



sage Construction and Real Estate

Executive guide to daily field reports

SKENDER
CONSTRUCTION

Contents

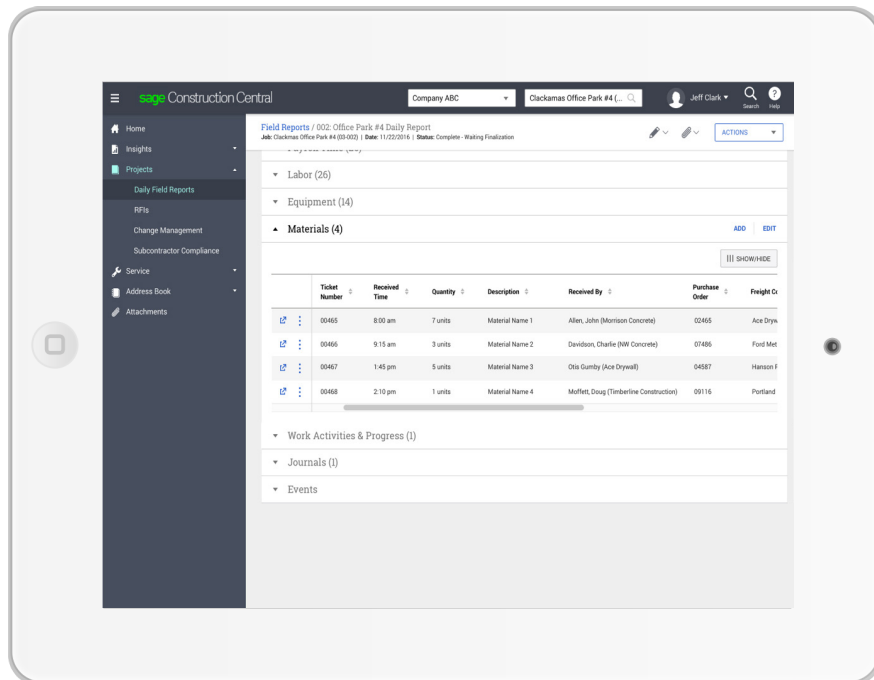
- 3** The not-so-daily field report
- 4** Your best defense from legal claims
- 4** Proactive project management
- 5** Documenting the daily details
- 6** Pictures tell the story
- 7** Simplified daily field reports

The not-so-daily field report

Your superintendents have a lot on their plates (and that's an understatement). So, documenting what's happening on the job each day is not necessarily at the top of their priority list. As a result, the daily reports they file may be sporadic and often incomplete. That's a problem.

Daily field reports are essential if you're faced with legal action. They also can help improve job quality and performance.

This guide offers tips on how to enhance the timeliness and thoroughness of your company's daily field reports. It'll help you identify the key elements you need to consider for effective and protective field reporting.



Ticket Number	Received Time	Quantity	Description	Received By	Purchase Order	Freight Co
00465	8:00 am	7 units	Material Name 1	Allen, John (Morrison Concrete)	02465	Acc Dryx
00466	9:15 am	3 units	Material Name 2	Devision, Charlie (NW Concrete)	07466	Ford Met
00467	1:45 pm	5 units	Material Name 3	Otis Gumbly (Ace Drywall)	04687	Hanson I
00468	2:10 pm	1 units	Material Name 4	Moffett, Doug (Timberline Construction)	09116	Portland





Your best defense from legal claims

People's memories fade. That's why, in a court of law, your daily field reports become key evidence of what actually happened on the job. Presented alongside a corroborating witness, your daily reports can save your company major legal headaches if documented correctly.

Superintendents should write daily reports while the work is occurring, or soon after, to capture an account as accurately as possible. Only then is the information admissible in court. If they wait until the end of the week, or even month, the information won't support your case.

Proactive project management

Failure to effectively monitor field progress is a big reason for project cost overruns and schedule delays. The discipline of daily field reporting helps superintendents identify and raise issues as soon as they see them. As a result, problems can be addressed immediately and change orders submitted quickly. Project managers reviewing the reports also have a more accurate, current account of job site activity for better decision-making and project oversight.

Don't be an "easy mark" for litigation. Showing that you have consistent and detailed daily reports can head off a legal claim even before it starts.

Documenting the daily details

What you put into your daily field reports is just as important as completing them each day. At a minimum, the report should include:

- Report date
- Who is writing the report
- Time work starts and finishes
- Weather conditions
- Who is on the job site, including number of employees and subcontractors by title and company
- Equipment on site
- Significant material deliveries, such as large dollar items like fixtures or pallets of tile
- Work completed
- Clear description of schedule status as compared to your scope of work
- Situations that are preventing you from moving forward (don't include this if you are the reason for the delay)
- Safety or environmental incidents
- Anything else that is occurring that may impact the project or your work

Consistency matters

Make sure time cards and other documents that also track on-site employees match up with your daily field reports. Inconsistencies will put the credibility of all your records and witnesses into question during a legal case.





Pictures tell the story

Judges and juries don't necessarily understand construction. And that is why photos that provide a visual job history can be critical evidence to support your case.

- Take pictures ideally every day, but no less than weekly, of where your crew is working. Also include pictures for any other areas you have access to.
- Identify every picture with a date, time stamp, and note of where it was taken.
- Save all pictures in a central location and back up everything regularly.

Videotaping your work is also a good idea, especially on large jobs. Walk the site and narrate where you are and what you are looking at for the best results.

Photos in action

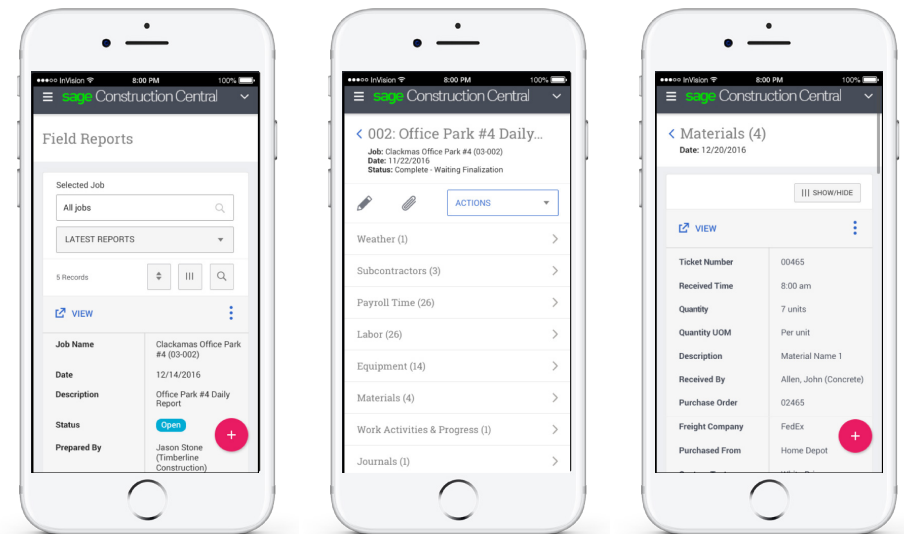
A stucco contractor received a delay claim saying that its employees hadn't completed their work according to schedule. The contractor's time-stamped job site photos, however, showed post tension cables sticking out of the building. The contractor's lawyer argued that the cables prevented the contractor from installing the swing stages needed to apply the stucco. Needless to say, the court ruled in favor of the stucco contractor. A handful of pictures made all the difference.

Simplified daily field reports

Site supervisors no longer have to walk back to the job site trailer to file a daily field report. Mobile devices and software now allow superintendents to log activity and situations as they happen. And new capabilities are helping to streamline the reporting task.

Look for daily field report software that is tightly integrated to your back-office system and, among other things, enables you to:

- Automatically capture current weather conditions
- Attach photos, with descriptions, to specific observations as well as full field reports
- Store your field reports and photos in a central location for easy access and backup
- Pull from a list of employees or subcontractors to log who is on the job that day
- View a list of your company's equipment to quickly select what is currently on site
- Log and then send production units in place and percentage complete directly into your job cost accounting software
- Document materials received, including time of receipt, supplier, purchase order, quantity, and unit of measure
- Email your daily reports, especially if an issue needs immediate attention
- Enter employee time for automatic transfer to your payroll system
- Customize for situations unique to your business



61% of contractors plan to use mobile software to manage daily field reports.

- 2017 Construction Outlook, AGC of America and Sage



Learn how Sage can help with your daily field reports and other mobile project management needs.

Visit [Sage 300 Construction and Real Estate](#)

Special thanks to Alex Barthet of The Barthet Firm and construction law blog [TheLienZone.com](#) for his assistance with this guide.