

Field Management TAG Meeting

- Minutes -

October 13, 2004

Mobile, Alabama

The Field Management Technical Advisory Group (TAG) meeting was called to order at 8:00 AM. Those in attendance are listed below. A conference call meeting was held on September 30 to allow members that could not attend the meeting in Mobile to participate in some of the key discussions and to cut down on the length of time for the meeting. The meeting minutes from last year's TAG meeting in Burlington, Vermont were approved at the conference call meeting. The mission statement was reviewed and updated at the conference call meeting and the new statement was shared. The updated 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, training and services required for effective management of construction projects in the field.

The TAG short range goals were reviewed and updated at the conference call meeting and the updates were shared. The updated short range goals are as follows:

1. Address issues related to the development of new FieldManager upgrades.
2. Serve as resource to the FieldNet release 2.0 Project Technical Review Team (TRT).
3. Serve as resource to the Contractor Performance Evaluation (CPE) enhancement Technical Review Team (TRT).
4. Address issues related to the Materials Management System project.
5. Assess need for management level construction progress reporting.

The TAG long range goals were reviewed and updated at the conference call meeting and the updates were shared. The updated long range goals are as follows:

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

Ian Baldwin from Info Tech gave a presentation on the SiteManager-FieldManager Interface (SFI). The SFI was released for production in February 2004 and is available in the current SiteManager and FieldManager production releases. The interface workflow was reviewed and discussion followed on current and potential uses. Benefits of the interface include:

- Increased flexibility and options for construction management in the field.
- Allows agencies using SiteManager the ability to utilize FieldManager at consultant facilities, local facilities, and/or agency field offices.

- Provides migration path for CAS states using FieldManager.
- Long range evolution to a modular construction offering as part of the Next Generation Trns*port initiative.

Ian Baldwin followed up with an overview and status of several upcoming FieldManager upgrades. The upgrades are designated as releases 3.4a-2, 4.0a, and 4.xa. Many of the enhancements and TMRs being addressed in the new releases were reviewed. Highlights include:

- System wide inquiries.
- Interaction with FieldNet 2.0.
- Support for Sybase SQL Anywhere 8.
- FieldPad workflow improvements.
- Functional level attachments.
- Contractor Performance Evaluation enhancements.

Ian Baldwin also gave an overview and status of the FieldNet 2.0 enhancement project. Delivery is planned for June, 2005. An architectural overview was presented and a summary of the various functions and benefits provided in FieldNet 2.0 were reviewed. Highlights include:

- Automate and simplify communication between field offices, regional offices, and the central office.
- Automation of data movement between FieldManager, FieldBook, and CAS.
- Approval processes for contract modifications and pay estimates.
- Tracking of contracts, contract modifications, and pay estimates.
- Scalable and flexible architectural design for future enhancements.
- Data transfers will be authenticated, authorized, reliable, secure, accurately routed, and delivered.

Marty Foster from the Michigan DOT gave an overview of the Materials Management System project. The objective of this project is to provide for automated methods to manage, standardize, and exchange material information between Trns*port components containing construction material related information and laboratory information management systems. A proposal is currently being developed to define the detailed business needs and establish the software requirements. Agencies interested in participating on the steering committee and/or participating in the funding for this project should contact Marty or Denis Glascock.

The ballot item winners from last year's voting were reviewed. A total of two items will be included in FieldManager release 4.x which is scheduled for delivery in June, 2005. The items are as follows:

5926: Show contract ID and type during contract import.

5994: Assign items to contractors.

Reviewed the current FieldManager Suite Ballot Item list (13 items), FieldNet Ballot Item list (7 items) and two items from the Major & General Enhancements Ballot Item list. Revisions were made to four of the ballot items as follows:

5998: Category: Trns*port FieldManager Suite.

Short Description: Add the ability to configure the name of common labels.

Long Description: Add an Agency Configuration Program (ACP) option where agencies can define standard system labels which display in FieldManager. This includes labels for the Inspector Daily Report and the Contract Modification. For example, agencies could change the Inspector Daily Report labels to Daily Work Report. The custom labels would be reflected in displays throughout the software including all screens, reports, inquiries, and messages. For reports that have a button on the application tool bar, the ACP will also include the ability to define the button label. For example, agencies could change the IDRs button label to DWRs. Each new label field in the ACP will contain a default value which will be defined during the enhancement design.

7950: Category: Move from Trns*port SiteManager Enhancements to Trns*port Major & General Enhancements.

7969: Category: Trns*port Major & General Enhancements.

* This TMR should be included in the Proposed Ballot Items for 2004 as it currently is not on the list available via Cloverleaf.

8102: Category: Move from Trns*port FieldNet to Trns*port FieldManager Suite.

Short Description: Enable the state of built in filters to be saved based on user option.

Long Description: In FieldManager and FieldBook, add an option to the Utilities - User Preferences - List Window tab that would allow a user to save built in filter settings when closing a list. For example, within the Item List, if a user had selected a project to filter on, if they left the list window, the filter would be applied when they return to the list window. This does not include saved filters.

One new ballot item was defined as follows:

#1: Category: Trns*port Major & General Enhancements.

Short Description: Transfer FieldManager IDR and Daily Dairy detail data to SiteManager.

Long Description: Enhance the SiteManager-FieldManager Interface to include the transfer of FieldManager Inspector Daily Reports (IDR) detail data to SiteManager Daily Work Reports (DWR), and also the transfer of Daily Diary detail data from FieldManager to SiteManager. This would allow for the creation

of the estimate within SiteManager as an option to generating the estimate in FieldManager and having the estimate data transferred as a single DWR into SiteManager, and then requiring the estimate to be regenerated within SiteManager.

Benefits of this for agencies that use a mix of SiteManager and FieldManager is the ability to have all IDR, DWR, and Daily Diary information stored within one system, and the ability to generate estimates within one system. In addition to benefits for the agency, consultants using FieldManager for another agency that doesn't require the use of SiteManager would not require retraining of field personnel generating daily reports.

There were not any ballot items recommend for removal.

The following seven ballot items were endorsed:

- 6299 Add Report Customization Functionality in FieldManager.
- 7950 Enable viewing stockpile detailed information within SiteManager for SFI.
- 7969 Map item to subcontractor relationships between SM and FM.
- 8092 Option to sort items on IDR's and Cont Mod's.
- 8095 Add Sort Option To Inquiries Containing Items.
- 8099 Add a FieldNet Mailbox button.
- 8101 Add a save/close button to all FieldNet web entry screens.

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

Chris Achilles, VT	Dave Hosking, VT
Zachary Albaugh, DC	Jim Johnson, FL
Ian Baldwin, ITI	Jeremy Kampeter, MO
Pamela Barry, ITI	Loren Lemmen, MI
Guy Berthiaume, ME	Jim Lilkendey, ITI
Pat Brown, ME	Kathy Lovett, FL
Joe Bruewer, MI	Monelle McKay, ITI
Dave Carrow, ITI	Gina Merseal, ITI
David Castleberg, WI	Conchi Ossa, ITI
Reggie Dausat, LA	Brad Parks, ITI
Melanie Douglass, NE	Joe Phelan, ITI
Cliff Farr, MI	Hollie Ross, ITI
Marty Foster, MI	Tom Rothrock, ITI
Kevin Fox, MI	Kenneth Standley, FL
Denis Glascock, MO	Charles Thurmon, OK
Sidney Hodgson, ITI	Ward Zeibe, ITI

With no other discussion, the meeting adjourned at 11:25 AM.