

# **Field Management TAG Meeting**

## **- Minutes -**

September 7, 2003  
Burlington, Vermont

The Field Management Technical Advisory Group (TAG) meeting was called to order at 8:30 AM. This was the group's second meeting since the TAG was formed in December, 2001. Those in attendance are listed below.

A conference call meeting was held on September 2 to allow members that could not attend the meeting in Burlington, Vermont to participate in some of the key discussions and to cut down on the length of time for the meeting. Elections were conducted at the September 2 meeting and the results were shared. Kevin Fox from the Michigan DIT was re-elected to serve a second term as the Coordinator, and Janet Wastenev from the Iowa DOT was elected as the Assistant Coordinator. The meeting minutes from last year's TAG meeting in Austin, Texas were also approved at the conference call meeting.

The mission statement was reviewed and accepted without any changes. The mission statement is as follows:

To support and enhance AASHTO's Trns.port FieldManager suite of software by advising the Trns.port Users Group (TUG) and the Trns.port Task Force on decisions relating to direction, support and services required for effective management of construction projects in the field.

The TAG short range goals were reviewed and updated as follows:

- Serve as resource to the FieldManager / SiteManager Interface TRT.
- Address issues related to the development of new FieldManager upgrades through release 4.0.
- Serve as resource to the FieldNet Release 2.0 Project TRT.
- Address issues related to the development of the Contractor Performance Evaluation (CPE) enhancement.
- Assess need for construction progress reporting.
- Assess need for FieldManager/LIMS interface.

The TAG long range goals were reviewed and updated as follows:

- Ensure FieldManager continues to be upgraded and enhanced to effectively meet the users' needs.
- Develop recommendation for daily report (IDR) attachment tools.
- Education of the AASHTO community as to available FieldManager products and the business functionality and benefits the software provides to users.

Conchi Ossa from Info Tech gave an overview and status of several new FieldManager upgrades currently under development. The upgrades are designated as releases 3.3, 3.4, 3.5 and 4.0. The various enhancements and TMRs being addressed were reviewed. Highlights of the upgrades include:

- Oracle database option.
- SiteManager interface.
- Contract modification signature history.
- Ability to assign multiple contractors to a single item.
- Ability to track quantities placed by contractors.
- Enhanced security features.
- Many additional user interface features.

Chad Schafer from Info Tech gave an update of FieldManager's FieldPad component. FieldPad release 3.3 enhancements were reviewed including an updated GUI containing tabbed windows and dropdown selections. Release 3.3 contains a copy IDR function, weather drop down carry over, and improved material tracking. Info Tech is also currently exploring wireless connectivity and various functional improvements including attachments and importing/exporting files.

Andres Marin from Info Tech gave an overview and status of the FieldNet 2.0 enhancement project. Delivery is planned for May, 2005. The enhancement list was reviewed and highlights include:

- Validation that files are correctly transferred.
- Audit trail via web for transferred files.
- Encryption and security of data during transfer.
- Automatically send read-only copies of contracts to contractors.
- Infrastructure for future data transfers such as FieldManager / SiteManager interface.

Andres also gave an overview and status of the FieldManager / SiteManager Interface project. Delivery is planned for the FieldManager and SiteManager upgrades being released in February, 2004. Benefits of the interface include:

- Increased flexibility and options for construction management in the field.
- Allows DOTs using SiteManager the ability to utilize FieldManager at DOT field offices, local agency and/or consultant facilities.
- Provides migration path for CAS states using FieldManager.
- Provides foundation for possible convergence of SiteManager and FieldManager in the future.

David Castleberg from the Wisconsin DOT gave a presentation on FieldManager use in Wisconsin. Wisconsin has been using the FieldManager suite since 1997 and has about 440 users running the main FieldManager component, 56 users running FieldBook, and about 490 FieldNet users. Wisconsin's user base is a mix of DOT staff and consultants. FieldManager processes Wisconsin's entire \$650 million annual construction program consisting of about 470 DOT let contracts each year.

Cliff Farr from the Michigan DOT gave a presentation on distributing FieldManager contracts to contractors. Michigan is implementing a policy of providing contractors with electronic read-only project files which are created by FieldManager. The files are provided to both prime and subcontractors upon request for any construction project the contractor is working on. Benefits of the new policy include better communication between managing offices and contractors which has resulted in improved managing office/contractor relationships. The policy also saves a significant amount of time due to a substantial reduction in telephone calls, mailings, and faxes.

The ballot item winners from last year's voting were reviewed. A total of five items will be included in FieldManager release 3.5a which is scheduled for delivery in March, 2004. The items are as follows:

5037: Add project and category subtotals to pay estimate report in project format.

5923: Keep signature history for each contract modification.

5932: Add contract modification number column to the contract item list window.

5933: Customization of item sort order on estimate reports.

5995: Only update Cont Mod revision number when the Cont Mod is generated.

The current FieldManager Ballot Item list (25 items) was reviewed. Revisions were made to five of the FieldManager ballot items as follows:

5076: When a user attempts to transfer a contract file which is larger than 1.4MB (usually has sketches), add the ability to separate the file so it can be placed on multiple diskettes. This applies to all types of FieldBook import and export files created by FieldManager and FieldBook.

5926: When importing contract init, transfer or read-only copy of contract file, indicate what contracts are contained in the file and whether they are regular read-only, contractor read-only or a working copy. Display this information during the import process.

5931: Add a box to the IDR Report labeled Electronic Attachments (or alternate label by mutual agreement) that displays the number of attachments associated with the IDR.

5935: Add an option to the ACP which would allow an agency to disable stockpile "stealing", where the recovery of a stockpiled item can draw from other items' allotment of the same stockpile. The change would insulate each stockpile item into it's own decrementation process.

5994: Add an option to allow FieldManager users to assign items to contractors by first selecting the contractor, and then assigning items to the selected contractor. Currently the user must first select each item one at a time to assign the subcontractor. Current functionality will remain the same. This enhancement will be an additional option. Add 'Contractor' button to the application toolbar between the 'Docu' and 'IDRs' buttons. When selected, the functionality will be similar to adding items to materials via the Materials functionality area.

Two new ballot items were defined as follows:

#1: Add a new level of inquiries that provides information spanning multiple contracts. This will be called System Level Inquiries (or alternative name by mutual agreement). Add an option to the Utilities menu called System Level Inquiries to display only those inquiries in the system level inquiries list. Place a new button to access the system level inquiries list after the Quick Queries fly out and before the Filter button in the window toolbar on the contracts list window only. The system level inquiries list will be similar to the current inquiries list except it will contain only inquiries at the system level. These inquiries will allow users to see the status of contracts on an overall view rather than choosing each contract separately. This would be especially useful for management in both the field and at the central office. Include the following inquiries in the new System Level Inquiries List:

- Contract Modifications Summary (or alternative name by mutual agreement). Include a selection window of contracts with a select all option. Inquiry should display the selected information in the same format as the current Contract Modifications Summary inquiry. Order by contract ID.
- Contract Status by Contract (or alternative name by mutual agreement). Include a selection window of valid contracts with a select all option. Display information for each contract. Order by Contract. Include the following columns:
  - Contract ID.
  - Award Amount.
  - Current Contract Amount.
  - Amount Paid to Date.
  - % Current Complete.
  - Net Change Amount (Pend).
  - Quantity Unpaid Dollar Amount.
- Contract Modifications that are Pending (or alternative name by mutual agreement). Include a selection window of contracts with a select all option. Inquiry should display the selected information in the same format as the current Contract Modifications Summary inquiry, except that those cont mods that are approved are excluded. Order by contract ID.

#2: On the IDR – Contractors tab, add the ability to associate each individual Personnel and Equipment entry to a specific work item. Also add this new information to the IDR Report.

It was recommended that the following ballot item be removed:

5937: Expand screens system wide to use 800 x 600 real estate.

The following four ballot items were endorsed:

5920: Option to turn off automatic print.

5994: Assign items to subcontractors by first selecting the subcontractor.

6046: FieldManager needs to allow Inc/Dec Cont Mods for Lump Sum items.

6299: Add Report Template Facility in FieldManager.

The following were in attendance (apologies to anyone missed or name is misspelled):

Chris Achilles, VT  
Chris Bump, VT  
Dave Carrow, ITI  
David Castleberg, WI  
Reginald Dausat, LA  
Robert DuPont, LA  
Cliff Farr, MI  
Marty Flores, FHWA  
Kevin Fox, MI  
Durwood Graham, MS  
Steve Hall, ME

Frank Hartley, NY  
Jeremy Kampeter, MO  
Loren Lemmen, MI  
Andres Marin, ITI  
Richard Meador, MO  
Conchi Ossa, ITI  
Chad Schafer, ITI  
John Tregoe, FHWA  
Wayne Weick, LA  
Janet Weigand, VA  
Greg Wilkinson, MS

With no other discussion, the meeting adjourned at 12:15 PM.