DAILY REPORTS

The **Daily Report** document is used to enter project events and progress for that day. This includes a description of physical conditions, a summary of the work accomplished at the job site, lists of resources used and delivered, a log of visitors to the site and a report of any problems encountered that day. These details are important to help strengthen the overall flow of the daily activities on site, and will help add clarification in the event of future job related discrepancies.

To navigate to the Daily Report, click **Project Forms**, then **Daily Reports** from the left hand menu. This displays the overall **Manager View** for the module and shows all records for all projects.

To search for an existing document, use the columns to filter for the data you need. For example, use the Record# column to search for a document. You can also narrow your search by school name by selecting it from the **Projects** drop down menu.

To add a new document, click the **Add** button.

The document screen displays. Enter the following information in the Header:

- Project (required)
- Report Date (required)
- Record # (required – this is automatically generated)
- Description
- Contract #
- Recorded By

Once completed, click the **Save** button to continue.

Scroll to the bottom of the screen to enter the details for the day.

Click the **Add button** and type the details on **the peach-colored line**. If multiple events occurred on that day, enter each event on a single line. For example, if equipment was delivered, select **Equipment** from the **Type** drop-down list, then enter the applicable fields related to equipment on the line. If visitors were on site, select **Visitors** from the **Type** drop-down list, then enter the applicable fields related to visitors on the line. If materials were delivered, select **Materials** from the Type drop-down list, the enter the applicable fields related to materials on the line.

Click the **Save** button when finished each line.

Click the **Timesheet tab** to enter information about the field force on site for the day. Click the Add button to begin entry on the peach-colored line. Click the **Save** button when finished each line.

Double-click the line in the **(Weather) Details** subtab to populate information about the weather conditions for the day. Click **Update Records** when completed.

MAIN	TIMESHEET	SDA DATA	NOTES (1)	ATTACHMENTS	WORKFLOW	NOTIFICATIONS

(Weather): Details

✏ Edit

SPEC	UOM	DATA	NOTES
Length of Suitable Conditions:		Acceptable all day	

(Weather): Period 1

(Weather): Period 2

(Weather): Period 3

Legacy Approvals

Under the **(Weather) Period 1**, **(Weather) Period 2** or **(Weather) Period 3** subtabs, double-click any line to populate information about the weather conditions for the day. Click **Update Records** when completed.

MAIN	TIMESHEET	SDA DATA	NOTES	ATTACHMENTS	WORKFLOW	NOTIFICATIONS

(Weather): Details

(Weather): Period 1

(Weather): Period 2

(Weather): Period 3

Legacy Approvals

✏ Edit

SPEC	UOM	DATA	NOTES
W1 Time			
W1 Temperature (F)			
W1 Precipitation			
W1 Sky			
W1 Wind (MPH)			
W1 Impact			
W1 Humidity %			

Click **Add** on the **Notes tab** to add additional notes as needed.
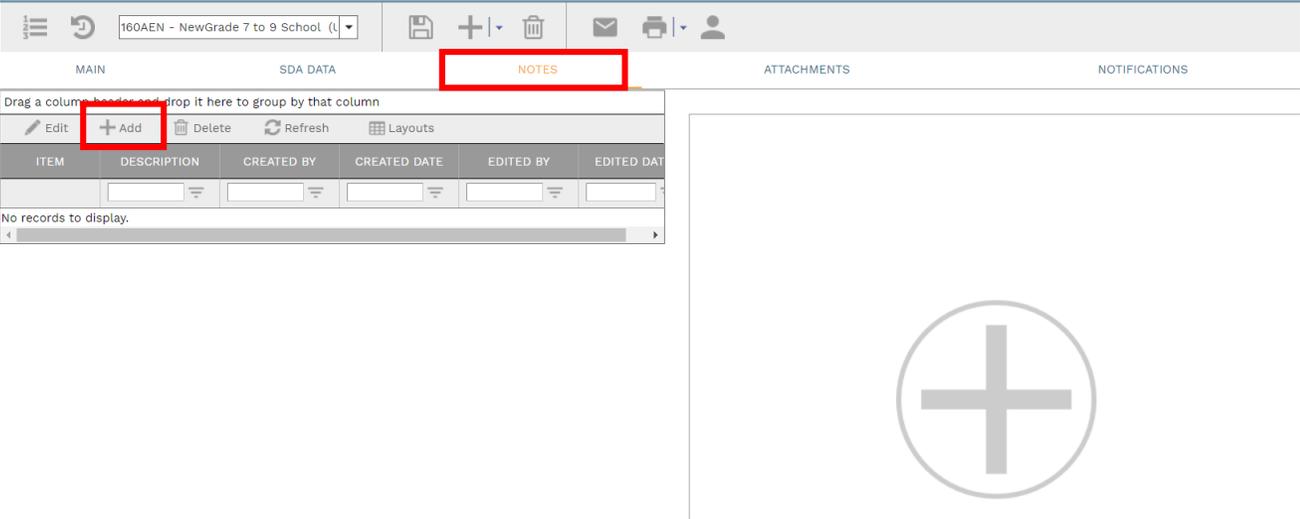
Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.
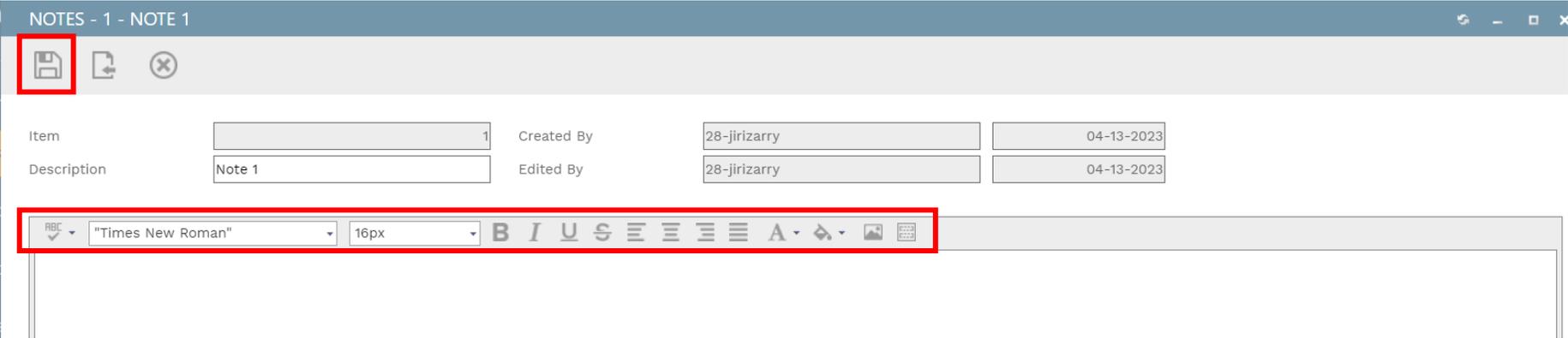
On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.
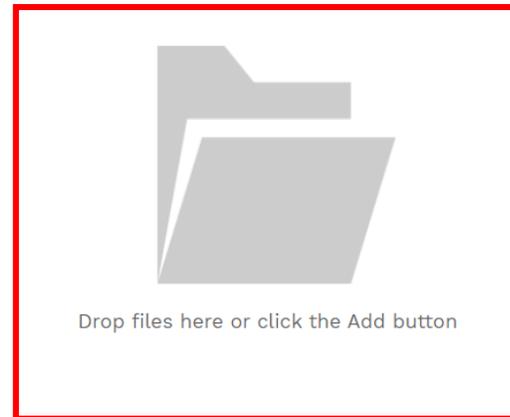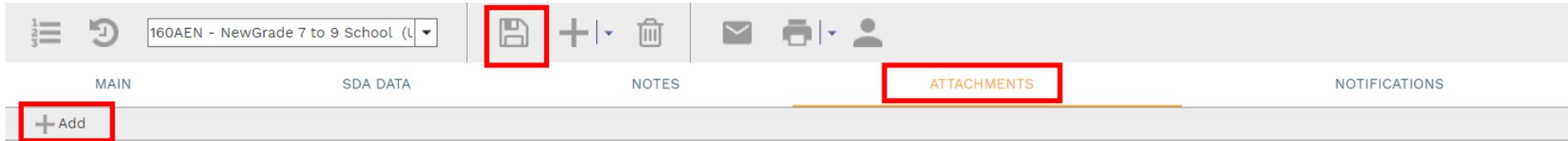
To print Daily Report information, click the **print button** and select **BI Reporting** from the drop down list. Choose an option from the report menu to receive your output (either Adobe or export to Excel) or to cancel the Reports Preview screen.

Note: Please be patient when waiting for output from a selected report. It may take a few minutes to load the data.

To create a Daily Report for the following day, select the previous day's report and choose the **Copy** function at the top of the screen (pull down of Add button).
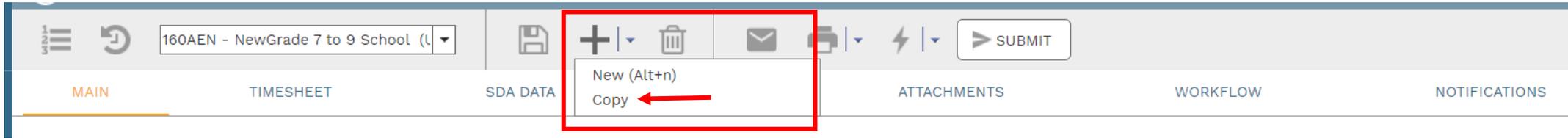
Important: This process will copy all data from the previous day into the current day's report. It is critical that the Details, Notes, Attachments and Weather conditions be modified for the current day's report. Review the information on all tabs to ensure the information for the current day is correct.