

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**.

Field Report Set			
View: All- By Title			
<input type="checkbox"/>	Title	Number	Current State
<input type="checkbox"/>	CO Status	01	Active
<input type="checkbox"/>	Daily Report	02	Active
<input type="checkbox"/>	Daily Report - Hensel Phelps	006	Active
<input type="checkbox"/>	Daily Report- Heery	007	Active
<input type="checkbox"/>	Detailed Status	03	Active
<input type="checkbox"/>	Executive Status	04	Active
<input type="checkbox"/>	Monthly Report - Heery	009	Active
<input type="checkbox"/>	Obligation Variance Explanation	05	Active
<input type="checkbox"/>	Weekly Report - Heery	008	Active

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.

6. The Field Report Setup dialog with the list of document subtypes appears. Click 'Finish' to complete the creation of a new Field Report. A blank Field Report document appears.
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.

The screenshot shows the 'DAILY REPORT: CM Daily Report (00001)' interface. The 'Journal Entries' section is expanded, showing an 'Add Line' button and a text area for entering journal notes. The text area contains the placeholder text '<<Enter your Daily Report journal notes here>>'. The interface also shows tabs for 'General', 'Workflow', 'Activity Log', and 'Attachments'.

Weather: Precipitation, Rainfall, Snowfall, and Temperatures.

The screenshot shows the 'DAILY WORK JOURNAL: New Document' interface. The 'Weather Entries' section is active, showing a table for weather data. The table has columns for Note, Precipitation, Rainfall, Snowfall, Low Temperature, and High Temperature. The current weather is 'Rain : Rain' with 2.00 inches of rainfall, 0.00 inches of snowfall, 76.00 degrees low temperature, and 86.00 degrees high temperature.

Note	Precipitation	Rainfall	Snowfall	Low Temperature	High Temperature
3 consecutive day of rain	Rain : Rain	2.00	0.00	76.00	86.00

Equipment: Enter equipment on the site.

The screenshot shows the 'DAILY WORK JOURNAL: GC Punchlist (00001)' interface. The 'Equipment List' section is active, showing a table for equipment data. The table has columns for Equipment, Operati Compa, Equipment Status, and Notes. The equipment listed is 'Backhoe' with status 'GC... Active-Regular' and location 'Trenching near south-east area'.

Equipment	Operati Compa	Equipment Status	Notes
Backhoe	GC... Active-Regular		Trenching near south-east area

Activities & Tasks: Enter activities or tasks and assign them to team members

General Workflow Activity Log Attachments

DAILY WORK JOURNAL: GC Punchlist (00001) Draft

Main | Journal | Weather | Equipment | Activities & Tasks | Events | Visitors | Labor | Properties

ACTIVITIES & TASKS Rows: 1 Columns: 9

Add	Remove	Task ID	Task Title	Description	Percent Complete	Actual Start Date
<input type="checkbox"/>	<input checked="" type="checkbox"/>	AI10	Contact Civil Engineer for results of sample borings	Fissured soil along south-west zone 5	0.00	09/21/2009

Events: Document time and details of an event.

General Workflow Activity Log Attachments

DAILY WORK JOURNAL: GC Punchlist (00001) Draft

Main | Journal | Weather | Equipment | Activities & Tasks | Events | Visitors | Labor | Properties

EVENT ENTRIES

Add Line Remove Line(s)

Event Time	Event Notes
<input type="checkbox"/> 12:00 PM	Catered Luncheon with The Design House Architect at job site.

Visitors: Record visitors to the site.

General Workflow Activity Log Attachments

DAILY WORK JOURNAL: GC Punchlist (00001) Draft

Main | Journal | Weather | Equipment | Activities & Tasks | Events | Visitors | Labor | Properties

VISITORS Rows: 1 Columns: 10

Visitor's Company	Visitor's Name	Purpose of Visit	To See
<input type="checkbox"/> AE Training Company	<input type="checkbox"/> Archie Tech	Punch List Review	<input type="checkbox"/> Patty Milestone

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

General Workflow Activity Log Attachments

DAILY WORK JOURNAL: GC Punchlist (00001) Draft

Main | Journal | Weather | Equipment | Activities & Tasks | Events | Visitors | Labor | Properties

LABOR Rows: 1 Columns: 10


*Company	Contract	Change Order	Count	UOM	Notes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			


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**.