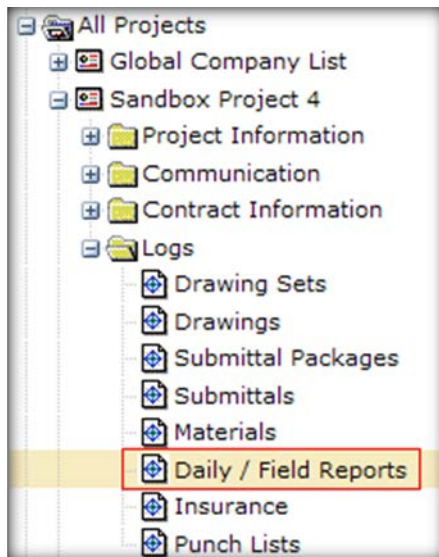


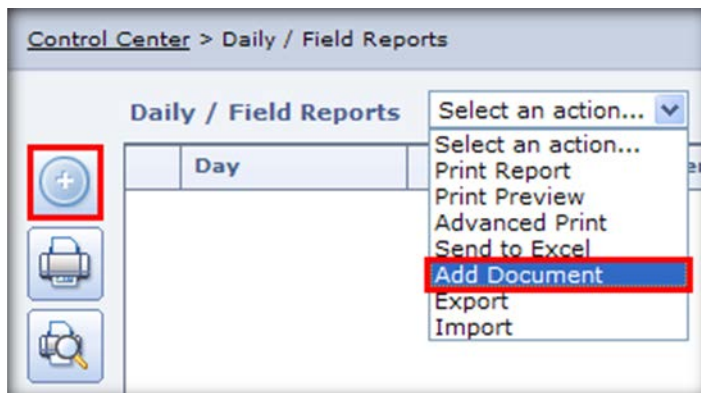
Adding and Generating Daily Reports and Field Observation Reports

Daily / Field Reports

1. Open Contract Management, browse to the applicable project, select Logs | Daily / Field Reports.



2. For the first report click the Add Document Button or 'Select an action



3. The first report will be created. The user is presented with a series of tabs that define the different elements of the report. Select each tab and insert information in the fields as needed.

4. In the **General** tab enter the following information: (items with an * asterisk are required)
 - a. **Contractor *** – Select the at the end of the field to choose yourself. If you don't see yourself in the list of contacts, please reach out to Cynthia King at ckking@cps.edu or call 773-553-1239
 - b. **Date *** – Enter the date of the report you are creating. If you are creating a report that occurred a week ago change the date to reflect that.
 - c. **Day** – Don't change. CM will do this for you.
 - d. **Report Number** – Don't change. CM will fill this data in for you.
 - e. **Report Period *** – Default is Daily but change this to reflect your report period (AORs should process "Weekly" reports)
 - f. **Contract** - Don't change
 - g. **Change Management Number** – This can't be changed from here.

The screenshot shows the 'General' tab of a software interface. The fields are as follows:

- Contractor ***: Text box containing 'Jacobs Engineering' and 'Cynthia K King' with a dropdown arrow icon on the right.
- Date ***: Text box containing 'Apr 17, 2017' with a calendar icon on the right.
- Day**: Text box containing 'Monday'.
- Report Number**: Text box containing '00001'.
- Report Period ***: Dropdown menu with 'Daily' selected.
- Contract**: Text box containing '<none selected>' with a dropdown arrow icon and a red 'X' icon on the right.
- Change Management Number**: Text box that is currently empty.

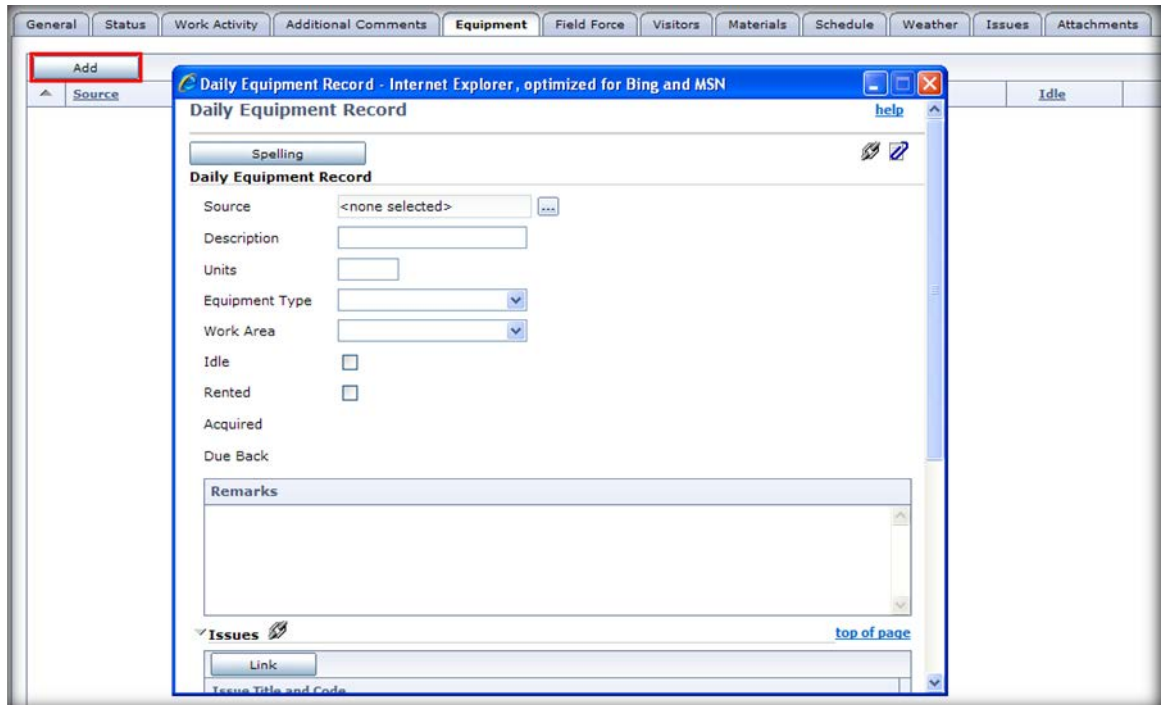
5. Nothing needs to be completed in the **Status** tab for now.
6. In the **Work Activity** and **Additional Comments** tabs, enter all work activity that is or has occurred on that day. There is no need to keep a running record of activities that are on another daily. In fact, it becomes a detriment since there is only so much space per field. Enter everything that is pertinent to the project remembering that this becomes the project record. The Additional Comments is for additional room if needed.

The screenshot shows the 'Work Activity' tab of a software interface. The content is as follows:

Work Activity

- ABC Electrical is running all the under slab conduit. The service is installed and will be energized by late afternoon.
- XYZ Masonry started tuck pointing the masonry lintels on the windows that were demolished and replaced.
- 123 Elevator is working on the pit but is having issues with ground water. They need to rent a pump. This may become a change.



7. The **Equipment** tab allows one to itemize and record all equipment that is on site. To enter a line or multiple lines, click the Add button.




- A Daily Equipment Record will be presented.
- a. **Source** - Click to select the contractor whose equipment this entry is referring to. If that contractor isn't listed simply type their company name in the Remarks section.
 - b. **Description** – Enter a description of the equipment.
 - c. **Units** – Enter the number of units (pieces of equipment) being used.
 - d. **Equipment Type** – Don't enter anything here. Include this data in the remarks.
 - e. **Work Area** - Don't enter anything here. Include this data in the remarks.
 - f. **Idle checkbox** - Mark this checkbox if the equipment was idle for the day.
 - g. **Rented checkbox** - Mark this checkbox if the equipment is rented. Marking this checkbox enables the Acquired and Due Back fields.
 - h. **Acquired** - Enter the date the equipment was rented.
 - i. **Due Back** - Enter the date the equipment is due back.
 - j. **Remarks** - Type any additional notes, including any equipment problems or other types of work where the equipment was used.
 - k. **Issues** – For those whose access allows entry of Issues, enter an issue if applicable.
 - l. **Attachments** – Enter attachments as needed. Click this button to open the Attach File dialog box to add an attachment to this equipment row.

Daily Equipment Record - Internet Explorer, optimized for Bing and MSN

Daily Equipment Record [help](#)


Spelling  


Daily Equipment Record

Source 

Description


Units


Equipment Type 

Work Area 

Idle


Rented


Acquired 

Due Back 

Remarks

Catalyst Mechanical was using the crane to lift the RTUs to the roof and secure. XYZ Masonry asked Catalyst to utilize the crane to remove demolition debris from the upper floor (possible contentious situation).

Issues  [top of page](#)

Attachments  [top of page](#)

Attach File Attach URL

When complete click Save and Close or Save and add another. Continue until finished.

- The **Field Force** tab allows one to record information about the personnel working at the site. Click the Add button to add the first record. Please note that if you are working multiple shifts you can track and enter these as a new line in this tab. You would simply add the Source again and just type 1st Shift, 2nd Shift, or 3rd Shift in the Category field.

The screenshot shows a web browser window titled "Daily Labor Record - Internet Explorer, optimized for Bing and MSN". The browser's address bar and tabs are visible at the top. The main content area displays a form with the following elements:

- A "Spelling" button at the top left of the form.
- A "Daily Field Force Record" section containing:
 - "Source": A dropdown menu showing "<none selected>" with a selection button.
 - "Category": A text input field.
 - "Work Area": A dropdown menu.
 - "Total Supervisors": A text input field.
 - "Total Supervisor Hours": A text input field containing "0.0".
 - "Total Foremen": A text input field.
 - "Total Foreman Hours": A text input field containing "0.0".
 - "Total Journeymen": A text input field.
 - "Total Journeyman Hours": A text input field containing "0.0".
 - "Total Apprentices": A text input field.
 - "Total Apprentice Hours": A text input field containing "0.0".
 - "Change Number": A dropdown menu showing "<none selected>" with a selection button.
- A "Remarks" section at the bottom, which is a large text area for entering notes.

- a. **Source** - Click to select the contractor who is supplying the labor. If that contractor isn't listed simply type their company name in the Remarks section.
- b. **Category** - Use this field to categorize the labor by profession.
- c. **Work Area** - Don't enter anything here. Include this data in the remarks.
- d. **Total Supervisors, Total Foremen, Total Journeymen, Total Apprentices** - Enter the number of workers employed in each of these categories.
- e. **Total Supervisor Hours, Total Foremen Hours, Total Journeyman Hours, Total Apprentices Hours** - Enter the total number of hours worked in each of these categories.
- f. **Change Number** - Click to open the Select Document dialog box to associate a Change Order with labor.
- g. **Remarks** - Type any additional notes about the labor.

Daily Labor Record - Internet Explorer, optimized for Bing and MSN

Daily Labor Record [<< Previous] [Next >>] [help](#)

Spelling

Daily Field Force Record

Source Catalyst ...

Category 1st Shift

Work Area

Total Supervisors 1

Total Supervisor Hours 8

Total Foremen 2

Total Foreman Hours 18

Total Journeymen 10

Total Journeyman Hours 80

Total Apprentices 1

Total Apprentice Hours 8

Change Number <none selected> ...

Remarks

Catalyst Mechanical installed all the RTUs and secured them to the building roof curb.



When complete click Save and Close or Save and add another.
Continue until finished.

9. The Visitors **Visitors** tab

- a. **Time** - Enter the time the visitor arrived.
- b. **Company** - Enter the name of the company the visitor comes from.
If you select a name from the Select Contact dialog box, Contract Management automatically enters this information based on that contact.
- c. **Name** - Enter the name of the visitor in this field, or click Select to open the Select Contact dialog box to select the name of the contact from the Companies log.
- d. **Remarks** - Type any additional notes about the visitor.

Daily Visitor Log - Internet Explorer, optimized for Bing and MSN


Daily Visitor Log [help](#)

Spelling  

Daily Visitor Record


Time


Company

Name 

Remarks

Joe came over to take pictures of the fall protection for the guys on the roof. He will send copies of his pictures in an email tomorrow.

Issues  [top of page](#)

Attachments  [top of page](#)

Attach File

Attachment	Subject	File Size	Date Attached	Attached By

Save and Close

10. Use the **Materials** section to record information about the items delivered to the site for the day.

General Status Work Activity Additional Comments Equipment Field Force Visitors **Materials** Schedule Weather Is

Add

Delivery Time

Delivery Ticket - Internet Explorer, optimized for Bing and MSN

Delivery Ticket help

Spelling

Delivery Tickets

Delivery Time

Material Name <none selected> ... ✖

Quantity

Area

Location

Ticket Number

Description

Contract <none selected>

Remarks

Issues [top of page](#)



Link

Issue Title and Code

- a. **Delivery Time** - Enter the time the delivery was received.
- b. **Material Name** – Don't use.
- c. **Quantity** - Enter the amount, weight, or number of units delivered.
- d. **Area** – Don't use
- e. **Location** - Enter the location where the materials were delivered.
- f. **Ticket Number** - Enter the ticket number or other identifying number from the delivery receipt.
- g. **Description** - Type a description of the delivered goods.
- h. **Contract** – Don't use.
- i. **Remarks** – Any comments about the delivery, such as missing or incorrect items.



Delivery Ticket - Internet Explorer, optimized for Bing and MSN

Delivery Ticket [help](#)


Spelling  

Delivery Tickets

Delivery Time:

Material Name:  

Quantity:

Area: 

Location:



Ticket Number:

Description:

Contract:

Remarks

Replacement windows for the auditorium. These were delivered by truck and all looked intact.

 **Issues**  [top of page](#)

Issue Title and Code

11. Nothing needs to be completed in the tab for now.

12. Weather Tab - Use this tab to track weather conditions for the day. The weather tab is subdivided into the three subordinate tabs.

Details tab

- a. **Length of Suitable Conditions** - Select the amount of time that weather conditions were acceptable for from the drop-down list.

Period 1, Period 2, and Period 3 tabs:

These tabs all have the following fields:

- a. **Time** - Enter the time for the period.
- b. **Temperature** - Select the temperature range for this day.
- c. **Precipitation** - Select the type of precipitation, such as drizzle, snow, rain, if any.
- d. **Duration** - Enter the length of time for the period.
- e. **Sky** - Select the condition of the sky, such as clear, cloudy, or overcast.
- f. **Wind** - Select the wind speed for the day.
- g. **Impact** - Select the type of weather if it impacted production.

General	Status	Work Activity	Additional Comments	Weather																																
<table border="1"> <tr> <td>Details</td> <td>Period 1</td> <td>Period 2</td> <td>Period 3</td> </tr> <tr> <td>Time</td> <td colspan="3">9:30am</td> </tr> <tr> <td>Temperature</td> <td colspan="3">70 - 80 ▼ F</td> </tr> <tr> <td>Precipitation</td> <td colspan="3">None ▼</td> </tr> <tr> <td>Duration</td> <td colspan="3"></td> </tr> <tr> <td>Sky</td> <td colspan="3">Clear ▼</td> </tr> <tr> <td>Wind</td> <td colspan="3"></td> </tr> <tr> <td>Impact</td> <td colspan="3"></td> </tr> </table>					Details	Period 1	Period 2	Period 3	Time	9:30am			Temperature	70 - 80 ▼ F			Precipitation	None ▼			Duration				Sky	Clear ▼			Wind				Impact			
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Wind																																				
Impact																																				

13. Use the **Custom Fields** tab to enter ADA specific observations.

y	Additional Comments	Equipment	Field Force	Visitors	Materials	Schedule	Weather	Custom Fields
<p>ADA Observations</p> <ol style="list-style-type: none"> 1. The accessible stall door at the Boy's B-1 toilet room will not open 90 degrees because of a conflict with the adjacent lavatory. The two lavatories on the north wall should be relocated to allow full operation of the stall door. Note the <u>centerline</u> of the two lavatories should be 30" apart, and the <u>centerline</u> of the east lavatory must be a minimum 15" off the adjacent side wall. 2. Handrail and guardrail sections are being installed for the new accessible ramp at Door #1. 3. Installing exterior signage at the accessible entrances. 4. Per the contract documents, cane detection must be provided at any drinking fountain locations where the bottom of the fixture is higher than 27" AFF. All the adult accessible drinking fountains have a bottom edge at approximately 								

14. Enter **Attachments** attachments as needed. Click this button to open the Attach File dialog box to add an attachment to this equipment row.

Equipment	Field Force	Visitors	Materials	Schedule	Weather	Custom Fields	Issues	Attachments
Attach File		Attach URL						
▲	<u>Attachment</u>	<u>Subject</u>	<u>Location</u>	<u>File Size</u>	<u>Date Attached</u>	<u>Attached By</u>		
📎	P8160001.JPG	Figure 1	7770	2 MB	Aug 18, 2011	David Periolat	remove	

Generate a Daily Report Based on an Existing One

Daily reports often contain several similar items. To reduce data entry time, use the Generate Wizard to create a copy of a daily report, then edit the copy to reflect any differences.

To generate a daily report:

- From the Logs folder, click Daily Reports to open the Daily Reports log window.
- Open the daily report that you want to copy, and choose Generate Document from the Select an action drop-down list.
- Edit the Date and Report Period fields as necessary, and then click

Generate Daily Report

Your entries for Activity, Equipment, and Field Force will be copied from the selected Daily.

Date *

Day

Report Number

Company *

Report Period *

* Required

- d. Select whether to link the new report to the same issues and attachments as the original report.

Generate Daily Report

Copy the original Daily Report's Work Activity?
 yes no

Copy the original Daily Report's Additional Comments?
 yes no

Copy the original Daily Report's Weather Conditions?
 yes no

Link the new Daily Report to the same Issues as the original?
 yes no

Link the new Daily Report to the same Attachments as the original?
 yes no

Previous Finish Cancel

- e. Select whether to copy the work activity data to the new report.
- f. Select whether to copy comments; select whether to copy weather conditions.
- g. Click **Finish**. The new Daily Report document window opens. Change those areas that have changed since the previous period. The tabs Visitors, Materials and Schedule are automatically cleared preparing the report for the new data.

Updated 4-17-17

