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.

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 uses...

Field Report

- General Contractor
- CM: Construction Manager

Field Report Set

- CM: Construction Manager

How To...

A. Review Field Report

1. Log into ePM as a user with the Daily Report – Editor security role and navigate to the appropriate project and 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. The Field Reports assigned to this set will auto-fill these tabs with information from the most recent document.
B. 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:
Main: Enter a title for the field report.

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

Weather: Precipitation, Rainfall, Snowfall, and Temperatures.

Continue entering information on the following pages within the Daily Report.
**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

8. Click the Workflow button on the top tool bar and click Start.

9. Click the lookup icon to add the name(s) of the parties to share the field report with and click the Execute button to complete the workflow.
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Start

To: 
Cc: 
Hcc: 
Recipient Action: None 
Custom Message: 
Priority: Normal 
Due Date: May 30, 2019

[Submit] Execute | Clear Fields | Cancel
REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the ePM Portal.

- QRG 01 – Navigating ePM
- QRG 02 – Using the ePM Address Book