



# HEXAGON

## HEXAGON XALT: DAILY REPORT USER GUIDE

Xalt PTO User Guide  
18 April 2019

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## BEFORE YOU BEGIN:

**DISCLAIMER:** This application will integrate seamlessly with the naming conventions of the **Spectrum Construction Management ERP database table structures**. Any organization who does not use Spectrum for the intended use of the Daily Report App can either join their own ERP database tables to the packaged SQL Scripts, or use the currently constructed SQL scripts as a stand-alone database. The second option will require the user to import Job, Phase Code, Employee, etc. information into the required tables.

## ROLES

Roles are inherited from the Spectrum Construction Management ERP Systems' role configuration. Primary focus of this app is to enable foreman's in the field reporting their time seamlessly in a digital workflow. Any user of this mobile app is, by definition, assigned to the role of a foreman. Users which are assigned to the role of a Supervisor and/or a Project Manager can approve reports. A user can be assigned to multiple roles.

## SETTING UP RECORDS

To begin using the Daily Report Application there is some setup required. Data will need to be utilized from your backend ERP system database. The information stored in those tables will include:

1. **Employee (Technician, Project Manager, Superintendent, Engineer) Master Data** (i.e. Employee Name, Department, Pay Rate, etc.).
2. **Job/Project Data** (i.e. Project Name, ID, Notes, Etc.).
3. **Phase Codes** (i.e. Phase Code Name, ID, Type, Etc.).

## XALT NOTIFICATION SERVER IS REQUIRED

When an employee submits a new Daily Report, a notification will be sent to the Supervisor and/or Project Manager. Notifications are also utilized throughout this application, outside of the above described main purpose, and those can be configured to meet your organizational needs.

To receive notifications, you will need them set up on your system. Setting up notifications is not covered in this guide. Contact your sales rep or email [support.ps@hexagon.com](mailto:support.ps@hexagon.com) for more information on setting up notifications.

## USING ATTACHMENTS WITH YOUR DAILY REPORT

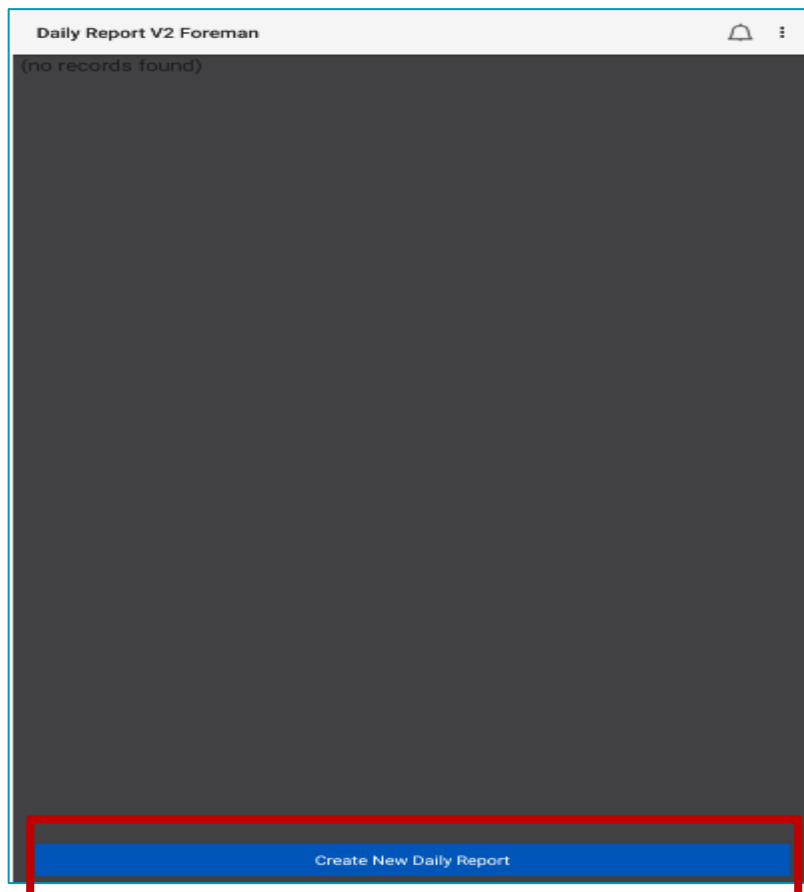
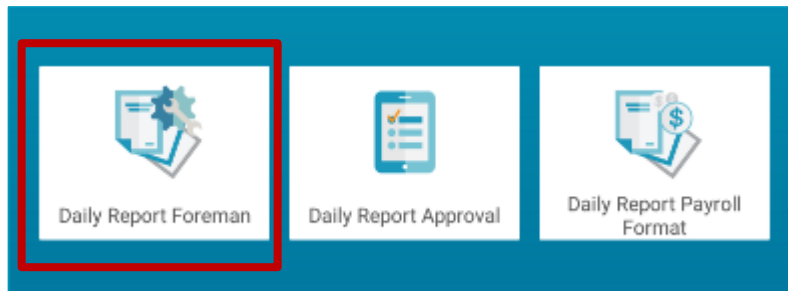
When an employee submits a new Daily Report, it is possible to include attachments to such a report. In order to be able to use attachments alongside with a Daily Report, an FTP Server needs to be configured with the app.

To use attachments, you will need configure the FTP Server with your App. Configuring an FTP is not covered in this guide. Contact your sales rep or email [support.ps@hexagon.com](mailto:support.ps@hexagon.com) for more information on configuring the FTP Server.

## WORKBENCH: DAILY REPORT

### LAUNCHERS: DAILY REPORT FOREMAN

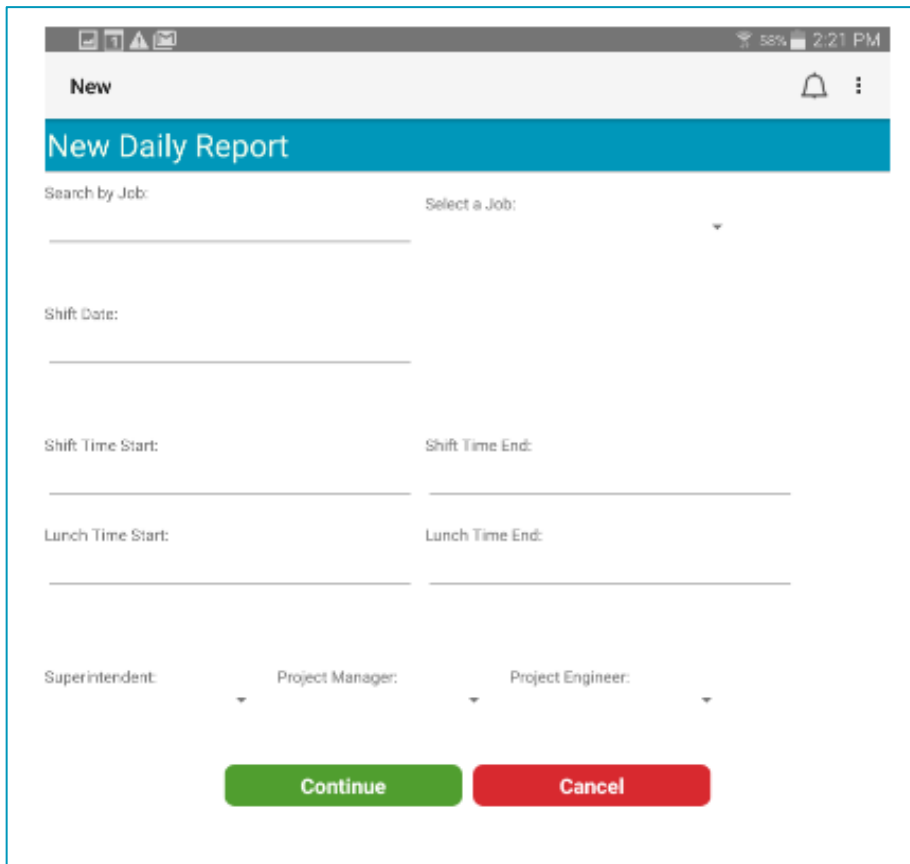
The “Daily Report Foreman” launcher enables the foreman user to create a new daily report. There is one default action button at the bottom, “Create New Daily Report”, that populates the fields required to create a daily report. See below images highlighting this functionality:



## THE “NEW DAILY REPORT”:

requires several pieces of data in order to be successfully created. Those required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:

- “**Search by Job**”: Search by Job name or number.
- “**Select a Job**”: The matching Job name/number(s) will display in a drop-down to select.
- “**Shift Date**”: The start date of the shift.
- “**Shift Time**”: The start time of the shift.
- “**Lunch Time Start**”: The start time of lunch if taken.
- “**Lunch Time End**”: The end time of lunch if take.
- “**Superintendent**”: A display drop-down of available superintendents to select for report.
- “**Project Manager**”: A display drop-down of available project managers to select for report.
- “**Project Engineer**”: A display drop-down of available project engineers to select for report.

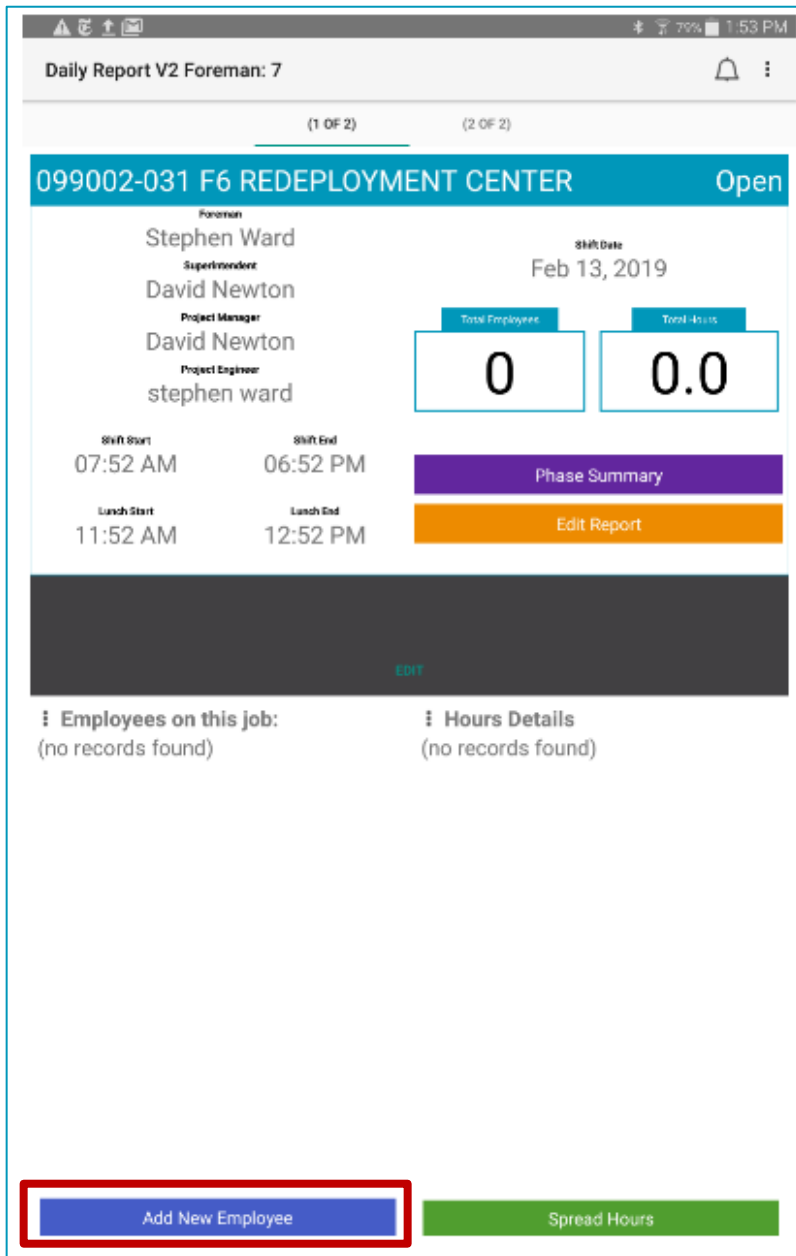


The screenshot shows a mobile application interface for creating a new daily report. The top status bar indicates 58% battery and 2:21 PM. The app header shows 'New' and a notification bell. The main title is 'New Daily Report'. The form contains the following fields:

- Search by Job:** A text input field.
- Select a Job:** A dropdown menu.
- Shift Date:** A date picker field.
- Shift Time Start:** A time picker field.
- Shift Time End:** A time picker field.
- Lunch Time Start:** A time picker field.
- Lunch Time End:** A time picker field.
- Superintendent:** A dropdown menu.
- Project Manager:** A dropdown menu.
- Project Engineer:** A dropdown menu.

At the bottom of the form are two buttons: a green 'Continue' button and a red 'Cancel' button.

- Next there will be an auto-generated screen detailing the initial information that was entered at the creation of the new Daily Report. From there you will need to “**Add New Employee**” to the report in order to keep track of their hours and type of work (i.e. Phase Code). One or many employees can be added depending on size and scope of the job. See below images detailing the screen layout and process to “Add New Employee”.



Daily Report V2 Foreman: 7

(1 OF 2) (2 OF 2)

**099002-031 F6 REDEPLOYMENT CENTER** Open

Foreman  
Stephen Ward

Shift Date  
Feb 13, 2019

Superintendent  
David Newton

Project Manager  
David Newton

Project Engineer  
stephen ward

Total Employees: 0

Total Hours: 0.0

Shift Start: 07:52 AM Shift End: 06:52 PM

Lunch Start: 11:52 AM Lunch End: 12:52 PM

[Phase Summary](#)

[Edit Report](#)

[EDIT](#)

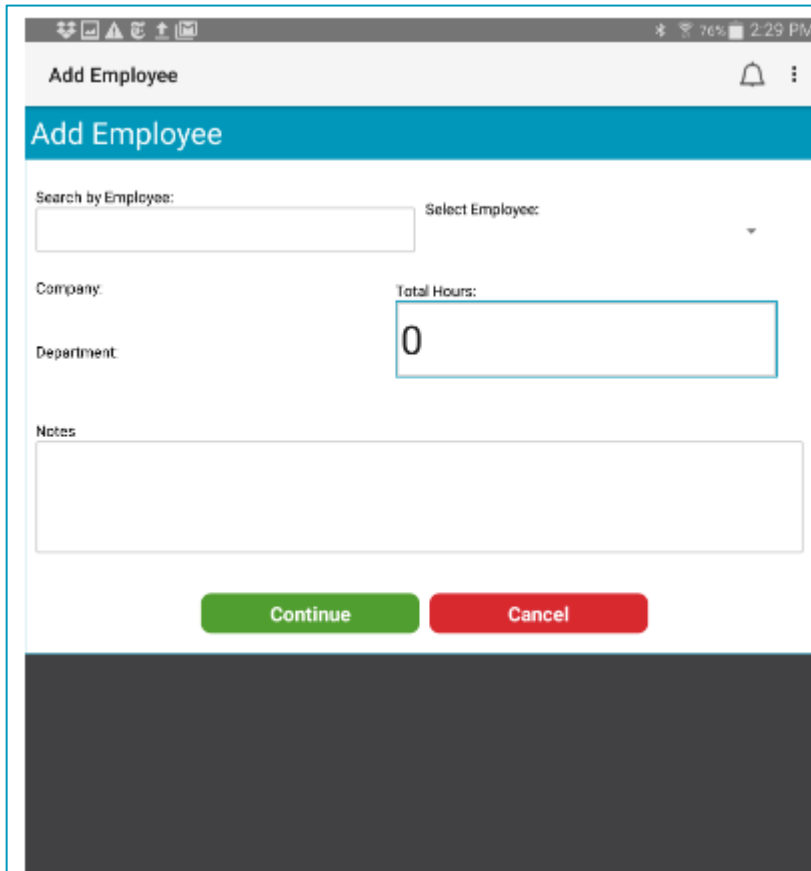
Employees on this job:  
(no records found)

Hours Details  
(no records found)

[Add New Employee](#) [Spread Hours](#)

## ADD NEW EMPLOYEE TO REPORT:

- will bring you to the **"Add Employee"** action screen which contains required data fields to successfully add an employee to a Daily Report. Those required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - **"Search by Employee"**: Search by employee name or id/number.
  - **"Select Employee"**: The matching employee name/number will display in a drop-down to select.
  - **"Company"**: Will auto-populate with corresponding affiliation (i.e. main company or temp group).
  - **"Total Hours"**: The number of hours worked by employee on this job.
  - **"Department"**: Will auto-populate based off employee/company record info.
  - **"Notes"**: Any notes that need to be highlighted for that employee.



- Once a new employee has been added to the report, you will now see an entry in the report main page under “Employees on this job” that displays that employee and the corresponding hours that have been documented for their time on the job for the day of the report. The next step will be to then **“Spread”** the hours against certain Phase Codes. See below image detailing the screen layout and process to “Spread” or **“Spread Hours”**.



Daily Report V2 Foreman: 7

(1 OF 2) (2 OF 2)

099002-031 F6 REDEPLOYMENT CENTER Open

Foreman: Stephen Ward  
Superintendent: David Newton  
Project Manager: David Newton  
Project Engineer: stephen ward

Shift Date: Feb 13, 2019

Total Employees: 1  
Total Hours: 3.0

Shift Start: 07:52 AM  
Shift End: 06:52 PM  
Lunch Start: 11:52 AM  
Lunch End: 12:52 PM

Phase Summary  
Edit Report

Employees on this job:

AARON C THOMPSON

Hours Used: 3.0  
Hours To Go: 3.0

Spread  
Edit  
Delete

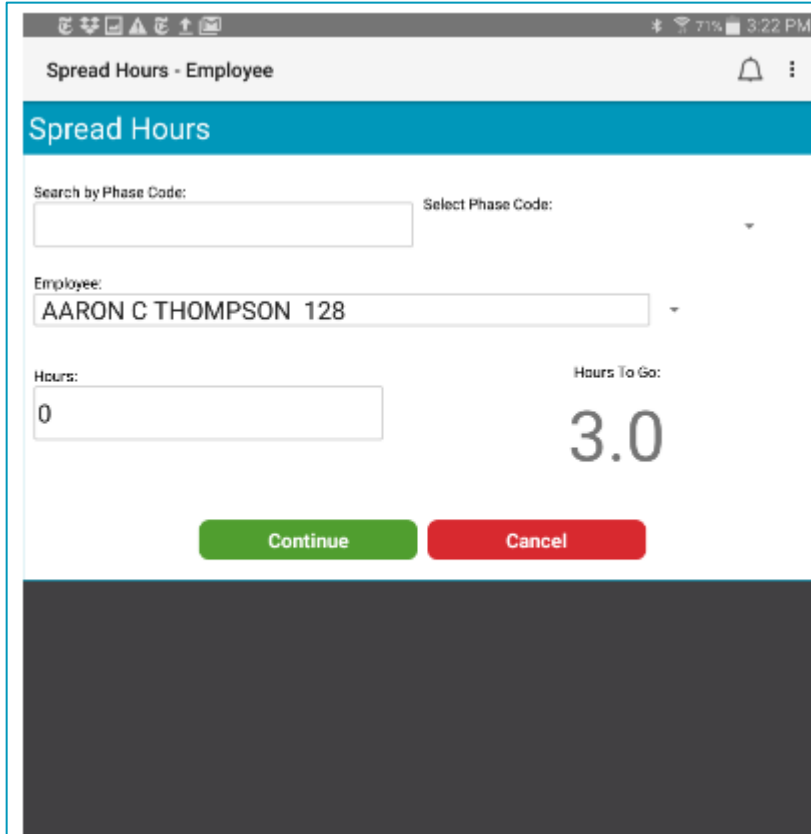
Hours Details  
(no records found)

Add New Employee  
Spread Hours

## SPREAD HOURS

Spread Hours will bring you to the “**Spread Hours**” action screen which contains required data fields to successfully spread the hours for an employee. Those required fields are displayed in the image below, and the corresponding description of what each piece entails in the following bullet points:

- “**Search by Phase Code**”: Search by a Phase Code name or id/number.
- “**Select Phase Code**”: The matching Phase Code name/number will display in a drop-down to select. (\*These Phase Codes come from the data setup from ERP/Database tables\*)
- “**Employee**”: Will auto-populate with the chosen employee.
- “**Hours**”: The number of hours to apply to the chosen Phase Code.
- “**Hours to Go**”: Will display the number of hours that are available to spread against Phase Code.



Spread Hours - Employee

Spread Hours

Search by Phase Code:  Select Phase Code: ▼

Employee:  ▼

Hours:  Hours To Go: 3.0

Continue Cancel

#### HOURS DETAILS:

- Once an entry has been completed to “Spread Hours” for a specific Phase Code, you will see a new display on the main page of the Daily Report. See below image detailing the screen layout, specifically paying attention to the entry under “**Hours Details**”.



Daily Report V2 Foreman: 7

(1 OF 2) (2 OF 2)

099002-031 F6 REDEPLOYMENT CENTER

Open

Foreman  
Stephen Ward

Superintendent  
David Newton

Project Manager  
David Newton

Project Engineer  
stephen ward

Shift Date  
Feb 13, 2019

Total Employees  
1

Total Hours  
3.0

Shift Start  
07:52 AM

Shift End  
06:52 PM

Lunch Start  
11:52 AM

Lunch End  
12:52 PM

Phase Summary

Edit Report

EDIT

Employees on this job:

AARON C THOMPSON

Hours Used  
3.0

Hours To Go  
0.0

Spread

Edit

Delete

Hours Details

AARON C THOMPSON

101550 SPECIAL SYSTEMS

Hours  
3.0

Delete

Add New Employee

Spread Hours

## PHASE SUMMARY

- If at any point while viewing the Daily Report main screen you need to see all the detailed Phase Codes, you can select the “**Phase Summary**” action. This is helpful for when there are multiple phase codes and hours associated with a job.

69% 3:53 PM

Daily Report V2 Foreman: 7

(1 OF 2) (2 OF 2)

099002-031 F6 REDEPLOYMENT CENTER

Open

Foreman

Stephen Ward

Superintendent

David Newton

Project Manager

David Newton

Project Engineer

stephen ward

Shift Date

Feb 13, 2019

Total Employees

1

Total Hours

3.0

Shift Start

07:52 AM

Shift End

06:52 PM

Lunch Start

11:52 AM

Lunch End

12:52 PM

Phase Summary

Edit Report

EDIT

Employees on this job:

AARON C THOMPSON

Hours Used

3.0

Hours To Go

0.0

Spread

Edit

Delete

Hours Details

AARON C THOMPSON

Hours

3.0

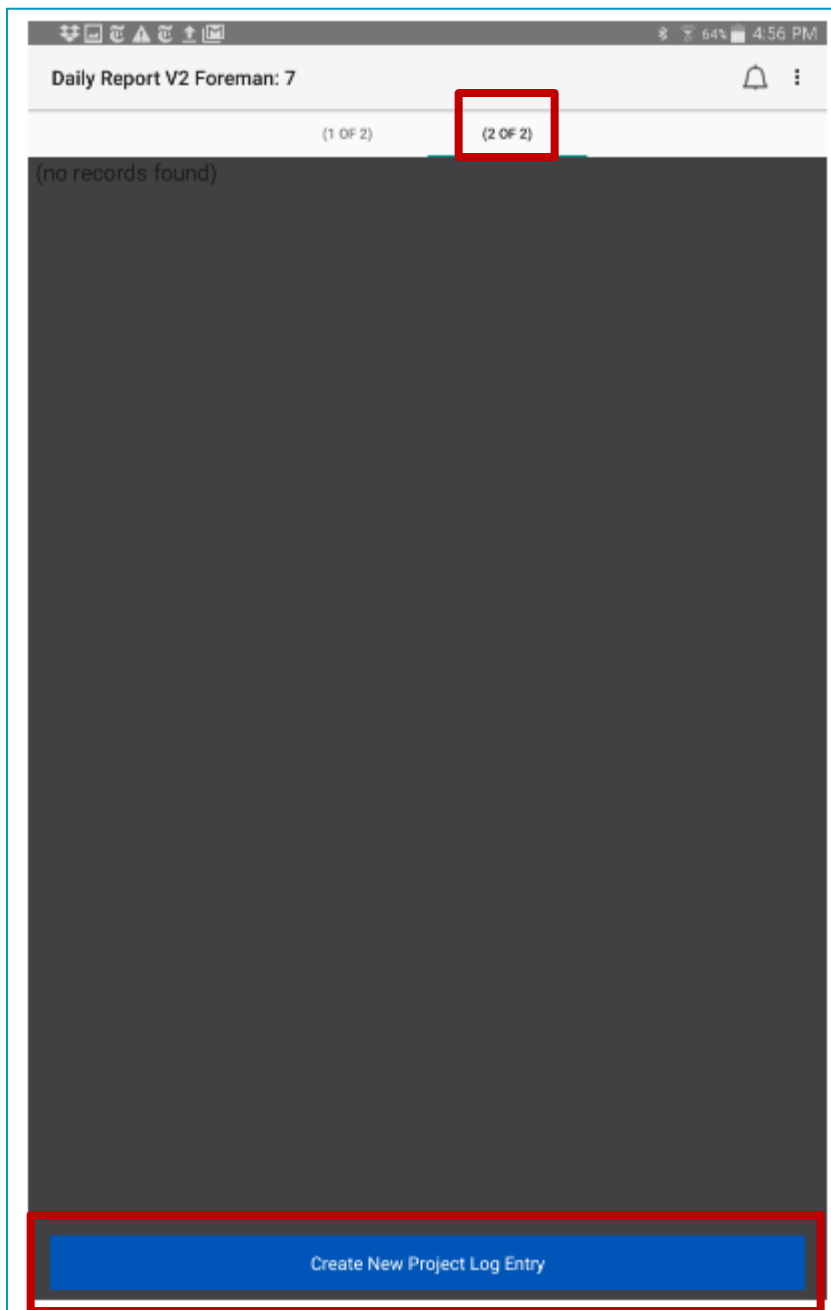
101550 SPECIAL SYSTEMS

Delete

Add New Employee

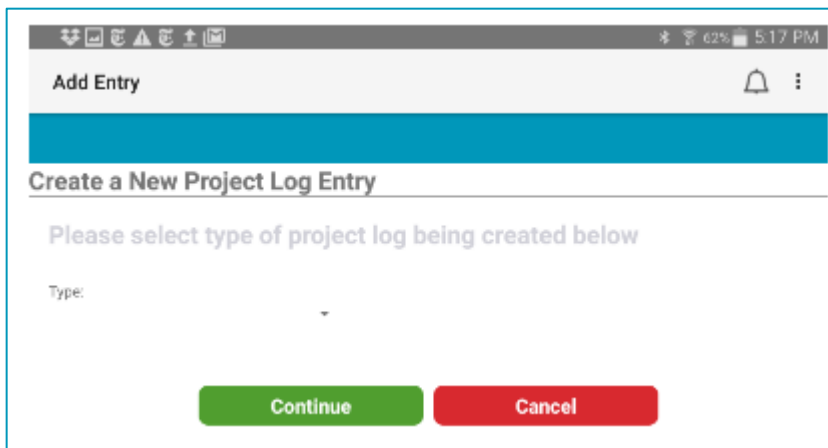
Spread Hours

- After Employees have been added and Hours have been spread across Phase Codes for those specific employees, it is now time to move onto the **Project Log**. The Project Log details more of the specific work that was performed (or not performed) during the time on the job. The Project Log section will be on the second screen (page) on your mobile device (swipe to the left). See below image on how to generate the new Project Log.



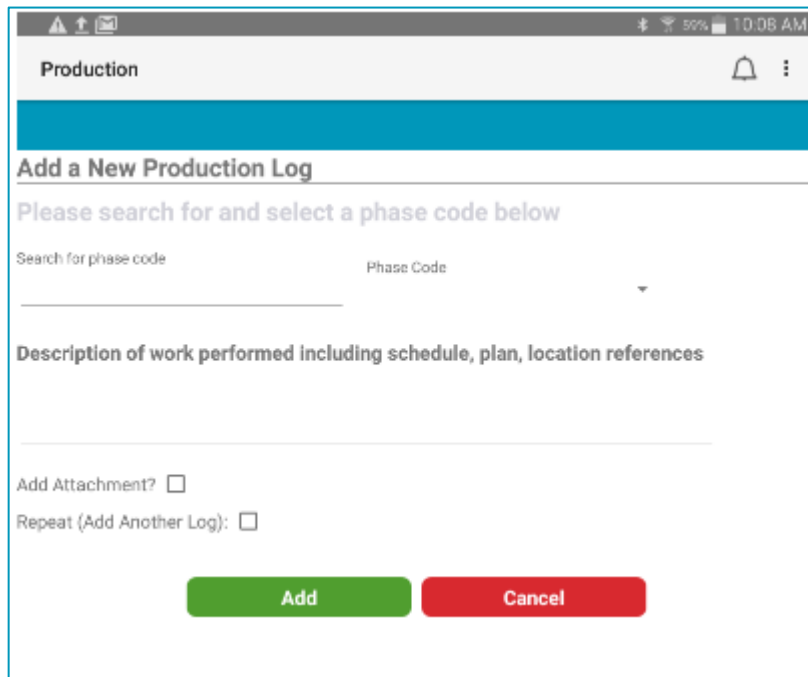
## CREATE NEW PROJECT LOG ENTRY

- After selecting the “**Create New Project Log Entry**” action in the above image, you will then be prompted to select the “Type” of project log to be created. Please see the following list of types that can be added to the corresponding Daily Report, and an image to display the “Create New Project Log Entry” Action. (**\*Each Project Log Type will be explained in the next several sections\***)
  - “Production”
  - “Impact”
  - “Rework”
  - “QADC”
  - “Visitors”
  - “Verbal Instructions”
  - “T&M Performed”
  - “Survey”
  - “Subcontractors”
  - “Safety Incident”
  - “Safety Inspection”



### PRODUCTION:

- “**Production**” is the standard, go-to Project Log that **must be** documented for each phase code for the Daily Report. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - “**Search for Phase Code**”: Search by a Phase Code name or id/number.
  - “**Select Phase Code**”: The matching Phase Code name/number will display in a drop-down to select. (**\*These Phase Codes come from the data setup from ERP/Database tables\***)
  - “**Description of work performed including schedule, plan, location references**”: Description and any other notes relevant to that job/phase code.
  - “**Add Attachment**”: Select this check box if there is an attachment (PDF, etc.) that needs to be a part of the Project Log.



Production

**Add a New Production Log**

Please search for and select a phase code below

Search for phase code  Phase Code

Description of work performed including schedule, plan, location references

Add Attachment? ☐

Repeat (Add Another Log): ☐

**Add** **Cancel**

## IMPACT

- **“Impact”** is a way to define different events that negatively impacted a job, specifically against a phase code for that job. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - **“Search for Phase Code”**: Search by a Phase Code name or id/number.
  - **“Select Phase Code”**: The matching Phase Code name/number will display in a drop-down to select. (**\*These Phase Codes come from the data setup from ERP/Database tables\***)
  - **“Detailed description of the impact or delay”**: Description of the specific cause of negative impact for each job/phase code on the daily report.
  - **“Enter number of hours SCHEDULE progress was lost”**: Enter number of hours that were lost for the scheduled work.
  - **“Enter number of hours MAN HOURS productivity was lost”**: Enter number of hours that were lost for productivity lost per each employee that was on the job (specific phase code).
  - **“Add Attachment”**: Select this check box if there is an attachment (PDF, etc.) that needs to be a part of the Project Log

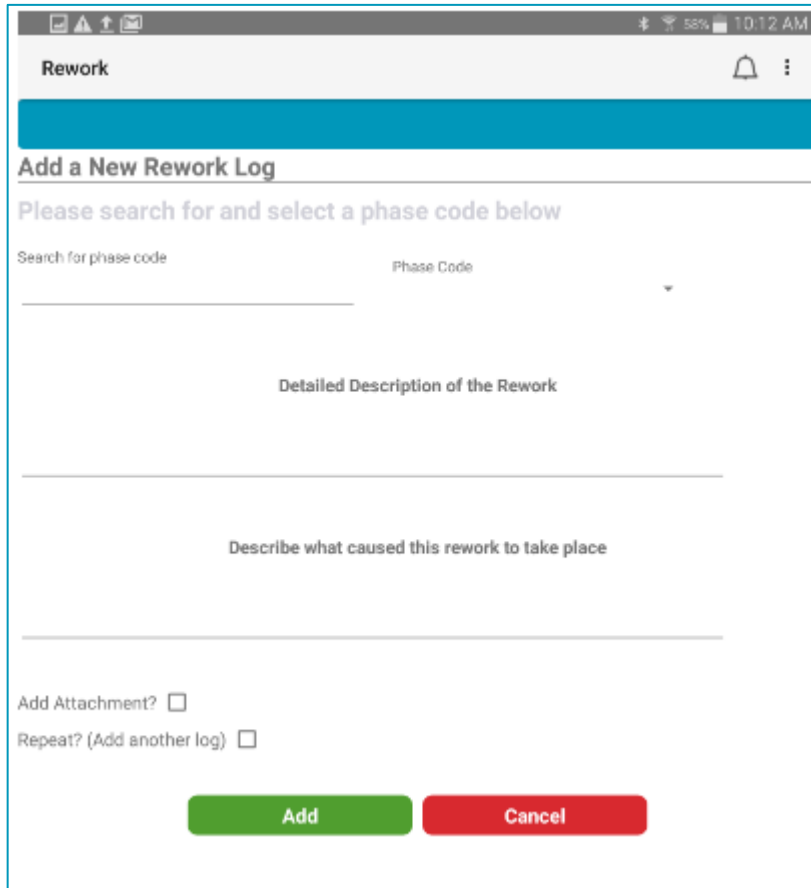


The screenshot shows a mobile application interface titled 'Impact'. At the top, there is a blue header bar with the title 'Impact' and a notification bell icon. Below the header, a section titled 'Add a New Impact Log' is displayed. The main content area contains the following fields and options:

- A prompt: 'Please search for and select a phase code below'.
- A search input field labeled 'Search for phase code'.
- A dropdown menu labeled 'Phase Code'.
- A text input field for 'Detailed description of the impact or delay'.
- An optional dropdown menu: 'To the best of your ability, identify the entity causing the delay (Optional)'.
- An optional text input field: 'Enter equipment description and hours of productivity loss (Optional)'.
- Two numeric input fields:
  - 'Enter the number of hours SCHEDULE progress was lost of this shift for this phase' with a value of '0'.
  - 'Enter the total number of MAN HOURS of productivity loss' with a value of '0'.
- Two checkboxes:
  - 'Add Attachment?' with an unchecked box.
  - 'Repeat? (Add another log)' with an unchecked box.
- Two buttons at the bottom: a green 'Add' button and a red 'Cancel' button.

## REWORK

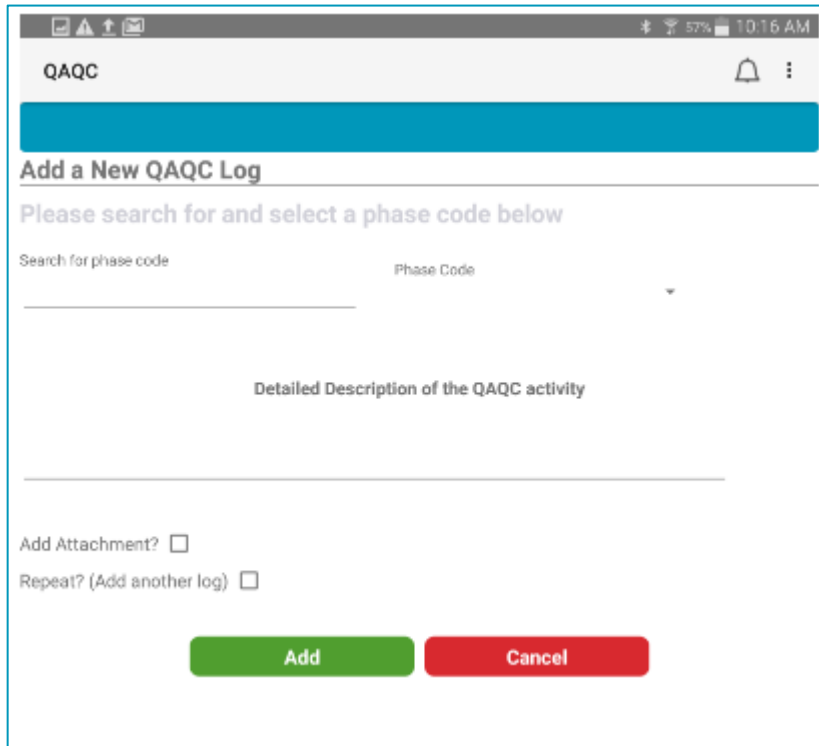
- **“Rework”** is a way to define any rework that needed to be completed for a phase code, and what specifically caused the need for that rework. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - **“Search for Phase Code”**: Search by a Phase Code name or id/number.
  - **“Select Phase Code”**: The matching Phase Code name/number will display in a drop-down to select. (**\*These Phase Codes come from the data setup from ERP/Database tables\***)
  - **“Detailed description of the Rework”**: Description of the specific rework that was completed for each job/phase code on the daily report.
  - **“Describe what caused this rework to take place”**: Description of the specific event that caused the need for rework.
  - **“Add Attachment”**: Select this check box if there is an attachment (PDF, etc.) that needs to be a part of the Project Log



The screenshot shows a mobile application interface for 'Rework'. At the top, there's a status bar with icons for signal, battery (55%), and time (10:12 AM). Below the status bar is a header with the word 'Rework' and a bell icon. A blue bar with the text 'Add a New Rework Log' is prominent. Below this, a prompt says 'Please search for and select a phase code below'. The form includes a 'Search for phase code' input field, a 'Phase Code' dropdown menu, a 'Detailed Description of the Rework' text area, and a 'Describe what caused this rework to take place' text area. At the bottom, there are checkboxes for 'Add Attachment?' and 'Repeat? (Add another log)', followed by green 'Add' and red 'Cancel' buttons.

## QAQC

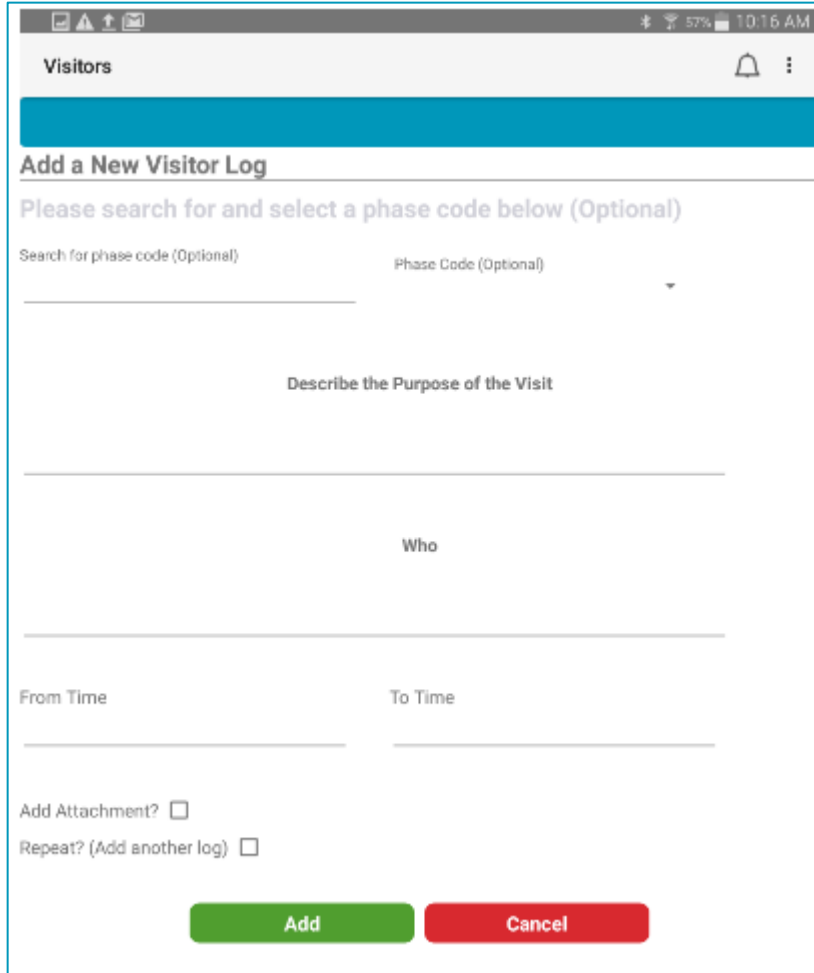
- “**QAQC**” is a way to define any Quality Assurance or Quality Control activities that were performed for each phase code for the Daily Report. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - “**Search for Phase Code**”: Search by a Phase Code name or id/number.
  - “**Select Phase Code**”: The matching Phase Code name/number will display in a drop-down to select. (**\*These Phase Codes come from the data setup from ERP/Database tables\***)
  - “**Detailed Description of QAQC activity**”: Description of any QAQC activity that was performed for each job/phase code on the daily report.



The screenshot shows a mobile application interface for 'QAQC'. At the top, there's a status bar with icons for signal, Wi-Fi, and battery (57%), and the time 10:16 AM. Below the status bar is a header with 'QAQC' and a bell icon. A blue bar follows. The main title is 'Add a New QAQC Log'. Below it, a subtitle says 'Please search for and select a phase code below'. There are two input fields: 'Search for phase code' and 'Phase Code' with a dropdown arrow. A large text area for 'Detailed Description of the QAQC activity' is below. At the bottom, there are two checkboxes: 'Add Attachment?' and 'Repeat? (Add another log)'. Two buttons, 'Add' (green) and 'Cancel' (red), are at the very bottom.

## VISITORS

- **“Visitors”** is a way to define any visitors that came on site and had any impact on a phase code, and why the visitor(s) were on site. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - **“Describe the purpose of the visit”**: Description of the specific reason why there was a visitor on site for each job/phase code on the daily report.
  - **“Who”**: Describe who the visitor(s) was for that specific phase code.
  - **“From Time”**: The start time of the visitor(s) arriving on site.
  - **“To Time”**: The end time of the visitor(s) being on site.
  - **“Add Attachment”**: Select this check box if there is an attachment (PDF, etc.) that needs to be a part of the Project Log



Visitors

**Add a New Visitor Log**

Please search for and select a phase code below (Optional)

Search for phase code (Optional) Phase Code (Optional)

Describe the Purpose of the Visit

Who

From Time To Time

Add Attachment? ☐

Repeat? (Add another log) ☐

Add Cancel

## VERBAL INSTRUCTIONS:

- **“Verbal Instructions”** is a way to define any specific instruction that were delivered by an individual on site that had any impact on a phase code. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - **“Search for Phase Code”**: Search by a Phase Code name or id/number.
  - **“Select Phase Code”**: The matching Phase Code name/number will display in a drop-down to select. (**\*These Phase Codes come from the data setup from ERP/Database tables\***)
  - **“Name and Company of person providing direction”**: List the name and corresponding company of the individual providing instructions.
  - **“Description of direction provided”**: Description of the specific instructions that were provided by the individual on site that impacted a phase code.
  - **“Add Attachment”**: Select this check box if there is an attachment (PDF, etc.) that needs to be a part of the Project Log.



Verbal Instructions

Add a New Verbal Instructions

Please search for and select a phase code below

Search for phase code

Phase Code

Name and Company of person providing direction

Description of direction provided

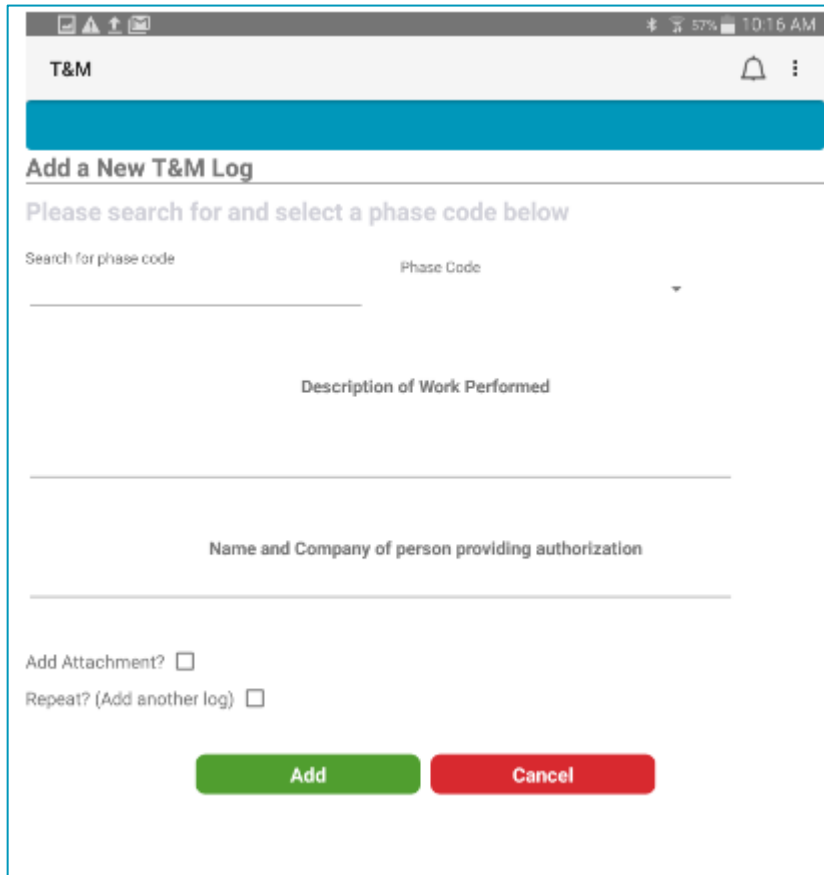
Add Attachment? ☐

Repeat? (Add another log) ☐

Add Cancel

## T&M

- **“T&M Performed”** is a way to define and describe any time and material activities that were performed against a phase code. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - **“Search for Phase Code”**: Search by a Phase Code name or id/number.
  - **“Select Phase Code”**: The matching Phase Code name/number will display in a drop-down to select. (**\*These Phase Codes come from the data setup from ERP/Database tables\***)
  - **“Description of Work Performed”**: Describe specific work/materials performed and used on a phase code.
  - **“Name and Company of person providing authorization”**: Identification of the company/individual authorizing specific time and material activities.
  - **“Add Attachment”**: Select this check box if there is an attachment (PDF, etc.) that needs to be a part of the Project Log.



T&M

## Add a New T&M Log

Please search for and select a phase code below

Search for phase code

Phase Code

Description of Work Performed

Name and Company of person providing authorization

Add Attachment? ☐

Repeat? (Add another log) ☐

Add Cancel

## SURVEY

- **“Survey”** is a way to define and surveying activities that were performed against a phase code. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - **“Search for Phase Code”**: Search by a Phase Code name or id/number.
  - **“Select Phase Code”**: The matching Phase Code name/number will display in a drop-down to select. (**\*These Phase Codes come from the data setup from ERP/Database tables\***)
  - **“Description of layout, bluestake, or survey performed internally or externally”**: Describe specific surveying activities performed and used on a phase code.
  - **“Name and Company of person performing survey”**: Identification of the company/individual performing the survey.
  - **“Add Attachment”**: Select this check box if there is an attachment (PDF, etc.) that needs to be a part of the Project Log.



Survey

Add a New Survey Log

Please search for and select a phase code below

Search for phase code

Phase Code

Description of layout, bluestake, or survey performed internally or externally

Name and Company of person (or lead person) performing survey

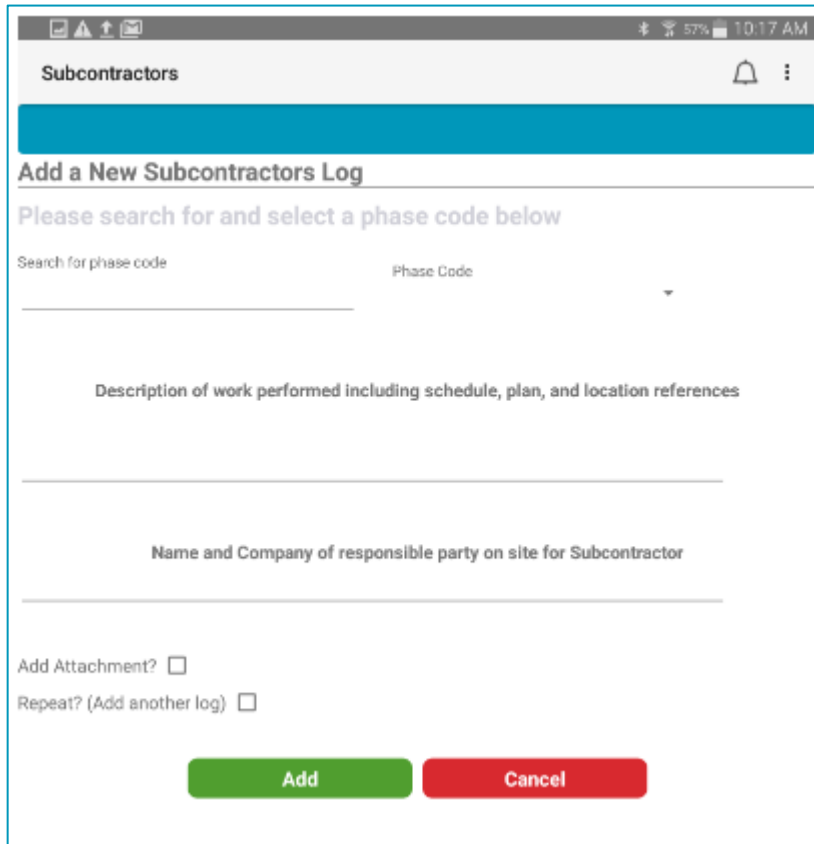
Add Attachment? ☐

Repeat? (Add another log) ☐

Add Cancel

## SUBCONTRACTORS:

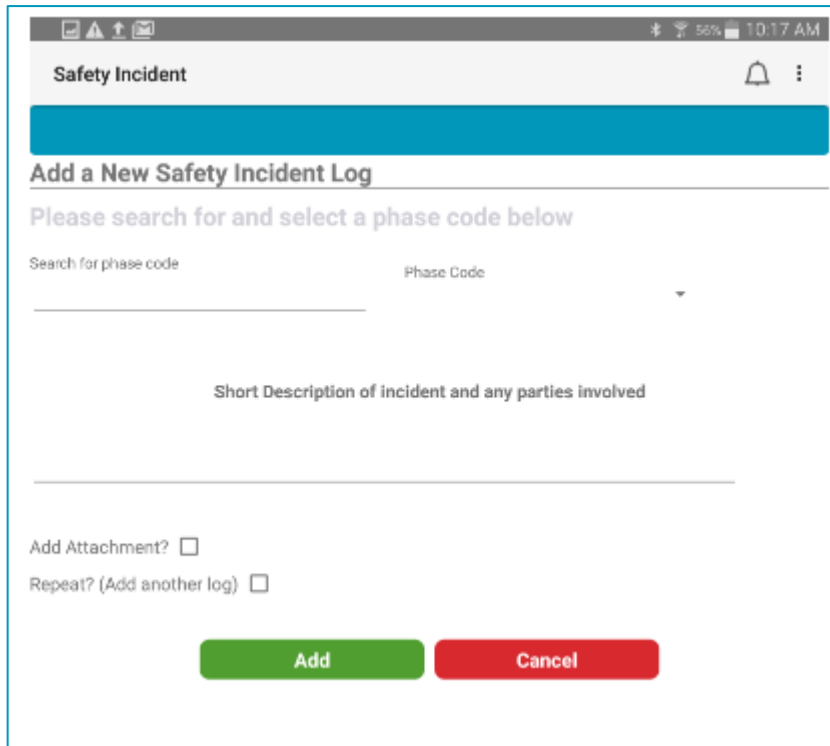
- **“Subcontractors”** is a way to define and describe any sub-contracting activities that were performed against a phase code. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - **“Search for Phase Code”**: Search by a Phase Code name or id/number.
  - **“Select Phase Code”**: The matching Phase Code name/number will display in a drop-down to select. (**\*These Phase Codes come from the data setup from ERP/Database tables\***)
  - **“Description of work performed including schedule, plan, and location references”**: Describe specific sub-contracting activities performed against a phase code.
  - **“Name and Company of responsible party on site for Subcontractor”**: Identification of the company/individual performing and managing the sub-contracting activities.
  - **“Add Attachment”**: Select this check box if there is an attachment (PDF, etc.) that needs to be a part of the Project Log.



The screenshot shows a mobile application interface for 'Subcontractors'. At the top, there's a status bar with icons for signal, Wi-Fi, and battery (57%), along with the time 10:17 AM. Below the status bar is a header with the title 'Subcontractors' and a bell icon. A blue bar with the text 'Add a New Subcontractors Log' is prominent. Below this, a prompt says 'Please search for and select a phase code below'. There are two input fields: 'Search for phase code' and 'Phase Code' (which is a dropdown menu). Below these is a large text area for 'Description of work performed including schedule, plan, and location references'. Another text area follows for 'Name and Company of responsible party on site for Subcontractor'. At the bottom, there are two checkboxes: 'Add Attachment?' and 'Repeat? (Add another log)'. Finally, there are two buttons: a green 'Add' button and a red 'Cancel' button.

## SAFETY INCIDENT:

- **“Safety Incident”** is a way to define and describe any incidents that occurred against a phase code while on the job. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - **“Search for Phase Code”**: Search by a Phase Code name or id/number.
  - **“Select Phase Code”**: The matching Phase Code name/number will display in a drop-down to select. (**\*These Phase Codes come from the data setup from ERP/Database tables\***)
  - **“Short Description of incident and any parties involved”**: Describe specific events and individuals that were involved in any incidents against a specific phase code.
  - **“Add Attachment”**: Select this check box if there is an attachment (PDF, etc.) that needs to be a part of the Project Log.



## SAFETY INSPECTION:

- **“Safety Inspection”** is a way to define and describe any safety related inspections that occurred against a phase code while on the job. The required fields are displayed in the image below, and the corresponding description of what each field entails in the following bullet points:
  - **“Search for Phase Code”**: Search by a Phase Code name or id/number.
  - **“Select Phase Code”**: The matching Phase Code name/number will display in a drop-down to select. (**\*These Phase Codes come from the data setup from ERP/Database tables\***)
  - **“Description of safety inspections performed”**: Describe specific inspection activities that were involved in any incidents against a specific phase code.
  - **“Name and Company of individual performing safety inspection”**: Identification of the company/individual performing and managing the inspection activities.
  - **“Add Attachment”**: Select this check box if there is an attachment (PDF, etc.) that needs to be a part of the Project Log.



Safety Inspection

Add a New Safety Inspection Log

Please search for and select a phase code below

Search for phase code

Phase Code

Description of safety inspections performed

Name and Company of individual performing safety inspection

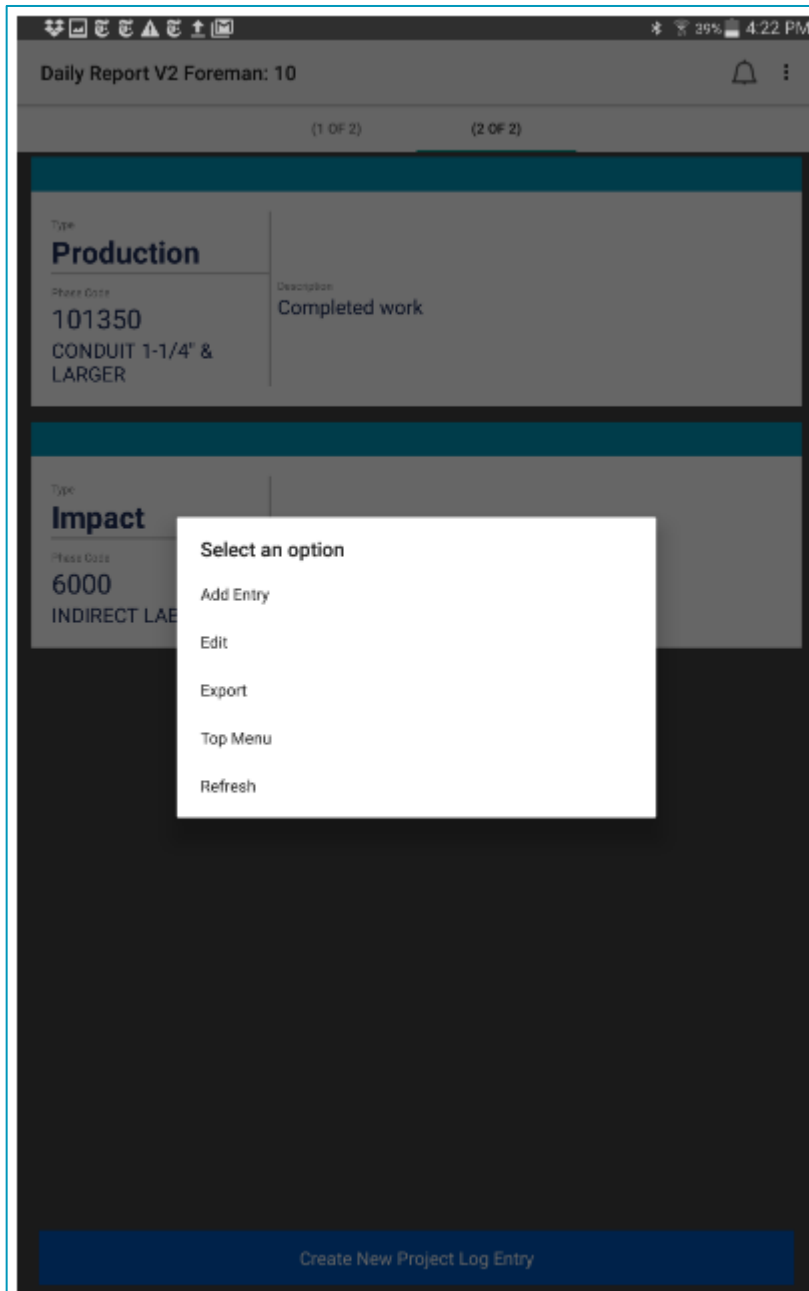
Add Attachment? ☐

Repeat? (Add another log) ☐

AddCancel

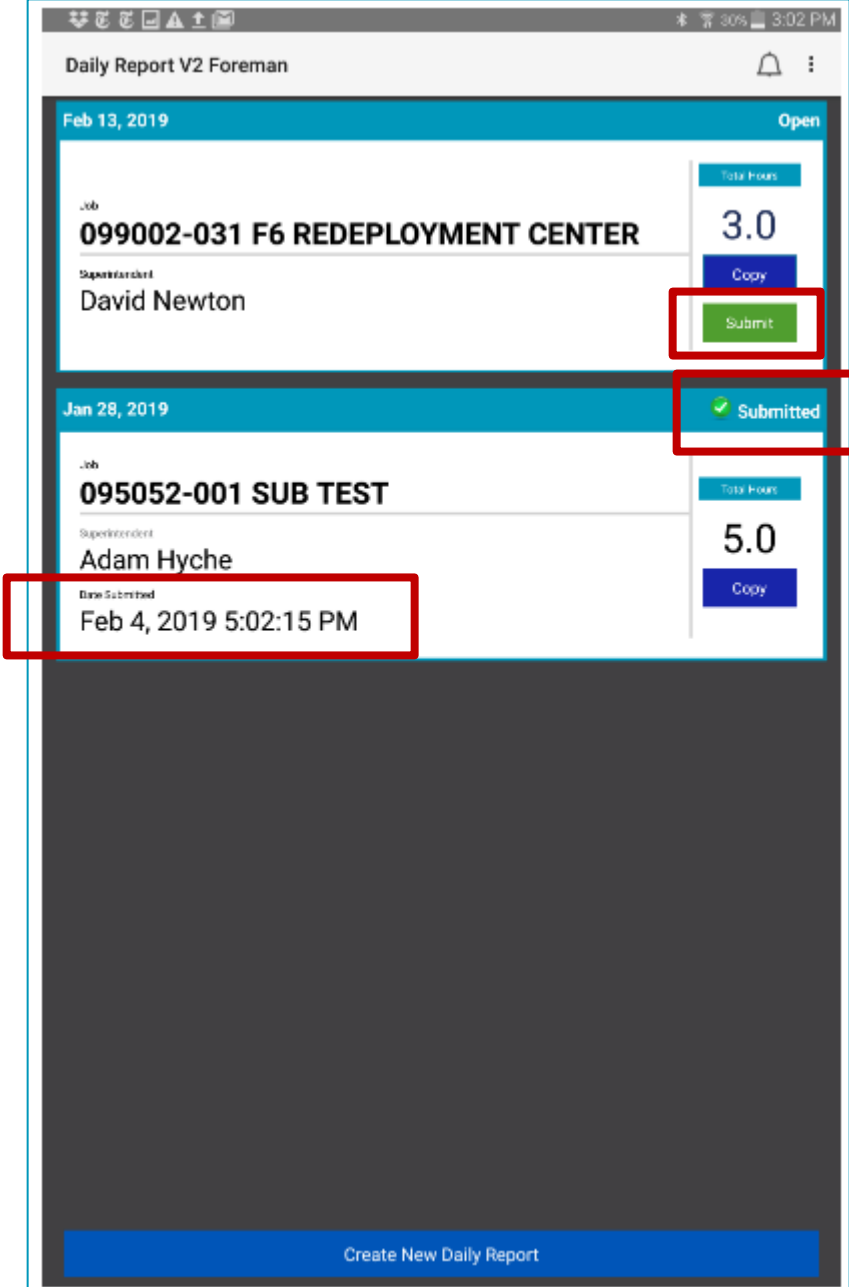
## EDIT PROJECT LOG

- See below image on how a completed Project Log entry will display, and how to “Edit” an entry once it has been made.



## SUBMIT PROJECT LOG

- After all appropriate and relevant Project Logs have been added to the report, the final step in the process is to “**Submit**” the Daily Report. See below image on how to Submit the daily report, and what an entry/report looks like once it has been submitted and ready for approval.



**Daily Report V2 Foreman**

**Feb 13, 2019** Open

Job: **099002-031 F6 REDEPLOYMENT CENTER**

Supervisor: **David Newton**

Total Hours: **3.0**

**Submit**

**Jan 28, 2019** Submitted

Job: **095052-001 SUB TEST**

Supervisor: **Adam Hyche**

Total Hours: **5.0**

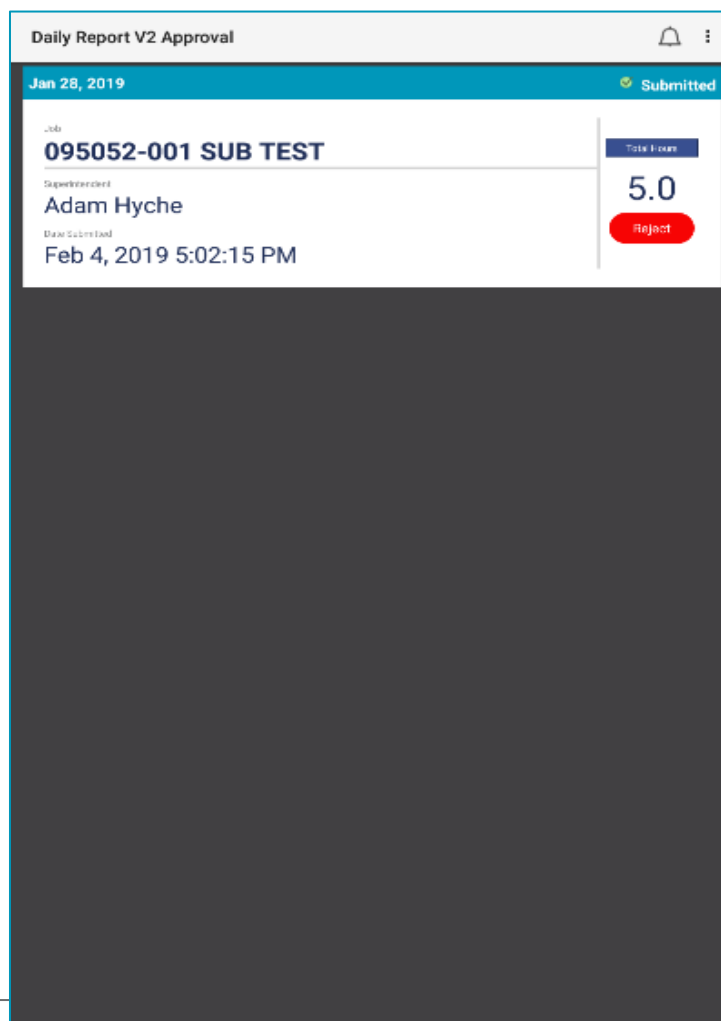
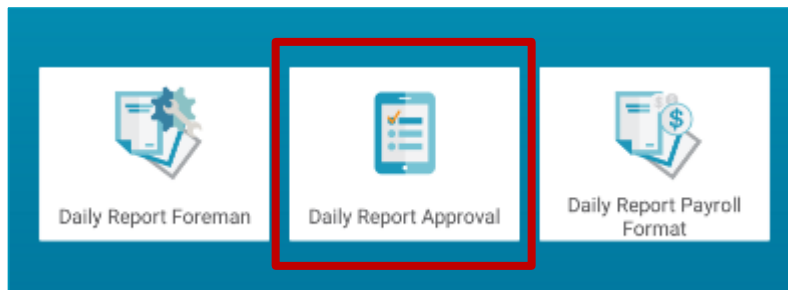
Date Submitted: **Feb 4, 2019 5:02:15 PM**

**Create New Daily Report**

## DAILY REPORT APPROVAL

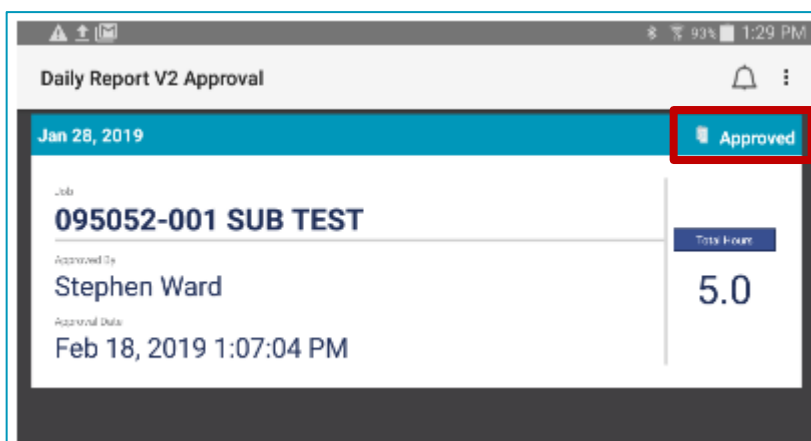
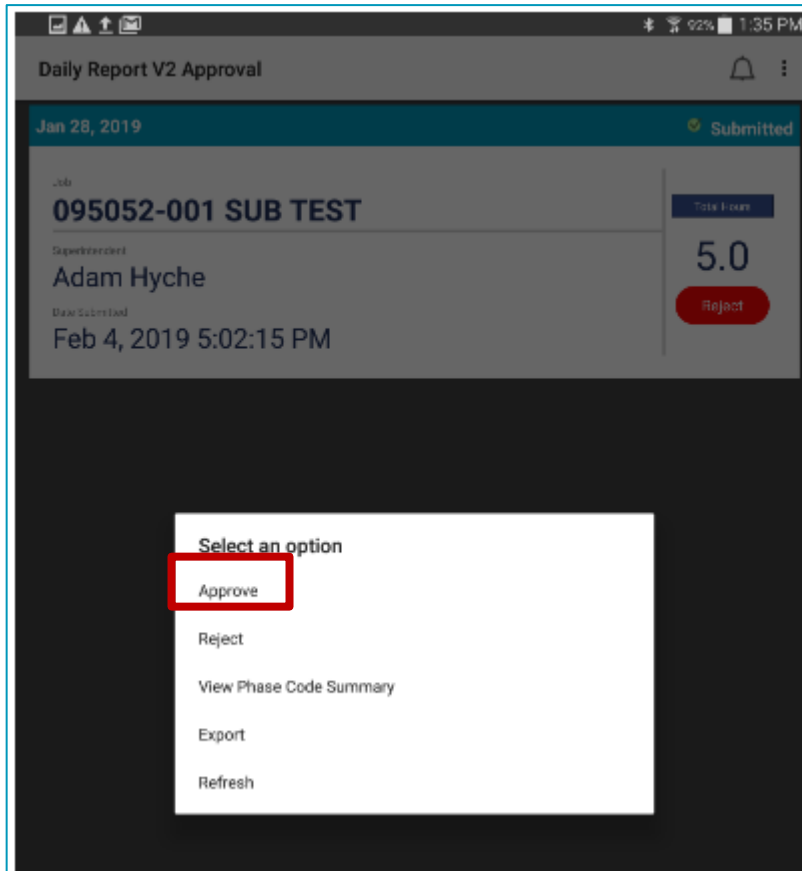
**Please note:** An approval of a Daily Report can only be performed by users with proper roles. Users assigned to the roles Supervisor and/or Project Manager are able to approve Daily Reports. A foreman is by definition not able to approve a Daily Report. An individual user can have multiple roles assigned. In case of questions, please contact [support.ps@hexagon.com](mailto:support.ps@hexagon.com).

Once a Daily Report has been submitted, a Daily Report must be approved by a supervisor/project manager. The **"Submitted"** Daily Reports are separated in this Launcher. If this launcher is selected without any reports being submitted, the user will see an empty screen. The below images highlight the launcher and the layout of a "Submitted" Daily Report:



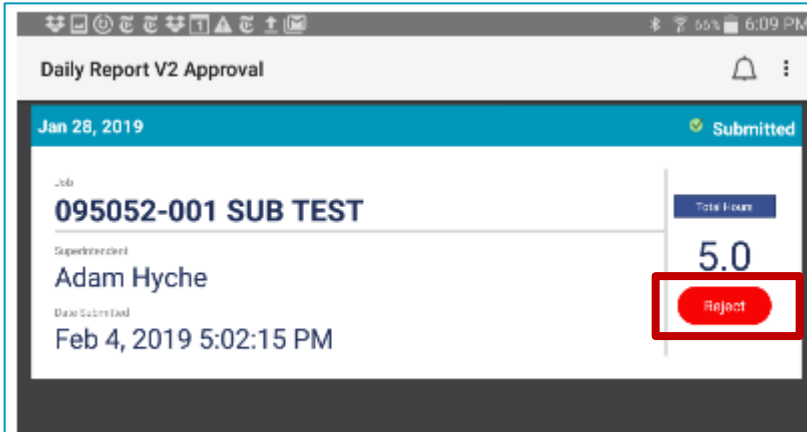
## APPROVE REPORT

- Now that a Daily Report has been “Submitted” and is available for review in the “**Approval**” launcher, it’s time to finally “Approve” the report. The below images highlight the layout/action that needs to be selected to “Approve” the report, and what the entry looks like once it has been approved.



## REJECT REPORT

- If a Daily Report needs to be “Rejected” for any reason, you have the ability to do so through the “Reject” action. When selecting “Reject” the user will then be prompted to enter in a “Reject Reason” to document why exactly the report was rejected. See below images on how to “Reject” the daily report, and what an entry looks like once it has been rejected (including rejector name and date).



Daily Report V2 Approval

Jan 28, 2019 Submitted

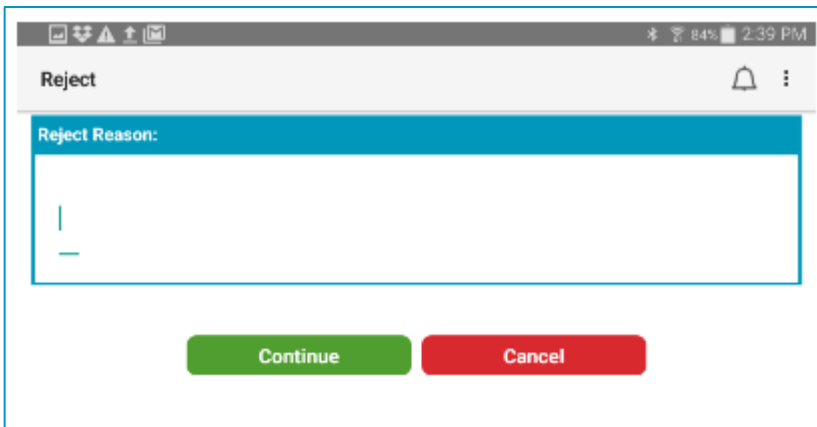
Job  
**095052-001 SUB TEST**

Supervisor  
Adam Hyche

Date Submitted  
Feb 4, 2019 5:02:15 PM

Total Score  
**5.0**

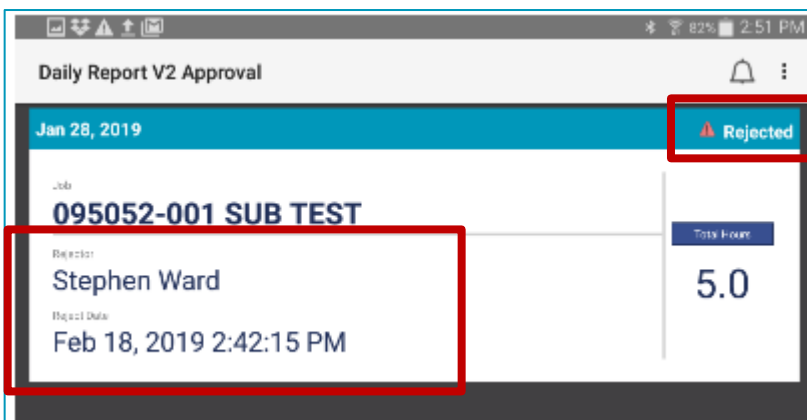
Reject



Reject

Reject Reason:

Continue Cancel



Daily Report V2 Approval

Jan 28, 2019 Rejected

Job  
**095052-001 SUB TEST**

Rejector  
Stephen Ward

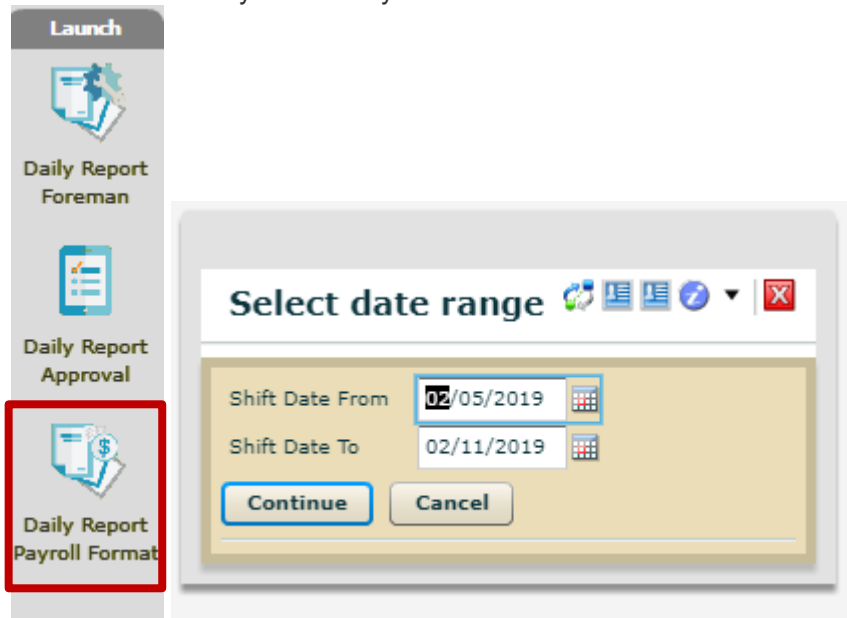
Reject Date  
Feb 18, 2019 2:42:15 PM

Total Score  
**5.0**

## DAILY REPORT PAYROLL FORMAT

### SELECT DATE RANGE

The Daily Report Payroll Format launcher allows admin/accounting personnel to search for approved reports via a date range search. This launcher is primarily used in the Web client of the application, as a report can be exported to an Excel or CSV file to then be imported into the back-office/ERP system. The below images highlight the launcher and the layout of a Payroll Format Search:



The image shows a sidebar menu with four options: 'Launch', 'Daily Report Foreman', 'Daily Report Approval', and 'Daily Report Payroll Format'. The 'Daily Report Payroll Format' option is highlighted with a red box. To the right, a 'Select date range' dialog box is open, showing 'Shift Date From' as 02/05/2019 and 'Shift Date To' as 02/11/2019. The dialog has 'Continue' and 'Cancel' buttons.

### EXPORT RECORDS TO CSV/EXCEL

- When you select the date range and launch the action, a list of the approved transactions will populate in a query layout that can then be exported to an Excel or CSV file. (\*This process will vary depending upon ERP and data upload functionalities\*).

Daily Report V2 Payroll-2

**Daily Report V2 Payroll**

Payroll Export

batch	employee_code 1	department	pay_type	hours	job_no	phase_code 3	cost_type	shift_date 2	message_line	wage_code	workers_group	work_order	state_tax_
2019-01-29 20:14:08 sward	354		R	3.0	095052-001	101600	L	1/28/2019	2019-02-18				
2019-01-29 20:14:08 sward	690		R	1.0	095052-001	101250	L	1/28/2019	2019-02-18				
2019-01-29 20:14:08 sward	690		R	1.0	095052-001	101250	L	1/28/2019	2019-02-18				



Daily Report V2 Payroll-2

### Daily Report V2 Payroll

Payroll Export

Export

Export To: File

Format: Excel

File Name: Daily Report V2 Payroll 02-18-2019

Include Column Headings: ☒

Continue Cancel

batch	employee_code	1	department	date	2	message_line	wage_code	workers_group	work_order	state_tax
2019-01-29 20:14:08 sward	354			2019		2019-02-18				
2019-01-29 20:14:08 sward	690			2019		2019-02-18				
2019-01-29 20:14:08 sward	690			2019		2019-02-18				