

Site Visits Quick Reference Guide

This topic provides a reference for the **Site Visits** activity center.

Purpose

Create trip reports for team members who visit the jobsite at regular intervals.

Audience

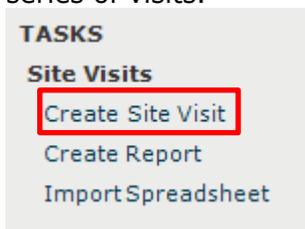
Construction corporate departments, such as Quality Assurance and Safety. Design professionals, such as architects and engineers.

Key Features

- Series of recurring visits with numbered items that continue between reports.
- Embedded action items to track accountability for follow-up activity.
- Draft and Final status to protect report from inadvertent changes.
- Full functionality through the Info Exchange website interface.

To create a new site visit

1. In the **Site Visits** activity center, select **Create Site Visit** in the **Tasks** panel. This creates a new series of visits.



- In the **Create Site Visit dialog box**, enter the **Visit Name** and **Visit ID**.

For a new series, the series name matches the visit name. After the first save, you can change each visit name, such as "October Regional Safety."

Create Site Visit

Visit Name: Monthly Safety Check | Visit ID: Auto Number

Created By: Adam Klose 24 (Jefferson Mill Associates 24) | Type: Safety

Form Template: Site Visits | Status: Draft

Distribution

To: | CC: |

Walkthrough

Start: Friday, April 24, 2020 | End: Friday, April 24, 2020

Participants: |

Observations | General | Supporting Documents (0) | Email Log (0) | Related Items (0) | Change Log

Add from Field Notes | Create Action Item | Add New | Create Similar | Delete

Item Number	Urgent	Category	SpaceName	Subject	Remarks
	<input type="checkbox"/>				

Keywords: |

Next Action: View Form | **OK** | Cancel | Help

- Select the **Type** of visit.

*The type you select controls the default form template and the list of categories on the **Observations** tab.*

- Complete the **Distribution** list.
- Enter the **Walkthrough** information including date, time and participants.
- Click **OK** to create the site visit.

To add site observations

You can add observations directly from the **Site Visits** activity center or you can pull them from the **Field Notes** activity center.

1. To add from notes taken in the field, click **Add from Field Notes** on the **Observations** tab. This allows you to choose notes from the **Field Notes** activity center.

2. To add new site observations, click **Add New**. This adds a line item to the observation list.
3. Select a **Category** from the dropdown list.

*The categories that appear are based on the **Type** chosen above.*

4. To add discussion notes, click in the **Discussion** field then click the button. In the **Discussion Items dialog box**, add new remarks or select from existing discussion entries. Click **OK** when finished.

5. To add weather observations and other comments, select the **General** tab and complete notes as needed.

To create similar site observations

You can easily create similar observations that allow information to carry over from observation to observation.

1. On the **Observations** tab, select the checkbox next to the observation and click **Create Similar**. A new line item with a copy of the observation information is created.

<input type="checkbox"/>	Item Number	Urgent	Category	SpaceName	Subject	Remarks
<input checked="" type="checkbox"/>	Auto Number	<input type="checkbox"/>		▼	ladder not extended	electrician

To create action items

You can create action items in the **Site Visit** activity center that are automatically related to the site visit.

1. On the **Observations** tab, select the checkbox next to the observation and click **Create Action Item**.

The screenshot shows the 'Observations' tab with a table of observations. The 'Create Action Item' button is highlighted with a red box. The table has columns: Item Number, Urgent, Category, SpaceName, Subject, and Remarks. One observation is visible with 'Auto Number' checked, 'Urgent' unchecked, 'Category' as a dropdown, 'SpaceName' as a dropdown, 'Subject' as 'ladder not extended', and 'Remarks' as 'electrician'.

2. The new action item appears in the grid under the observation. 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 Items** activity center.

The screenshot shows the 'Observations' tab with the 'Create Action Item' button highlighted in red. Below the observation table, a new grid for action items is visible, with its header row highlighted in red. The header row includes: Action Item ID, Type, Subject, Priority, Assigned To, CC, and Due Date. The first row in the grid has 'Auto Number' for Action Item ID, 'Action Item' for Type, 'electrician' for Subject, and 'Normal' for Priority.

To add supporting documents

Any files linked on the **Supporting Documents** tab can be included as attachments to the final transmitted site visit. Examples include sketches, referenced spec sections, site photos or OSHA standard excerpts.

1. Select the observation, then select the **Supporting Documents** tab.
2. Click **Add Files** to add any relevant files.

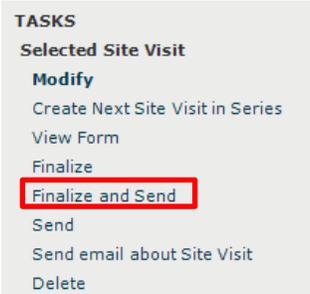
The screenshot shows the 'Supporting Documents' tab with a table of documents. The 'Share with External' dropdown menu is open, showing 'Yes' and 'No' options. The table has columns: Name, Shared, Type, and Size. One document is visible: 'M201.pdf', 'Yes', 'PDF File', '913 KB'.

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

To finalize site visit

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).

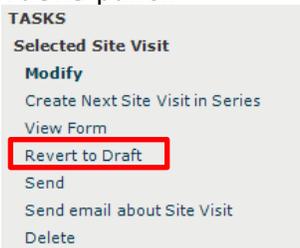
1. To finalize a site visit, highlight a draft site visit in the **Site Visits** activity center and select **Finalize** from the **Tasks** panel.
2. Once finalized, the **Send** action takes you through the steps of distributing the report via email or Info Exchange. If you decide you are not ready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



To revert a site visit to draft status

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

1. Select the finalized site visit in the **Site Visits** activity center and select **Revert to Draft** from the **Tasks** panel.



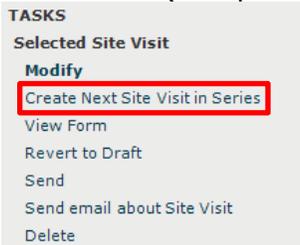
2. Make edits, re-finalize, and re-send the site visit. A new PDF of the revised report is saved in the **Record Copies** folder (along with all previous versions) and latest version is displayed on the site visit's **Preview** tab.

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

To create the next site visit in the series

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

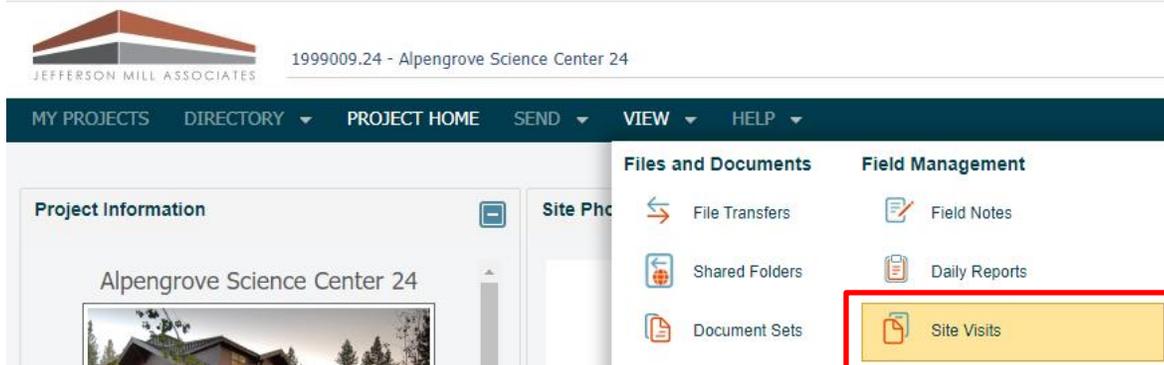
1. Highlight the site visit in the **Site Visits** activity center and select **Create Next Site Visit in Series** from the **Tasks** panel. This option saves data entry time when creating the next site visit. All information (except the **Visit ID**) copies into the new record and can be edited as needed.



To view site visits on Info Exchange

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

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



By default external users can only see site visits they are a party to.

2. In the **Site Visits log**, select the site visit **Start** date to see its details. Use the buttons on the **Site Visit page** toolbar to finalize, modify, delete, create next in series and more.

Site Visit

↶ Site Visits
Finalize
✎ Modify
✖ Delete
➦ Create Next In Series
✉ Send Email
📄 View Form

Visit Name:	Sarah's Site Visit 191216	Visit ID:	006
Date Created:	12/16/2019	Type:	Quality
Created By:	Adam Klose 24 (Jefferson Mill Associates 24)	Status:	Draft
Start:	12/16/2019 8:00 AM	End:	12/16/2019 5:00 PM
Participants:	Carolyn Hunter 24 (Hunter Electric 24) and 2 others	CC:	Adam Klose 24 (Jefferson Mill Associates 24)
To:	Bob Welder 24 (MacDougall Construction 24)		
Form Template:	Site Visits		
Keywords:			

OBSERVATIONS
GENERAL
EMAIL LOG
SUPPORTING DOCUMENTS
RELATED ITEMS
CHANGE LOG

	Item Number ↑	Urgent	Category	Space	Subject	Remarks
	006-001			10051 - Stair 1	Scuff on wall	Near stairs

*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 set to **Share with External** from the site visit in Project Center.*

User Notes

Here are some important notes to remember when working with site visits:

- Discussion builds a dated, threaded history of the observation development across visits. The most recent discussion item is displayed in the **Observation** grid.
- Text in the **Internal Notes** section is not included in the final report, and is not visible on the website to external team members.
- Make edits and re-finalize the site visit. A new PDF of the revised report will be saved in the **Record Copies** folder (along with all previous versions) and the latest version is displayed on the site visit's **Preview** tab.
- The **Change Log** tab shows the history of each finalization.