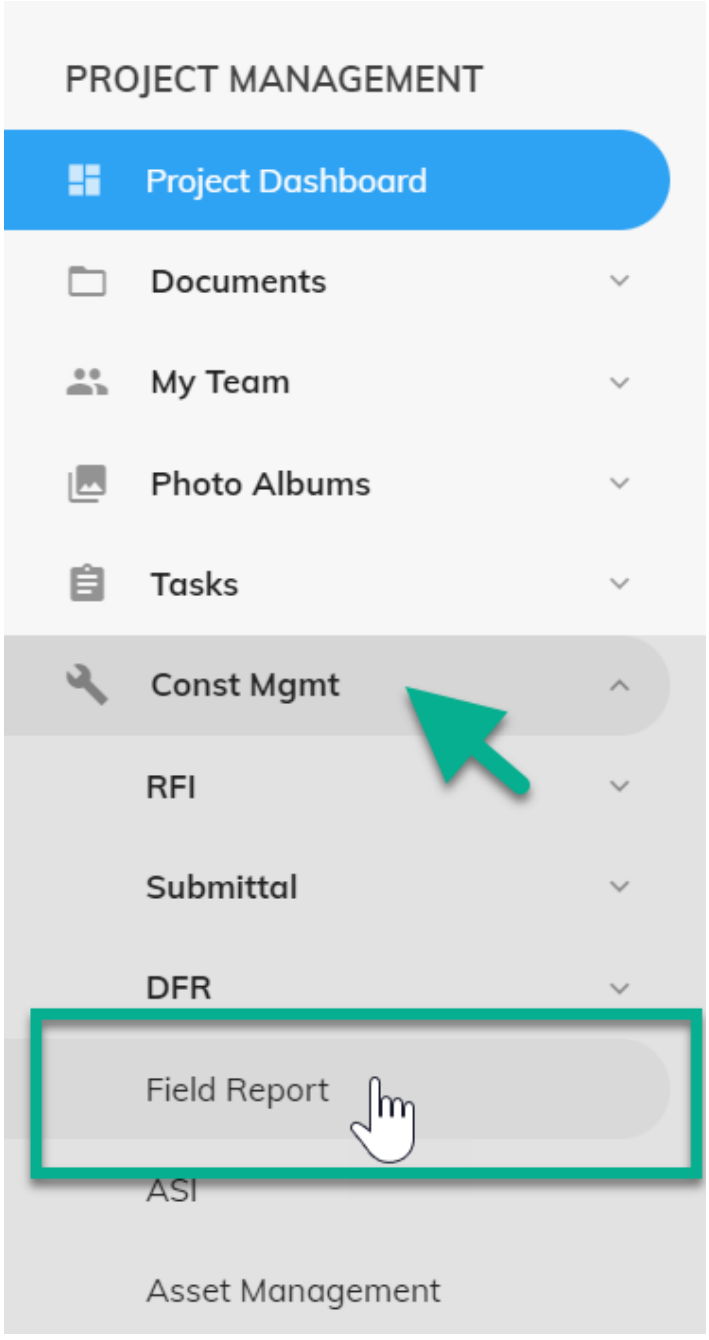
SITE VISIT FIELD REPORTS

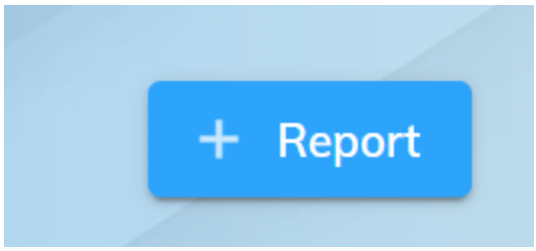
What Is The Field Reports Feature?
Field Reports are used by the architect, project manager or other project team members to record field observations. You can attach documents, photographs or sketches with your field reports.



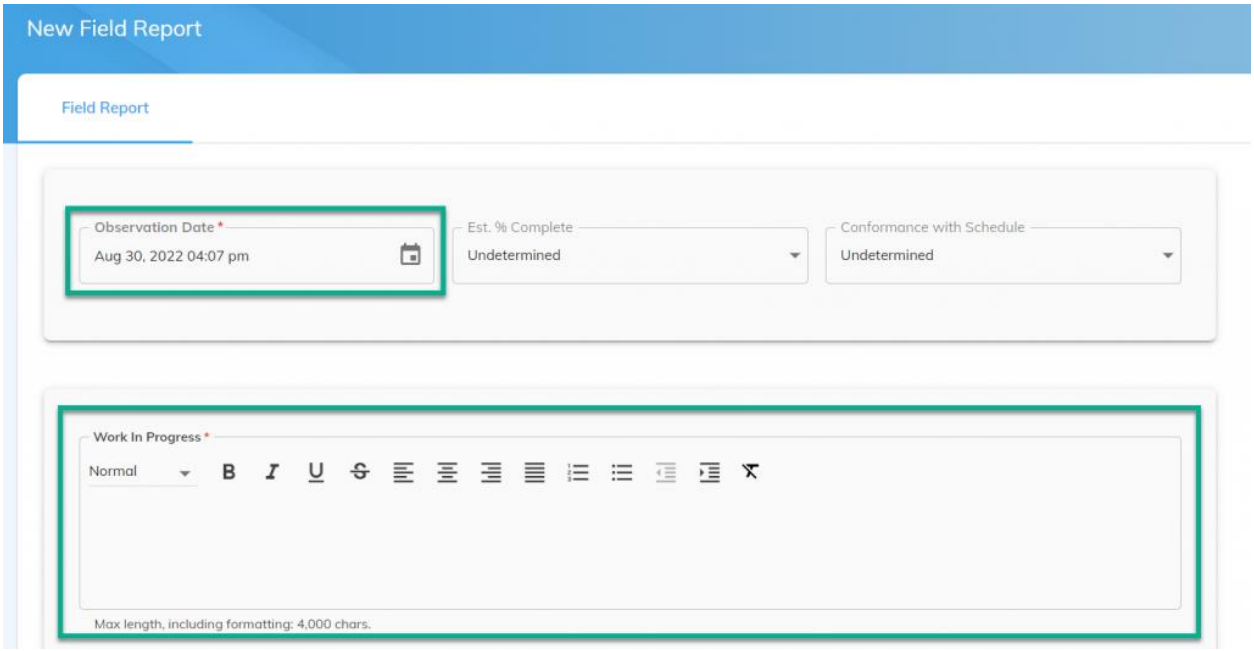
To access the Field Report module, click **Construction Mgmt** in the navigation menu on the left to expand and then click the **Field Report** button in the drop down.

The Field Report log will now be displayed on screen.

Creating A Field Report
To create a new Field Report, click the "+ Report" button at the top right-hand corner of the screen.



On the report page, you may now add the report date and work description.



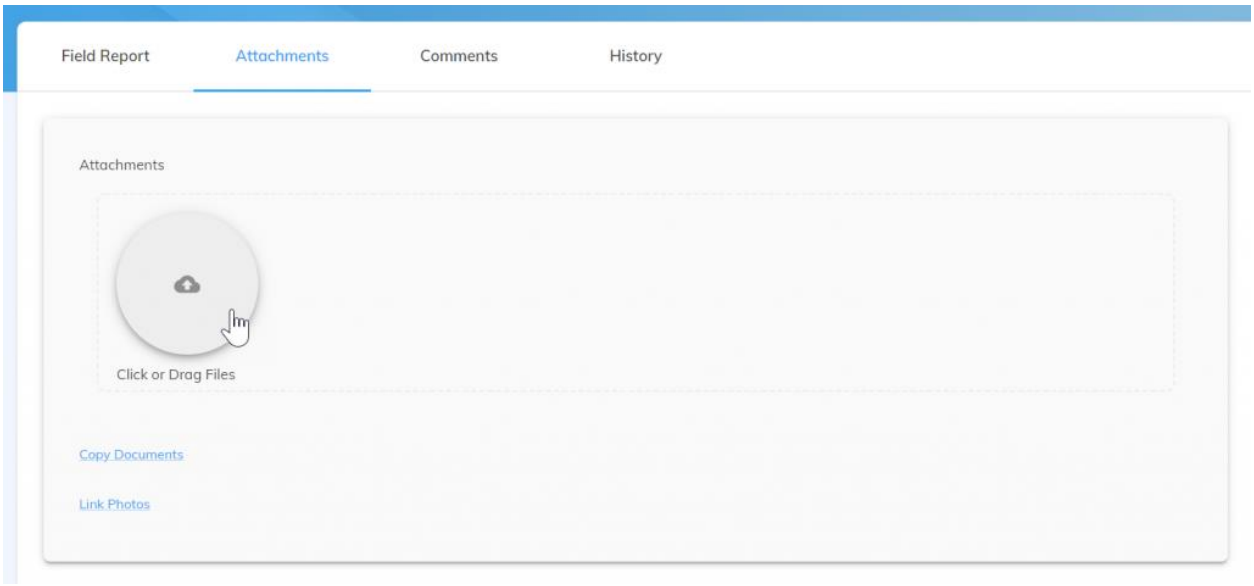
Click **Save Draft** to save the report. Alternatively, you may choose to complete the report and click on "**Save and Finalize**". Please note: Once finalized, the report is locked and no longer editable.

This page will also allow you to add additional information to the report such as:

- Weather Conditions
- Personnel Present at Site
- General Observations
- Items to Verify
- Notes on Information/Action Required

At the bottom of the page, you can select from users to be notified of the Field Report.

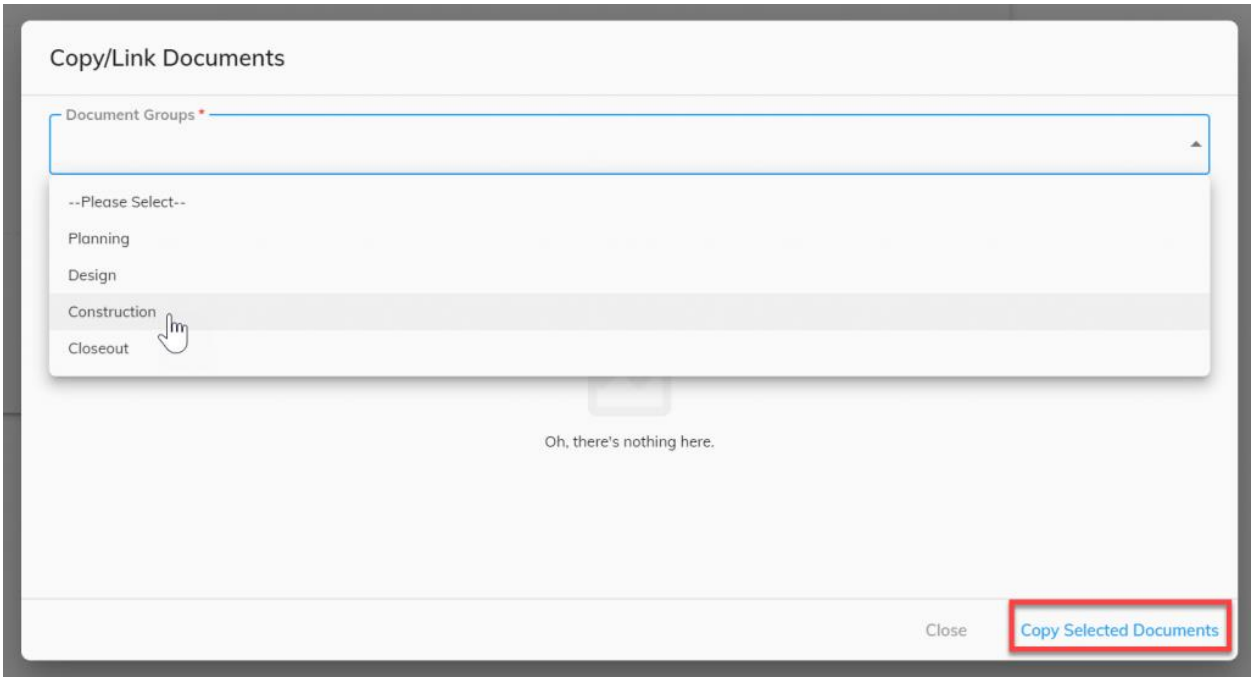
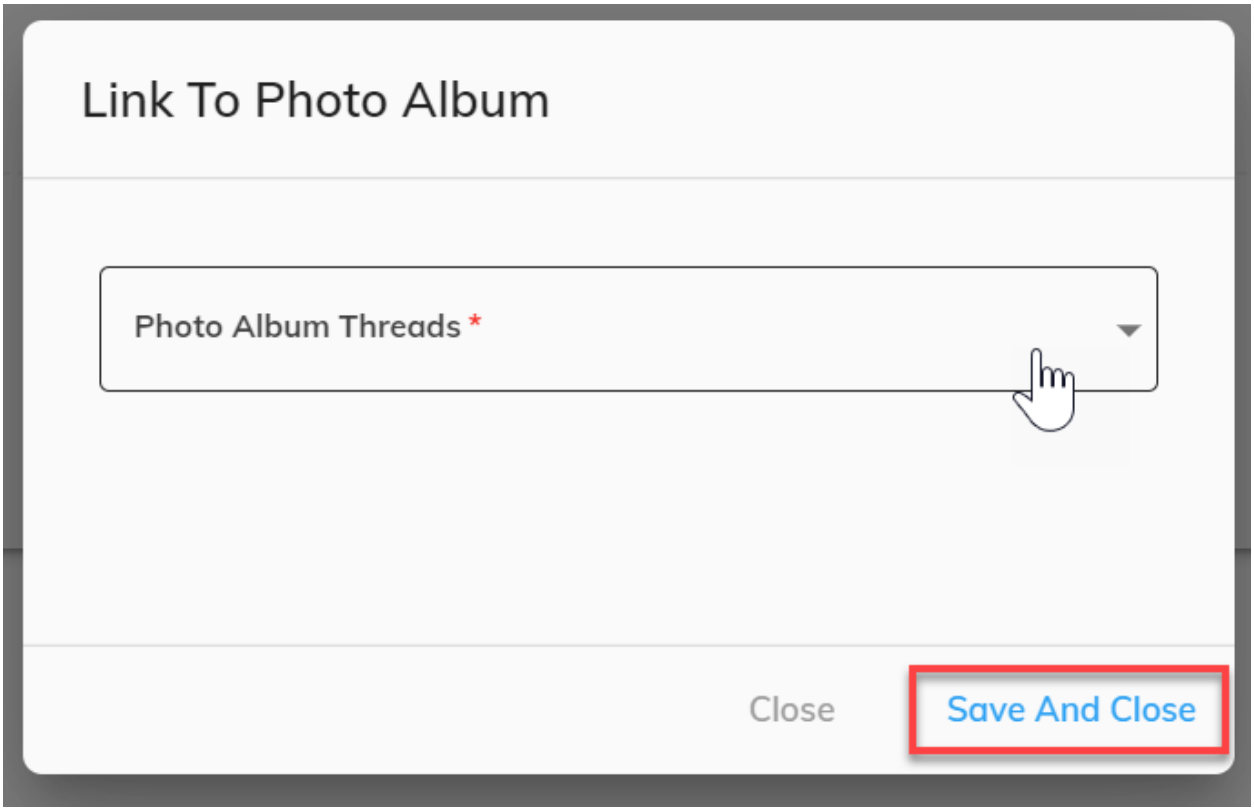
Once you have saved the report as a draft, you will be able to see the next tabs – **Attachments, Comments, History.**



The **Attachments** tab will allow you to add documents and photos to the report. Click the presented button or drag and drop file or photo attachments onto this space.

You may alternatively choose to link documents and/or photos that are already uploaded into the project on Projectmates by clicking on the provided links on the page.

Click **Copy Documents** and select the path to desired document in the pop-up that opens. When you have selected these documents, click **Copy Selected Documents** to finish this action.



Click **Link Photos** and select the thread and photo album for desired photos in the pop-up that opens. When you have selected the album, click on **Save And Close** to finish this action.