Daily Reports Quick Reference Guide

This topic provides a reference for the Project Center **Daily Reports** activity center.

Purpose

Use daily reports to create an official record of the jobsite status and activities for the day.

Audience

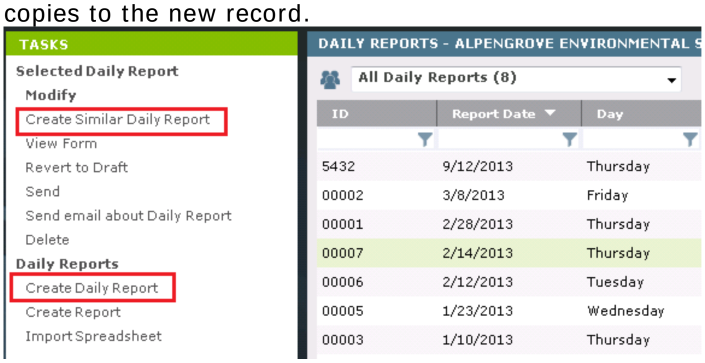
Construction superintendents

Key Features

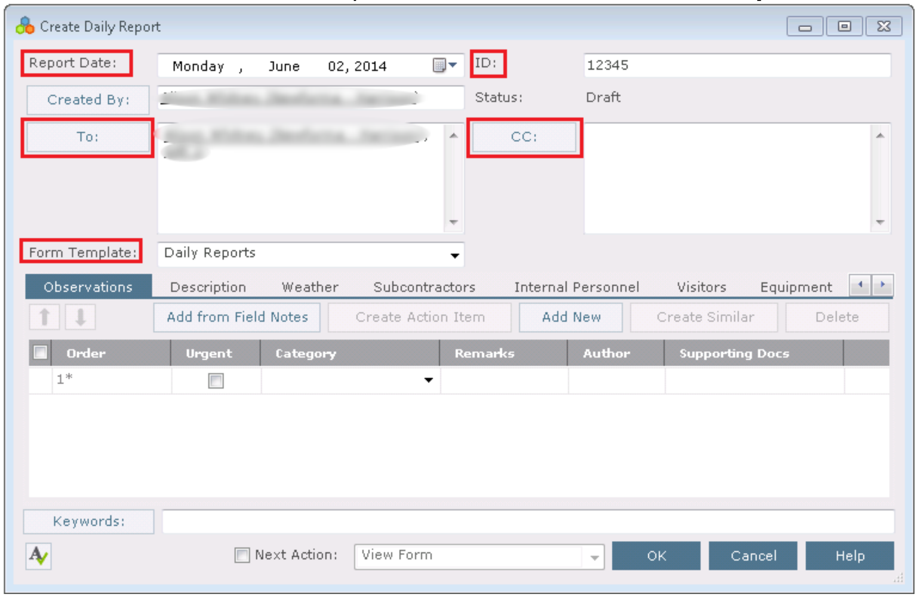
- Integration with **Field Notes mobile app** for collecting team observations and photos on the go.
- Copy forward the previous day's report for easy editing.
- Embedded action items to track accountability for follow-up activity.
- Record work progress, deliveries, major events, weather observations, subcontractor headcount & activities, internal personnel, visitors and rental equipment.
- Draft and Final status to protect report from inadvertent changes.
- Full functionality through the Info Exchange website interface.

To create a daily report

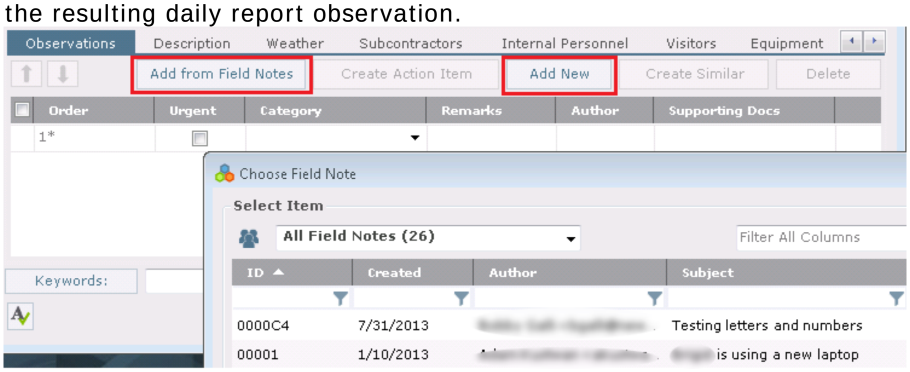
1. In the **Daily Reports** activity center, select **Create Daily Report** in the **Tasks** panel. Alternately, highlight an existing report and select **Create Similar Daily Report** to save data entry time. All information (except the ID) copies to the new record.



2. In the **Create Daily Report dialog box**, fill in the **Report Date** and **ID** and add contacts in the **To** and **CC** fields for distribution of the final report. Select the Word **Form Template** that will be merged for the final report.

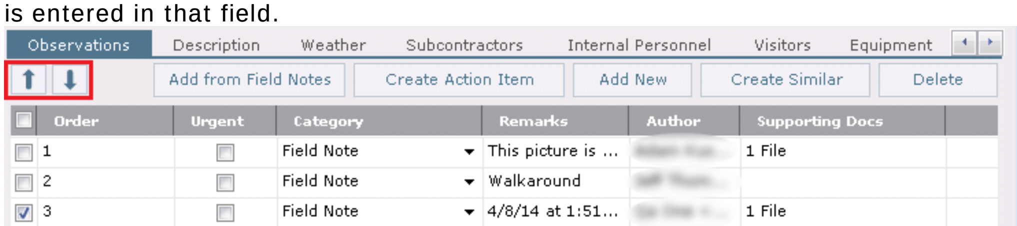


3. Select the **Observations** tab and add observations using the **Add New** button for a blank row, or **Add from Field Notes** to select from the **Field Notes** activity center. The source field note is not affected by edits made in the resulting daily report observation.

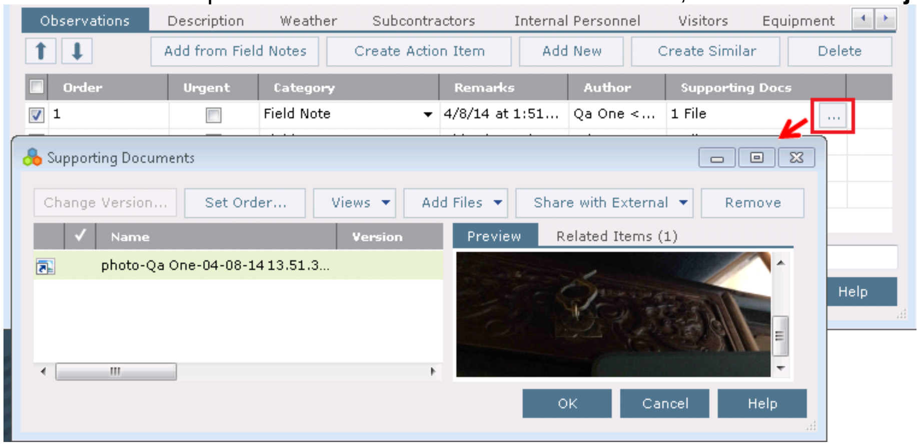


4. Add data as needed for the observation.

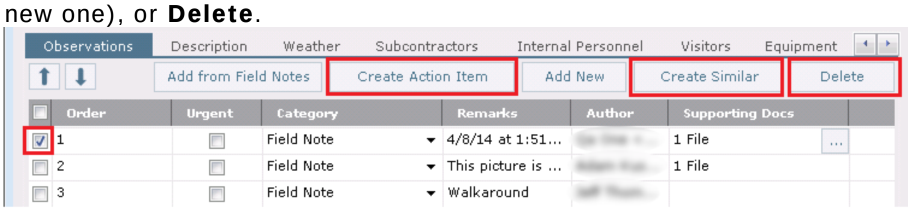
- To change the order of the observations, select the checkbox for an observation and use the up/down arrows to change its position.
- **Category** is a required field. The list is controlled in keywords by the Global Administrator.
- Add a description of the event, activity or issue in the **Remarks** field. Use the ellipsis button to open a larger window for editing the field.
- **Author** defaults the name of the current user. If added from field notes, the author of the field note is entered in that field.



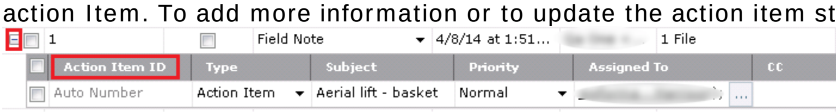
5. Any media files brought in via field notes are attached to the observation row in the **Supporting Documents** field. Use the ellipsis button to view the attached media, or to browse **Project Files** to select additional files.



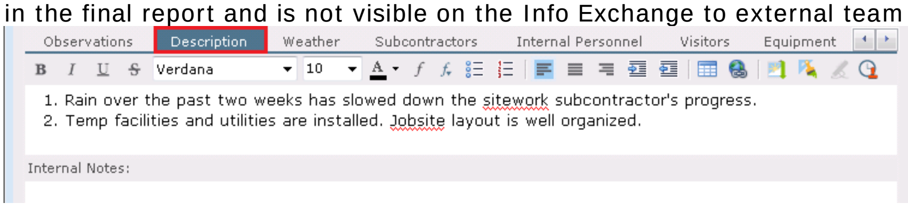
6. Other items can be added in observations. Select the checkbox of an observation item. Use the buttons on the **Observations** tab to either **Create Action Item**, **Create Similar** (which copies the observation row to add a new one), or **Delete**.



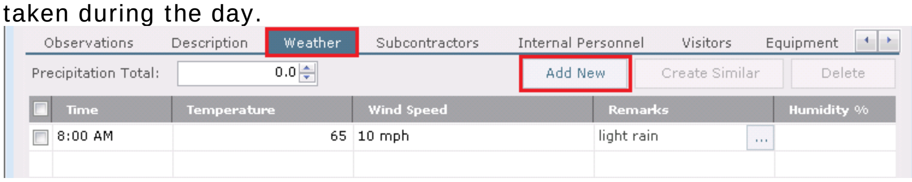
7. If you select **Create Action Item**, it embeds the action item on the **Observations** tab. The action item pane can be viewed or hidden using the expand/collapse button for the observation. Fill out the minimum fields for the action Item. To add more information or to update the action item status, use the **Action Item** activity center.



8. On the **Description** tab list overall comments about the day. Text in the **Internal Notes** section is not included in the final report and is not visible on the Info Exchange to external team members.

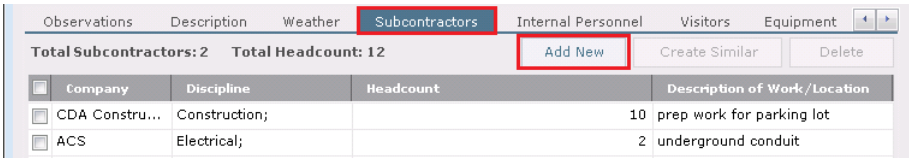


9. On the **Weather** tab select **Add New** to add weather data for the day. Add new rows for each weather reading taken during the day.



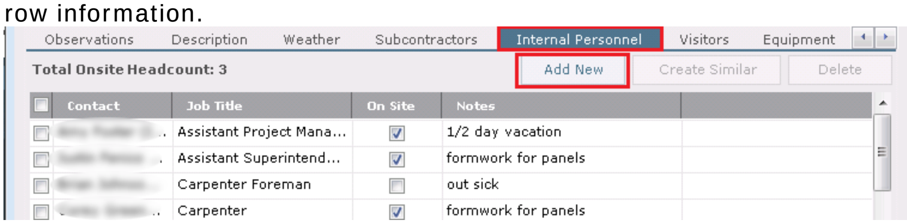
10. On the **Subcontractors** tab select **Add New** to add rows listing subcontractors on site for the day.

- Click in the **Company** field and use the ellipsis button to select a company from the **Choose Company dialog box**. The **Discipline** field fills in from the company record.
- Enter the **Headcount** for number of subcontractor employees on site, and enter text for **Description of Work** performed by the subcontractor.
- Subtotals at the top of the tab count the number of companies and subcontractor headcount based on the row information.



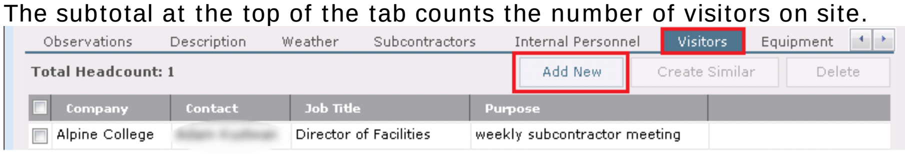
11. On the **Internal Personnel** tab select **Add New** button to add any internal personnel.

- Click in the **Contacts** field and use the ellipsis button to select contacts from the **Choose a Project Team Member dialog box**. The selection list is filtered to display internal team members. The **Job Title** field fills in from the contact record.
- Use the **On Site** checkbox to indicate whether the individual is at work that day. Enter text in **Notes** field to describe work performed.
- The subtotal at the top of the tab counts the number of employees on site that day based on the row information.

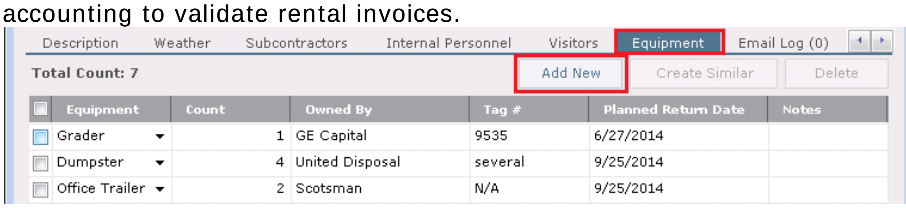


12. On the **Visitors** tab select **Add New** to add rows for any visitors on the job site for the day.

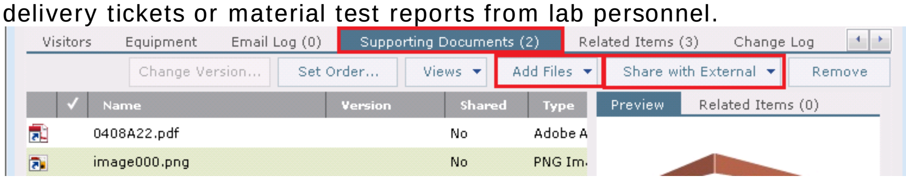
- Click in the **Company** or **Contact** field and use the ellipsis button to select the company or contact to add to the visitors list. The **Job Title** field fills in from the contact record. Alternatively, type the information into the field if the visitor is not a regular part of the team.
- Enter text in the **Purpose** field to describe the reason for the visit.
- The subtotal at the top of the tab counts the number of visitors on site.



13. On the **Equipment** tab select **Add New** to add rows listing any equipment on site for the day. You can select from the **Equipment** drop-down list or type in the equipment name. This information can be helpful for accounting to validate rental invoices.



14. Add files on the **Supporting Documents** tab as needed. They can be included as attachments to the final transmitted daily report. Examples are daily reports submitted by the subcontractors, safety incident reports, delivery tickets or material test reports from lab personnel.



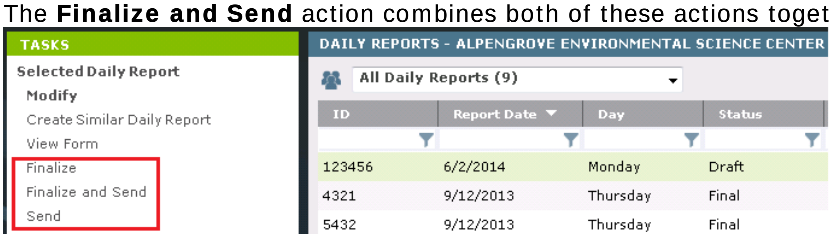
*In order for supporting documents to be visible to external team members on the Info Exchange website, each file must be specifically shared. Highlight the supporting document file name, select **Share with External** and select **Yes** to share the file.*

15. Select **OK** when done to save the report.

To finalize and distribute the daily report

The Finalize action changes the status of the site visit report to **Final**. That makes the record read-only and a PDF of the report is saved in the Project Files Record Copies folder. If changes are needed before sending, the report can be reverted to **Draft** (see below).

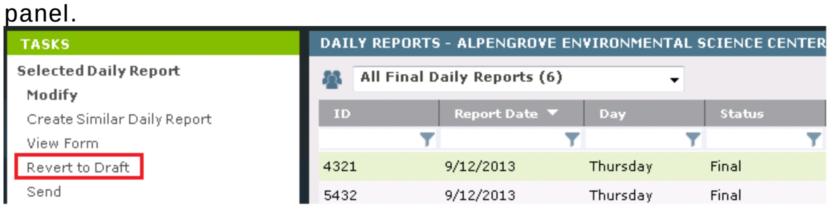
1. To finalize a daily report, highlight a draft daily report in the **Daily Reports** activity center and select **Finalize** from the **Tasks** panel.
2. Once finalized, the **Send** action takes you through the steps of distributing the report via email or Info Exchange. If you decide you are not ready to do this you can close the screen and perform this step later from the **Tasks** panel.
3. The **Finalize and Send** action combines both of these actions together.



To revert a daily report to draft status

If you need to make changes to a finalized daily report, use the **Revert to Draft** task.

1. Select the finalized daily report in the **Daily Reports** activity center and select **Revert to Draft** from the **Tasks** panel.



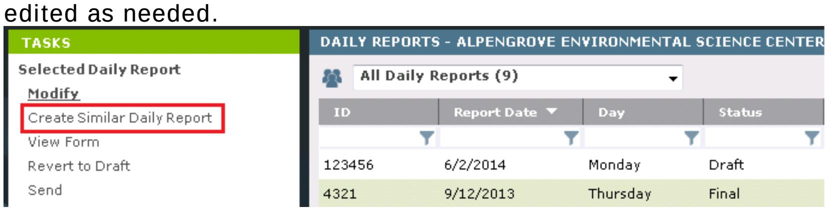
2. Make edits, re-finalize, and re-send the daily report. A new PDF of the revised report will be saved in the **Record Copies** folder (along with all previous versions) and latest version is displayed on the daily report's **Preview** tab.

*The **Change Log** tab shows the history of each finalization.*

To create the next daily report

Once a daily report is created and saved, you can use it as the basis for the next daily report within the same series.

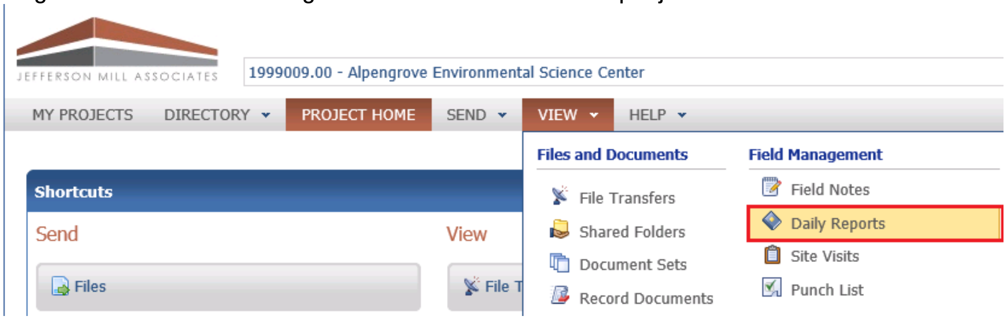
1. Highlight the daily report in the **Daily Reports** activity center select **Create Similar Daily Report** from the **Tasks** panel. This option saves data entry time when creating the next day's report. All information (except the **ID**, **Weather** tab info, **Supporting Documents** and **Related Items**) copies into the new record, and can be edited as needed.



To view daily reports on Info Exchange

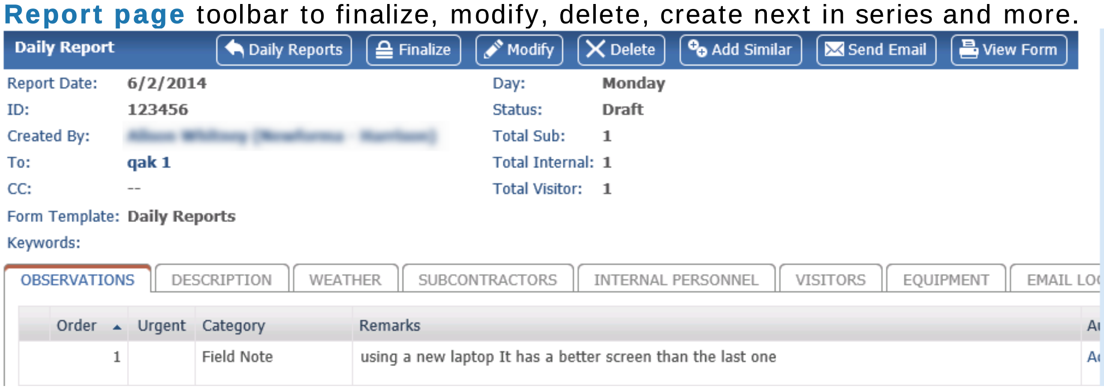
Both internal and external project team members can view, edit, and create daily reports from the Info Exchange website (depending on permissions).

1. Log into the Info Exchange website and select the project. Select **View > Field Management > Daily Reports**.



By default external users can only see daily reports they send or receive.

2. In the **Daily Reports log**, select a daily report to see the details. Use the buttons on the **Daily Report page** toolbar to finalize, modify, delete, create next in series and more.



*Supporting documents are available by default for internal users on the Info Exchange website. To share them with external users, the file has to be marked to **Share with External** from the daily report in Project Center.*