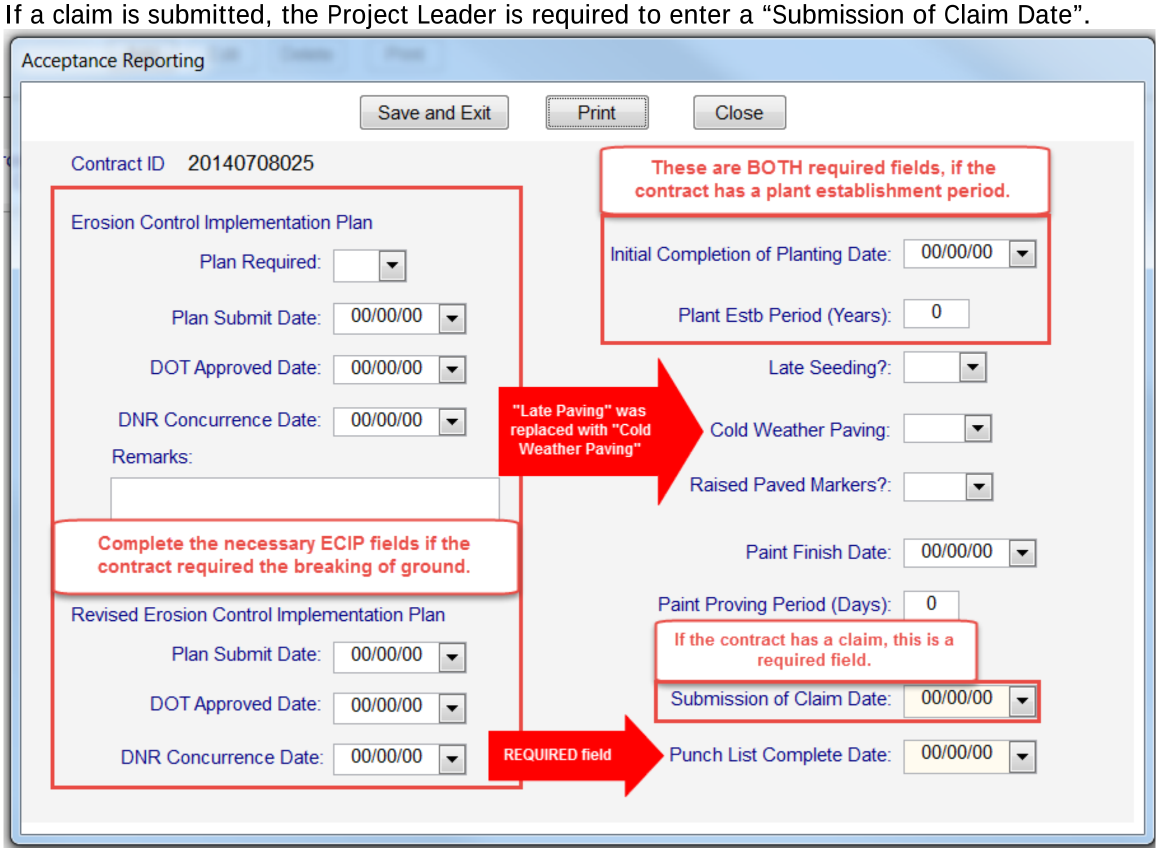
- *IDR Summary & Index by Item & Category* - lists all the items and their quantities in item order.
- *IDR Summary & Index by Project, Category & Item* - lists all items and their quantities in project ID, category, and item order.
- *Supplemental Contract Agreement – Staff cannot create a Supplemental Agreement in FIT but can view previously created reports. The information is entered as a FieldManager contract modification with guidance provided in the CMM 2-32.2.4.*
- *Weekly Force Account* – Use this report to view/print force account information entered into FIT.

Acceptance tab

Some fields are required – see details below.

ALWAYS complete a FIT data merge and send if changes are made to the Acceptance tab.

- ***All contracts*** require the Project Leader to enter a "Punch List Complete Date"
- Erosion Control Implementation information (ECIP) is **REQUIRED** if the contract requires the breaking of ground.
- ***Only if the contract has a plant establishment period***, the Project Leader is required to enter ***BOTH*** the "Initial Completion of Planting Date" ***AND*** the "Plant Estb Period (Years)".
- Select "Yes" if the project has late seeding (no or minimal germination prior to winter)
- Select "Yes" if the project has late paving (after October 15).
  NOTE: Late Paving will be changed to Cold Weather Paving with the FIT Service Pack released in 2016.
- Select "Yes" if the project has raised Paved Markers.
- If the project has painting (centerline/edge line), enter the "Paint Finish Date" and "Paint Proving Period (Days)".
- If a claim is submitted, the Project Leader is required to enter a "Submission of Claim Date".



Structures tab

Data entry of structure information in FIT is no longer required.

1. All falsework plans must be sealed by a P.E. Project Leader should verify that falsework plan is being followed.
2. All temporary structures require a contractor inspection and Form DT2007 provided prior to opening to traffic.
3. Contact Bridge Designer / BOS for ANY structural field adjustment approvals.
4. Notify Region Bridge Maintenance Section immediately when any structure is completed to set up an initial inspection (while contractor is still on site).
5. Email Vertical / Horizontal Clearance forms / pdf to DOTDLDTSDStructuresRecords@dot.wi.gov and to Region Bridge Maintenance Engineer. (found in Statewide Pantry Forms)
6. Email all Structural Shop Drawings to DOTDLDTSDStructuresRecords@dot.wi.gov.
7. PILING RECORD (DT1315): Email to addresses below, with PM concurrence

   - ☐ ORIGINAL- FINAL BOX
   - ☐ EMAIL COPY TO DOTDTSDStructuresPiling@dot.wi.gov
   - ☐ EMAIL COPY TO DOTDTSDGeotechnicalPiling@dot.wi.gov

8. PILE DRIVING DATA (DT1924): Email to addresses below, with PM concurrence

   - ☐ ORIGINAL- FINAL BOX
   - ☐ EMAIL COPY TO DOTDTSDStructuresPiling@dot.wi.gov
   - ☐ EMAIL COPY TO DOTDTSDGeotechnicalPiling@dot.wi.gov

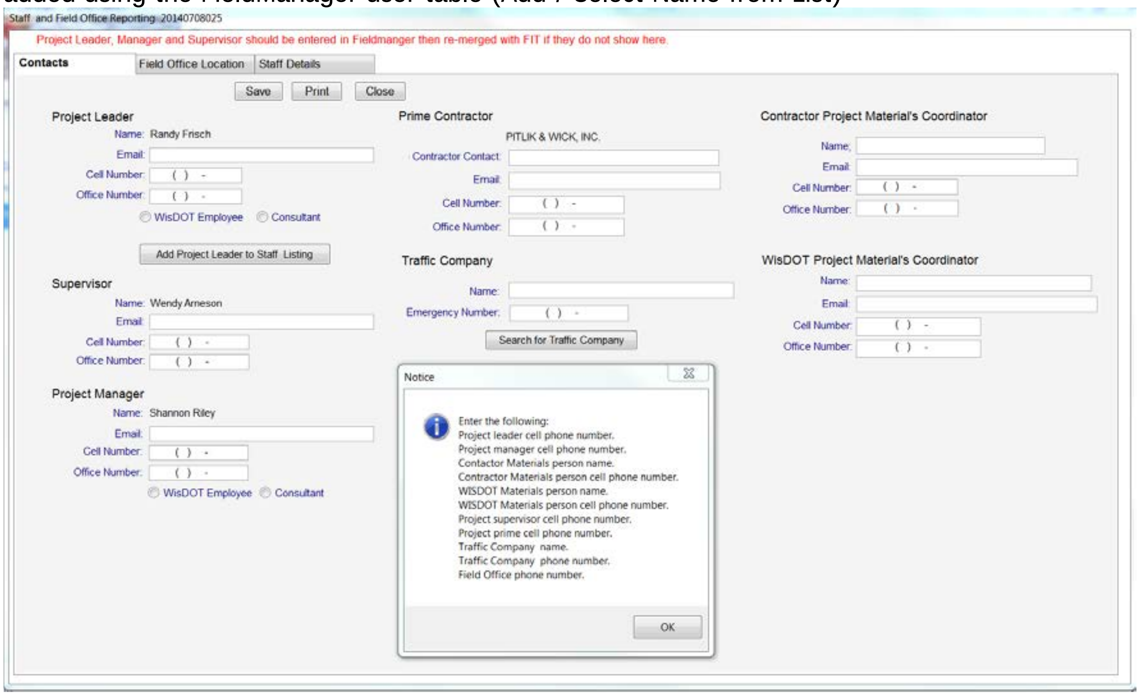
9. Bolt tightening (PreInstallationVerificationTestOfHighStrengthBoltsDT2114.dotm form (Statewide Pantry Forms)
10. Anchor Bolts and Sign Structure Installation – Complete PreInstallationVerificationTestOfHighStrengthBoltsDT2114.dotm, HighStrengthSteelAnchorRodInstallationTensioningRecordDT2321.dotm, AncillaryStructuresPreInstallationVerificationTestOfHighStrengthBoltsDT2322.dotm (Statewide Pantry Forms)

Staff / Field Office tab

Staff / Field office information is required for all contracts.

ALWAYS do a FIT data send after changes are made to the Staff / Field Office tab. Notify your region or local program management Contract Specialist. This is very important so they can complete a process to ensure emails are automatically sent appropriate staff the substantially complete notice and semi finals.

- Contacts section –
  - Provide e-mail addresses, cell and office phone numbers for the Project Leader, supervisor and Project Manager. Select WisDOT employee or consultant for each of these staff.
  - Enter prime contractor and traffic company contact information.
  - Enter Contractor and WisDOT Project Material Coordinators' contact information.
- Field Office Location – Provide address, directions and telephone number for the field office.
- Staff Details – Create a staff listing of staff overseeing the contract including the Project Leader. Staff can be added using the FieldManager user table (Add / Select Name from List)



Force Account tab

Project Leaders have the ability to enter force account information.

Warranty tab

Field staff are required to enter warranty item information, if applicable.

Project Controls tab

Do not enter data under this tab until further instruction is provided.

Sending FIT data

Field staff are required to MERGE and SEND FIT data for the following circumstances:

- When the ECIP is approved.
- When contract time starts.
- When a contract modification is ***created.***
- When a contract modification is ***approved.***
- When work is completed on the contract.
- When a DQI report is completed.
- When an estimate is submitted.
- When a claim in submitted (enter date on Acceptance tab).
- When the punch list is complete (enter date on the Acceptance tab).

- After the Project Leader enters the all the contact information for staff working on this contract plus the field office location on the Staff / Field Office tab.
- Weekly, at a minimum, for labor compliance reviews.

IMPORTANT NOTE: There is a time delay between the FIT Data send and the appearance of the data in Project Tracking. FIT data is imported into the Project Tracking database twice a day. Contract Specialists will see data from sends after 11 a.m. and 4 p.m. each day so keep this in mind when sending FIT data.

Steps to follow to send FIT data:

1. Select <Send Data> followed by "Start Processing Send Data"
2. Confirm and/or update the contact information on the *FIT Data Send* window.
3. Select the method to send your FIT data:
    a. Consultant staff – Select "Direct Web Send" to send data to Atwood Systems
    b. WisDOT staff – Select "Send Via Email" to send using the WisDOT Exchange servers.
4. Select <Merge FieldManager Data> if you forgot to complete this step when you opened FIT
5. Select <Start Data Send> to continue the process.
6. Select <OK> on the window that the data send was successful.

To edit your e-mail protocol information

1. Select the <Send Data> button followed by <Configure E-mail>.
    - FieldNet ID – fmgr???
    - POP Server name
        - Consultants – leave this field blank
        - WisDOT staff – mail.dot.state.wi.us
    - SMTP Server name
        - Consultants – leave this field blank
        - WisDOT staff – mailx.dot.state.wi.us
    - Select "A Userid and Password is NOT required"
2. Select <Save and Exit> to save any changes made to this information.

Support

Support website	http://www.atwoodsystems.com/wisdot/
E-mail address	support@atwoodsystems.com
Telephone number	1-877-518-1920 (toll free)

Tips for MIT (Materials Information Tracking System)

The Materials Information Tracking (MIT) and Materials Tracking System (MTS) are supplemental programs developed by Atwood Systems.

- Materials Information Tracking System (MIT) – Used by field personnel to remotely enter reports. After verifying the reports, they are sent by field staff and posted on the Internet. The reports are also for region and central office staff to review using the Materials Tracking System (MTS).
- Materials Tracking System (MTS) – WisDOT LAN application used by region and central office materials staff to enter reports directly into the Oracle database.

General system information

System logon

The MIT logon ID is “verifier” and the password is “person”.

Projects

Projects are imported into MIT so that material reports can be entered.

MIT Site ID – registering your computer

If this is the first time MIT is installed on this computer, complete the *Application Registration* window that appears when you log onto MIT:

- Project Leader’s name
- Company
- Project Leader’s e-mail address
- Telephone number without special characters (no hyphens, parentheses, etc.)
- Select <Get Installation Key> to register the computer

Download aggregate source, brand/mill, sub/supplier, test type, admixture, and project lists.

To download the latest data for any of the above lists

1. Select the <Get Updates> button followed by “Project Data”
2. Wait for the download and import process to complete.

Adding / Removing Projects

Projects are downloaded from the MRS system. Each project is added separately. Projects can be loaded on multiple materials PCs.

1. On the Projects tab, the list of projects added to this computer will appear. Use this screen to add or delete projects from this computer.
2. To add new projects, select the <Add a Project> button.
3. Search for the project by entering the “partial project ID” Scroll through the list and select the project to add. Select the <Return w/selection> button.
4. If the project does not appear, select the <Get Updates> button followed by “Project Data” to obtain a new project list.
5. All projects added in this area are available for use when creating MIT reports.

Approved Lists

- The Approved Lists can be found on the Internet at http://www.atwoodsystems.com/sysportal.htm . These include approved products, approved beam guard heat numbers, pre-tested white curing compounds, approved nuclear gauges and users and current the approved pit and quarry listing by county.
- New users must register online and obtain a logon ID and password.

Materials report information – list of reports that field staff may create

Important notes:

1. On each report be sure to include the full name of the individual sampling and testing the specific material.
2. Staff MUST use the test data remarks field when a remark is required. DO NOT use the sample card remarks field.

130 Concrete cylinders
135 Concrete Probing Thickness
155 Miscellaneous Materials

This includes QMP Summary Reports and RFI's for explanation on acceptance of Non-conforming Materials.
The "test description" field is used to enter report comments. This information is entered on Test Data screen.
The "remarks" field is used to reference another report. This information is entered on the Sample Card screen.

162 Fine & coarse aggregate for concrete

Summary report for concrete aggregate gradations - this includes all Concrete Aggregate Gradations.

217 Aggregates

Summary report for all other aggregates - this includes Aggregate Field Gradations, Base Course, Backfill, Select Borrow.

232 Soil Nuclear Density
257 Asphalt Mix Testing

Only used by Asphalt Mix Testing laboratory.

262 Asphaltic Pavement Nuclear Density
900 External Test Reference

This includes Certifications, Certified Report of Tests, Aggregate Quality Tests not sent to Madison under your Project ID and Asphalt Mix Designs.

905 Material Diary Inspection

Standard report when required from EGuide comments, also includes ability to reference Certifications, Certified Report of Tests, Aggregate Quality Tests not sent to Madison under your Project ID and Asphalt Mix Designs.

DT1310

WisDOT Certification of Materials Report
Project Materials Coordinator creates this report upon completion of the materials finals.

Test types

Important notes:
1. The test type is a required entry.
2. Some test types are designated as *reserved*. DO NOT select these types unless you have been authorized.
3. Refer to the project specifications for correct test types.

Analytical Test

Reserved for use by Central Office Laboratory personnel only. Typical AT test report would be design test data or test research information.

Certification Verification Program (CVP)

Report done for the WisDOT CVP. **Reserved** for use by the Region IA Specialist or approved persons. Prefix 155 only.

Certifications on File (CF)

Report used for referencing external Certification of Compliance and Certified Report of test and Analysis documents.

Independent Assurance (IA)

Report of test and observation done for the Independent Assurance Program. **Reserved** for use by Independent Assurance personnel.

Quality Control (QC)

Report of tests done by the contracts as required under QMP specifications. Not commonly input at this time. Electronic entry of QC test is optional.

Verification (V)

Report of tests done by WisDOT to verify product/material quality. These are tests of independent samples taken by the Department as required by certain QMP specifications or for non-QMP material acceptance. This type replaces Acceptance (A) and Quality Verification (QV).

Verifying and sending MIT reports

Important note: All reports must be verified prior to sending to the web. Region materials support staff recommend sending verified reports to the Atwood Systems immediately after verifying.

Lab Site and Verification Information:

1. Select the Create | Edit Tests tab.
2. Select the <Lab Site / Verifier> button.
3. Enter the verifier's name.
4. Choose the lab site by selecting <Add / Change Lab Site>
5. Use the Alphabet listing to locate the company.
6. Double click on the company name
7. Double click on the correct company address.
8. Select <Save and Continue> OR select <Save / Stop Prompting>
9. Select <Save> to save changes.

Verifying tests:

1. From the Create | Edit Tests tab, select <To Be Verified> from the pulldown list.
2. Double click on the report you would like to submit.
3. On the *Labsite and Verification Information* window, confirm the first and last name of the verifier along with the company name. Select "Stop showing this window" followed by <Save> to use the same verifier for all the reports in this group.
4. Confirm that the report is accurate and complete.
5. Select <Create Verified Report>.
6. Select <Close Test>
7. Repeat the steps 1-6 to verify other reports.

Steps to follow to send MIT data:

1. Select <Send Data> followed by "Start Processing Send Data"
2. Confirm and/or update the contact information on the *FIT Data Send* window.
3. Select the method to send your FIT data:
    - c. Consultant staff – Select "Direct Web Send" to send data to Atwood Systems
    - d. WisDOT staff – Select "Send Via Email" to send using the WisDOT Exchange servers.
4. Select <Merge FieldManager Data> if you forgot to complete this step when you opened FIT
5. Select <Start Data Send> to continue the process.
6. Select <OK> on the window that the data send was successful.

To edit your e-mail protocol information

1. Select the <Send Data> button followed by <Configure E-mail>.
    - FieldNet ID – fmgr???
    - POP Server name
        - o Consultants – leave this field blank
        - o WisDOT staff – mail.dot.state.wi.us
    - SMTP Server name
        - o Consultants – leave this field blank
        - o WisDOT staff – mailx.dot.state.wi.us
    - Select "A Userid and Password is NOT required"
2. Select <Save and Exit> to save any changes made to this information.

Confirming that MIT reports are posted successfully on the Internet

Important note: The Project Leader is responsible for ensuring that the reports were successfully posted to the Internet.

After creating reports in the MIT system, the reports are verified, and sent to Atwood Systems. Atwood Systems replicates the reports to MTS and posts them on the Internet. Staff should ensure the reports are posted and accurate by accessing http://www.atwoodsystems.com/syslinks.cfm

Materials finaling process

Here are things to do to help expedite the Materials Finaling process.

- All reports created in MIT should be verified and sent to the web prior to sending in for review.
- One hard copy of all reports for each project ID needs to be printed and submitted for review.
- Once the reports are posted on the web, be sure to print all the reports. All region generated reports are now in the MIT system (e.g. cylinder breaks, asphalt QMP reports).
- Call one of the region or local program materials support staff so they can generate an index from the MIT LAN system. A copy of the index will be sent to the Project Leader so that all reports are included in test report record.
- Submit the Materials Diary and all reports along with the index to the region materials support staff for review.

Support

Support website	http://www.atwoodsystems.com/wisdot/
E-mail address	support@atwoodsystems.com
Telephone number	1-877-518-1920 (toll free)

North Central Region
STH 156, Clintonville – STH 29, Shawano County
Contractor – RC Excavating, Inc.
Project Leader – Dave Julson, EMCS, Inc.
Project Manager – Jim Volkmann
Project Supervisor – Anna Wisner

Backing up FieldManager, FIT, and MIT data
Weekly backups are recommended!

It is critical that WisDOT and consultant staff perform weekly backups of their FieldManager, FIT and MIT databases. Below is a semi-automated process that the Project Leader can setup and run from an USB drive or external hard drive.

To setup the backup (contact BITS Level 2 ACM support for assistance)

1. Create a folder on your USB drive named \ACMApplications
2. Copy c:\acmapplications\backup*.* to USB drive\ACMApplications

To run a backup

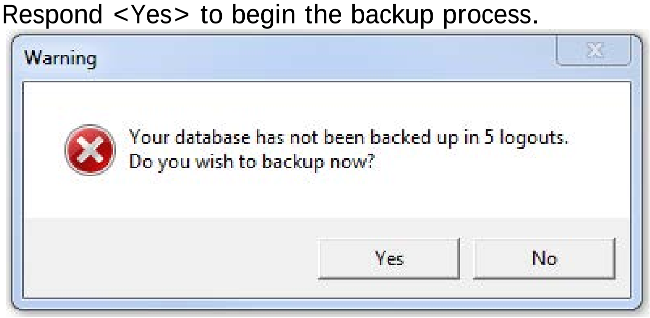
1. Go to USB Drive\ACMApplications
    a. Double click on ACMBackup.bat to backup the project databases.
    b. Double click on ACMBackup_WithUserProfile.bat to backup the project databases plus the current user profile.
2. A folder will be created on the USB or external hard drive with a date/time stamp
   Example: \ACMApplications\Backup\20160420115631\
3. The folders and files noted in the table below will be backed up.

Folder/files	Description	Backup batch file
C:\users\userprofile	Current user's profile	ACMBackup_WithUserProfile.bat
C:\ProgramData\AtwoodSystems\FIT\database	Field Information Tracking database(s)	ACMBackup.bat
C:\ProgramData\AtwoodSystems\MIT\database	Materials Information Tracking database	ACMBackup.bat
C:\ProgramData\FieldBook\database	FieldBook database	ACMBackup.bat
C:\ProgramData\FieldManager\database	FieldManager database(s)	ACMBackup.bat

Automatic prompt to backup the FieldManager database only

Upon exiting your FieldManager database for the 5th time, a *Warning* window will appear prompting you to backup.

1. Respond <Yes> to begin the backup process.



2. The *Backup Database* window will appear. Select <Backup>
3. If any FieldManager windows are open, you will be asked to close them before proceeding. Select <Yes>.
4. A window will appear stating the backup was completed successfully. Select <OK>
   NOTE: The FieldManager database backup copy is saved to C:\ProgramData\FieldManager\database\Backup
5. A window will appear to copy the backup to an additional location. Click <Yes> to continue and <Browse> to an external USB or hard drive to save an additional copy of the FieldManager database backup.
6. <Close> the *Backup Database* window when the process is complete.

NOTE: If the contract computer experiences hardware or software issues and no backups were performed, work with BITS Level 2 ACM support staff and the AASHTOWare Project Administrators to see if the FieldManager contract can be restored. FIT and MIT data would most likely be lost. Contract restores are a very time consuming process. Remember that if weekly backups are performed, a contract restore from a data back is relatively easy to complete.

Don't forget to keep your backup media offsite in case a disaster occurs!

Support contacts

Name		Telephone number	Email address
AASHTOWare Project Administrators Statewide AASHTOWare Project application support and server administration. Handle issues as noted in the guide directly (bad contract transfers, missing vendors, data sync issues between FieldManager and AASHTOWare Project CAS, Mobile Inspector license availability, etc.). AASHTOWare Project Administrators work directly with the contract specialists and local program contacts listed below for elevated issues.			
David Castleberg	Madison	608-264-7606	david.castleberg@dot.wi.gov
Annette Czerneski	Wisconsin Rapids	715-421-7319 or 715-459-4773 (M)	annette.czerneski@dot.wi.gov
Contract Specialists State project contract administration including assistance with contract modifications, estimates, site time and events, adding projects or categories to an active contract, liquidated damages, retainage, and other issues.			
Priscilla Abbott	SWR Edgerton	608-884-1234	priscilla.abbott@dot.wi.gov
Kelly Addison	SWR Madison	608-246-7914 or 608-575-7810 (M)	kelly.addison@dot.wi.gov
Paul Butler	NER Green Bay	920-492-5699	paul.butler@dot.wi.gov
Diane Cichy	NCR Wisconsin Rapids	715-421-8036	diane.cichy@dot.wi.gov
Jennifer Fowler	SWR La Crosse	608-789-5537	jennifer.fowler@dot.wi.gov
Kris Goodwill	NWR Superior	715-392-7956	kris.goodwill@dot.wi.gov
Jennifer Oldenburg	NWR Eau Claire	715-855-7662 or 715-225-9592 (M)	jennifer.oldenburg@dot.wi.gov
Karen Roberts	SER Waukesha	262-548-8650	karen.roberts@dot.wi.gov
Jennifer Trudeau	NCR Rhinelander	715-365-5723	jennifer.trudeau@dot.wi.gov
Jennifer Zavada	NER Green Bay	920-492-5720	jennifer.zavada@dot.wi.gov
Local Program Contacts for Construction Administration support Local program project contract administration including assistance with contract modifications, estimates, site time and events, adding projects or categories to an active contract, liquidated damages, retainage, and other issues.			
Sandi Villiesse	Statewide Local Program	414-750-1485 (M & text msg.)	sandra.villiessse@dot.wi.gov
Kathy Busack	SEL - DAAR	414-225-9817	kathy.busack@daarcorp.com
Chris Ehlert	NWL - KL Engineering	715-231-1600	cehlert@klengineering.com
Scott LaCoursiere	SWL - OTIE	608-243-6471	slacoursiere@otie.com
Mike Novey	NCL - DAAR	608-334-5215	michael.novey@daarcorp.com
Courtney Chlopek	NEL - JT Engineering	920-468-4771	courtneychlopek@jt-engineering.com
BITS Level 2 ACM Support Staff **Through July 31, 2016,** contact BITS Level 2 ACM Support staff to schedule an appointment for software updates. Contact the WisDOT IT Service Desk at 1-800-362-3050 for software support issues.			
Kristie Ambrosius	Green Bay	920-492-5706 or 920-370-9451 (M)	kristiea.ambrosius@dot.wi.gov
Adam Bleskacek	Eau Claire	715-833-5574 or 715-817-6801 (M)	adam.bleskacek@dot.wi.gov
Peter Dobrogowski	Waukesha	262-548-8656 or 414-750-2214 (M)	peter.dobrogowski@dot.wi.gov
Adam Gremminger	Wisconsin Rapids	715-421-7303 or 715-579-9307 (M)	adam.gremminger@dot.wi.gov
Tim Hintz	Madison	608-266-1414 or 608-516-1034 (M)	tim.hintz@dot.wi.gov
Richard Marko	Rhinelander	715-365-5726 or 715-490-0009 (M)	richard.marko@dot.wi.gov
Steve Nies	Green Bay	920-492-5662 or 920-360-3610 (M)	stephen.nies@dot.wi.gov
Mark Soleimani	Madison	608-266-5167 or 608-513-5893 (M)	mark.soleimani@dot.wi.gov
Theresa Vydrzal	La Crosse	608-789-7867 or 608-792-0083 (M)	theresa.vydrzal@dot.wi.gov
Sherry Wheaton	Superior	715-392-7942 or 715-225-9458 (M)	sherry.wheaton@dot.wi.gov
WisDOT IT Service Desk **After August 1, 2016**, open a ticket through the WisDOT IT Service Desk to contact BITS L2 ACM support for software installs AND software support issues.			
WisDOT IT Service Desk		1-800-362-3050 (toll free) OR 608-264-9434	DOTITServiceDesk@dot.wi.gov