

## **Bureau of Project Development Procedure FieldManager Contractor Read-Only Copies**

The Bureau of Project Development has implemented a new WisDOT procedure of providing contractors FieldManager “Contractor Read-Only” electronic copies of construction contracts upon request by the contractor. This procedure applies to all construction contracts let by WisDOT, whether managed by the department or consultants.

Prime contractors and subcontractors may request to receive Contractor Read-Only copies of contracts they are working on. It is recommended that contractors submit the request at the pre-construction conference. Managing offices (office administering the contract) should use FieldManager’s read-only distribution function, which will automatically send Contractor Read-Only copies whenever Construction Pay Estimate Reports are generated. On rare occasions contractors may also request an additional Contractor Read-Only copy during a time frame that is outside of the normal Construction Pay Estimate Report process. These Contractor Read-Only copies can be sent upon mutual agreement of the managing office.

NOTE: On occasion a Pay Estimate Report may not be approved for payment and must be revised and regenerated by the Managing office. A revised Pay Estimate Report will be sent with a new Read-Only copy. All Pay Estimate Report information is considered as an estimate of payment until such time as the approved payment voucher is processed. A copy of the payment voucher is mailed to the prime contractor with their payment.

This procedure encourages managing offices and contractors to take advantage of the following Contractor Read-Only benefits:

- Improved communication between managing offices and contractors
- Reduced volume of telephone calls, mailings, and faxes
- Reduced time required to gather information for contractors
- Reduced volume of questions from contractors
- More accurate and timely information from contractors
- Earlier identification of errors and concerns
- More efficient discussions concerning item status reviews
- More efficient review of contract modifications
- Timelier responses from project staff during the busy construction season
- Improved quality and timeliness of IDRs
- Improved contract finalization process
- Elimination of some contractor spreadsheets and hand-generated data
- Elimination of difficulties related to viewing information received due to poor quality faxes
- Improved managing office/contractor relationships

## Managing Office Information

Prior to completing the set-up process described below the project leader must contact Kristen McDaniel at 608-261-2561 or [kristen.mcdaniel@dot.wi.gov](mailto:kristen.mcdaniel@dot.wi.gov) and cc. David Castleberg at 608-264-7606 or [david.castleberg@dot.wi.gov](mailto:david.castleberg@dot.wi.gov) to request an updated FieldManager Agency Configuration Program that will enable the Contractor Read-Only function.

Following are the steps required to automatically send Contractor Read-Only copies to contractors:

1. From the FieldManager application toolbar, click the **Docu** button.
2. Click the **R/O Distribution** tab.
3. Under the “Contractor Read-Only List Distributed Upon Estimate Generation” column, click the **Add Recipient** button.
4. Highlight the contractor(s) to be added and click the **Select** button.
5. From the Window toolbar, click the **Save/Close** button.

To send an additional Contractor Read-Only copy, use the following procedure:

1. From the Menu Bar, click **File**.
2. Click **Export - Transfer Contracts**.
3. In the window asking if you wish to use FieldNet, click the **Yes** button.
4. Highlight the contract to be exported and click the **Select** button.
5. Select the **Create a contractor read-only copy of the contract** radio button and click the **OK** button.
6. Highlight the contractor to receive the export and click the **Select** button.
7. Click on the **FN Mailbox** button and then click the **Send Outbox** button.

## Contractor Information

Contractors must obtain a FieldManager license to receive Contractor Read-Only copies. Two different applications are available depending upon the needs of the contractor. To simply view the data, select the FieldManager Read-Only application. If in addition there is a need to manage the data, create discrepancy reports, establish subcontracts, etc., choose the FieldManager Contractor application.

Both [options](#) are available for [licensing](#) directly from [Info Tech, Inc.](#)

When installing FieldManager, contractors must configure the software as specified in the *FieldManager installation and conversion guide* supplied with the licensed copy of

FieldManager. The installation process will require the contractor to have an Agency Configuration Program and FieldNet user id that must be obtained from the department.

The Agency Configuration Program sets up FieldManager with the WisDOT specific parameters. FieldNet is a webservice administered by the department to manage the transfer of contract information. The FieldNet user id is for a mailbox on the FieldNet webserver. A separate FieldNet user id is required for each licensed FieldManager installation.

To obtain a FieldNet user id and Agency Configuration Program, contact Kristen McDaniel at 608-261-2561 or [kristen.mcdaniel@dot.wi.gov](mailto:kristen.mcdaniel@dot.wi.gov) . With the request please provide the following:

- Contractor name
- Contractor WisDOT Vendor id
- Contact name
- Contact phone number
- Date of purchase of FieldManager license

After installing FieldManager the contractor must contact the Managing Office to request that they begin sending Read-Only contracts. As part of the request, inform the project leader to contact central office for an updated FieldManager Agency Configuration Program (described in the Managing Office section above).

Contractors must keep their release of FieldManager current to continue receiving Contractor Read-Only copies. All license types include delivery of new FieldManager releases issued during the license period.

If you have any questions regarding this information, please contact David Castleberg at 608-264-7606 or Kristen McDaniel at 608-261-2561

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