



STATE OF NEW JERSEY

SCHOOLS DEVELOPMENT AUTHORITY

Section 23

Daily Construction Reports

ORACLE Primavera

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I. Daily Reports Overview

The Daily Reports 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.

II. Populating the Location Section Dictionary at the Project Level

When you add dictionary definitions to fields in Contract Management, the entries appear under the field columns in drop-down lists. Users can then select the definition from the drop-down list to apply to the corresponding document.

In order for the dictionaries in the applicable fields of the Daily Construction Report to be populated with choices, these dictionaries must be entered at the project level prior to the creation of the Daily Construction Report.

A. Add a Drawing Area

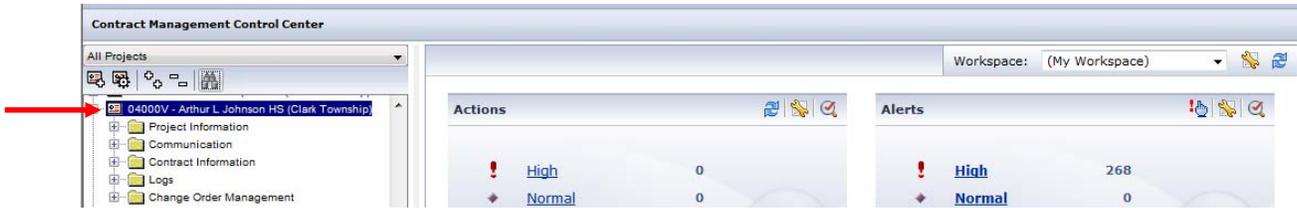
To assist in determining the portion of a project to which a specific area applies, you can define specific areas such as Lobby, Foyer, Office, and so on. Once you define areas for a project, they are specific to that project only.

1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).

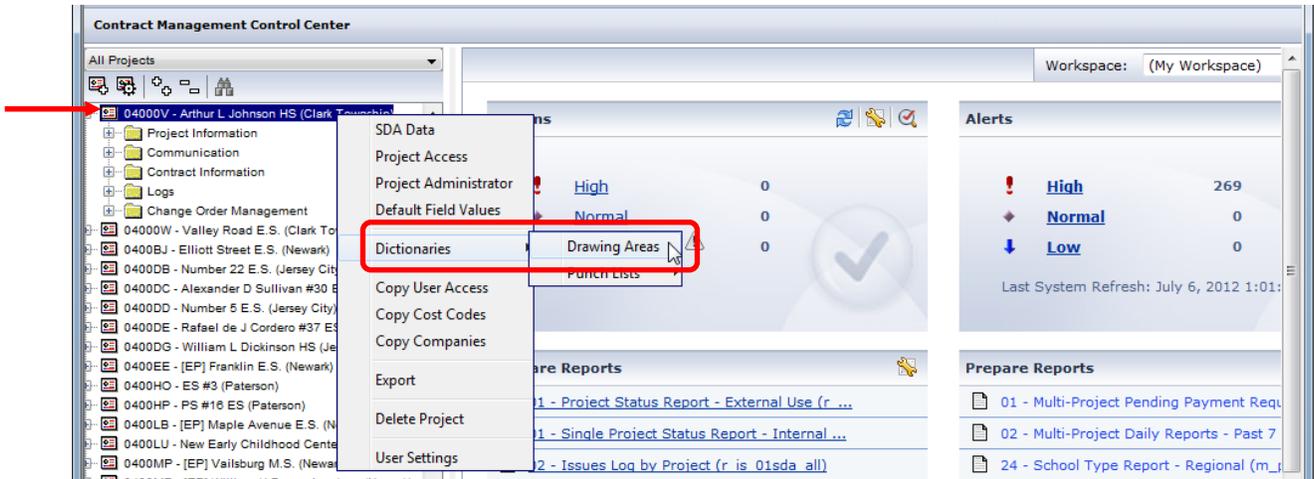
The screenshot displays the Oracle Primavera Contract Management Control Center. The top navigation bar includes the Oracle logo, the text 'Primavera Contract Management', and user options: 'Change Group', 'Print', 'Help', and 'Logout'. Below the navigation bar, a welcome message reads 'Welcome, Jennifer Irizarry' and the date 'May 29, 2012' is shown. The main interface is divided into several sections:

- Navigation Pane (Left):** A tree view showing a list of projects under 'All Projects'. The list includes project IDs and names, such as '000114 - Number 7, Grant E.S. (Passaic City)', '000467 - Hubbard M.S. (Plainfield)', and '010597 - ES 3 (Jersey City)'. A search icon and a refresh icon are visible at the top of the list.
- Workspace (Right):** A main area with a 'Workspace: (My Workspace)' dropdown. It contains three primary sections:
 - Actions:** A table showing the status of actions. It has three rows: 'High' with a red exclamation mark icon and a value of 0, 'Normal' with a diamond icon and a value of 0, and 'Low' with a blue downward arrow icon and a value of 0. A large checkmark icon is overlaid on this section.
 - Alerts:** A table showing the status of alerts. It has three rows: 'High' with a red exclamation mark icon and a value of 268, 'Normal' with a diamond icon and a value of 0, and 'Low' with a blue downward arrow icon and a value of 0. A large exclamation mark icon is overlaid on this section. Below the table, it says 'Last System Refresh: May 29, 2012 1:00:25 AM EDT'.
 - Prepare Reports:** Two sections, each with a list of report links. The left section includes '01 - Project Status Report - External Use (r ...)', '01 - Single Project Status Report - Internal ...', and '02 - Issues Log by Project (r is_01sda_all)'. The right section includes '01 - Multi-Project Pending Payment Requisitio...', '02 - Multi-Project Daily Reports - Past 7 Day...', '24 - School Type Report - Regional (m_proj_sc...', and '26 - Multi-Project CCD Report - Executed in t...'.

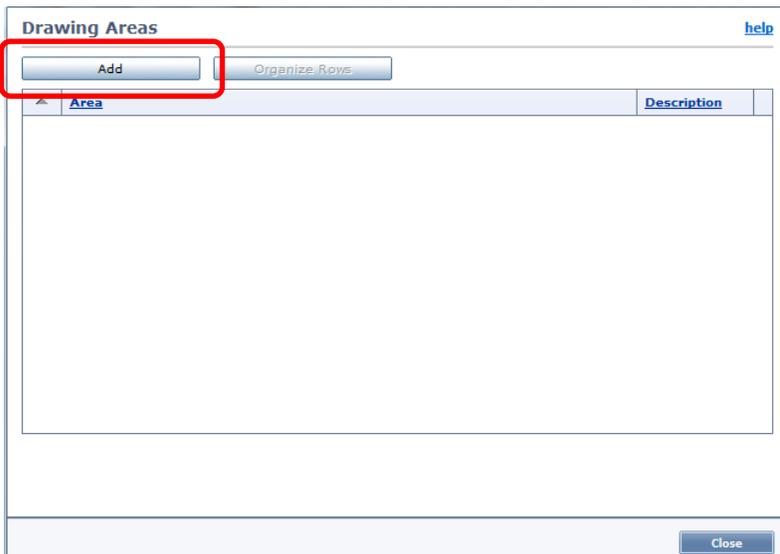
2. Select your desired project.



3. Right click the project name, choose **Dictionaries**, then choose **Drawing Areas**.



4. The **Drawing Areas** screen displays. Click the **Add** button.



5. Enter a name for the **Area** (8 character field) and enter a **Description** (23 character field). In the **Move Below** drop down box, click to choose where to insert the new definition in the drop-down list. Click **Save and Add Another** to add additional areas, or choose **Save and Close** to continue.

Drawing Areas Detail [help](#)

Area *

Description

Move Below

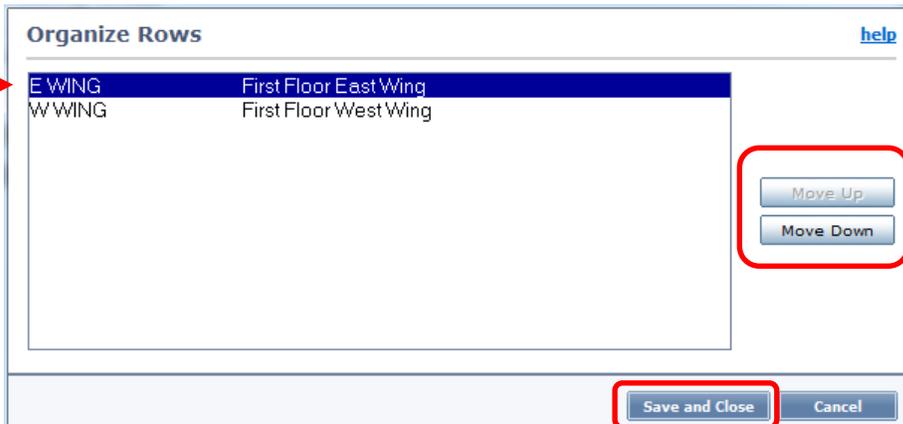
* Required

6. If multiple rows are entered, when you return to the Drawing Areas box, the **Organize Rows** button will be activated (as shown). Click this button to open the **Organize Rows** dialog box, where you can set the order in which the categories appear in drawing area drop-down list.

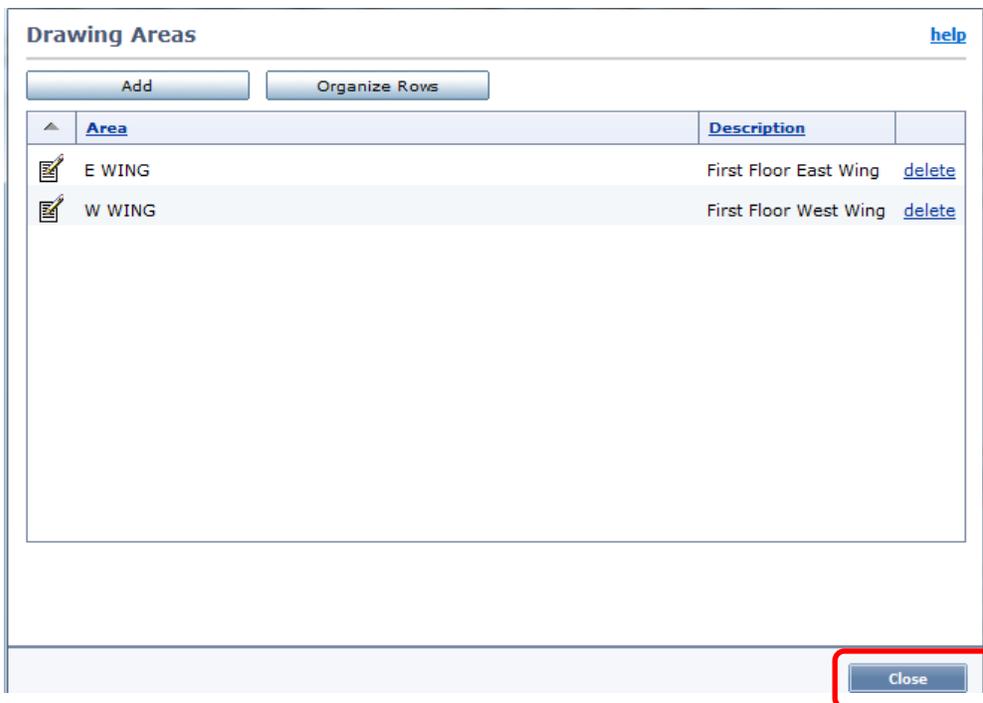
Drawing Areas [help](#)

Area	Description	
E WING	First Floor East Wing	delete
W WING	First Floor West Wing	delete

7. Select the options in the list and choose the **Move Up** or **Move Down** buttons to sort the list as desired. The order you set here applies to drop-down lists associated with various fields within this project. Choose the **Save and Close** button when completed.

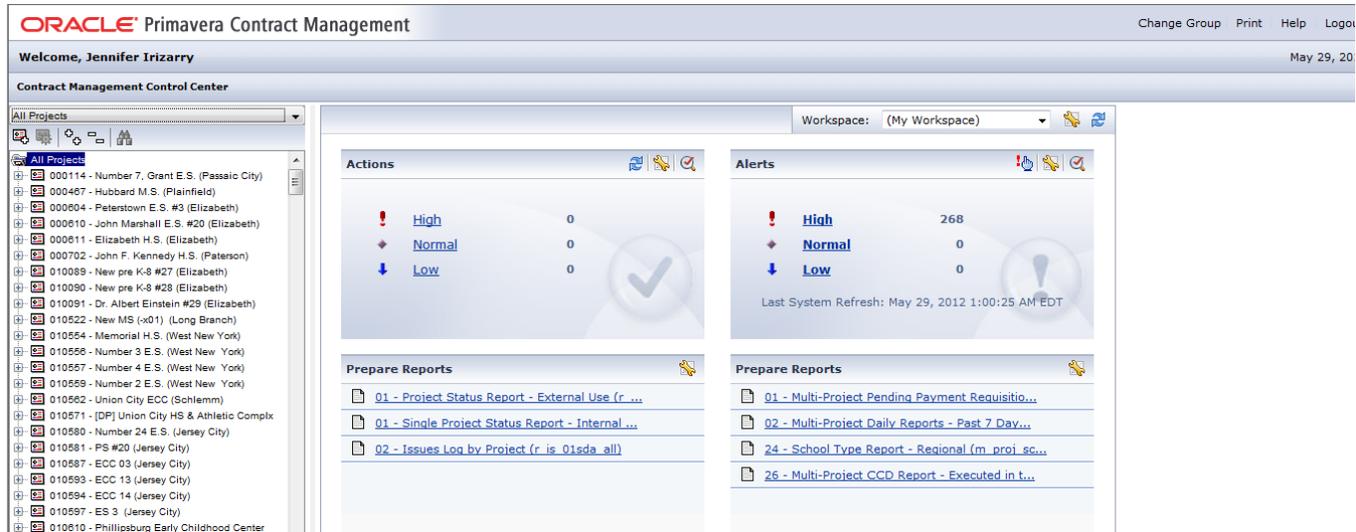


8. When you return to the Drawing Areas box, choose the **Close** button at the bottom of the screen to finish.



III. Create a Daily Report

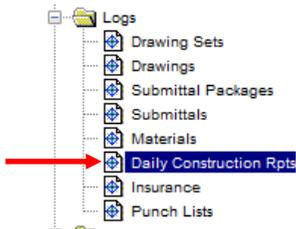
1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



2. Select your desired project.



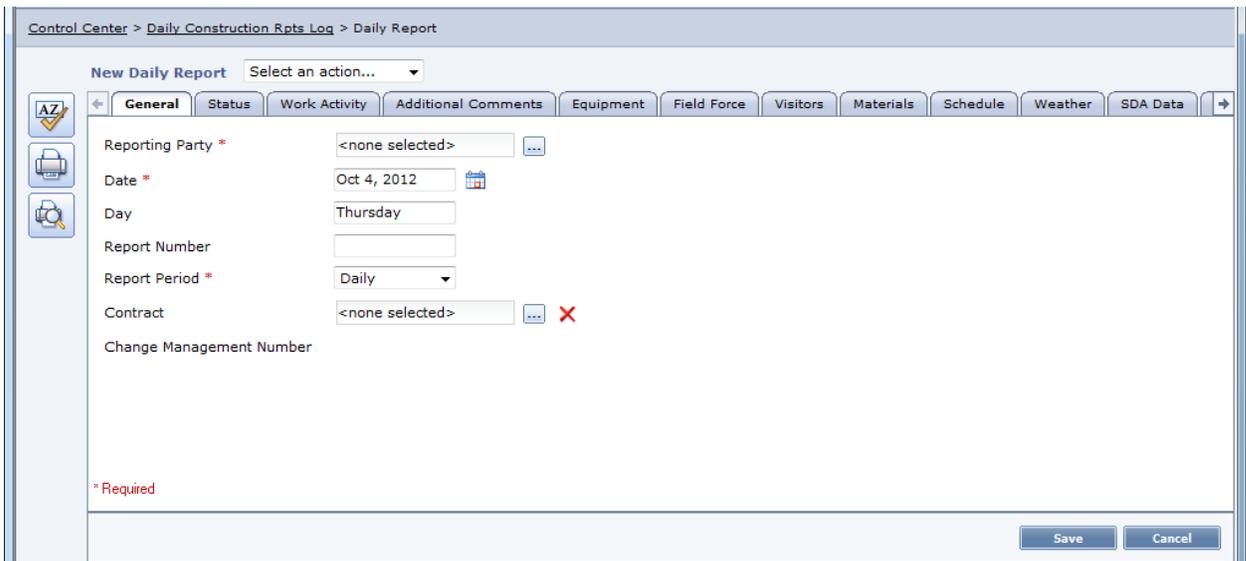
3. Open the **Logs** folder (a list of modules will display) and select **Daily Construction Rpts**.



4. The **Daily Construction Rpts Log View** displays. Click the **Add Document** button.



5. A blank Daily Report displays. The document is divided into several sections:



A. General Tab

Control Center > Daily Construction Rpts Log > Daily Report

New Daily Report Select an action...

← **General** Status Work Activity Additional Comments Equipment Field Force Visitors Materials Schedule Weather SDA Data →

Reporting Party * <none selected> ...

Date * Oct 4, 2012 📅

Day Thursday

Report Number

Report Period * Daily ▾

Contract <none selected> ... ✖

Change Management Number

* Required

Save Cancel

- **Reporting Party** – Choose the name and company of the reporting party by clicking the **select** button next to the field. This is a required field.
- **Date** – The current date will display by default, but can be changed by clicking the **calendar icon** to choose a new date. This is a required field.
- **Day** – The current day of the week will display based on the selected date.
- **Report Number** – Contract Management automatically assigns the document number once the Reporting Party has been selected.
- **Report Period** – The default is **Daily**, however, this can be changed by clicking the **drop down** box to choose the frequency of the report. This is a required field.
- **Contract** – Click the **select** button next to the field to choose the associated contract for this daily report.
- **Change Management Number** – If Change Management is initiated from this document, Contract Management will automatically fill in the associated Change Management number.

An example of a completed section is shown.

New Daily Report Select an action...

← **General** Status Work Activity Additional Comments Equipment Field Force Visitors Materials Schedule Weather SDA Data →

Reporting Party * Epic Management, Inc.
William Costello ...

Date * Oct 4, 2012 📅

Day Thursday

Report Number 00001

Report Period * Daily ▾

Contract Construction (NT-0032-C02) ... ✖

Change Management Number

* Required

Save Cancel

B. Status Tab

The screenshot shows the 'New Daily Report' form with the 'Status' tab selected. The 'Status' tab is highlighted with a red box. The form contains the following fields and controls:

- Priority:** A dropdown menu set to 'Normal'.
- Ball in Court:** A text field containing '<none selected>' with a '...' button to its right.
- Approved?:** A radio button labeled 'no' and an 'Approve and Save' button.
- Approved by:** A section containing:
 - Company:** A text field with 'New Jersey Schools Development Auth'.
 - Contact:** A text field with 'Jennifer Irizarry' and a '...' button to its right.
 - Approved Date:** A date picker field.

At the bottom right of the form are 'Save' and 'Cancel' buttons.

- **Priority** – **Normal** is the default, but can be changed to **High** or **Low** as necessary.
- **Ball in Court** – If desired, an overall responsible party for the Daily Construction Report can be selected by clicking the **select** button next to the field.
- **Approved ?** – Once the document is finished, a Daily Construction Report can be approved and saved (given the appropriate access rights) by selecting the approver, entering approval date and clicking the **Approve and Save** link. Once approved, a document cannot be edited unless you have the appropriate access rights.
- **Approved By** – Use the **select** button to choose the approver's name in the **Contact** field. The **Company** will automatically populate based on the name selected. Click the calendar icon to choose the **Approved Date**. By default, the Company and Contact name of the person creating the document will display in those fields.

An example of a completed section is shown. Note that the document has not yet been approved.

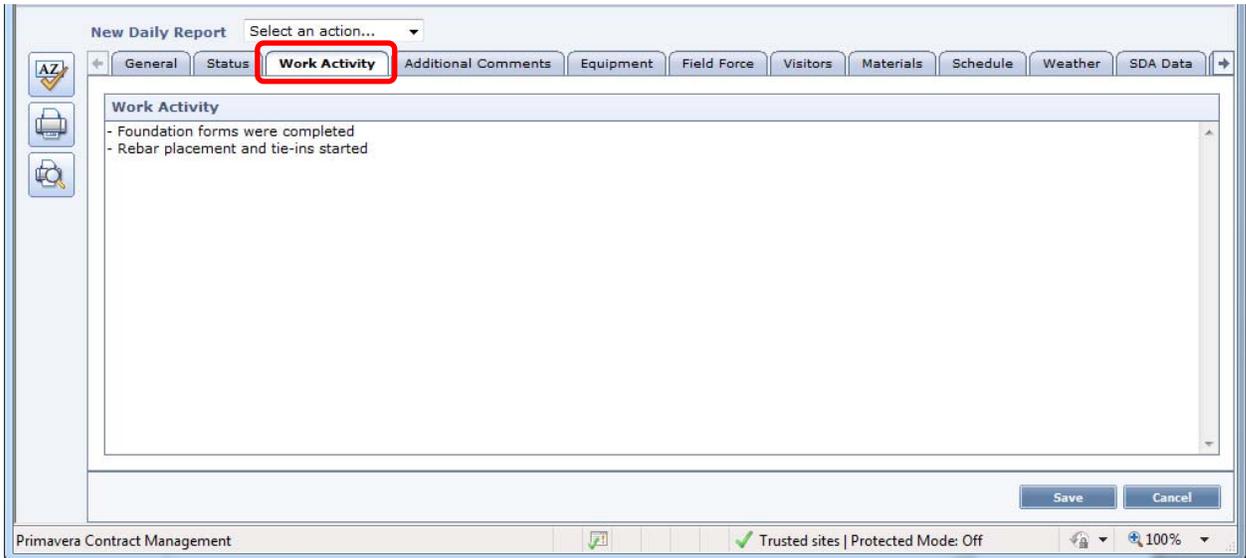
The screenshot shows the 'New Daily Report' form with the 'Status' tab selected. The form contains the following fields and controls:

- Priority:** A dropdown menu set to 'Normal'.
- Ball in Court:** A text field containing 'Epic Management, Inc. Brian Farley' with a '...' button to its right.
- Approved?:** A radio button labeled 'no' and an 'Approve and Save' button.
- Approved by:** A section containing:
 - Company:** A text field with 'New Jersey Schools Development Auth'.
 - Contact:** A text field with 'Jennifer Irizarry' and a '...' button to its right.
 - Approved Date:** A date picker field.

At the bottom right of the form are 'Save' and 'Cancel' buttons.

C. Work Activity Tab

Enter information on work completed for the day in the **Work Activity** field (4000 character field). Include remarks, descriptions of progress, milestones, delays or new conditions that may affect the project.



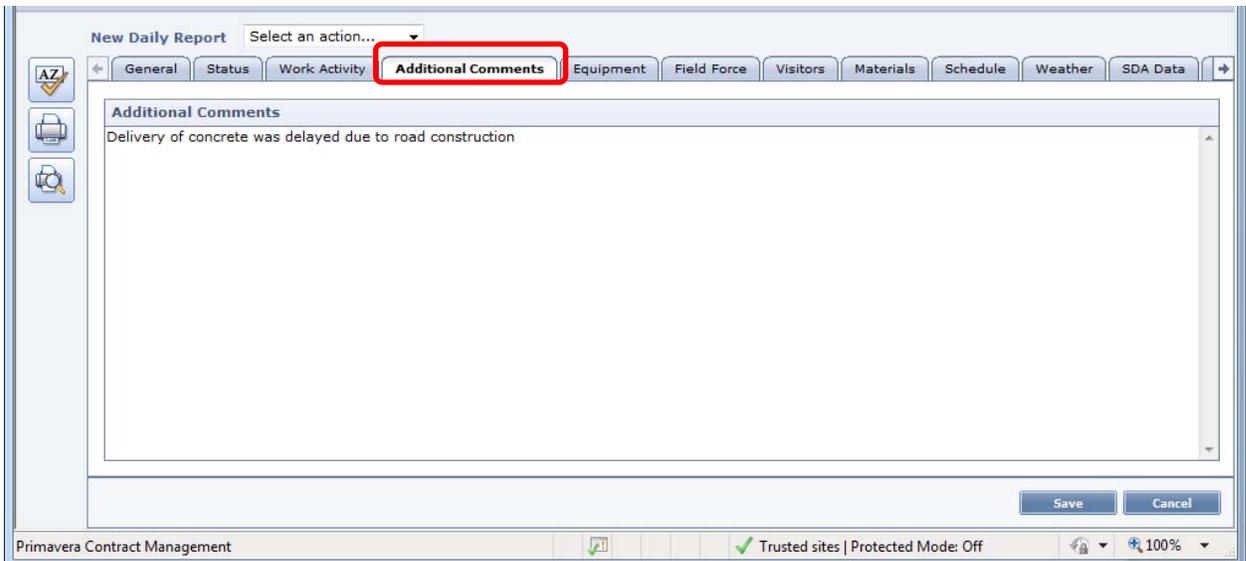
The screenshot shows the 'New Daily Report' form in Primavera Contract Management. The 'Work Activity' tab is selected and highlighted with a red box. The form contains a text area with the following text:

- Foundation forms were completed
- Rebar placement and tie-ins started

At the bottom right of the form are 'Save' and 'Cancel' buttons. The status bar at the bottom indicates 'Trusted sites | Protected Mode: Off' and a zoom level of 100%.

D. Additional Comments Tab

Enter any comments that may affect the project, but are not related to work activities in the **Additional Comments** field (4000 character field).



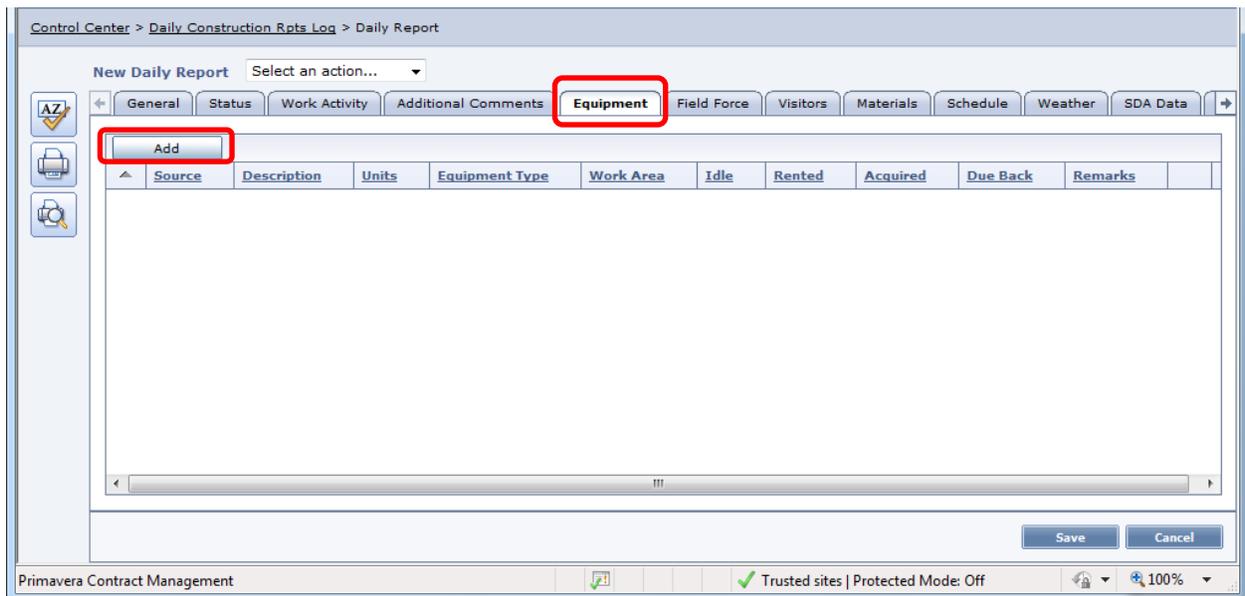
The screenshot shows the 'New Daily Report' form in Primavera Contract Management. The 'Additional Comments' tab is selected and highlighted with a red box. The form contains a text area with the following text:

Delivery of concrete was delayed due to road construction

At the bottom right of the form are 'Save' and 'Cancel' buttons. The status bar at the bottom indicates 'Trusted sites | Protected Mode: Off' and a zoom level of 100%.

E. Equipment Tab

1. This section will be used to track information about the equipment used on the work site. Click the **Add** button.



2. The **Daily Equipment Record** dialog box displays. Enter the following information:

The 'Daily Equipment Record' dialog box is shown. It contains the following fields and controls:

- Source:** A dropdown menu currently showing '<none selected>' with a 'select' button.
- Description:** A text input field.
- Units:** A text input field.
- Equipment Type:** A dropdown menu.
- Work Area:** A dropdown menu.
- Idle:** A checkbox.
- Rented:** A checkbox.
- Acquired:** A checkbox.
- Due Back:** A text input field.
- Remarks:** A large text area for notes.

At the bottom, there are sections for 'Issues' and 'Attachments', each with a 'top of page' link. A 'help' link is located in the top right corner.

- **Source** – Enter the Contractor name by clicking the **select** button.
- **Description** – Enter a description of the equipment type (ie-crane, backhoe, etc.) (15 character field).
- **Units** – Enter the number of units (or pieces of equipment used) as applicable (4 character field).
- **Equipment Type** – Not currently used.

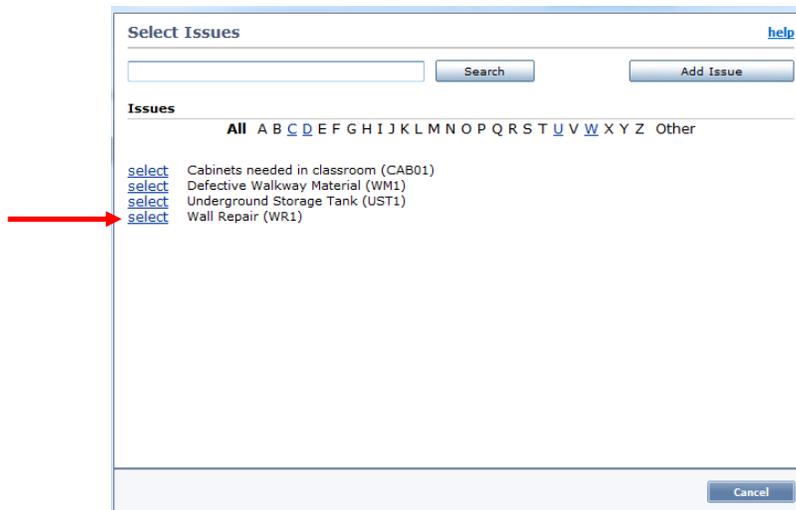
- **Work Area** – Select the applicable work area from the drop down box. This list will be populated based on the information that was entered during the creation of the data dictionary (see section I).
- **Idle** – Check this box if the equipment was onsite, but not being actively used.
- **Rented** – Check this box if the equipment was rented.
- **Acquired** – Enter the date that the equipment rental began by clicking the **calendar icon**. This field will only be active if the Rented box has been checked.
- **Due Back** – Enter the date that the equipment must be returned by clicking the **calendar icon**. This field will only be active if the Rented box has been checked.
- **Remarks** – Enter any pertinent information regarding the equipment (4000 character field).

3. If this Daily Equipment Record relates to an Issue that was previously entered in the Issues log, it can be linked to this item. Click the **Link** button in the **Issues** section.



Note: Issues can also be linked at the Daily Report document level in addition to the Daily Equipment level.

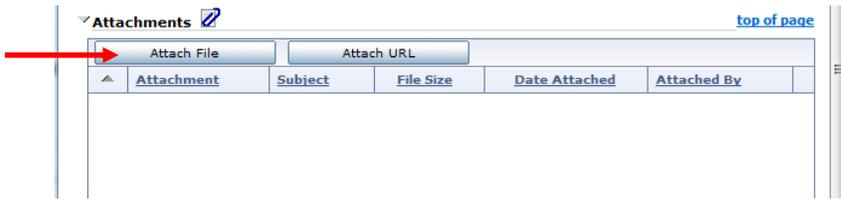
- The **Select Issue** window will display. Choose the desired issue by clicking the **select** link to the left of the issue title.



- The selected issue will display in the **Issues** section of the Daily Equipment Record.

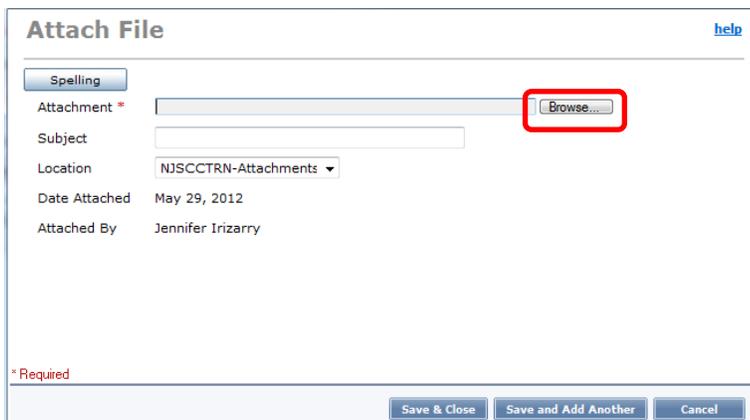


- To attach supporting documentation to this item, scroll to the **Attachments** section and click the **Attach File** button.



Note: Attachments can also be linked at the Daily Report document level in addition to the Daily Equipment level.

- Click the **Browse** button to navigate to the document you wish to attach.



- The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.

Attach File [help](#)

Spelling

Attachment * C:\Users\jirizarry\Desktop\report.pdf [Browse...](#)

Subject Report

Location NJSCCTR-Attachments

Date Attached Jun 19, 2012

Attached By Jennifer Irizarry

* Required

Save & Close Save and Add Another Cancel

- The attached file will display in the **Attachments** section.

Attachments [top of page](#)

Attachment	Subject	Location	File Size	Date Attached	Attached By
report.pdf	Report	0850-005-04-000V	33 KB	Oct 4, 2012	Jennifer Iriz

5. When all necessary fields have been entered, scroll to the bottom of the screen and click the **Save & Add Another** button to add another item or the **Save & Close** button to save changes and return to the Daily Reports document.

Spelling

Daily Equipment Record

Source Safeway Contracting, Inc [...](#)

Description Crane

Units 1

Equipment Type

Work Area First Floor East Wing

Idle

Rented

Acquired

Due Back

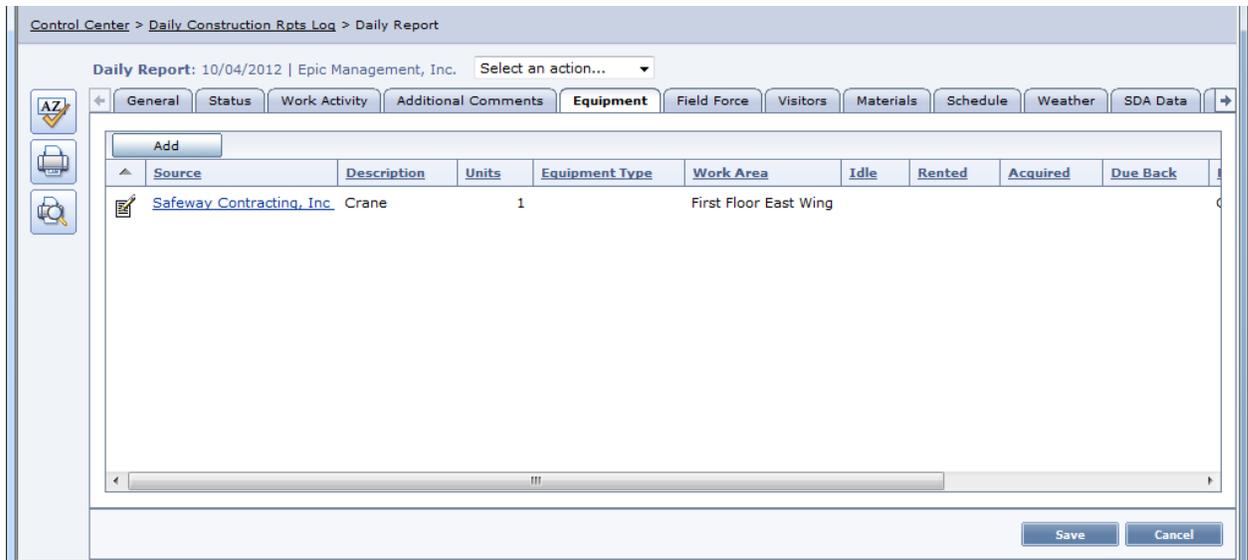
Remarks
Crane brought in to assist with repair of cracked wall on first floor

[top of page](#)

[top of page](#)

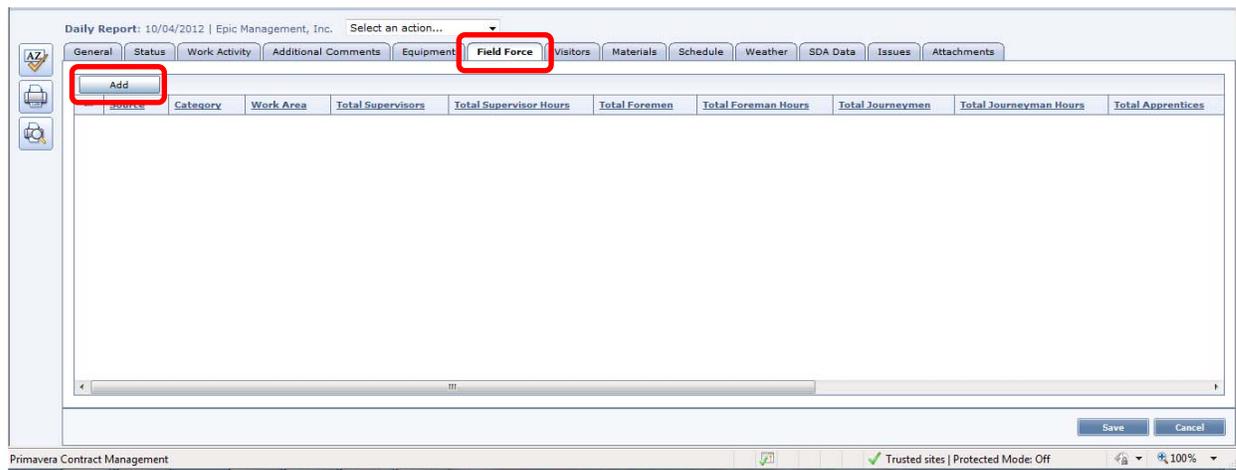
Save and Close Cancel

6. An example of a completed Equipment line item is shown:



F. Field Force Tab

1. The section will be used to record information about the personnel working at the site. Click the **Add** button.



2. The **Daily Labor Record (Daily Field Force Record)** dialog box displays. Enter the following information:

Daily Labor Record help

Spelling

Daily Field Force Record

Source <none selected> ...

Category

Work Area

Total Supervisors

Total Supervisor Hours 0.0

Total Foremen

Total Foreman Hours 0.0

Total Journeymen

Total Journeyman Hours 0.0

Total Apprentices

Total Apprentice Hours 0.0

Change Number <none selected> ...

Remarks

No problems noted with staff on site today

- **Source** – Click the **select** button to choose the name of the company supplying the trade classification for the project.
 - **Category** – Enter Masonry/Steel Workers/etc. (15 character field).
 - **Work Area** – Select the applicable work area from the drop down box.
 - **Total Supervisors** – Enter the number of supervisors on site for this trade.
 - **Total Supervisor hours** – Enter the total number of supervisor hours logged.
 - **Total Foremen** – Enter the total number of foremen on site for this trade.
 - **Total Foreman hours** – Enter the total number of foreman hours logged.
 - **Total Journeymen** – Enter the total number of journeymen on site for this trade.
 - **Total Journeyman Hours** – Enter the total number of journeymen hours logged.
 - **Total Apprentices** – Enter the total number of apprentices on site for this trade.
 - **Total Apprentice Hours** – Enter the total number of apprentice hours logged.
 - **Change Number** – Select the change order number associated as applicable using the **select** button.
3. Scroll to the **Remarks** section and enter any applicable information regarding the daily field force.

Remarks

No problems noted with staff on site today

4. Scroll to the **SDA Data** section and enter the following:



- **Total Laborer Hours** – Enter the total number of laborer hours logged
- **Total Laborers** – Enter the total number of laborers on site for this trade.

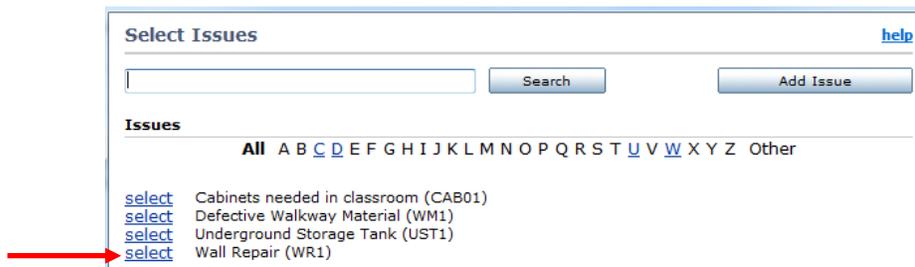
5. Scroll to the **Issues** section and complete the following, if applicable.

Note: Issues can also be linked at the Daily Report document level in addition to the Daily Field Force level.

- If this Daily Field Force Record relates to an Issue that was previously entered in the Issues log, it can be linked to this item. Click the **Link** button in the **Issues** section.



- The **Select Issue** window will display. Choose the desired issue by clicking the **select** link to the left of the issue title.



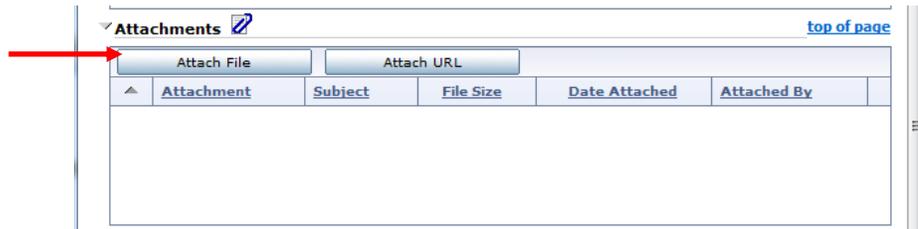
- The selected issue will display in the **Issues** section of the Daily Equipment Record.



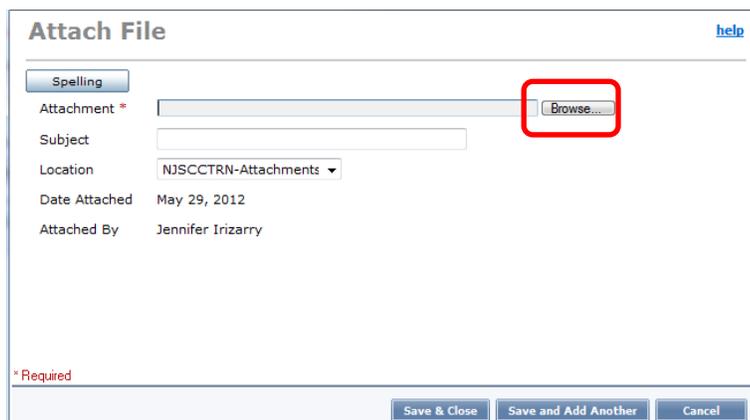
6. Scroll to the **Attachments** section and complete the following, if applicable.

Note: Attachments can also be linked at the Daily Report document level in addition to the Daily Field Force level.

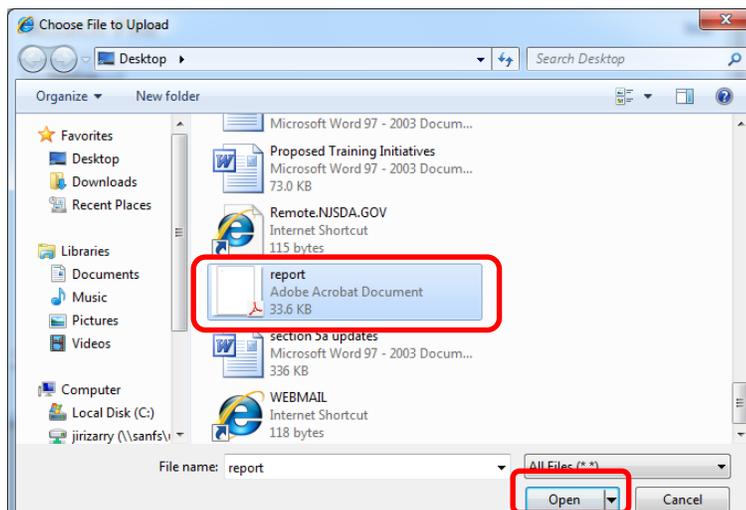
- To attach supporting documentation to this item, scroll to the **Attachments** section and click the **Attach File** button.



- Click the **Browse** button to navigate to the document you wish to attach.



- The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.

https://dev2pe.njsda.gov/ - Attach File - Windows Internet Explorer

Attach File [help](#)

Spelling

Attachment * C:\Users\jirizarry\Desktop\report.pdf [Browse...](#)

Subject Report

Location NJSCCTR-Attachments

Date Attached Jun 19, 2012

Attached By Jennifer Irizarry

* Required

Save & Close Save and Add Another Cancel

- The attached file will display in the **Attachments** section.

Attachments [top of page](#)

Attachment	Subject	Location	File Size	Date Attached	Attached By
report.pdf	report	0850-005-04-000V	33 KB	Oct 15, 2012	Jennifer Iriz

7. An example of a completed Daily Labor Record (Daily Field Force Record) is shown.

8. When all necessary fields have been entered, scroll to the bottom of the screen and click the **Save and Add Another** button to add another item or the **Save and Close** button to save changes and return to the Daily Reports document.

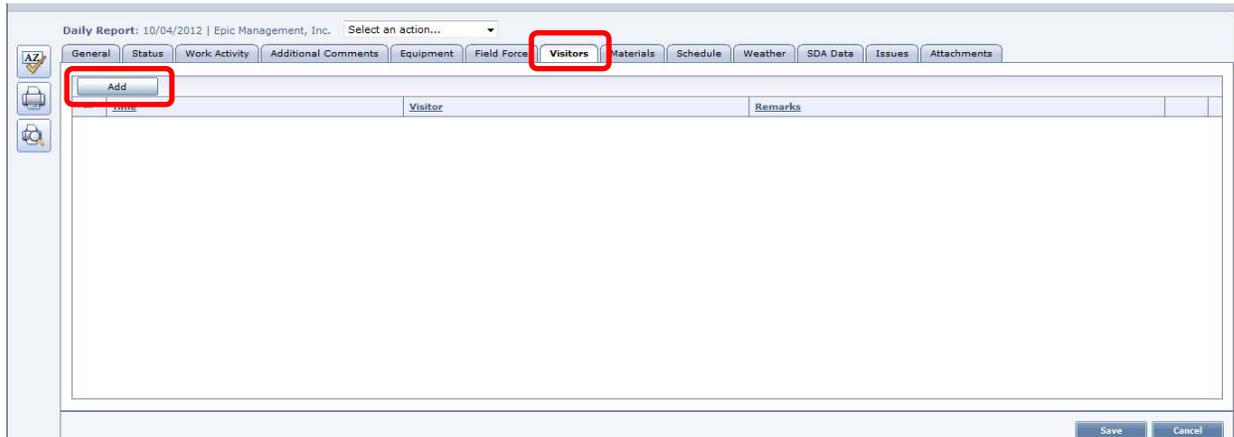


9. An example of a completed Field Force line item is shown:

Source	Category	Work Area	Total Supervisors	Total Supervisor Hours	Total Foremen	Total Foreman Hours	Total Journeymen	Total Journeyman Hours
DandK Construction Co, Inc	labor summary	First Floor East Wing	1	8.00	2	16.00	8	64
Grid Totals:				8.00	16.00			

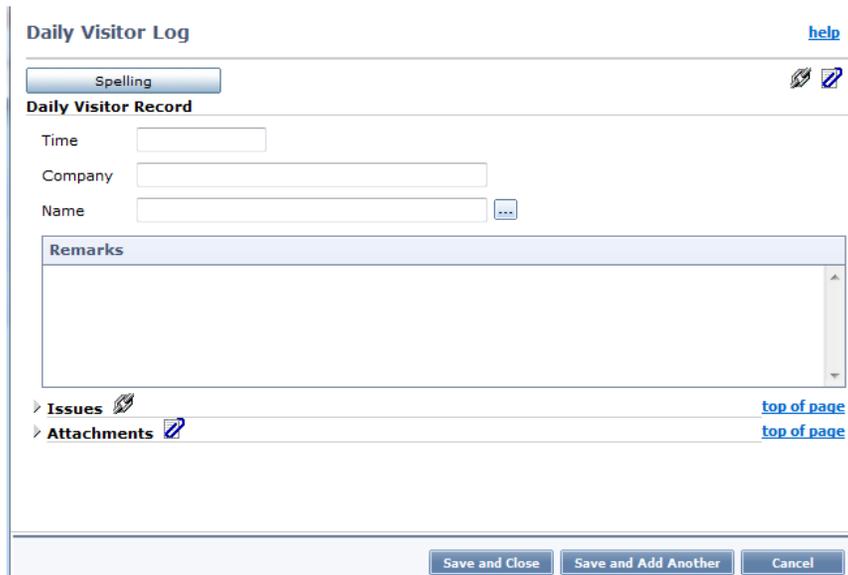
G. Visitors Tab

1. This section will be used to record the names of people that visit the site. Click the **Add** button.



The screenshot shows a software interface for a 'Daily Report' dated 10/04/2012 for 'Epic Management, Inc.'. The 'Visitors' tab is selected and highlighted with a red box. Below the tab, there is a table with columns for 'Time', 'Visitor', and 'Remarks'. An 'Add' button is also highlighted with a red box. At the bottom right of the interface, there are 'Save' and 'Cancel' buttons.

2. The **Daily Visitor Log (Daily Visitor Record)** dialog box displays. Complete the following information:



The screenshot shows the 'Daily Visitor Log' dialog box. It includes a 'Spelling' button, a 'Daily Visitor Record' section with input fields for 'Time', 'Company', and 'Name' (with a 'select' link), and a 'Remarks' text area. There are also sections for 'Issues' and 'Attachments', each with a 'top of page' link. At the bottom, there are 'Save and Close', 'Save and Add Another', and 'Cancel' buttons.

- **Time** – Enter the time that the visit occurred.
- **Company** – Enter the company that the visitor works for (36 character field).
- **Name** – If the visitor is a contact in the system, click the **select** link to choose the name from the contact list. The name can also be manually entered (22 character field). **Note:** If you use the **select** link to choose the contact's name, the Company information will be automatically entered also.
- **Remarks** – Enter the description as to the nature of the visit (4000 character field).

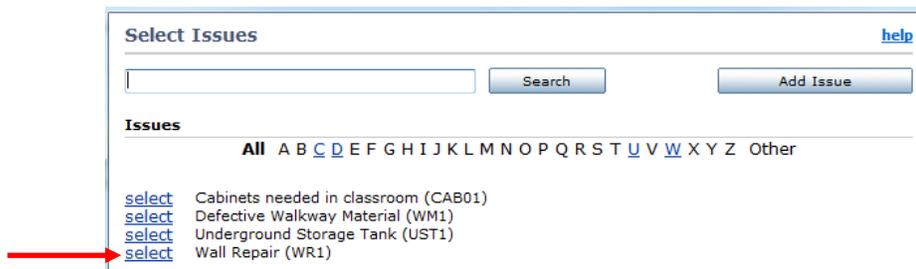
3. Scroll to the **Issues** section and complete the following, if applicable.

Note: Issues can also be linked at the Daily Report document level in addition to the Daily Visitor Log level.

- If this Daily Visitor Log relates to an Issue that was previously entered in the Issues log, it can be linked to this item. Click the **Link** button in the **Issues** section.



- The **Select Issue** window will display. Choose the desired issue by clicking the **select** link to the left of the issue title.



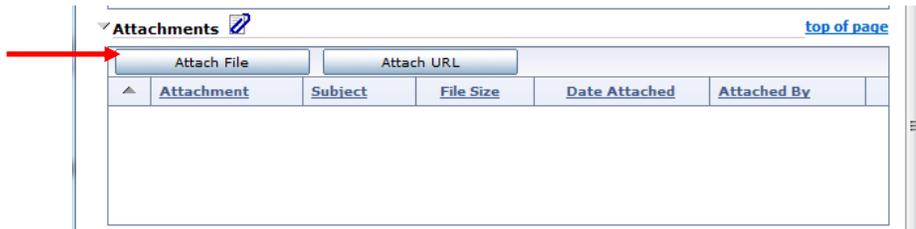
- The selected issue will display in the **Issues** section of the Daily Equipment Record.



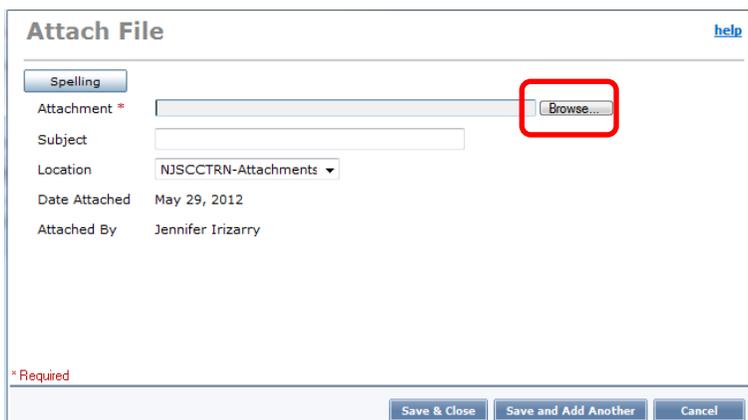
4. Scroll to the **Attachments** section and complete the following, if applicable.

Note: Attachments can also be linked at the Daily Report document level in addition to the Daily Visitors log.

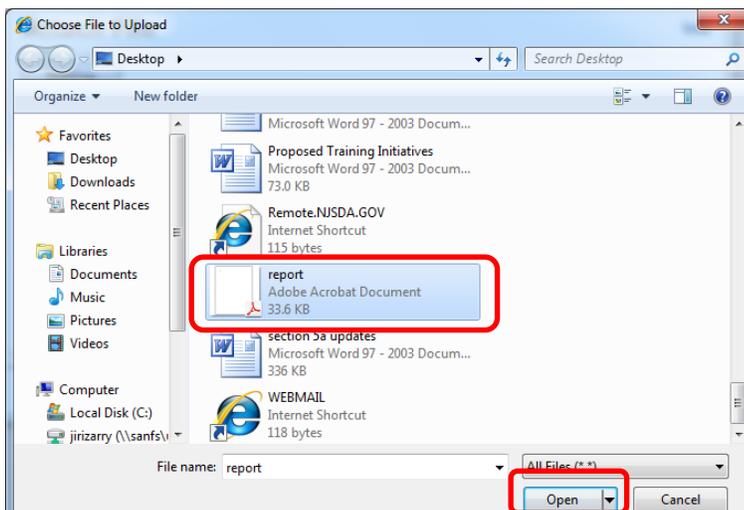
- To attach supporting documentation to this item, scroll to the **Attachments** section and click the **Attach File** button.



- Click the **Browse** button to navigate to the document you wish to attach.



- The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.

https://dev2pe.njsda.gov/ - Attach File - Windows Internet Explorer

Attach File [help](#)

Spelling

Attachment * C:\Users\jirizarry\Desktop\report.pdf [Browse...](#)

Subject Report

Location NJSCCTR-Attachments

Date Attached Jun 19, 2012

Attached By Jennifer Irizarry

* Required

Save & Close Save and Add Another Cancel

- The attached file will display in the **Attachments** section.

Attachments [top of page](#)

Attachment	Subject	Location	File Size	Date Attached	Attached By
report.pdf	report	0850-005-04-000V	33 KB	Oct 15, 2012	Jennifer Iriz

5. An example of a completed Visitors Log is shown. When all information has been entered, scroll to the bottom of the screen and click the **Save and Add Another** button to add another record, or click the **Save and Close** button to return to the Daily Construction Reports screen.

Daily Visitor Log [help](#)

Spelling

Daily Visitor Record

Time 10:00 am

Company New Jersey Schools Development Auth

Name Aaron Goss

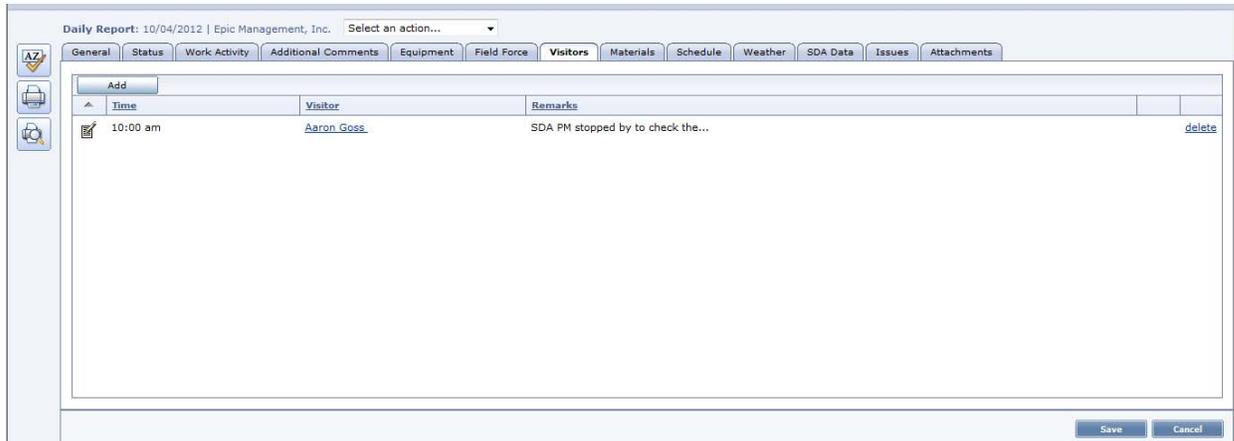
Remarks
SDA PM stopped by to check the status of the wall repaire

Issues [top of page](#)

Attachments [top of page](#)

Save and Close Save and Add Another Cancel

6. An example of a completed Visitors line item is shown:



H. Materials Tab

1. This section will be used to record information about the items delivered to the site for the day. Click the **Add** button.



2. The **Delivery Tickets** dialog box displays. Complete the following information:

The 'Delivery Ticket' dialog box contains the following fields and options:

- Spelling** (button)
- Delivery Tickets** (title)
- Delivery Time:
- Material Name: (with selection icon and red X)
- Quantity:
- Area: (dropdown)
- Location:
- Ticket Number:
- Description:
- Contract:
- Remarks:
- Issues: (with icon)
- Attachments: (with icon)
- Buttons: [top of page](#), [top of page](#), , ,

- **Delivery Time** – Enter the time when the delivery was made.
- **Material Name** – Would be chosen from list created in Materials module which SDA is not using.
- **Quantity** – Enter the quantity of material delivered (numbers only).
- **Area** – Area where materials are being used. Choose from the options in the drop down box.
- **Location** – Enter the location where the materials were delivered (14 character field).
- **Ticket number** – Enter the ticket number or other identifying number from the delivery receipt (10 character field).
- **Description** – Enter a short description of materials delivered (10 character field)
- **Contract** – Would be populated based on material list which SDA is not using.

3. Scroll to the **Remarks** section and enter a detailed description of the materials delivered.

Remarks
Delivered new sheet rock for repair of cracked wall

4. Scroll to the **Issues** section and complete the following, if applicable.

Note: Issues can also be linked at the Daily Report document level in addition to the Materials level.

- If this Material log relates to an Issue that was previously entered in the Issues log, it can be linked to this item. Click the **Link** button in the **Issues** section.

Issues [top of page](#)
Link
Issue Title and Code

- The **Select Issue** window will display. Choose the desired issue by clicking the **select** link to the left of the issue title.

Select Issues [help](#)
Search Add Issue
Issues
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other
[select](#) Cabinets needed in classroom (CAB01)
[select](#) Defective Walkway Material (WM1)
[select](#) Underground Storage Tank (UST1)
[select](#) Wall Repair (WR1)

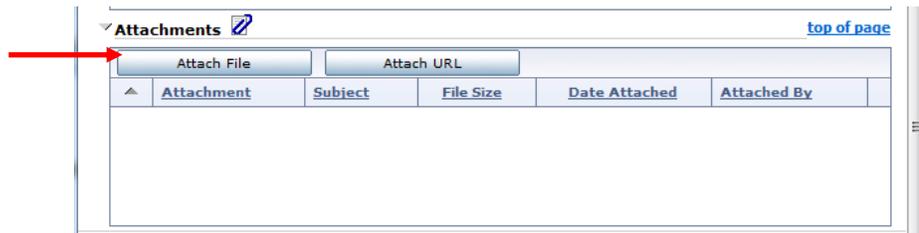
- The selected issue will display in the **Issues** section of the Daily Equipment Record.



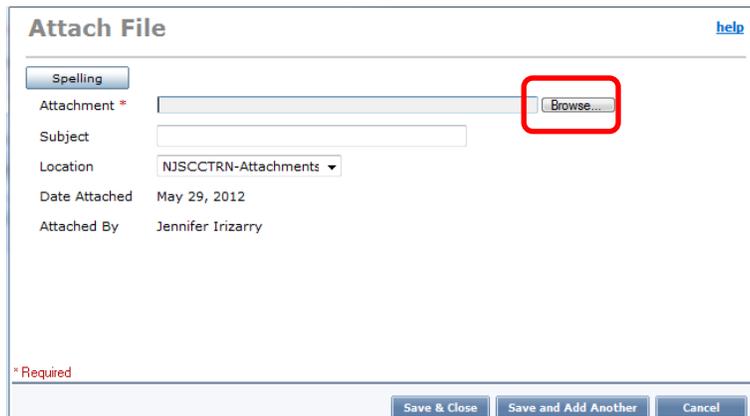
5. Scroll to the **Attachments** section and complete the following, if applicable.

Note: Attachments can also be linked at the Daily Report document level in addition to the Materials log.

- To attach supporting documentation to this item, scroll to the **Attachments** section and click the **Attach File** button.



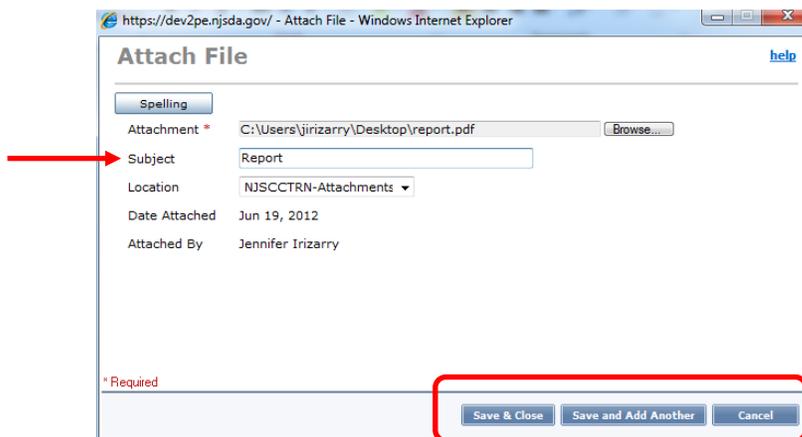
- Click the **Browse** button to navigate to the document you wish to attach.



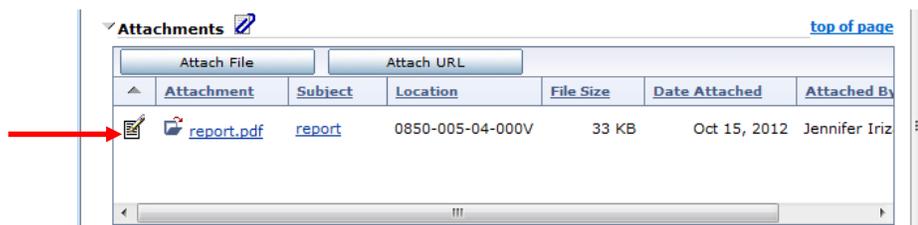
- The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.



- The attached file will display in the **Attachments** section.



6. An example of a completed Delivery Ticket is shown:

Delivery Ticket [help](#)

[[Previous] [Next >>]

Spelling ^{ABC} [issues](#) [attachments](#)

Delivery Tickets

Delivery Time: 10:30 am

Material Name: <none selected> [select..](#) [x clear](#)

Quantity: 1.000

Area: First Floor East Wing

Location: Side yard

Ticket Number: 36

Description: Sheet Rock

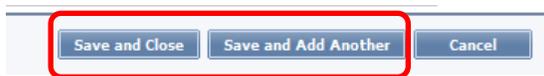
Contract: <none selected>

Remarks

Delivered new sheet rock for repair of cracked wall.

Issues [top of page](#)

7. When all entries are completed, scroll to the bottom of the screen and click the **Save and Close** button to return to the Daily Construction Report screen. Click Save and Add Another to add a second item.



8. An example of a Materials line item is shown:

Control Center > Daily Construction Rpts Log > Daily Report

Daily Report: 10/04/2012 | Epic Management, Inc. Select an action...

General Status Work Activity Additional Comments Equipment Field Force Visitors **Materials** Schedule Weather SDA Data Issues Attachments

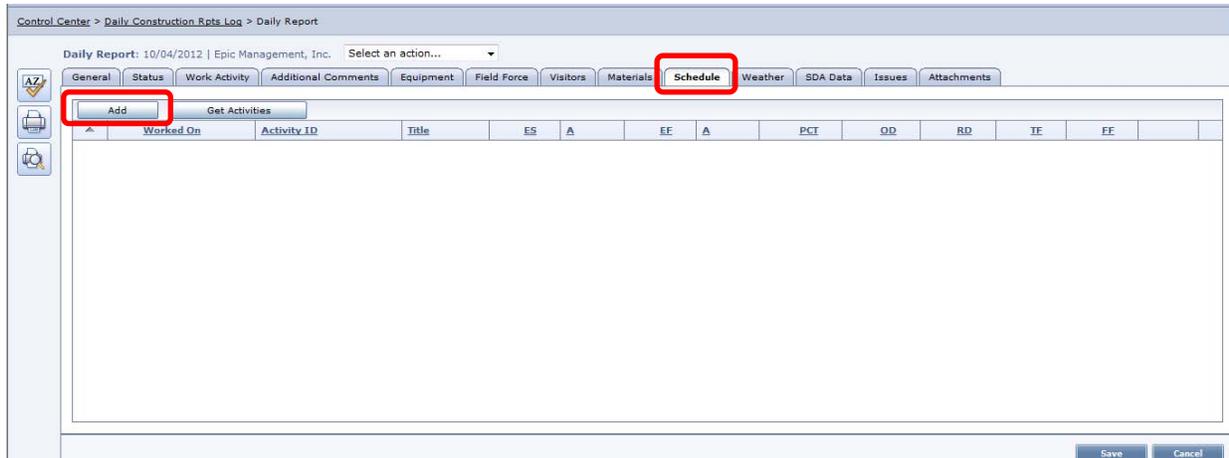
Delivery Time	Material Name	Quantity	Area	Location	Ticket Number	Description	Remarks	Contract
10:30 am	sheet rock	1,000.000	First Floor East Wing	Side yard	36	sheet rock	Delivered new sheet rock for repair...	

Save Cancel

I. Schedule Tab

This section will be used to reflect updates to the project schedule. The information can be manually entered, or if this project is linked to a project schedule, the information will be populated when you retrieve it. Any information you enter will not directly update the project schedule. It is recommended that you notify the appropriate SDA Project Team representative concerning any potential changes in the project schedule.

1. Click the **Schedule** tab. Click the **Add** button to enter the activity information.



The screenshot shows a web application interface for a 'Daily Report'. The title bar indicates the report is for '10/04/2012 | Epic Management, Inc.' and includes a 'Select an action...' dropdown. Below the title bar is a navigation menu with tabs: 'General', 'Status', 'Work Activity', 'Additional Comments', 'Equipment', 'Field Force', 'Visitors', 'Materials', 'Schedule', 'Weather', 'SDA Data', 'Issues', and 'Attachments'. The 'Schedule' tab is highlighted with a red box. Below the navigation menu is a toolbar with an 'Add' button (highlighted with a red box) and a 'Get Activities' button. Below the toolbar is a table with columns: 'Worked On', 'Activity ID', 'Title', 'ES', 'A', 'EF', 'A', 'PCT', 'OD', 'RD', 'TF', 'FE'. The table is currently empty. At the bottom right of the interface are 'Save' and 'Cancel' buttons.

2. The following example shows a Daily Schedule Record dialog box that contains information populated from the Get Activities button.

Daily Schedule	
Worked On	<input type="checkbox"/>
Activity ID	30900 select
Title	Substantial Completion TCO/CO Issued
Start	<input checked="" type="checkbox"/> Dec 4, 2007
Finish	<input type="checkbox"/> Dec 4, 2007
% Complete	90.00
Original Duration	0
Remaining Duration	0
Total Float	0
Free Float	0
Schedule Activity top of page	
Original Duration	0
Remaining Duration	0
% Complete	0.0
Start	Dec 4, 2007
Finish	Dec 4, 2007
Total Float	0

- **Worked On** – Click this checkbox to indicate that the activity has been worked on.
- **Activity ID** – Associated schedule activity linked to this daily report. If schedule information has been populated, the Activity ID will display. Click the **select** link on the right side of the screen to edit the Activity ID if necessary. If you are manually entering this information, enter the desired Activity ID (16 character field). In this case, a select link will not display for this field.
- **Title** – The name of the activity. If schedule information has been populated, the Title will be automatically filled in based on the selected Activity ID. Enter a new title if necessary. If you are manually entering this information, enter the desired title for the activity (120 character field).
- **Start** – The activity start date. If schedule information has been populated, the start date will display. The **checkbox** to the left of the date will be checked if the activity has already started. If you are manually entering this information or need to change the information, use the **calendar icon** to the right of the field to select the start date. Click the checkbox if the activity has already started.
- **Finish** – The activity finish date. If schedule information has been populated, the finish date will display. The **checkbox** to the left of the date will be checked if the activity has finished. If you are manually entering this information or need to change the information, use the **calendar icon** to the right of the field to select the finish date. Click the checkbox if the activity has finished.
- **% Complete** – The percentage of the activity that is complete. If schedule information has been populated, the percentage will display. If you are manually entering this information or need to change the information, enter the percentage complete.

- **Original Duration** – The original time duration for the activity (represented in hours). If schedule information has been populated, the duration hours will display. If you are manually entering this information or need to change the information, enter the original duration in hours.
- **Remaining Duration** – The remaining time duration for the activity (represented in hours). If schedule information has been populated, the duration hours will display. If you are manually entering this information or need to change the information, enter the remaining duration in hours.
- **Total Float** – The number of work periods the start or finish of the activity can be delayed without affecting the project finish date. Float is measured in hours, days, weeks or months (depending on what time representation was agreed upon when the project was planned) and can have negative, zero or positive values. Regardless of whether the activity was already linked to the project or is being manually entered, Contract Management will automatically populate the value in this field.
- **Free Float** – Regardless of whether the activity was already linked to the project or is being manually entered, Contract Management will automatically populate the value in this field.

NOTE: The **Schedule Activity** section will only display if the schedule information has been populated. None of the fields in this section can be modified, they only summarize the same information that was entered in the Daily Schedule section above.

Schedule Activity 		top of page
Original Duration	2940	
Remaining Duration	2282	
% Complete	22.0	
Start	✓ Apr 15, 2009 A	
Finish	Jun 28, 2011	
Total Float	0	

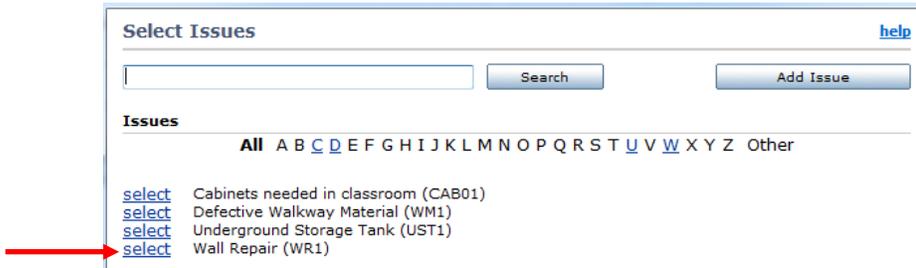
3. Scroll to the **Issues** section and complete the following, if applicable.

Note: Issues can also be linked at the Daily Report document level in addition to the Schedule level.

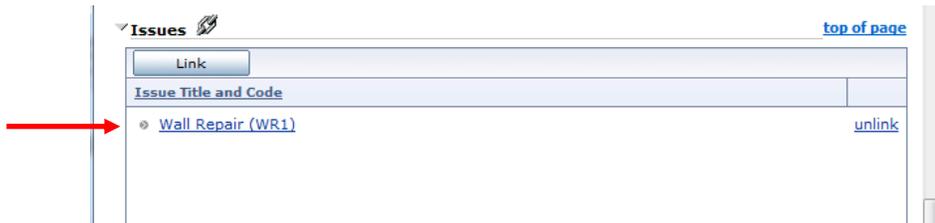
- If this Schedule relates to an Issue that was previously entered in the Issues log, it can be linked to this item. Click the **Link** button in the **Issues** section.



- The **Select Issue** window will display. Choose the desired issue by clicking the **select** link to the left of the issue title.



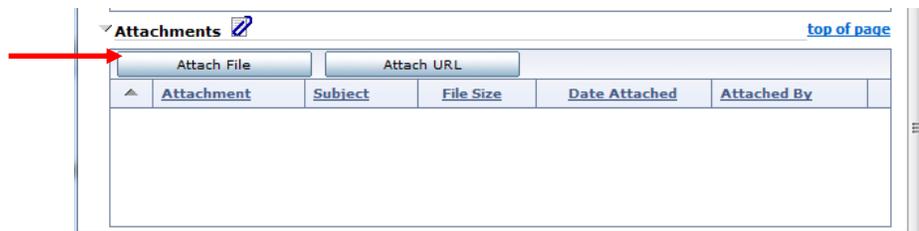
- The selected issue will display in the **Issues** section of the document.



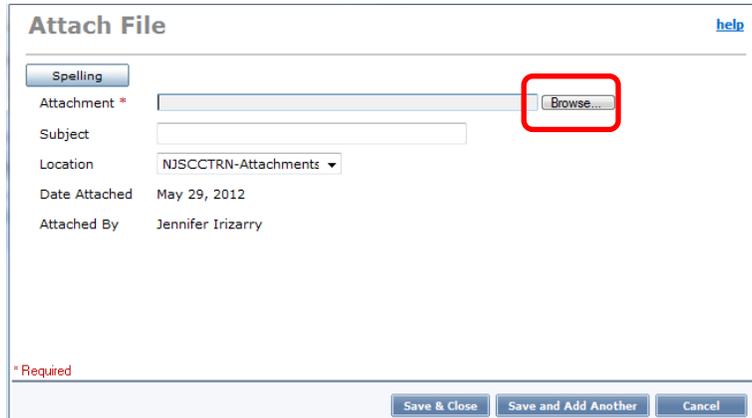
4. Scroll to the **Attachments** section and complete the following, if applicable.

Note: Attachments can also be linked at the Daily Report document level in addition to the Schedule log.

- To attach supporting documentation to this item, scroll to the **Attachments** section and click the **Attach File** button.



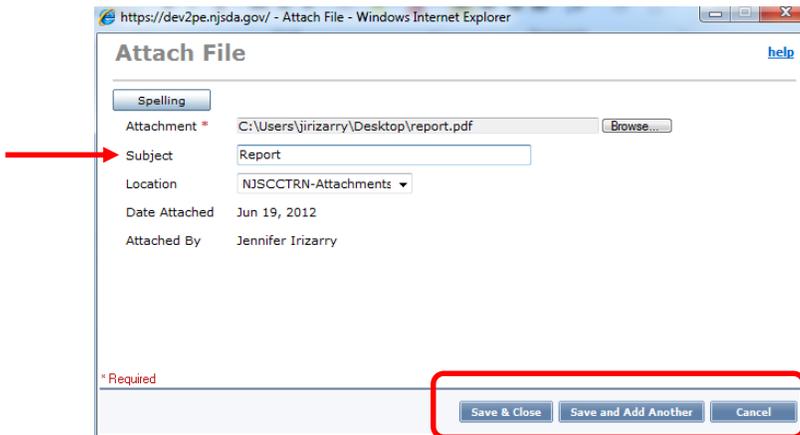
- Click the **Browse** button to navigate to the document you wish to attach.



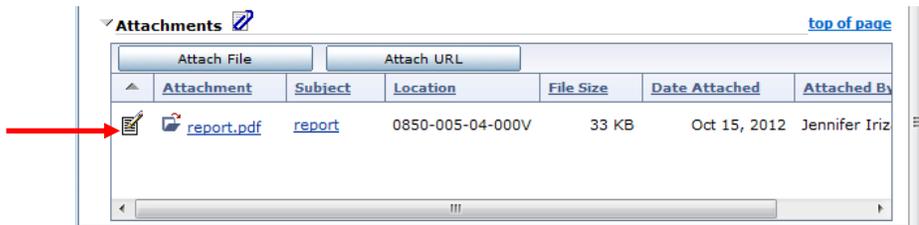
- The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.



- The attached file will display in the **Attachments** section.

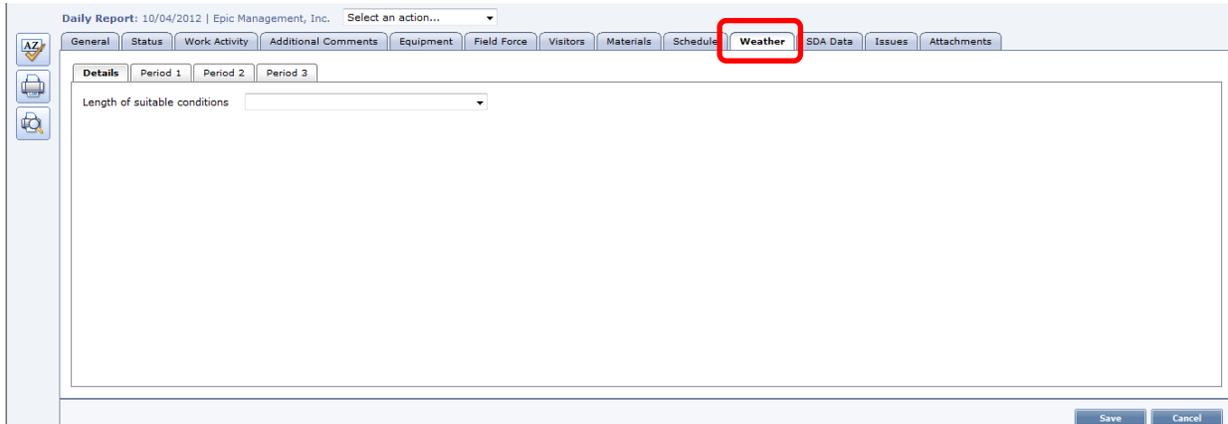


5. When all entries are completed, scroll to the bottom of the screen and click the **Save and Add Another** button to add additional Schedule items or click the **Save and Close** button to return to the Daily Construction Report screen.



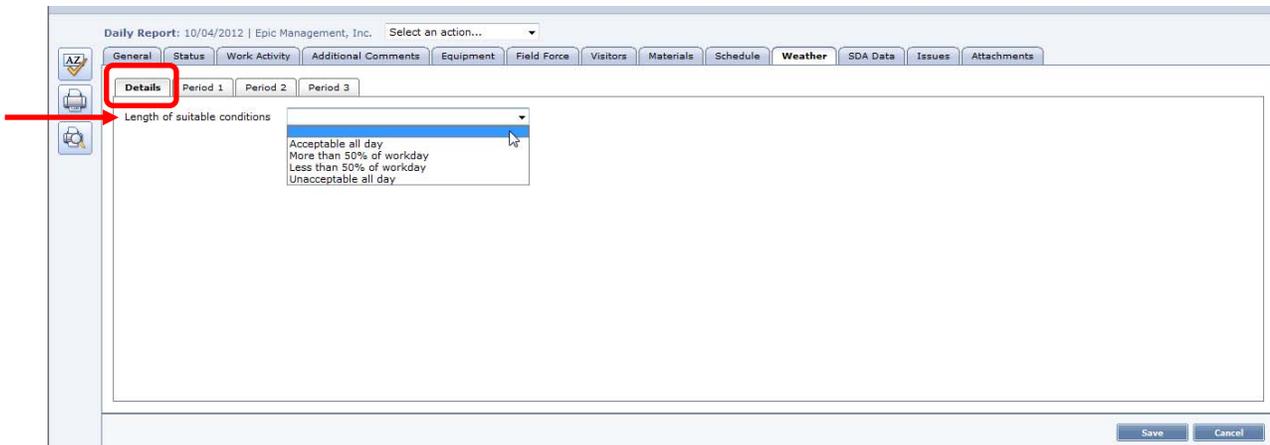
J. Weather Tab

1. Click the **Weather** tab to track the weather conditions for the day. This section is divided into three periods and can be used to indicate first, second and third shift, if applicable. All three periods contain the same fields.



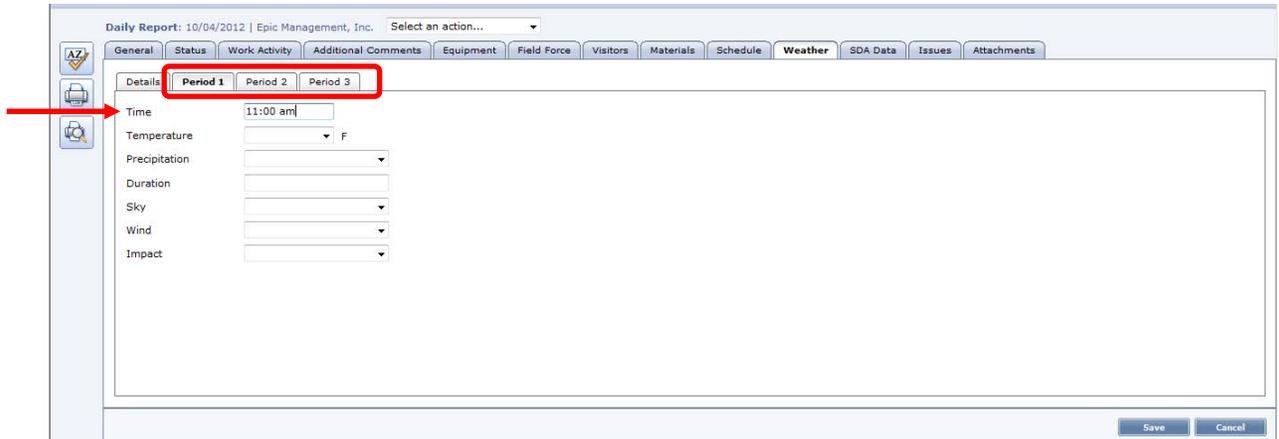
The screenshot shows the 'Weather' tab selected in the 'Daily Report' interface. The 'Weather' tab is highlighted with a red box. Below the tabs, there are sub-tabs for 'Details', 'Period 1', 'Period 2', and 'Period 3'. The 'Details' sub-tab is active, showing a dropdown menu for 'Length of suitable conditions'. The interface includes a top navigation bar with various tabs like 'General', 'Status', 'Work Activity', etc., and a bottom bar with 'Save' and 'Cancel' buttons.

- **Length of suitable conditions (Details subtab)** – Click the drop down box to choose an option.

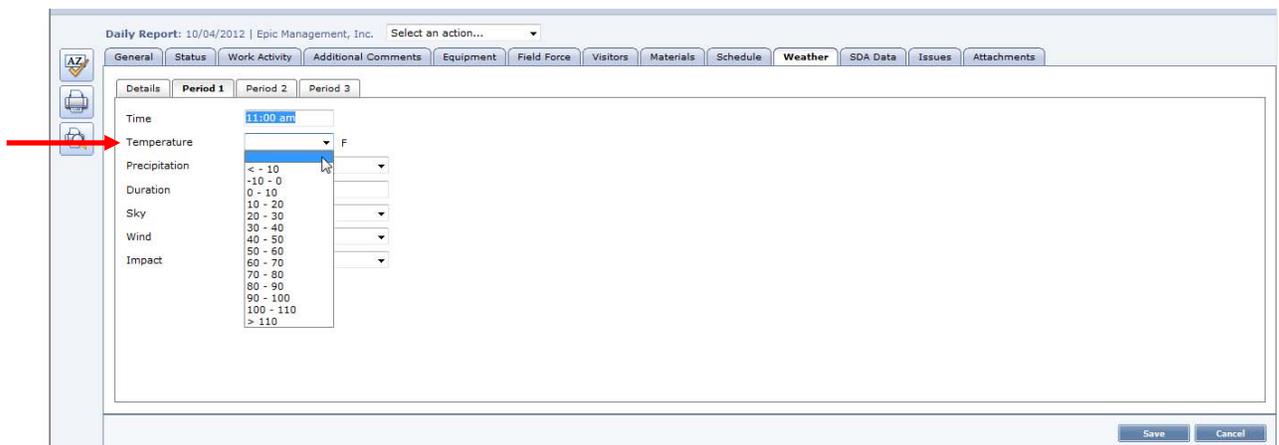


This screenshot shows the 'Weather' tab with the 'Details' sub-tab selected. The 'Length of suitable conditions' dropdown menu is open, displaying four options: 'Acceptable all day', 'More than 50% of workday', 'Less than 50% of workday', and 'Unacceptable all day'. A red arrow points to the dropdown menu. The 'Weather' tab is also highlighted with a red box. The interface includes a top navigation bar and a bottom bar with 'Save' and 'Cancel' buttons.

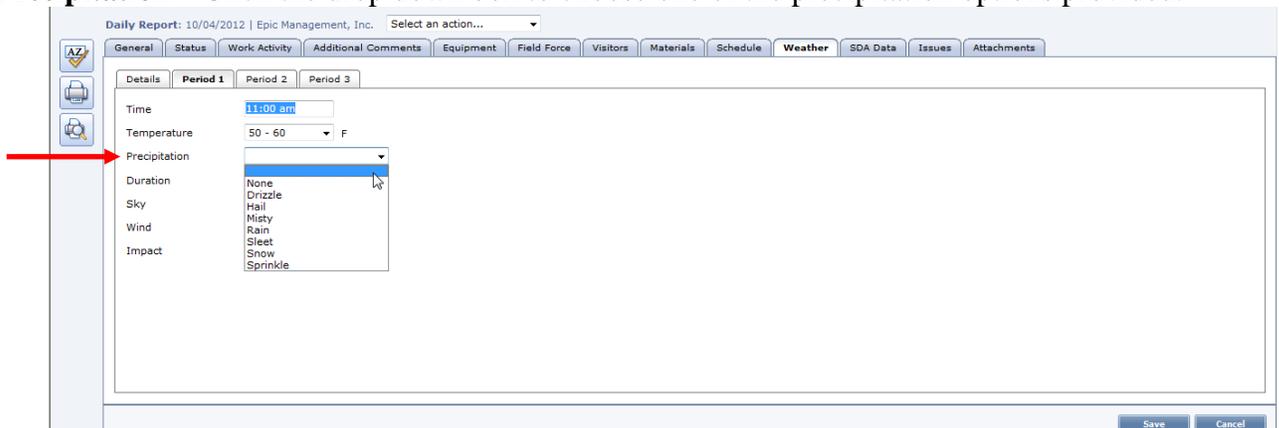
- **Time (from Period Subtab)** – Enter the time the weather conditions were recorded.



- **Temperature** – Click the drop down box to choose one of the temperature ranges provided.



- **Precipitation** – Click the drop down box to choose one of the precipitation options provided.



- **Duration** – Enter the length of time that the precipitation lasted (12 character field).

The screenshot shows the 'Daily Report' form for 10/04/2012. The 'Weather' tab is selected. The 'Details' section is active, and the 'Period 1' tab is selected. The 'Duration' field is highlighted with a red arrow. The form contains the following fields:

Time	11:00 am
Temperature	50 - 60 F
Precipitation	Rain
Duration	1 hour
Sky	
Wind	
Impact	

- **Sky** – Click the drop down box to choose one of the options provided.

The screenshot shows the 'Daily Report' form with the 'Sky' dropdown menu open. A red arrow points to the dropdown box. The menu options are: Clear, Overcast, and Prt Cloudy. The form contains the following fields:

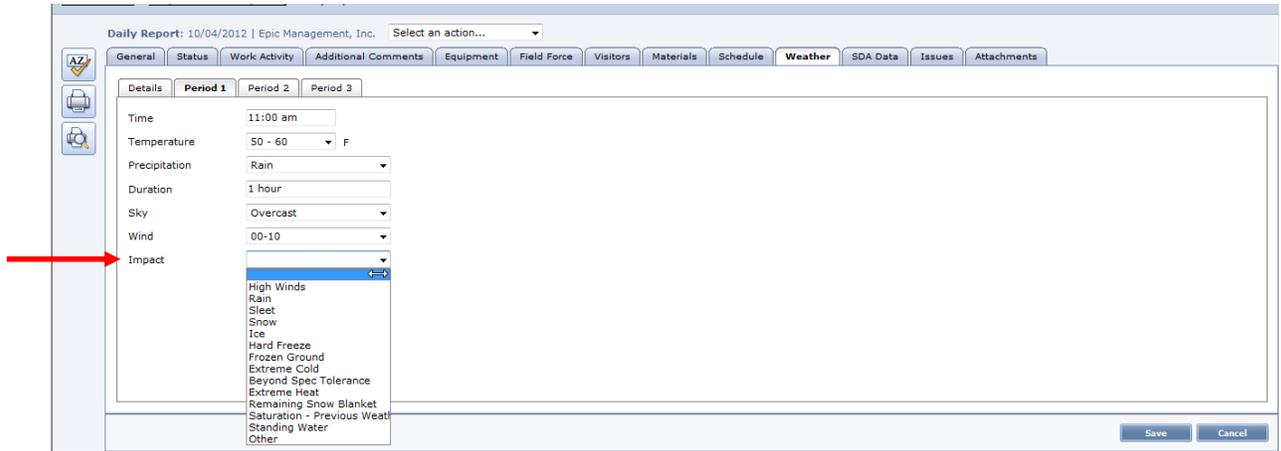
Time	11:00 am
Temperature	50 - 60 F
Precipitation	Rain
Duration	1 hour
Sky	Clear
Wind	
Impact	

- **Wind** – Click the drop down box to choose one of the wind speed ranges provided.

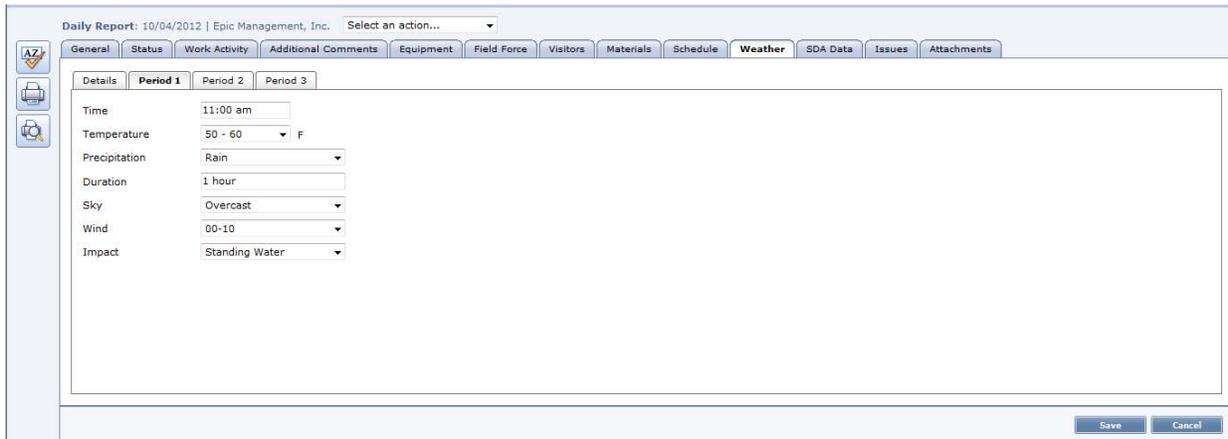
The screenshot shows the 'Daily Report' form with the 'Wind' dropdown menu open. A red arrow points to the dropdown box. The menu options are: 00-10, 10-20, 20-30, 30-40, 40-50, 50-60, and 60-70. The form contains the following fields:

Time	11:00 am
Temperature	50 - 60 F
Precipitation	Rain
Duration	1 hour
Sky	Overcast
Wind	00-10
Impact	

- **Impact** – Click the drop down box to choose one of the impact options provided.

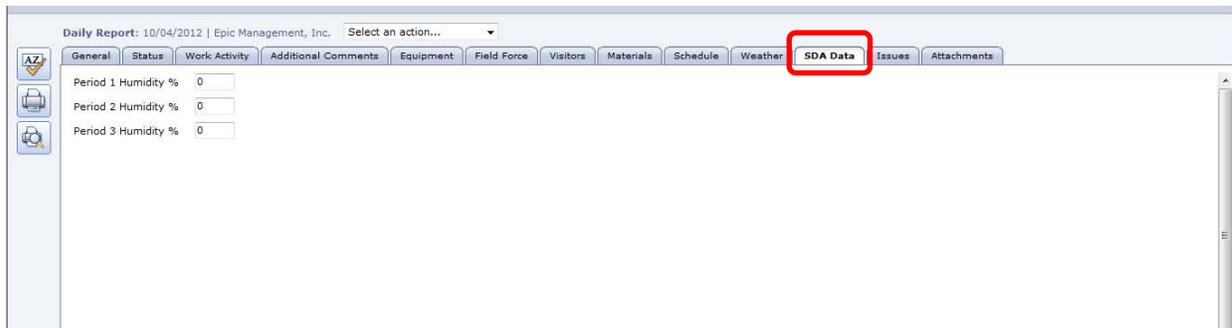


2. An example of a completed weather section is shown. If required, repeat these steps for additional periods.



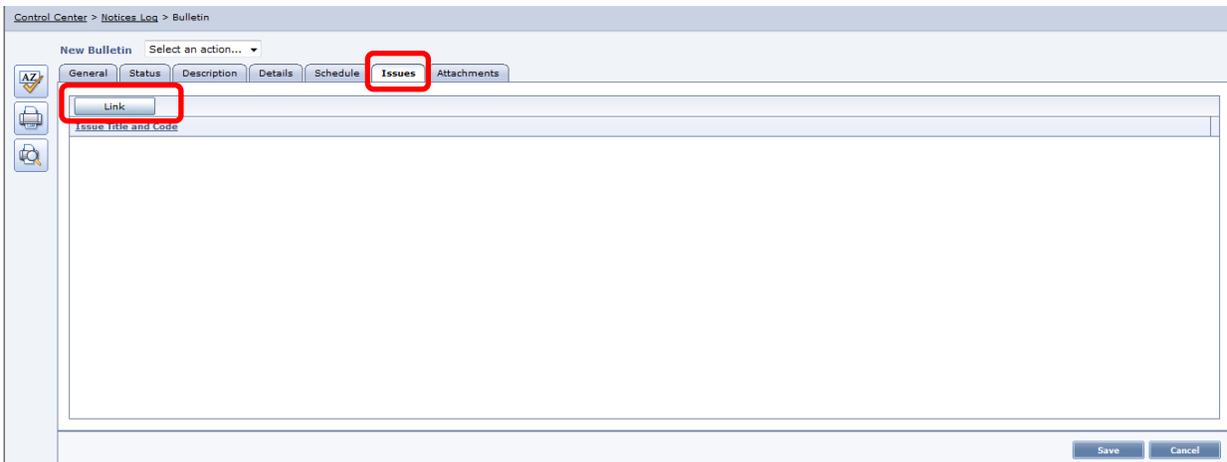
K. SDA Data Tab

1. Click the **SDA Data** section and enter the **Humidity** conditions for Periods One, Two and Three. The percentage will be entered as a number.



L. Issues Tab

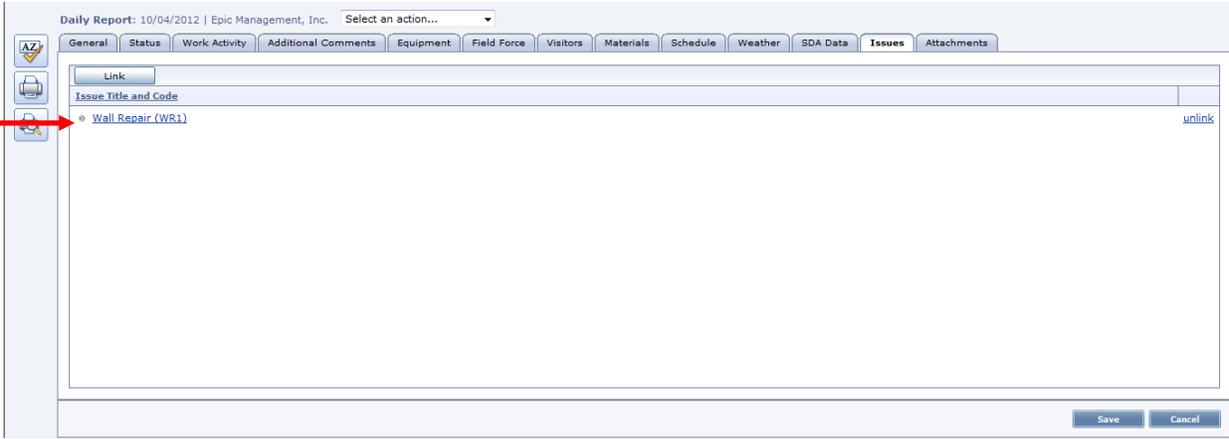
1. Click the **Issues** tab and complete the following, if applicable.
 - If this Daily Report relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button in the **Issues** section.



- The **Select Issues dialog box** displays. Locate your desired issue and click the **select** link to the left of the issue title to link it to the Notice. Once you click the select link, you will return to the Notice.



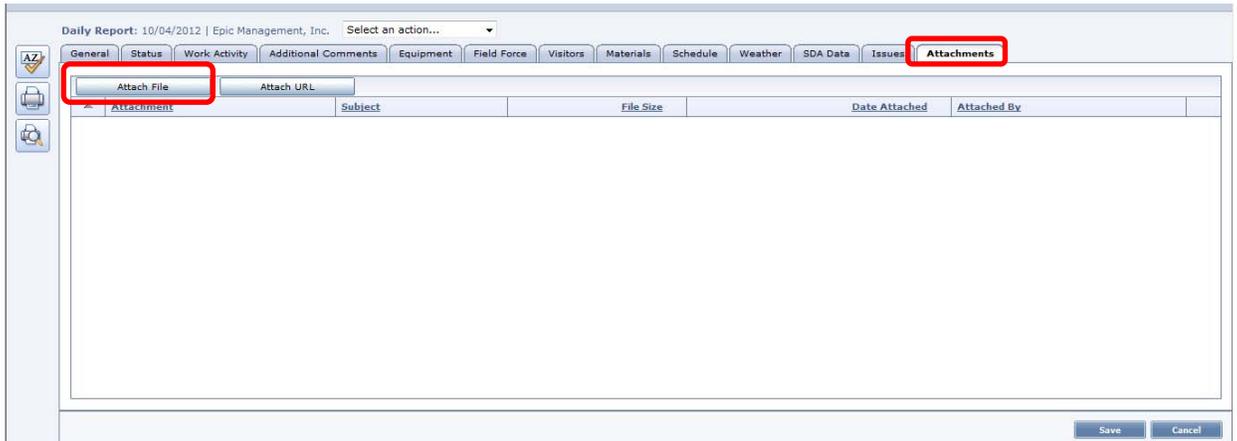
An example of a completed section is shown:



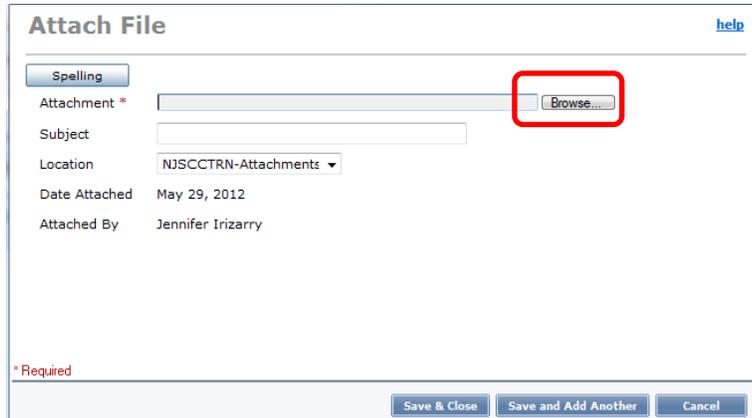
M. Attachments Section

1. Click the **Attachments** tab and complete the following, if applicable.

- To attach supporting documentation, scroll to the **Attachments** section and click the **Attach File** button.



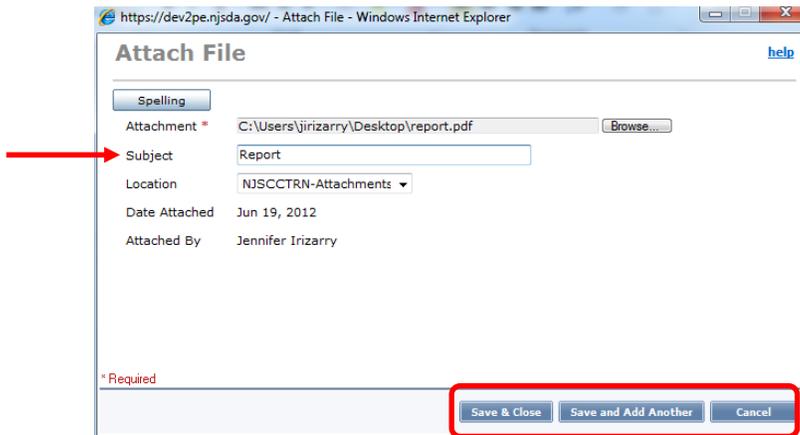
- Click the **Browse** button to navigate to the document you wish to attach.



- The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



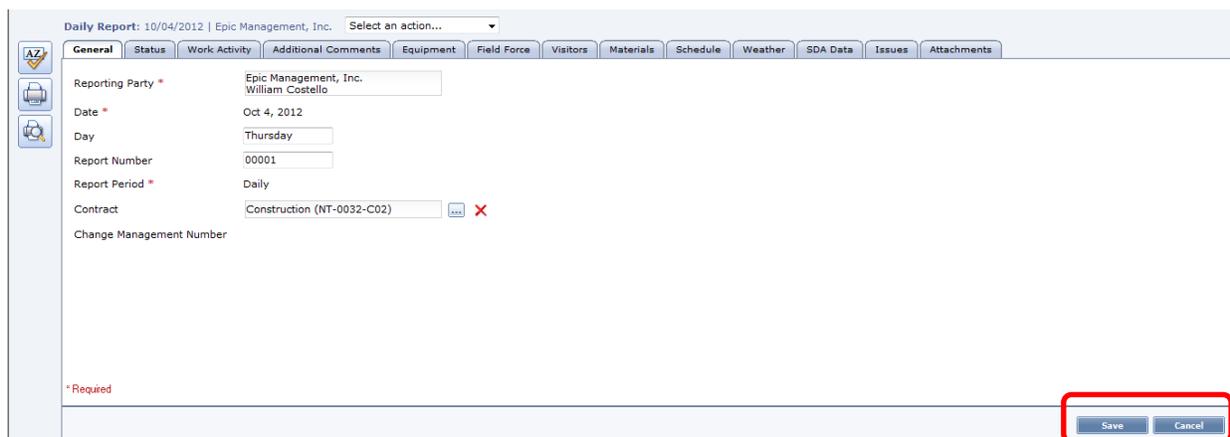
- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.



- The attached file will display in the **Attachments** section.



5. When all entries are completed, click the **Save** button to save the document.



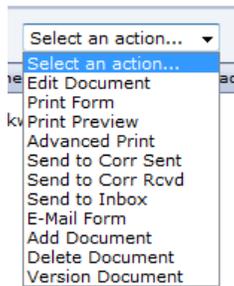
IV. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

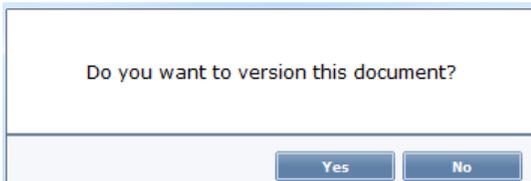
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

A. Create a Document Version

1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.



3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.



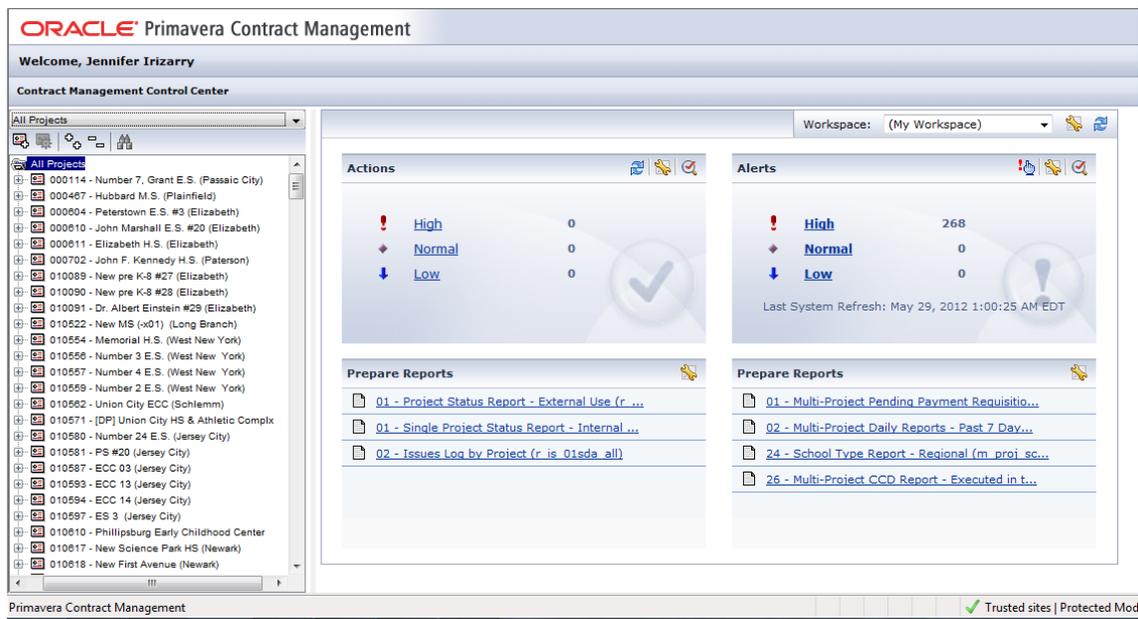
V. E-Mail a Daily Construction Report

The Daily Construction Report document can be e-mailed for distribution and review before the document is approved and saved. Users who have an account on Contract Management will be able to click the document link in the e-mail message.

Users with the appropriate access will have the ability to edit the Daily Construction Report as necessary. Any documentation supporting the changes should be attached in the Attachments section of the Daily Construction Report.

To e-mail a Daily Construction Report:

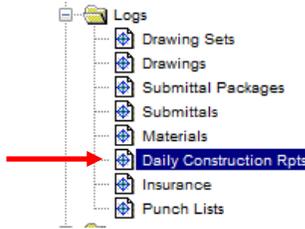
1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



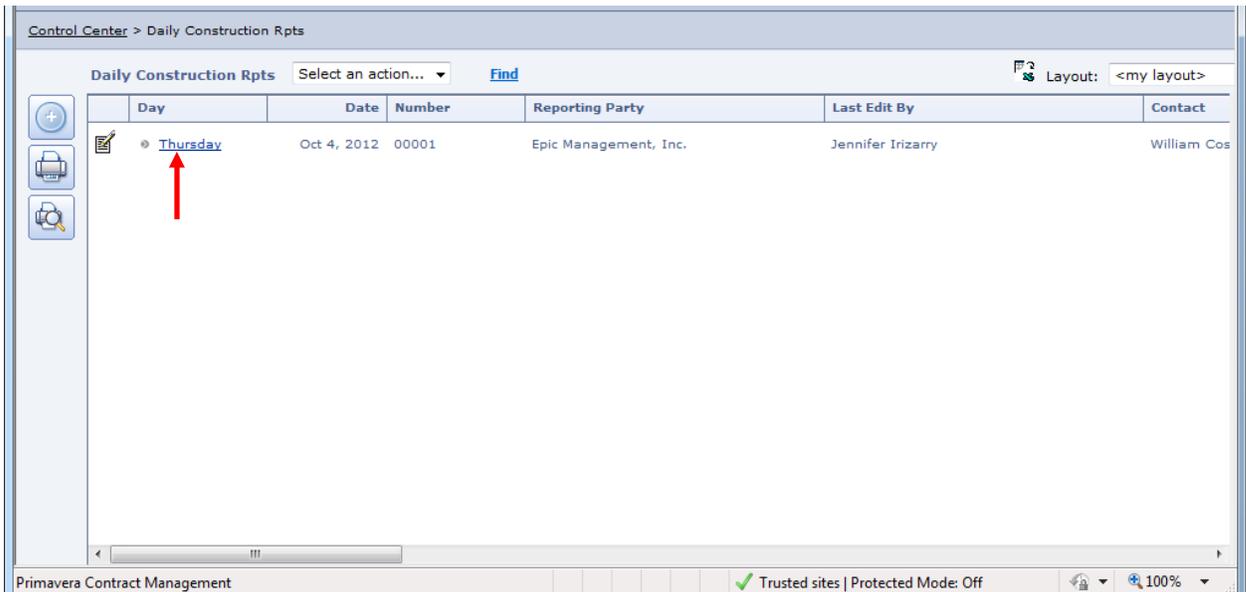
2. Select your desired project.



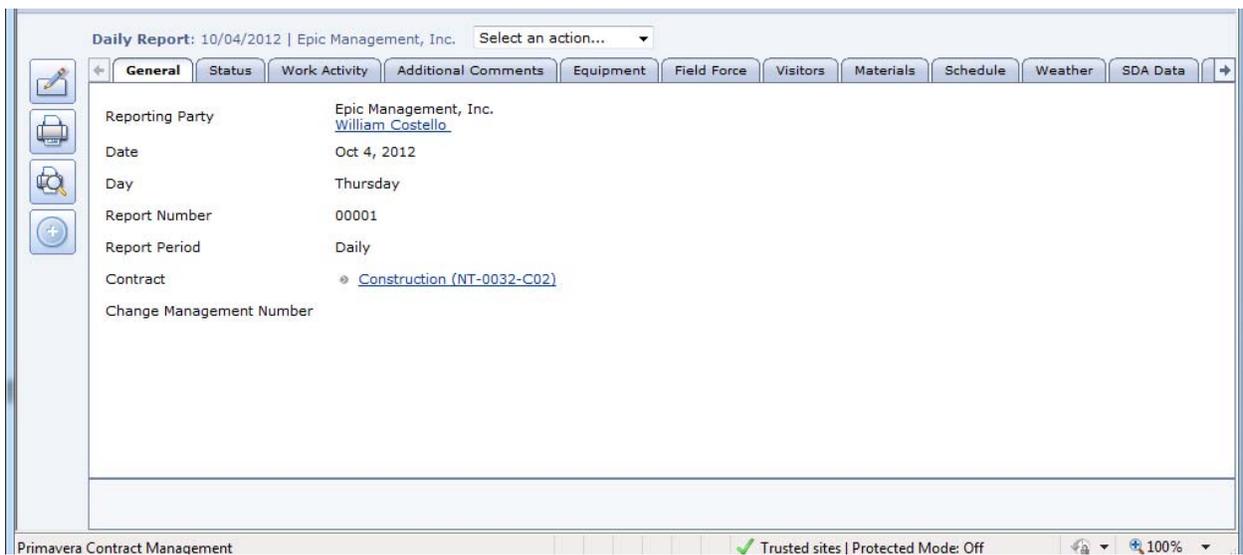
3. Open the **Logs** folder (a list of modules will display) and select **Daily Construction Rpts.**



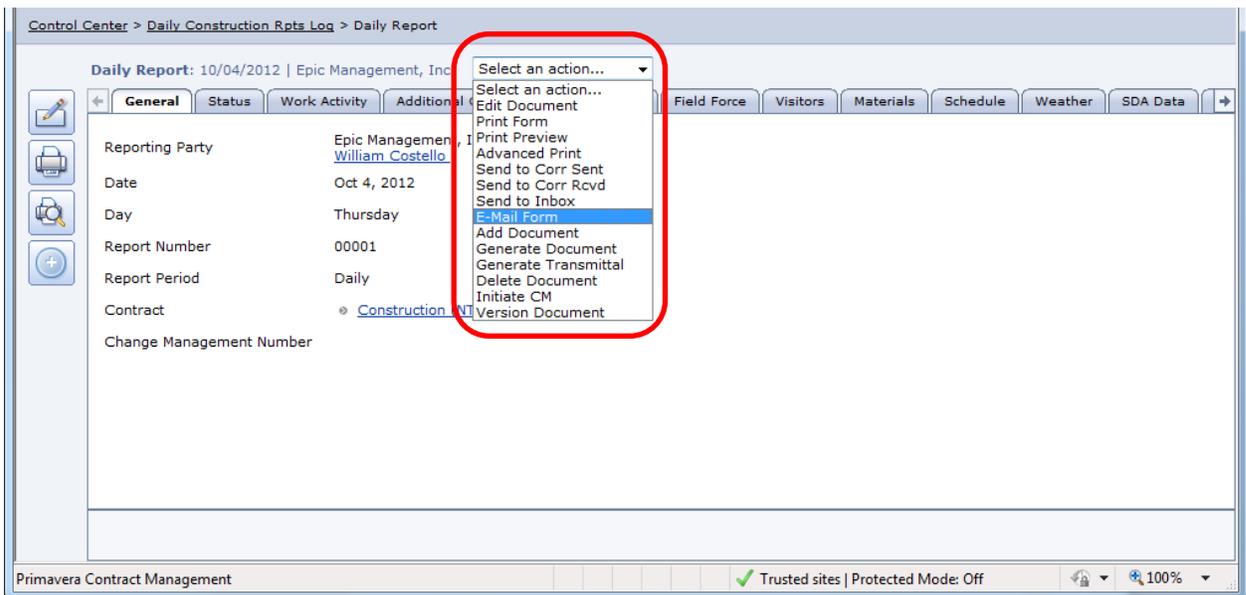
4. The Daily Construction Rpts **Log View** displays. Locate your desired document and click the **blue title link** to open it.



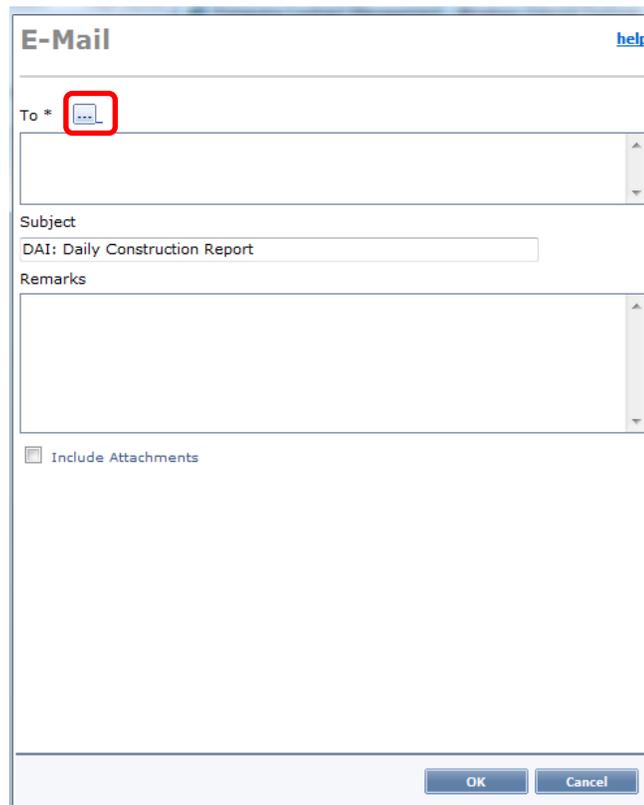
5. The Daily Report document displays.



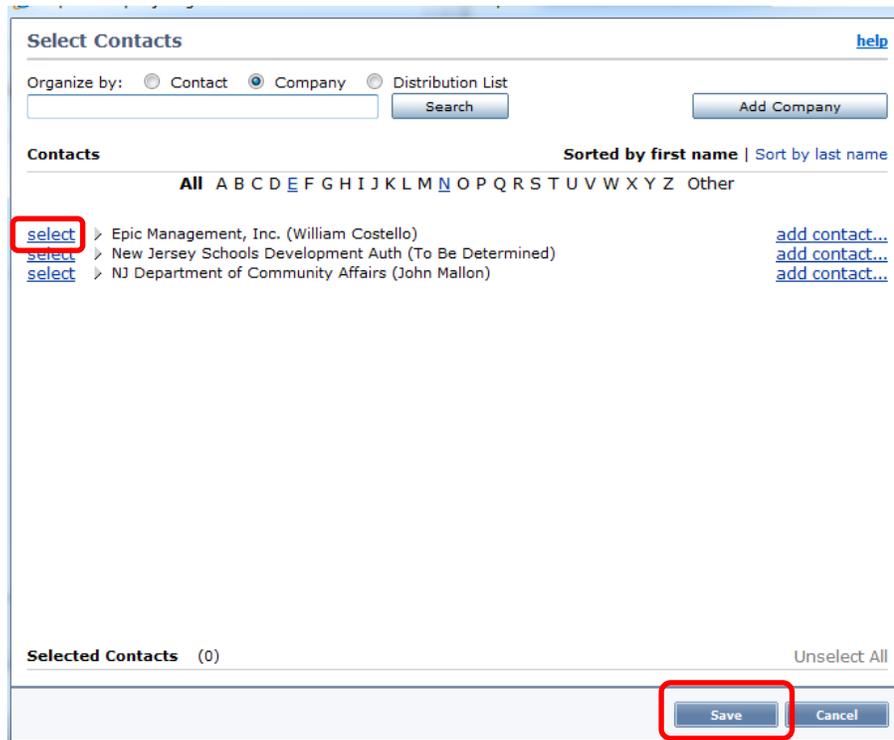
6. With the Daily Report document open, choose the **Select an Action** drop-down list at the top of the screen and choose **E-Mail Form**.



7. The **E-Mail dialog box** displays. Click the **select** button in the **To** box to bring up a list of companies and contacts.



- Choose the names from the contact list by clicking the **select** link to the left of the contact name and click the **Save** button when finished.



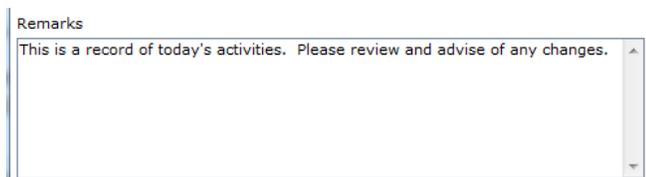
- The selected names display in the **To** section of the **E-Mail** dialogue box. It is also recommended that the sender of the e-mail include their own name in the To box.



- The default information in the **Subject** field can be changed as required.



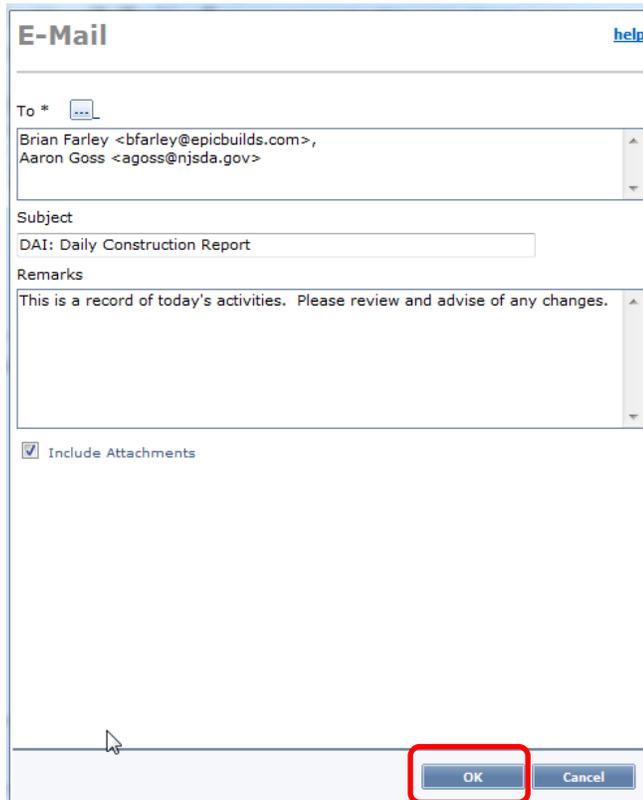
- Enter any comments in the **Remarks** field. The information entered here will display in the body of the e-mail message.



12. If there are any attachments to be included with the e-mail, check the **Include Attachments** box at the bottom of the **E-mail** window.



13. When all fields have been completed, scroll to the bottom of the **E-Mail** window and click the **OK** button to send the e-mail.



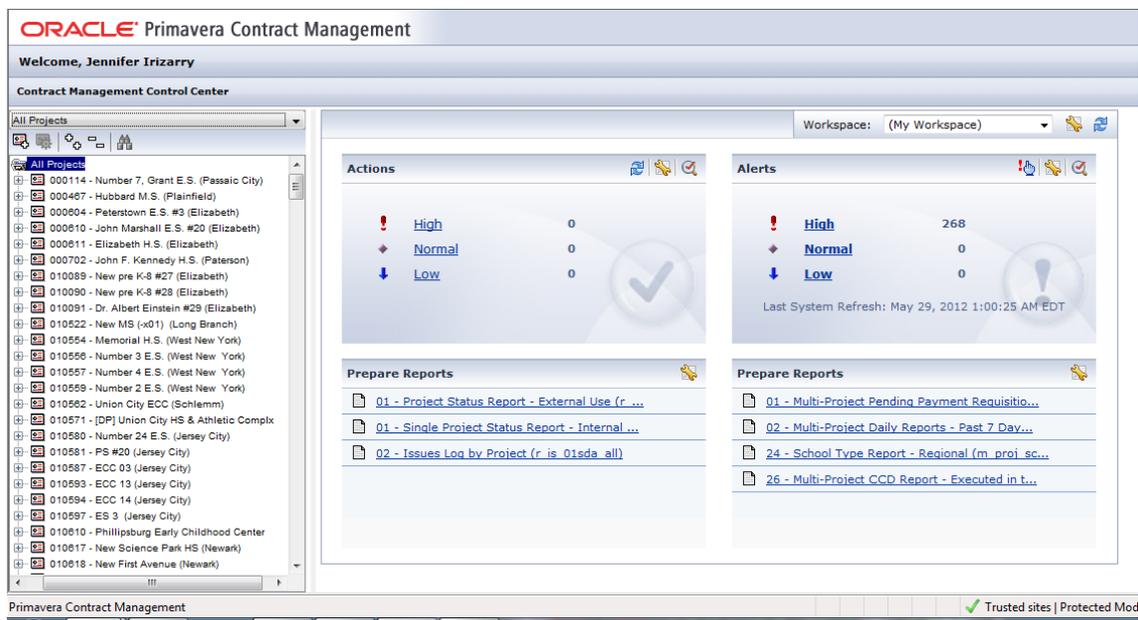
VI. Approve and Save a Daily Construction Report

Before a new Daily Construction Report is created, it is recommended that the current Daily Construction Report be approved and saved. While this is an *optional* function, approving and saving a document will ensure the integrity of all historical information that is entered on this document.

It is important to note that this function should only be selected right before you are ready to generate a new Daily Construction Report. If the approve and save function is chosen at any point before you are ready to generate a new Daily Construction Report, a user (such as an Architect or General Contractor) who would normally be able to edit the document will be locked out.

To approve and save a Daily Construction Report:

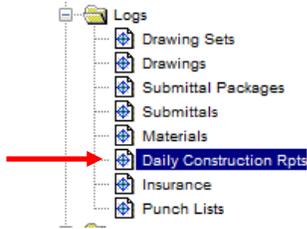
1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



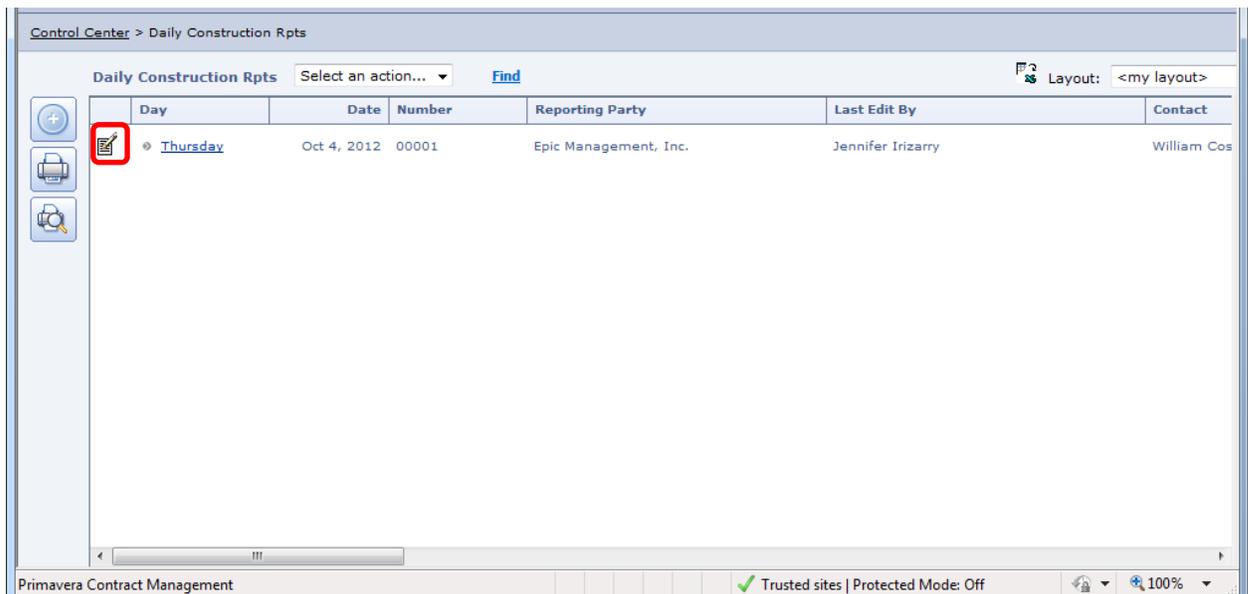
2. Select your desired project.



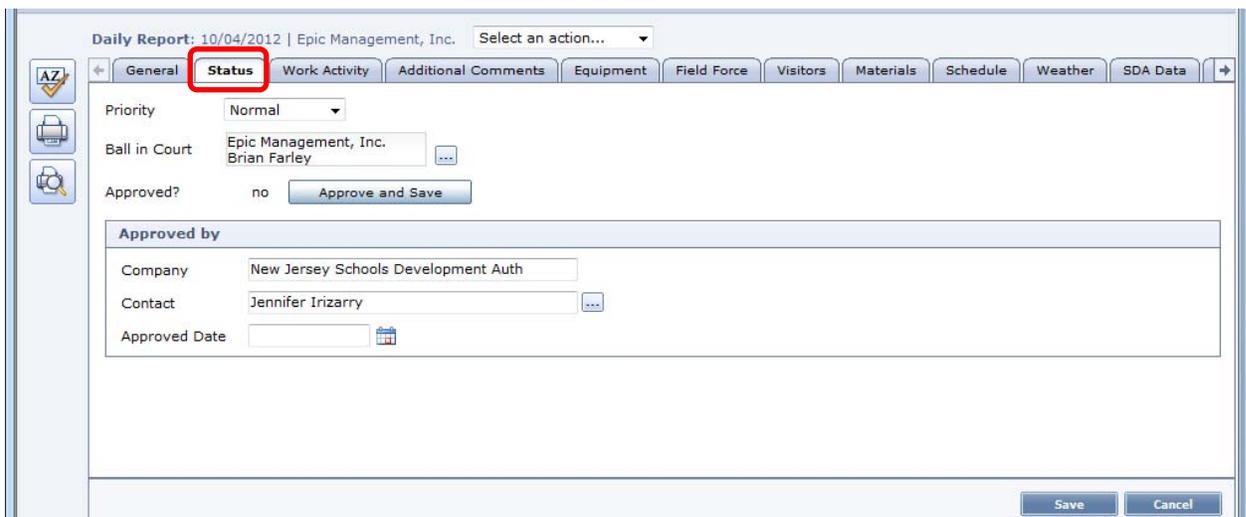
3. Open the **Logs** folder (a list of modules will display) and select **Daily Construction Rpts.**



4. The Daily Construction Rpts **Log View** displays. Locate your desired document and click the **edit icon** to open it.



5. The Daily Report document displays. Click the **Status** tab.



- The **Approved by** information must be completed before the approve and save button can be clicked. The default information displayed in the Approved by section reflects the name of the person who created the document. This needs to be changed to the person who is approving the Daily Construction Report. Click the **select** button next to the field to select the correct name from the contact list.

Daily Report: 10/04/2012 | Epic Management, Inc. Select an action...

Priority: Normal

Ball in Court: Epic Management, Inc. Brian Farley

Approved?: no Approve and Save

Approved by

Company: New Jersey Schools Development Auth

Contact: Jennifer Irizarry

Approved Date: [Calendar Icon]

Save Cancel

- Once selected, the **Company** and **Contact** fields will be populated. Click the **calendar icon** on the **Approved Date** field to select the date the document is approved.

Daily Report: 10/04/2012 | Epic Management, Inc. Select an action...

Priority: Normal

Ball in Court: Epic Management, Inc. Brian Farley

Approved?: no Approve and Save

Approved by

Company: Epic Management, Inc.

Contact: Brian Farley

Approved Date: Oct 15, 2012

Save Cancel

- To ensure that this document will not continue to display in a user's Action Item box on the Control Center, the **Ball in Court** should be set to **To Be Determined**. Click the **select** button next to the field and choose **To Be Determined** from the contact list.

Daily Report: 10/04/2012 | Epic Management, Inc. Select an action...

General Status Work Activity Additional Comments Equipment Field Force Visitors Materials Schedule Weather SDA Data

Priority Normal

Ball in Court To Be Determined To Be Determined

Approved? no Approve and Save

Approved by

Company Epic Management, Inc.

Contact Brian Farley

Approved Date Oct 15, 2012

Save Cancel

- Once the Approved by information has been completed and the Ball in Court has been changed, click the **approve and save** button.

Daily Report: 10/04/2012 | Epic Management, Inc. Select an action...

General Status Work Activity Additional Comments Equipment Field Force Visitors Materials Schedule Weather SDA Data

Priority Normal

Ball in Court To Be Determined To Be Determined

Approved? no Approve and Save

Approved by

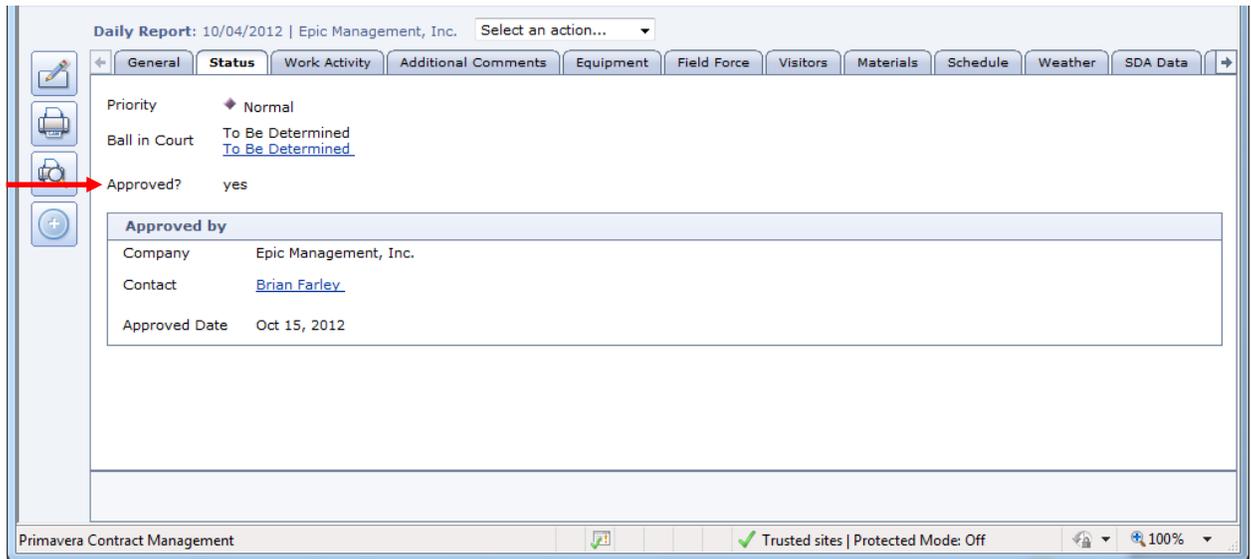
Company Epic Management, Inc.

Contact Brian Farley

Approved Date Oct 15, 2012

Save Cancel

10. The **Approved?** field will change to **yes**. This means that the document cannot be changed unless you have the appropriate edit rights.

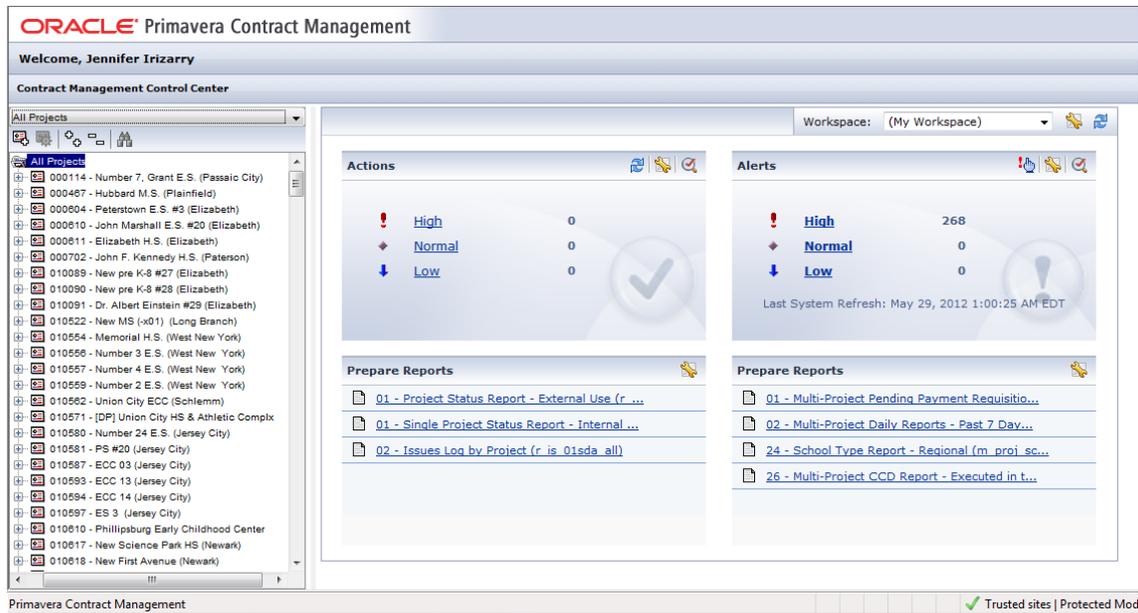


VII. Generate a Subsequent Daily Construction Report

This procedure outlines the steps to create a new Daily Construction Report from a previous Daily Construction Report. This will allow all information entered on the original document to be copied over into the new document, reducing entry time.

It is recommended that the previous Daily Construction Report be **Approved and Saved** before beginning this process.

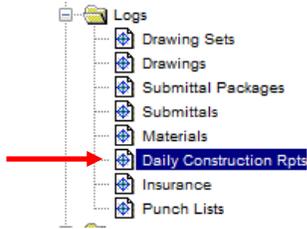
1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



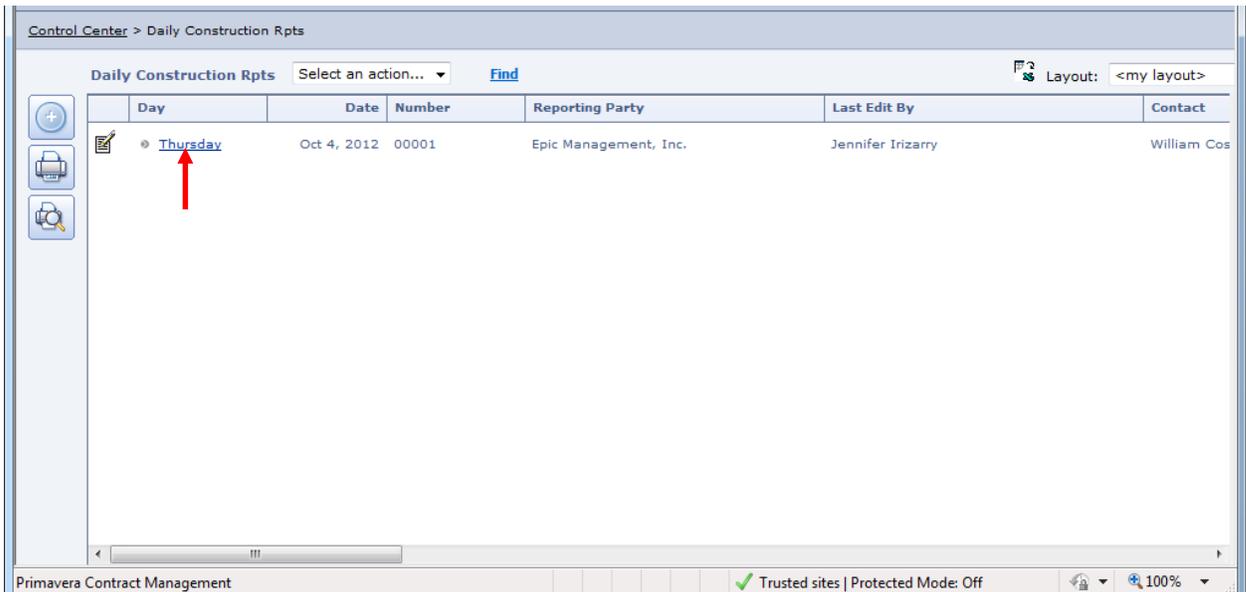
2. Select your desired project.



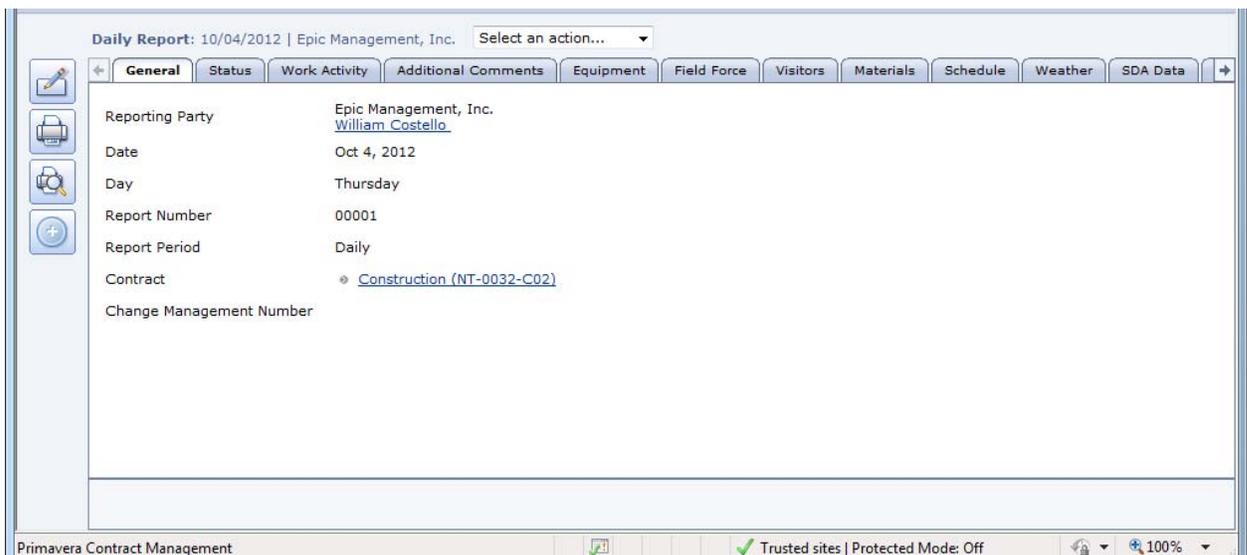
3. Open the **Logs** folder (a list of modules will display) and select **Daily Construction Rpts.**



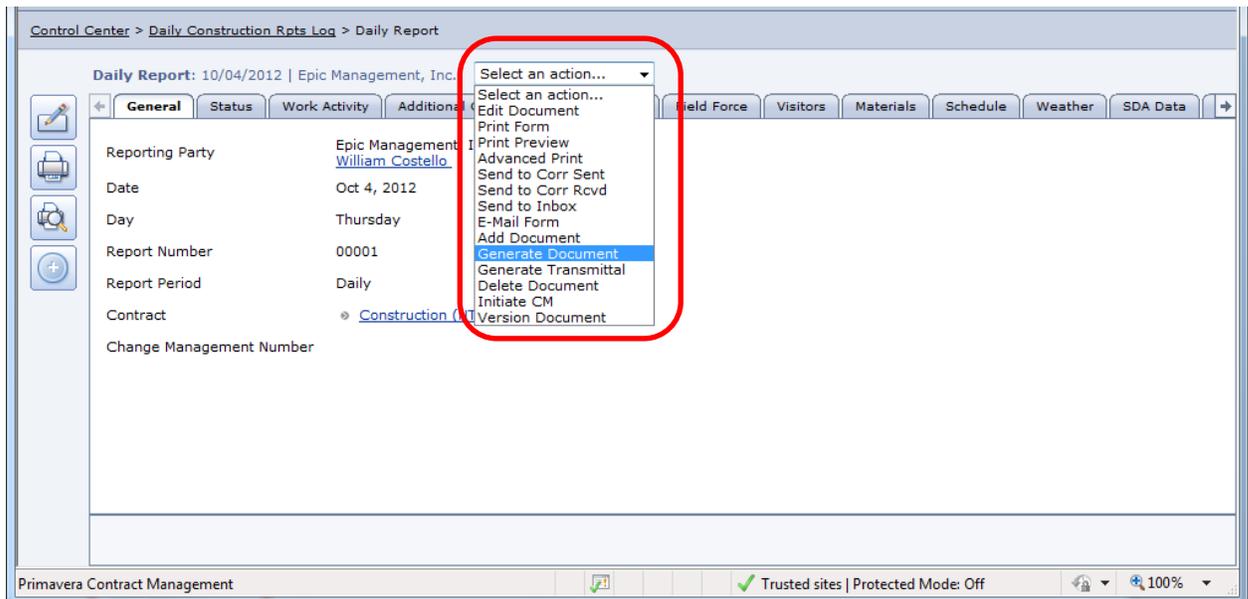
4. The Daily Construction Rpts **Log View** will display. Locate your desired document and click the **blue title link** to open it.



5. The Daily Report document displays.



6. With the Daily Construction Report open, click the drop down box on the **Select an action** menu on the top of the screen and choose **Generate Document** from the menu options.



7. The **Generate Daily Report** dialog box displays.

The 'Generate Daily Report' dialog box is shown. It contains the following fields and controls:

- Date ***: A text box containing 'Oct 15, 2012' and a calendar icon.
- Day**: A text box containing 'Monday'.
- Report Number**: A text box containing '00002'.
- Company ***: A text box containing 'Epic Management, Inc. William Costello' and a dropdown arrow.
- Report Period ***: A dropdown menu set to 'Daily'.

At the bottom of the dialog, there are three buttons: 'Next', 'Finish', and 'Cancel'. A red asterisk indicates that the Date, Company, and Report Period fields are required.

- **Date** – Will reflect the current date. Use the **calendar icon** to change if necessary. This is a required field.
- **Day** – Corresponds to the Date field and will change if the Date field is changed.
- **Report Number** – Will automatically increment to the next report number.

- **Company** – Will default to the name in the Reporting Party field on the previous document. Click the **select** link on the right side of the screen to pick another name from the Contact list. This is a required field.
 - **Report Period** – Will default to **Daily**. Use the drop down list to make another selection if desired (Daily, Weekly, Monthly, Quarterly, Semiannually, Annually). This is a required field.
8. When all selections have been made, click the **Next** button to continue to make further selections, or click the **Finish** button to generate the new document. In the example shown, the Next button has been clicked.

Generate Daily Report

Your entries for Activity, Equipment, and Field Force will be copied from the selected Daily Report.

Date *

Day

Report Number

Company *

Report Period *

* Required

9. If you click the Next button, additional options displays. Read each option carefully and choose the correct response to create the new document. Please note that the Visitor and Materials sections will not be copied over, they must be recreated. When all options have been selected, click the **Finish** button to create the new document.

Generate Daily Report

Copy the original Daily Report's Work Activity?
 yes no

Copy the original Daily Report's Additional Comments?
 yes no

Copy the original Daily Report's Weather Conditions?
 yes no

Link the new Daily Report to the same Issues as the original?
 yes no

Link the new Daily Report to the same Attachments as the original?
 yes no

Previous **Finish** Cancel

10. The new Daily Report displays. Click the **Edit Document** button on the left side of the screen to edit the fields as needed.

Daily Report: 10/15/2012 | Epic Management, Inc. Select an action...

General Status Work Activity Additional Comments Equipment Field Force Visitors Materials Schedule Weather SDA Data

Reporting Party Epic Management, Inc.
[William Costello](#)

Date Oct 15, 2012

Day Monday

Report Number 00002

Report Period Daily

Contract [Construction \(NT-0032-C02\)](#)

Change Management Number

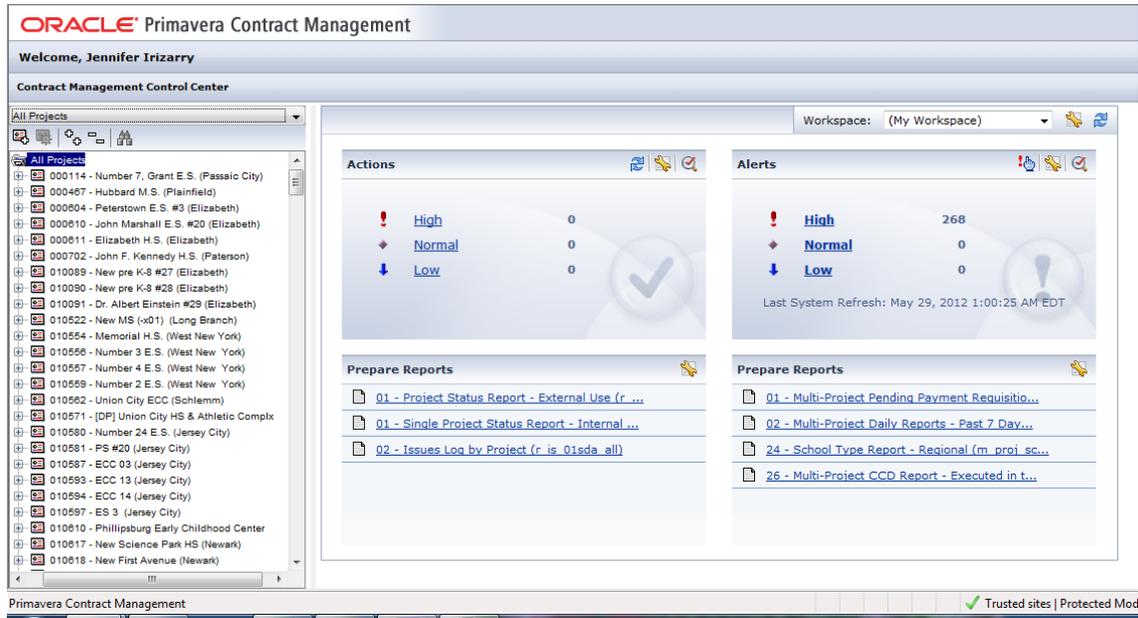
javascript:void 0; Trusted sites | Protected Mode: Off 100%

VIII. Available Reports

A. Print the Daily Report Form

To print an individual Daily Construction form:

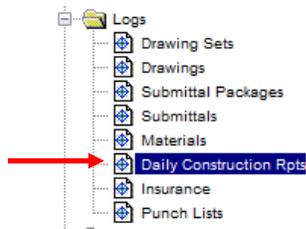
1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



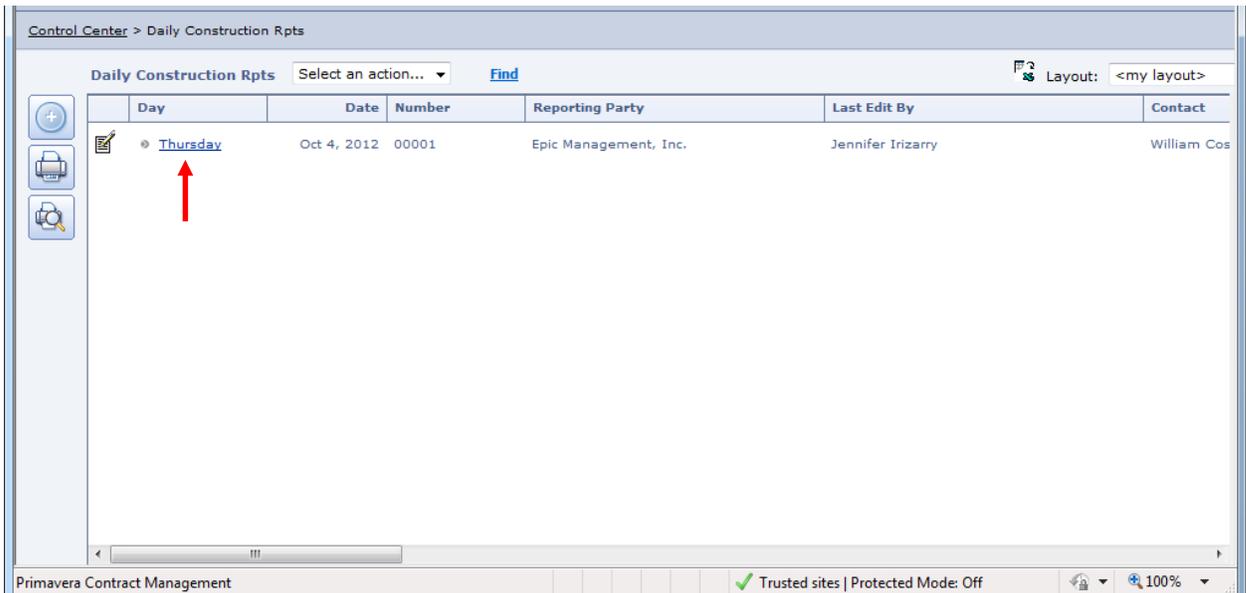
2. Select your desired project.



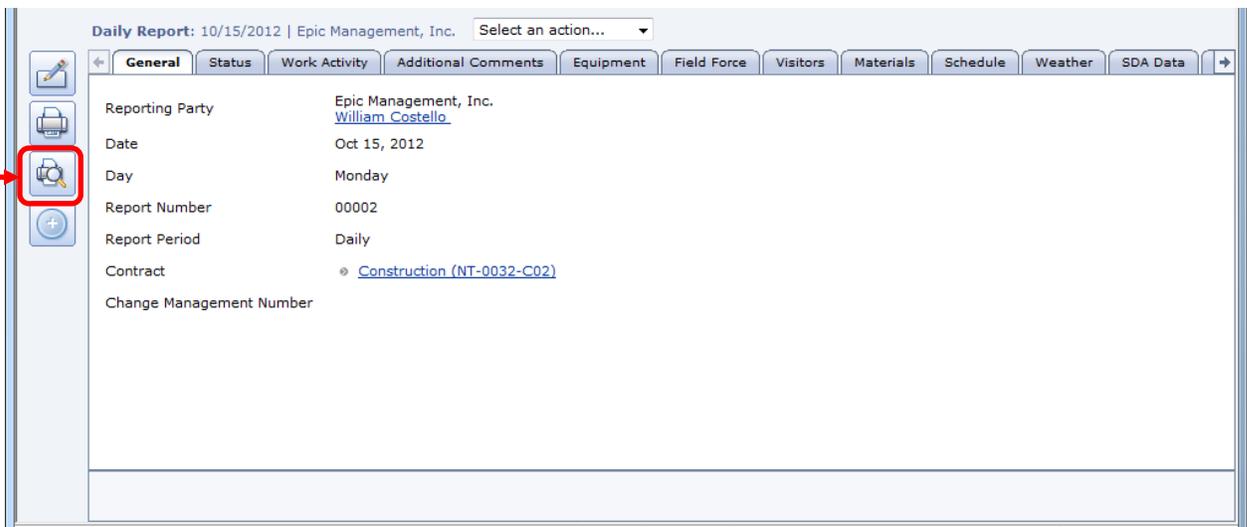
3. Open the **Logs** folder (a list of modules will display) and select **Daily Construction Rpts.**



- The Daily Construction Rpts **Log View** displays. Locate your desired document and click the **blue title link** to open it.



- The Daily Report document displays. Click the **Print Preview** button on the left side of the screen. When the **Daily Report** form displays:
 - Click the **Print** button on the upper right side of the screen to get a printed output or create a PDF document.
 - Click the **Save a Copy** button on the upper left side of the screen to save this report to your local or network drive.
 - Click the **Close** button on the upper right side of the screen when finished.



B. Advanced Reports

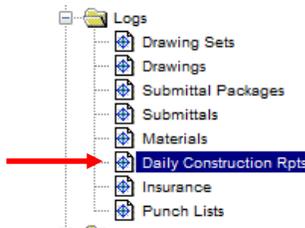
1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



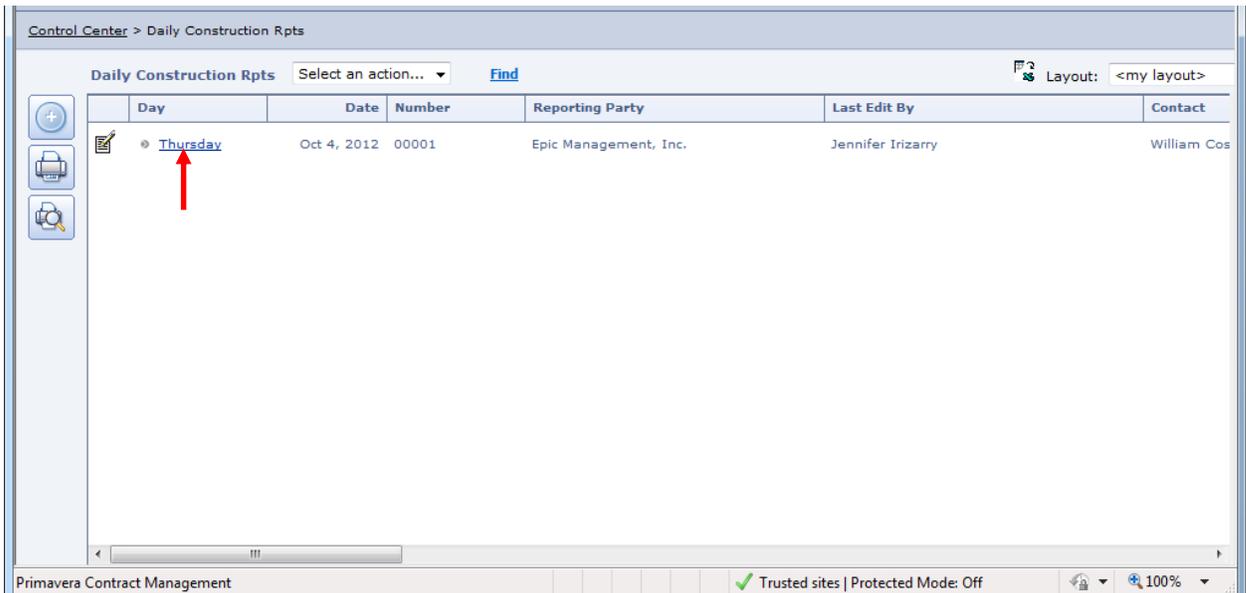
2. Select the project you wish to work with.



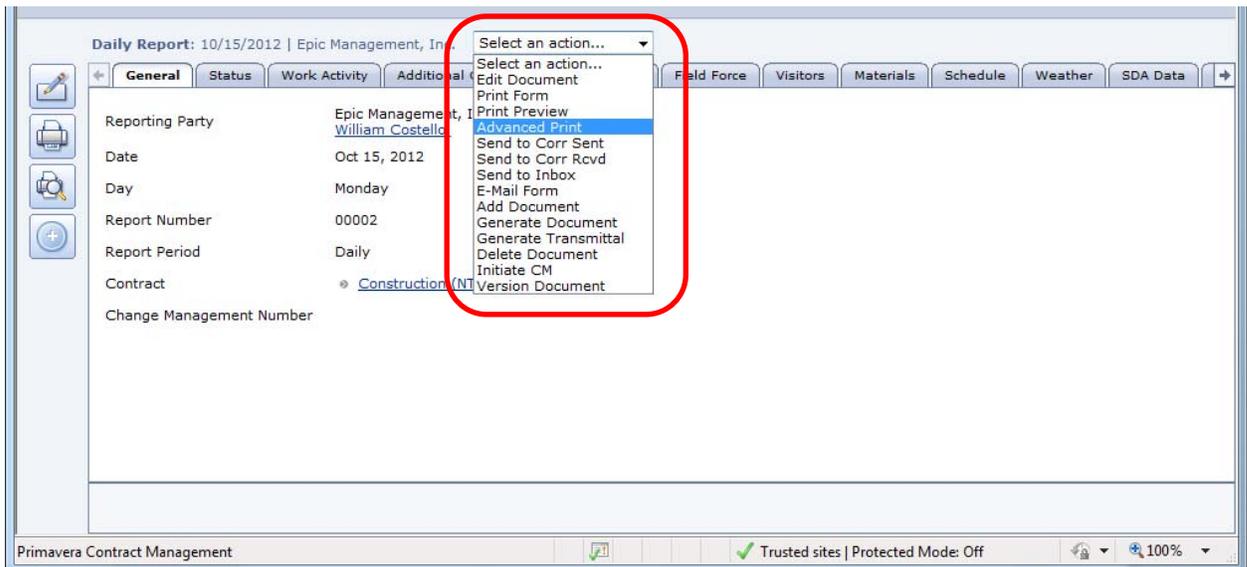
3. Open the **Logs** folder (a list of modules will display) and select **Daily Construction Rpts.**



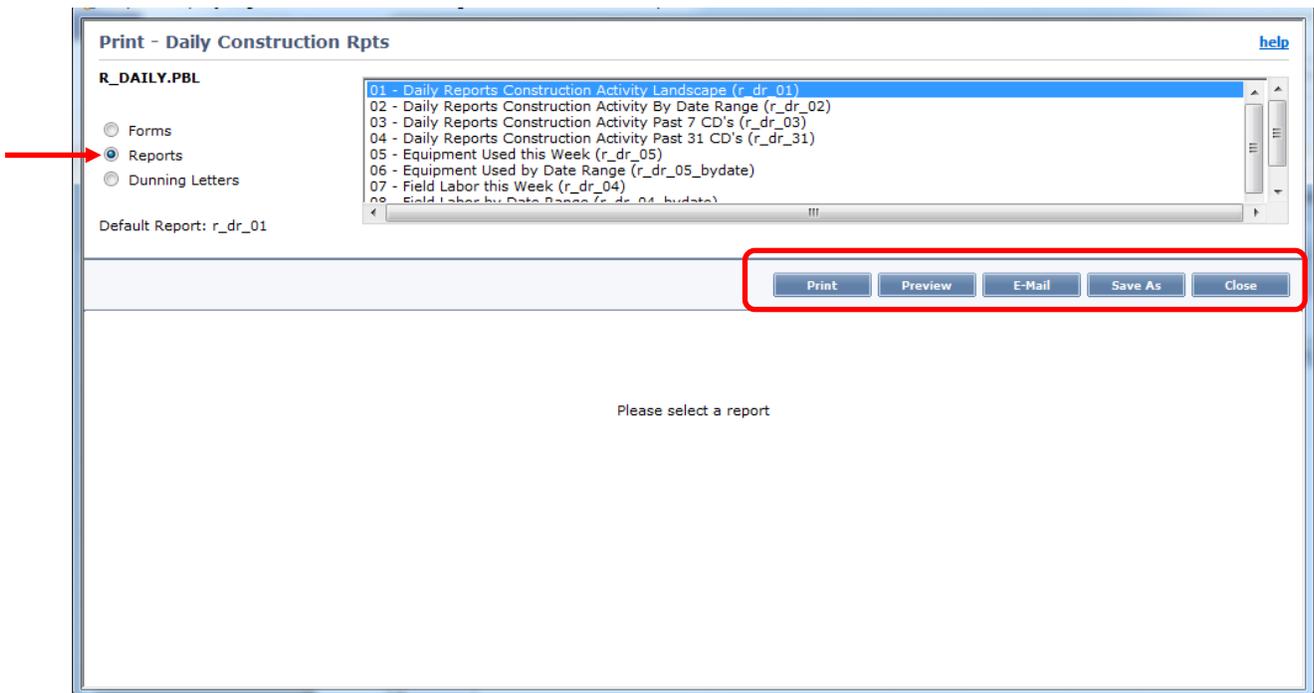
4. The Daily Construction Rpts **Log View** displays. Locate your desired document and click the **blue title link** to open it.



5. The Daily Report document displays. Click the drop down box on the **Select an action** menu on the top of the screen and choose **Advanced Print**.



6. The **Print – Daily Construction Rpts** dialog box displays. Click the **Reports** radio button to display the report options.



- Click the **Print** button to get a printed output of the report
- Click the **Preview** button to see the report displayed on the screen
- Click the **E-Mail** button to e-mail the report to a selected user(s)
- Click the **Save As** button to save the output to your computer in an Excel format
- Click the **Close** button to close this report window

Note: if report criteria is requested, use the following examples to enter your criteria for the report.

Example 1: Enter a single date to search	Example 2: Enter a range of dates to search