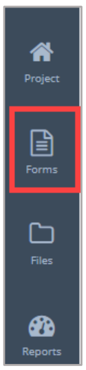
Field Report

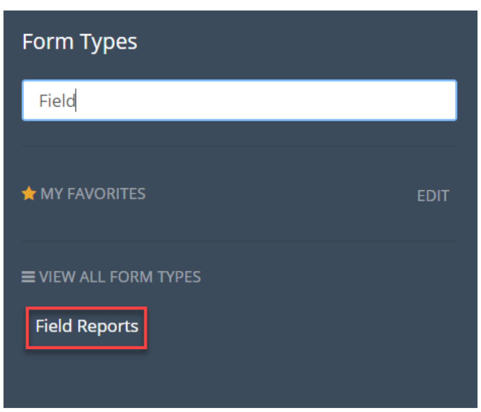
The Field Reports are usually generated by the general contractor to document daily work progress and conditions on the job site. This form can also be used by other parties to document pertinent information from field or site visits. This instruction will provide information to Create and/or Edit a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

Create A New Field Report

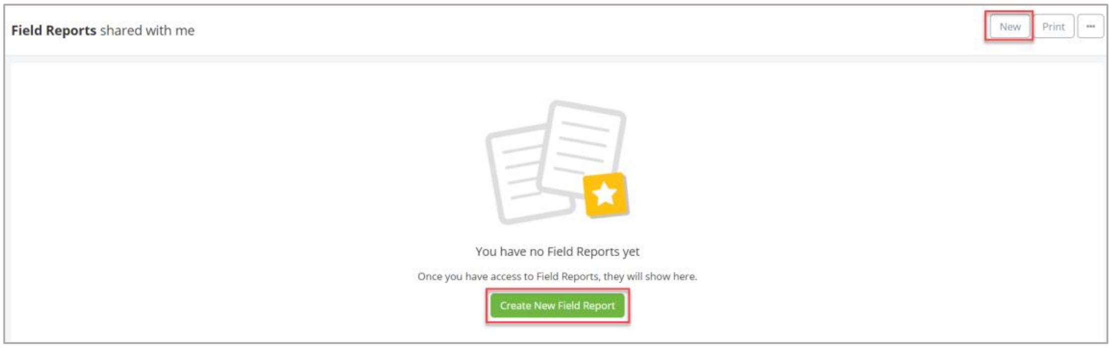
1. Within the project, click the **Forms** icon on the left navigation pane.



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

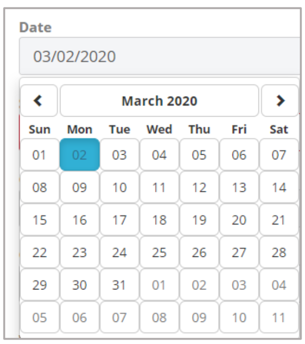


3. Select the **New** button in the upper right corner.



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

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



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).

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.

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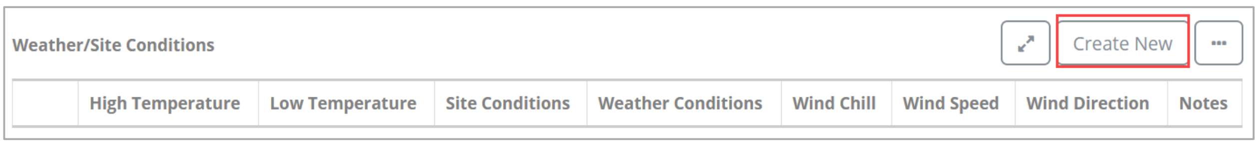
8. Type your name in the **Created By Name** field. As you type, your name may appear in a list below where you can select it.

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.



   a. Enter **High Temperature**.

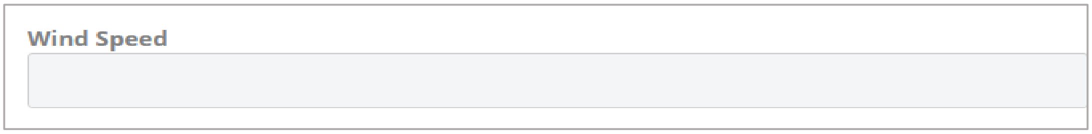
   b. Enter **Low Temperature**.

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

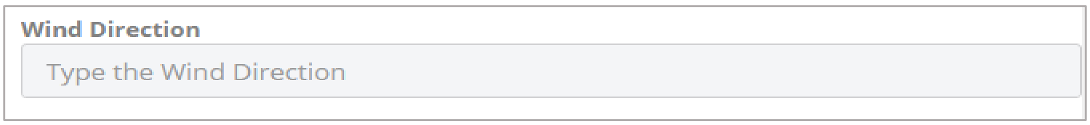
   d. Click in **Weather Conditions** field and select the condition which best applies.

   e. Enter the **Wind Chill** if applicable.

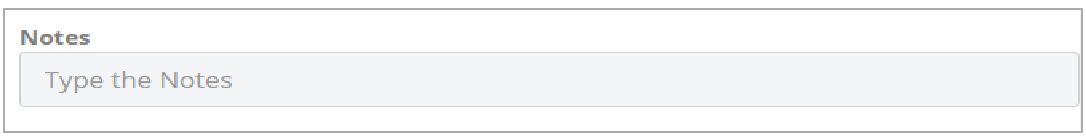
f. Enter **Wind Speed** if applicable.



g. Enter the **Wind Direction** if applicable.



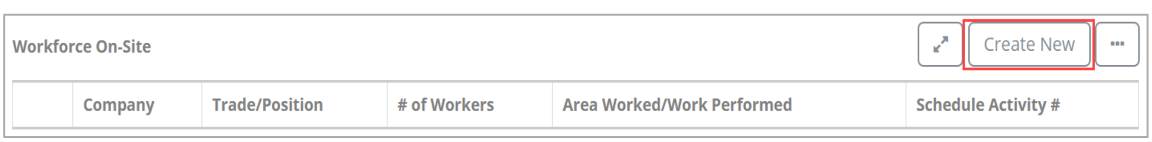
h. Click in **Notes** and add any additional information about the weather conditions.



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**.

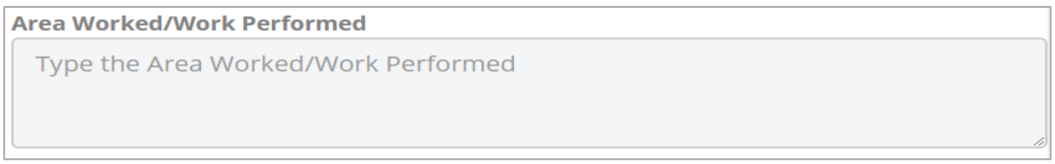


a. Type your company name in the **Company** field. As you type, your company name may appear in a list below where you can select it.

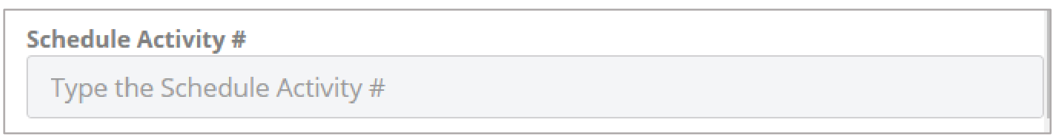
b. Enter a **Trade/Position**.

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

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



e. Enter a **Schedule Activity #**.



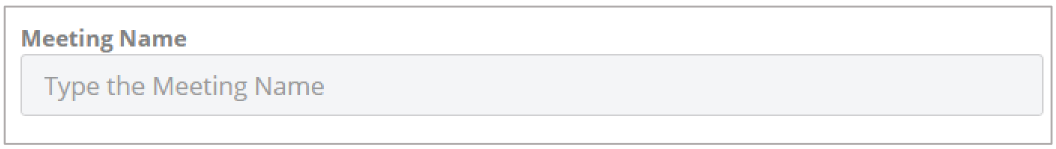
f. After you complete the **Workforce Onsite** information click the Add button which saves the data and returns you to the form.

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

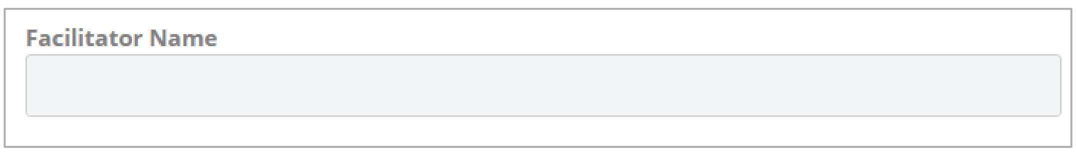
Meetings/Significant Decisions

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.

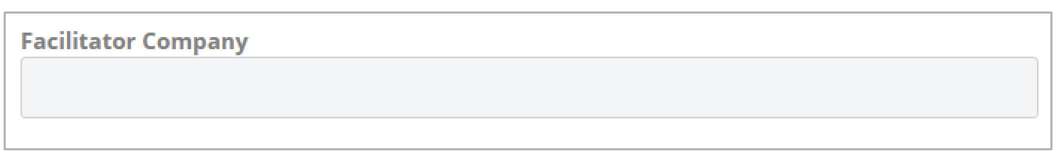
a. Enter **Meeting Name**.



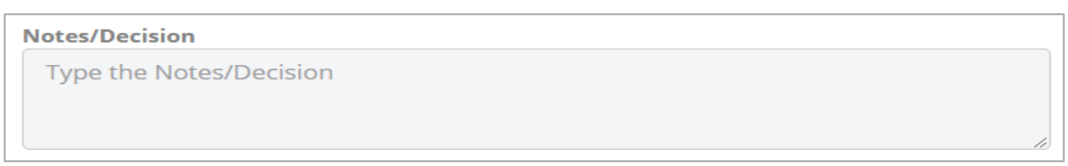
b. Enter **Facilitator Name**.



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.



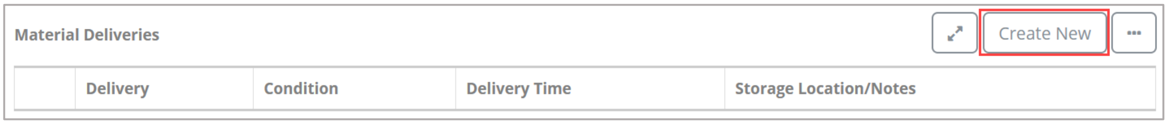
d. Enter **Notes/Decision**.



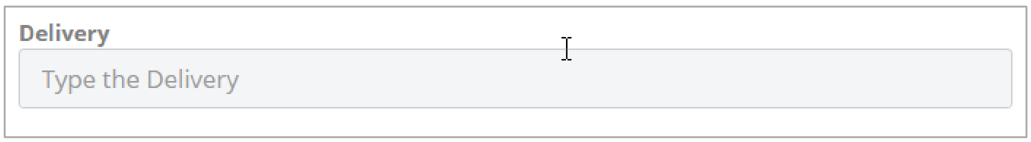
e. After you complete the **Meetings/Significant Decisions** information click the **Add** button which saves the data and returns you to the form.

Material Deliveries:

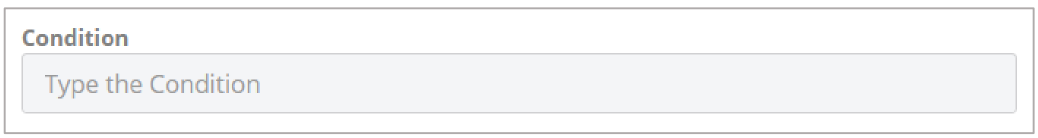
13. Click **Create New** to enter material deliveries for the project. Multiple lines can be created as the materials are delivered throughout the day.



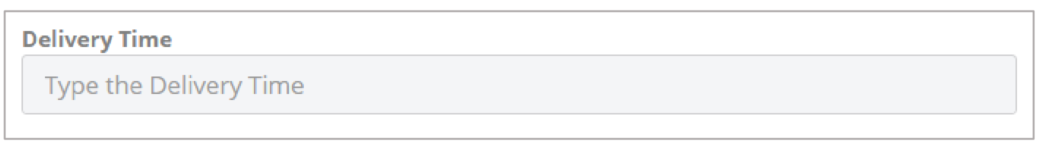
a. Enter the **Delivery**.



b. Enter the **Condition**.



c. Enter **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.

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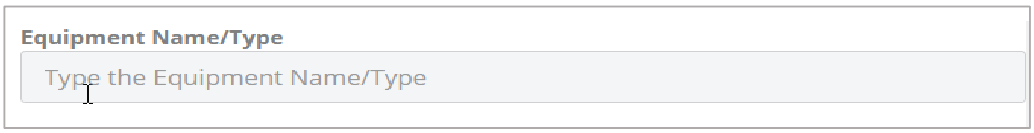
Equipment:

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

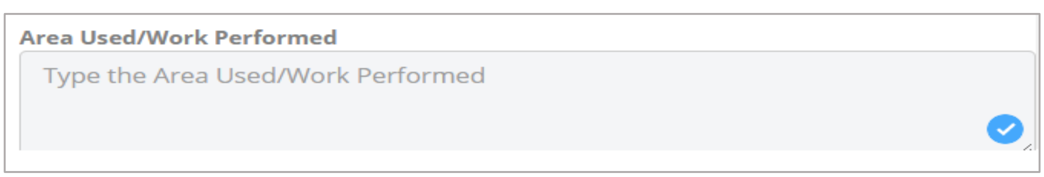
   a. Enter **Equipment Name/Type**.



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

   c. Enter **Hours Used**.

   d. Enter the **Area used/Worked Performed**.

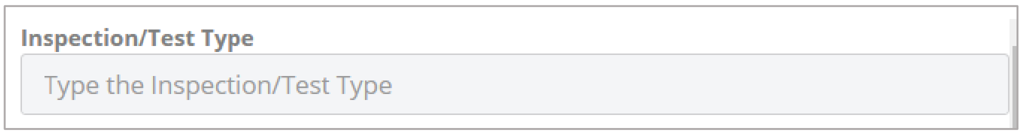


   e. After you complete the **Equipment** information entry click the **Add** button which saves the data and returns you to the form.

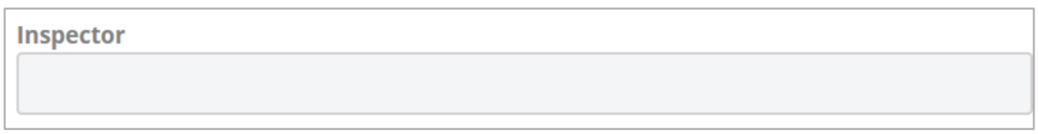
Testing/Inspections

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

b. Enter the **Inspection/Test Type**.

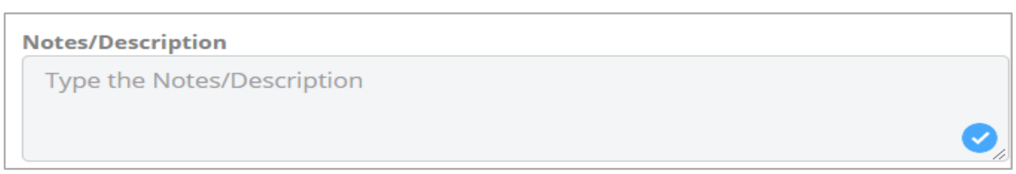


a. Type a name of the **Inspector** field. As you type, your name may appear in a list below where you can select it.

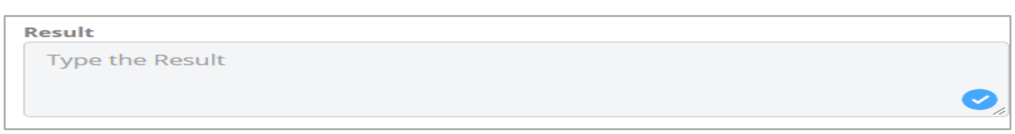


c. Type the company name in the **Inspecting Company** field. As you type, your company name may appear in a list below where you can select it

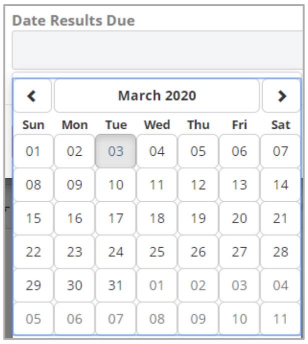
d. Enter **Notes/Description**.



e. Enter inspection **Results**.



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

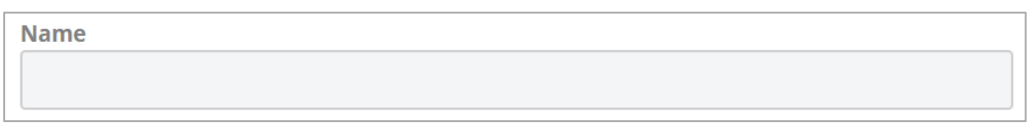


g. After you complete the **Testing/Inspections** information click the **Add** button which saves the data and returns you to the form.

Visitors

16. Click **Create New**.

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



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

c. Enter **Reason For Visit**.

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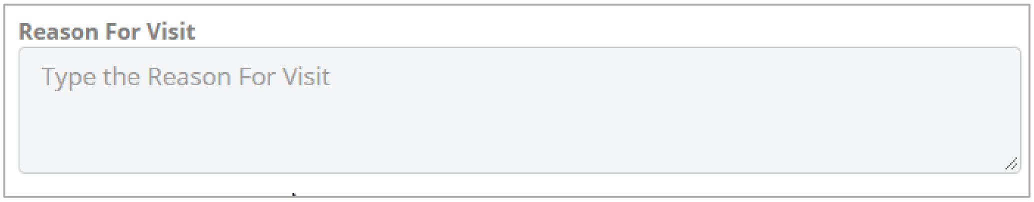
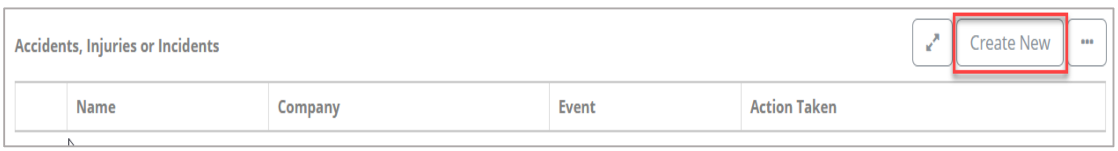


d. After you complete the **Testing/Inspections** information click the **Add** button which saves the data and returns you to the form.

Accidents, Injuries or Incidents

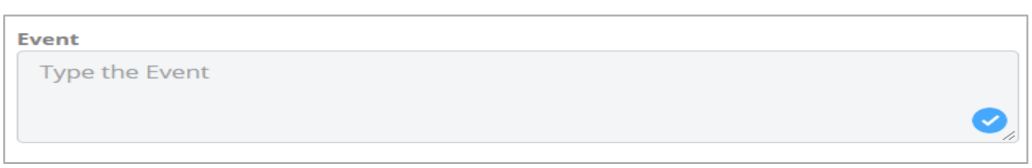
17. Click **Create New** if applicable.



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

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.

c. Enter an **Event.**



d. Enter **Action Taken**.

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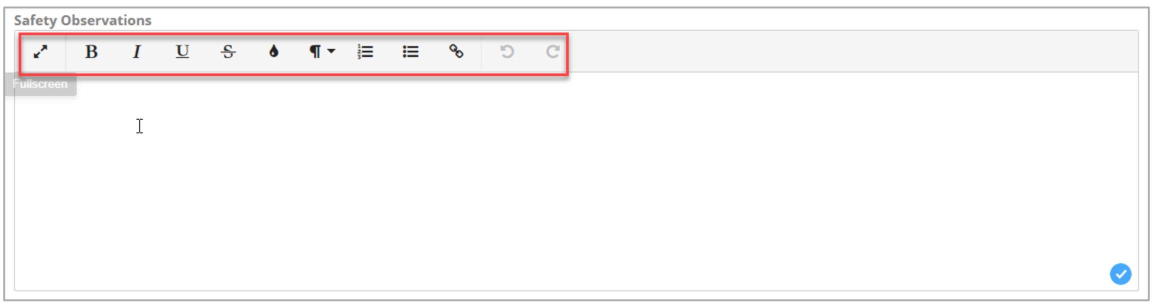
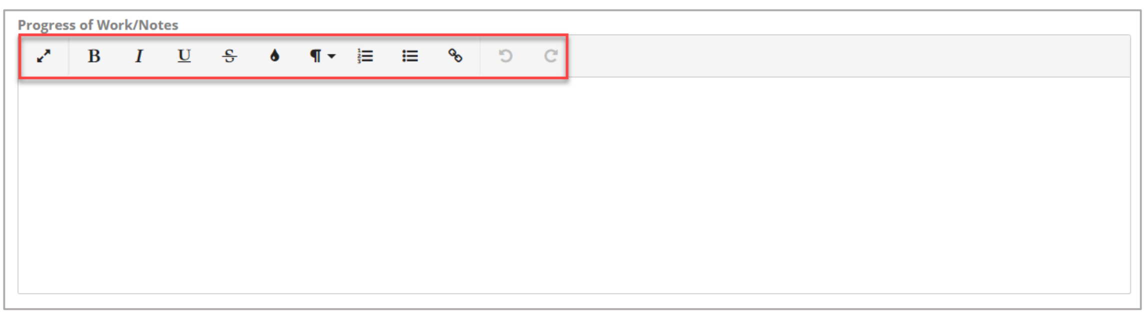
k. After you complete the **Accidents, Injuries or Incidents** information click the **Add** button which saves the data and returns you to the form.

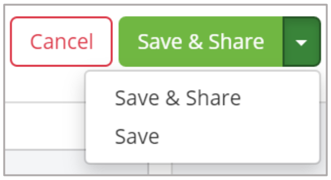
18. Enter **Safety Observations**. Note that this data field has enhanced formatting to assist in the proper presentation of the entry.



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

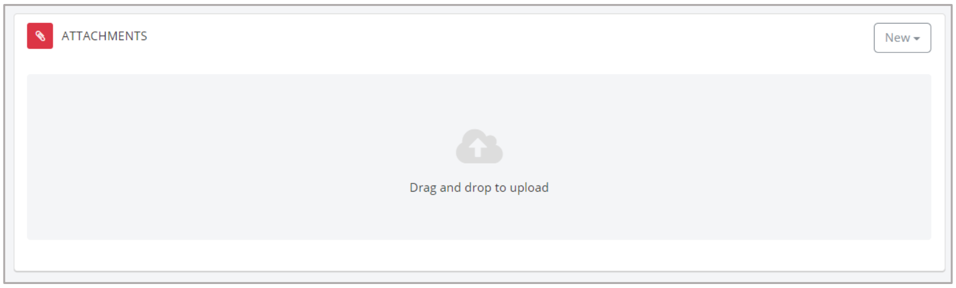


20. To complete and save the **Field Report** document, click the dropdown arrow beside **Save & Share** and click the **Save & Share** button and share with the applicable share groups.



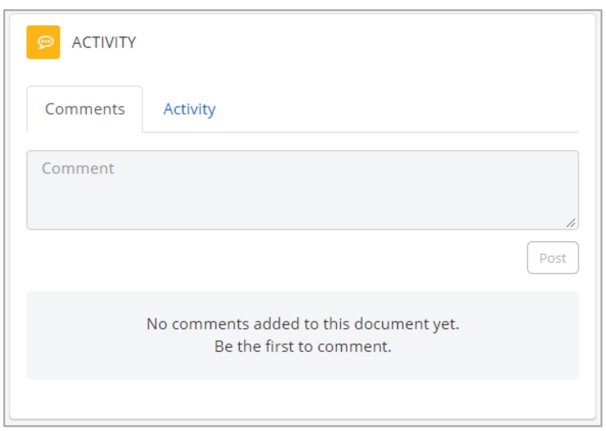
Attach Supporting Documentation

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



Comments

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

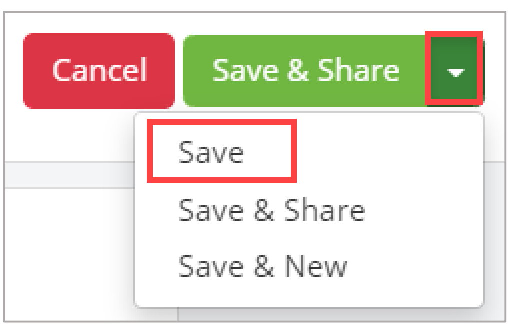


Editing a Field Report

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

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

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



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