



ePM Quick Reference Guide #040

Field Reports & Field Report Sets

WHAT IS...

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

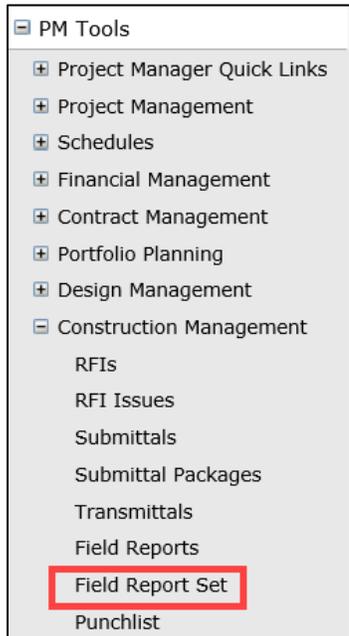
How To...

A. REVIEW FIELD REPORT

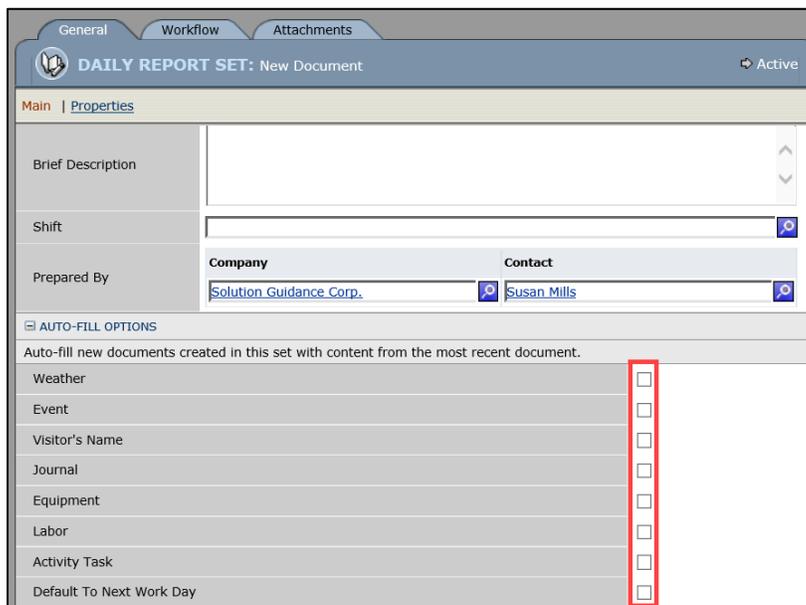
1. Log into ePM as a user with the Daily Report – Editor security role and navigate to the appropriate project and navigate to PM Tools > Construction Management > Field Report Set.

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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. .

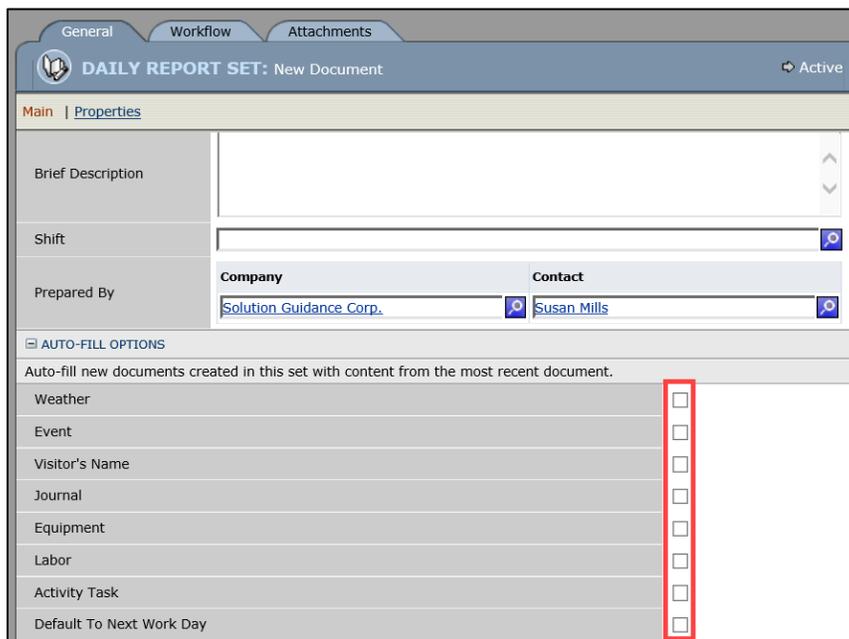


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B. CREATE FIELD REPORTS

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.

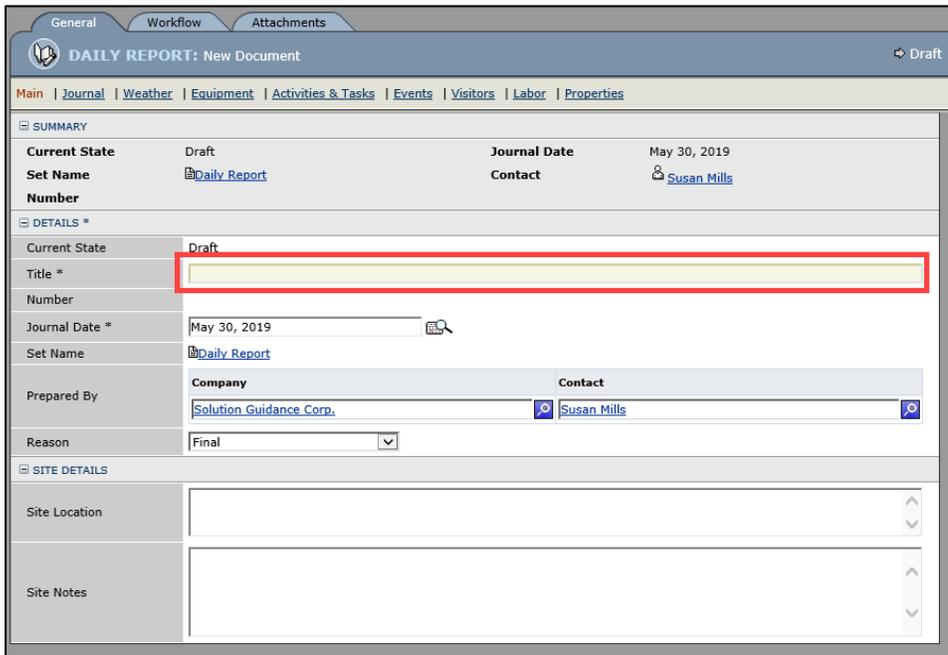


2. Click the 'New' button when you are prepared to create a new Field Report.
3. You are prompted to create a new Field Report from a Field Report Set template. Click on the look-up menu button
4. Click the 'Add' button to select the appropriate Field Report Set.
5. Click 'OK' and the 'Next' button to continue.
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:

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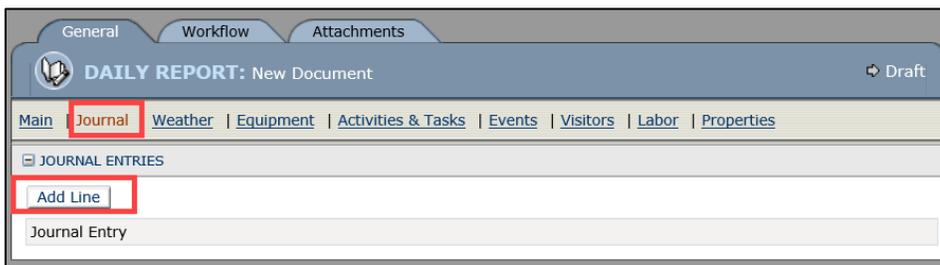
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Main: Enter a title for the field report.



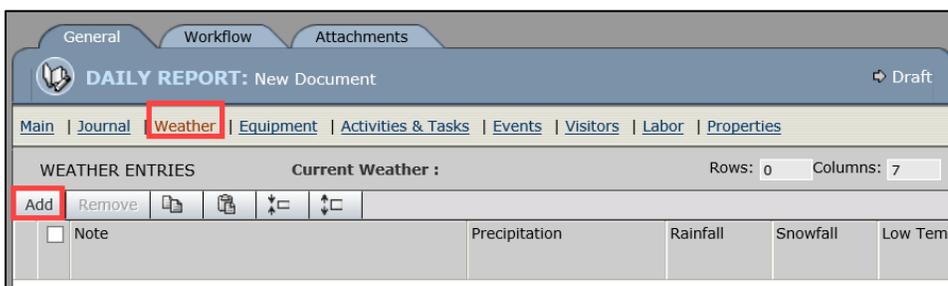
The screenshot shows the 'DAILY REPORT: New Document' interface. The 'Main' tab is selected. The 'SUMMARY' section includes fields for 'Current State' (Draft), 'Journal Date' (May 30, 2019), 'Set Name' (Daily Report), and 'Contact' (Susan Mills). The 'DETAILS *' section includes a 'Title *' field, which is highlighted with a red box. Other fields include 'Number', 'Journal Date *', 'Set Name', 'Prepared By' (with 'Company' and 'Contact' dropdowns), and 'Reason' (Final). The 'SITE DETAILS' section includes 'Site Location' and 'Site Notes' text areas.

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



The screenshot shows the 'DAILY REPORT: New Document' interface with the 'Journal' tab selected. The 'Add Line' button is highlighted with a red box. Below the button is a 'Journal Entry' text field.

Weather: Precipitation, Rainfall, Snowfall, and Temperatures.



The screenshot shows the 'DAILY REPORT: New Document' interface with the 'Weather' tab selected. The 'Add' button is highlighted with a red box. The 'WEATHER ENTRIES' section includes a 'Current Weather' field and a table with columns for 'Note', 'Precipitation', 'Rainfall', 'Snowfall', and 'Low Temp'. The table currently has 0 rows and 7 columns.

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

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Equipment: Enter equipment on the site.

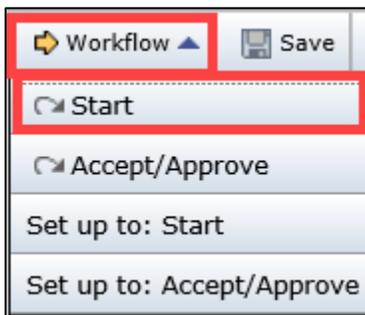
Activities & Tasks: Enter activities or tasks and assign them to team members

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

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



- 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:

Custom Message:

Priority:

Due Date: 



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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