Field Reports & Field Report Sets

What is a Field Report?

The Field Report module is used by the project team in the field to record daily journal entries, weather conditions, equipment use, activities and tasks, events, visitors, and labor force. These reports are bound together in different Field Report Sets.

Who Will Use This?

- General Contractor
- CM: Construction Manager

Why do I need a Field Report Set?

Field Report Sets are templates for collections of Field Journals sharing common attributes. They can be created by work location, contract type, shift, etc. You cannot create a Field Report without a Field Report Set template. During the project team kickoff meeting, the team will decide what sets are required. Additional sets can be created, as needed, by the Regional System Administrators.

Who Will Use This?

- CM: Construction Manager
Steps to Review Field Report Sets

1. Log into ePM as a user with the Daily Report – Editor security role and navigate to the appropriate project. Then navigate to **PM Tools > Construction Management > Field Report Set**.

2. Select one of the existing Field Report Sets listed in the register. Reference the **Auto-Fill Options** section. Field Reports will contain these options as tabs in the document if activated.
Steps to Create Field Reports

1. Log into ePM as a user with the Daily Report- Creator security role and navigate to the appropriate project. Then navigate to **PM Tools > Construction Management > Field Reports**.

2. Click the ‘**New**’ button when you are prepared to create a new Field Report.

3. You are prompted to create a new **Field Report** from a **Field Report Set** template. Click on the look-up menu button.

4. Click the ‘**Add**’ button to select the appropriate Field Report Set.

5. Click ‘**OK**’ and the ‘**Next**’ button to continue.

7. Enter various details within each of the Field Report pages:

**Journal:** Select ‘Add Line’ for a single journal entry and enter text within the Journal Entry field.

**Weather:** Precipitation, Rainfall, Snowfall, and Temperatures.

**Equipment:** Enter equipment on the site.
Activities & Tasks: Enter activities or tasks and assign them to team members.

Events: Document time and details of an event.

Visitors: Record visitors to the site.

Labor: Track number of workers by company, contract, labor type, trade, work area.
Tips

√ Required fields are marked with an asterisk.

√ Use the ‘Forward’ button if collaboration is required from other users.

√ Click on the Activity Log tab to view the audit trail of the document.

√ Clicking the online help button provides generic help related to Daily Reports, NOT for the specific uses of GSA’s Daily Reports.

√ To expand or collapse sections in a document, click on the double headed arrow buttons:

√ Notices with yellow icons require action; blue means a document was forwarded; white means you were cc’d.

√ For additional help and support, contact your GSA Regional Point of Contact:

√ Link uploaded PDM/ePM Photos to Daily Report documents by selecting the Daily Report Attachments tab. The Attachments tab is not visible until the Daily Report is set to Active.