



# **Field Report**

The Field Reports are usually generated by the general contractor to document daily work progress and conditions on the job site. This form can also be used by other parties to document pertinent information from field or site visits. This instruction will provide information to Create and/or Edit a Field Report

#### **Create A New Field Report**

1. Within the project, click the **Forms** icon on the left navigation pane.



2. In the search area of the Form Types start to enter Field and select Field Report.



3. Select the **New** button in the upper right corner.

Field Reports shared with me	ew Print
You have no Field Reports yet	
Once you have access to Field Reports, they will show here. Create New Field Report	

4. Select your role on the project from the pick list in the **Project Role** field.

Project Role

5. Select the date of the field report from the calendar utility in the **Date** field.

Date							
03/02/2020							
<		Ma	arch 20	)20		>	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
01	02	03	04	05	06	07	
08	09	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30	31	01	02	03	04	
05	06	07	08	09	10	11	

6. Enter the subject for the report in the **Subject** field. If there is more than one company or multiple users from the same company creating field reports on a project, make sure to include a text in the subject that will allow viewers to determine the owner of the Field Report. For example, you can use the name of your company as a prefix (X Company-Contractor Daily Field Report).

Subject	* Required
Type the Subject	

7. Type your company name in the **Created By Company** field. As you type, your company name may appear in a list below where you can select it.

Created By Company

8. Type your name in the **Created By Name** field. As you type, your name may appear in a list below where you can select it.

Created By Name	

### Weather/Site Conditions

9. Click **Create New** to enter weather and site information for the project. Multiple lines can be created as the weather changes throughout the day.

Weathe	Weather/Site Conditions					Create Nev	N	
	High Temperature	Low Temperature	Site Conditions	Weather Conditions	Wind Chill	Wind Speed	Wind Direction	Notes

# a. Enter High Temperature.

Γ	High Temperature

## b. Enter Low Temperature.

Low Temperature		
·		

c. Click inside the **Site Conditions** field and select the condition which best applies.

Site Conditions		

d. Click in Weather Conditions field and select the condition which best applies.

Weather Conditions						

e. Enter the Wind Chill if applicable.

Vind Chill		

f. Enter Wind Speed if applicable.



g. Enter the Wind Direction if applicable.

Wind Direction	
Type the Wind Direction	

h. Click in **Notes** and add any additional information about the weather conditions.

Notes		
Type the Notes		

i. After you complete the **Weather/Site Condition** information click the **Add** button which saves the data and returns you to the form.



#### Workforce On-Site

10. Select Create New.

Workfor	rce On-Site				R.	Create New	
	Company	Trade/Position	# of Workers	Area Worked/Work Performed	Sched	ule Activity #	

a. Type your company name in the **Company** field. As you type, your company name may appear in a list below where you can select it.

(	Company
Ľ	

b. Enter a Trade/Position.



#### c. Enter the **# of Workers**.

# of Workers			

### d. Enter the Area worked/Work Performed.



### e. Enter a Schedule Activity #.



f. After you complete the **Workforce Onsite** information click the Add button which saves the data and returns you to the form.



11. Enter information in the **Progress of Work/Notes**.

Progress of Work/Notes	
Type the Progress of Work/Notes	
	0

### **Meetings/Significant Decisions**

12. Click **Create New** to enter any meetings and significant decisions for the project. Multiple lines can be created as additional meetings maybe required throughout the day.

Meetings/Significant Decisions				Create New
	Meeting Name	Facilitator Name	Facilitator Company	Notes/Decision

### a. Enter Meeting Name.



### b. Enter Facilitator Name.



c. Click inside the **Facilitator Company** field and select the company. Type a company name in the **Facilitator Company** field. As you type, the company name may appear in a list below where you can select it.



d. Enter Notes/Decision.



e. After you complete the **Meetings/Significant Decisions** information click the **Add** button which saves the data and returns you to the form.



### Material Deliveries:

13. Click **Create New** to enter material deliveries for the project. Multiple lines can be created as the materials are delivered throughout the day.

Material Deliveries					د معند Create New
	Delivery	Condition	Delivery Time	Storage Location/Notes	

### a. Enter the **Delivery**.

Delivery	т	
Type the Delivery	T	

### b. Enter the **Condition**.

Condition	
Type the Condition	

## c. Enter Delivery Time.

Delivery Time	
Type the Delivery Time	

# d. Enter Storage Location/Notes.



j. After you complete the **Material Deliveries** information click the **Add** button which saves the data and returns you to the form.



### Equipment:

14. Click **Create New** to enter equipment information for the project. Multiple lines can be created as equipment changes occur throughout the day.

Equipm	ent				u <sup>R</sup> u	Create New	••••
	Equipment Name/Type	Condition	Idle	Hours Used	Area Used/Work Perform	med	

# a. Enter Equipment Name/Type.



b. Enter the **Condition** of the equipment and select the Box **Idle** if needed.

Condition			
Type the Condition			
Idle			

### c. Enter Hours Used.

Hours Used	Là

d. Enter the Area used/Worked Performed.



e. After you complete the **Equipment** information entry click the **Add** button which saves the data and returns you to the form.



#### **Testing/Inspections**

15. Click **Create New** to enter testing and inspections information for the project. Multiple lines can be created as needed throughout the day.

Testing	/Inspections					R Create New
	Inspection/Test Type	Inspector	Inspecting Company	Notes/Description	Result	Date Results Due

b. Enter the Inspection/Test Type.



a. Type a name of the **Inspector** field. As you type, your name may appear in a list below where you can select it.

Inspector			

c. Type the company name in the **Inspecting Company** field. As you type, your company name may appear in a list below where you can select it

Inspecting Company	

### d. Enter Notes/Description.

1	Notes/Description							
	Type the Notes/Description							
		1						

#### e. Enter inspection Results.

Result Type the Result f. Select the date of the **Date Results Due** field and select a Date from the calendar displayed.

<	March 2020					>
Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04
05	06	07	08	09	10	11

g. After you complete the **Testing/Inspections** information click the **Add** button which saves the data and returns you to the form.

Add & New	Add
-----------	-----

#### Visitors

16. Click Create New.

Visitors				×,	Create New	
	Name	Company	Reason For Visit			

a. Click inside the Name field and select a name from the list.

Name	

b. Click in **Company** and select a company from the list.

Company	
	J

c. Enter Reason For Visit.

Reason For Visit	
Type the Reason For Visit	
	10

d. After you complete the **Testing/Inspections** information click the **Add** button which saves the data and returns you to the form.



#### Accidents, Injuries or Incidents

17. Click **Create New** if applicable.

Accide	nts, Injuries or Incidents		Le Rew		
	Name	Company	Event	Action Taken	
	N				

a. Type a name in the **Name** field. As you type, a list of names may appear which you can select from.

Name	

b. Type a company name in the **Company** field. As you type, company name may appear in a list below where you can select it.

Company			

c. Enter an Event.

Event		
Type the Event		
		- lie

d. Enter Action Taken.

Actio	Action Taken					
Ту	the Action Taken					

k. After you complete the **Accidents, Injuries or Incidents** information click the **Add** button which saves the data and returns you to the form.



18. Enter **Safety Observations**. Note that this data field has enhanced formatting to assist in the proper presentation of the entry.



19. Enter **Progress of Work/Notes**. Note that this data field has enhanced formatting to assist in the proper presentation of the entry.

Prog	rogress of Work/Notes											
2	•	в	I	U	<del>S</del>	٥	¶ -	3≡	IШ	ø	Ċ	C

20. To complete and save the **Field Report** document, click the dropdown arrow beside **Save & Share** and click the **Save & Share** button and share with the applicable share groups.

Cancel	Save & Share	•			
Save & Share					
Save					

### **Attach Supporting Documentation**

1. Drag and drop any supporting files to the **Attachments** section of the record.

ATTACHMENTS	New -
Drag and drop to upload	

#### Comments

1. To ask questions or add commentary regarding the Field Report record, use the **Comments** section.

Comments	Activity	
Comment		
		Post
	No comments added to this document yet. Be the first to comment.	

# **Editing a Field Report**

1. Open the Field Report register and **click the title of the Field Report** you wish to edit.

Field Reports shared with me							
	Subject 🗢	Created On 👻	Shared				
	Test of Daily Field Report	1/14/20 8:54 AM	L 1 Edit				

2. Click the Edit button in the Details section of the Field Report and make the required changes.

DETAILS	Edit
Project Role CM	
Date 1/14/20	
Subject Test of Daily Field Report	
Created By Company DGS	

3. Once the Field Report editing is complete, click the **Save** button.

