hh2 User Guide

Field Reports Mobile App

For the Field User

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Field Reports Capabilities and Benefits

The Field Reports module assists with:

- **Mobile Field Updates:** Generate daily logs and updates on mobile devices, ensuring flexibility and on-the-go productivity. Logs may include, but are not limited to, weather, subcontractor headcount and time, receipt of materials, production units, events, and so much more.

- **Customization and Rapid Reporting:** Tailored tabs for varied Daily Log types, allowing comprehensive reporting and swift generation of custom reports.

- **Instant Office Access:** Walk the job site, post field reports, and provide the main office with instant access to critical information. Logs may be edited, copied, moved, printed, and emailed.

- **Document Management:** Attach supporting documents directly to field updates, ensuring all relevant information is readily available.

- **Record Any Meeting or Visitor on the Job Site:** Log and note attendance for any site meeting, such as OSHA safety meetings. Log site visitors such as inspectors.

- **Auto Fill Labor and Equipment Time:** Easily connect to the Remote Payroll product for labor and equipment time recording,

The Field Reports Module streamlines the logging process to enhance overall communication, reporting and efficiency. Let’s get started!

Users that will Benefit from this User Guide

- Field Employee
- Field Supervisor
- Superintendent
- Project Manager
- Crew Manager
- Other managerial roles in the field
- Managers and Administrators who want to understand how Field Reports are used in the field.

Note: A Glossary of Terms is available for in the Manager User Guides. It includes hh2 terminology for all product areas and some general industry language. See your Administrator for a list of terms.

Note: This User Guide is intended to be used alongside the software for maximum comprehension.

Field Reports Quick Start Guide

1. Download the Field Report mobile application.
2. Log in.
3. Synchronize.
4. Select a Job from the Home Page.
5. Select a Report Type from the Home Page.
6. Select a day on the calendar.
7. Select the Hamburger icon.
8. Select the tab by which to create the Daily Log. For instance, if creating a weather log, select Weather.
9. Select the Add icon.
10. Enter the data and Save.
11. Repeat for each tab, as needed.
12. Finalize and sign the log. Finalization applies to <u>all</u> tabs. Once finalized, changes cannot be made, but addendums can be added.
13. Use the More icon and select Create PDF to create reports.

- The Home icon will return the user to the Home Page.
- To get help, select the Help icon from the Home Page.
- The Settings icon from the Home Page will take the user to system settings to configure the Field Reports mobile application.

Guía Rápida de Informes de Campo en Español

1. Descarga la aplicación móvil de Informes de Campo.
2. Inicia sesión.
3. Sincroniza.
4. Selecciona un trabajo desde la página de inicio.
5. Selecciona un tipo de informe desde la página de inicio.
6. Selecciona un día en el calendario.
7. Haz clic en el ícono de las tres líneas.
8. Selecciona la pestaña para crear el Registro Diario. Por ejemplo, si estás creando un informe meteorológico, elige "Clima".
9. Haz clic en el ícono de agregar.
10. Ingresa los datos y guarda.
11. Repite según sea necesario para cada pestaña.
12. Finaliza y firma el registro. La finalización se aplica a todas las pestañas. Una vez finalizado, no se pueden realizar cambios, pero se pueden agregar anexos.
13. Usa el ícono de "Más" y selecciona "Crear PDF" para generar informes.

- El ícono de inicio te llevará de vuelta a la página de inicio.
- Para obtener ayuda, selecciona el ícono de ayuda.
- El ícono de configuración desde la página de inicio te llevará a la configuración del sistema para ajustar la aplicación móvil de Informes de Campo.

The Field Reports Mobile Application

The Field Reports module feature must be enabled:

1. Download the hh2 Field Reports app (a one-time event).
2. Log In.
3. Perform a synchronization.

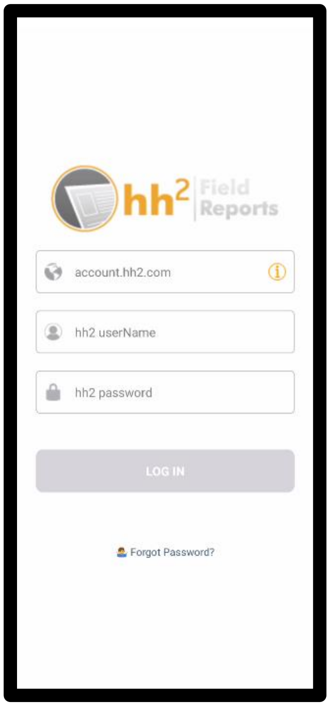
Download the Mobile Application

Download the hh2 Field Reports Mobile from the Apple Store for iOS, iPhones, and iPads. For Android products download the hh2 Field Reports Mobile from the Google Play Store.

To Download:

1. Search for hh2 Field Reports.
2. Select it.
3. Install it.
4. Open the application once the installation process is complete.
5. Log In using the hh2 credentials provided by your Administrator.

Log In



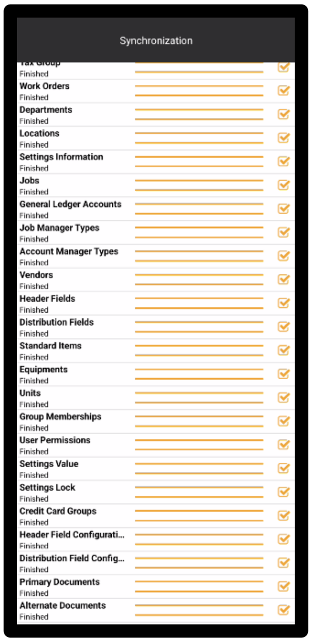
1. Enter the construction company's hh2 account (company identifier). For instance, if the company's identifier is construction.hh2.com, the user would enter construction.
2. Enter the Username.
2. Enter the Password.
3. Select Log In.
4. If there is an error, the system will flag the user that either the identifier, username or password is incorrect. **Note:** If the user has forgotten their password, simply click Forgot Password. The user will need to know the account name and email address associated with the account to reset the password.

Synchronization

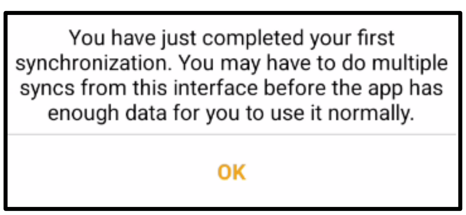
Upon log in, the mobile application will automatically synchronize all the company's and user data (such as jobs, and vendors), along with permissions to access specific areas of the hh2 software. This will occur upon each log in to the hh2 mobile application.

To Complete Synchronization:

1. Once the synchronization is complete, all boxes will be checked.



2. Select Done once all boxes are checked. The following message will display after the first synchronization:

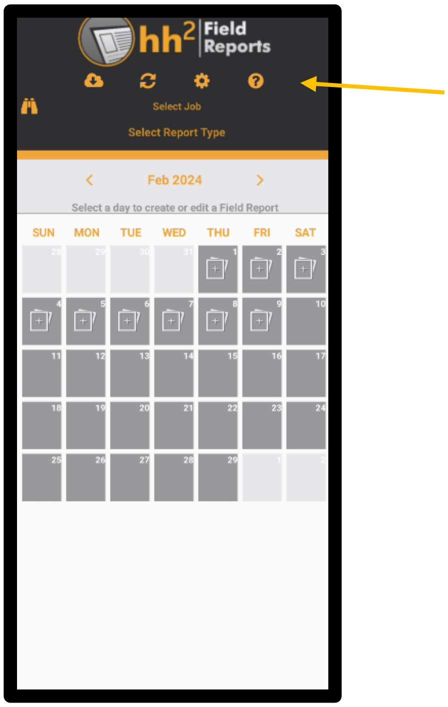


3. Subsequent synchronizations will display a message that the synchronization has completed. For either, select Ok.

Note: Occasionally, more than one synchronization is required. When changes are made on the hh2 website, the Field user will not see those changes until a synchronization has occurred. To update all data accessible to the user, synchronization must occur from Sync Settings. See Sync Settings.

Tools on the Field Reports Home Page

A variety of tools at the top of the Field Report Home Page are available to the user. These tools are the same for the end field user as well as the supervisor or manager in the field.



The tools allow the user to:

- Download information
- Synchronize
- Access system settings (if permitted to do so)
- Obtain help

Note: Throughout the mobile application, the title of the page is often indicated in white, while functions are indicated in color.

Download

From the Field Reports Home Page, information may be downloaded from the hh2 website or any other company device to ensure the most updated information is on hand. **Note:** It is recommended that the user perform this action periodically to ensure that the latest company data is available.

To Download the Most Recent Information :

1. Go to the Home Page.
2. Select the Download icon.
3. Information on the user's device will synchronize with the most updated information.

Refresh

Field Reports for the month can be downloaded using Refresh from the Home Page.

To Refresh:

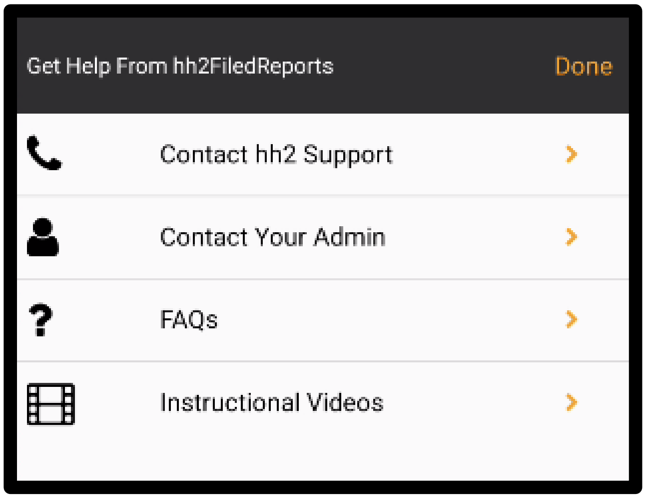
1. Go to the Home Page.
2. Select the Refresh icon.
3. This will refresh data on the current page with reports for the month.

Field Reports Settings

See Mobile Application System Configuration.

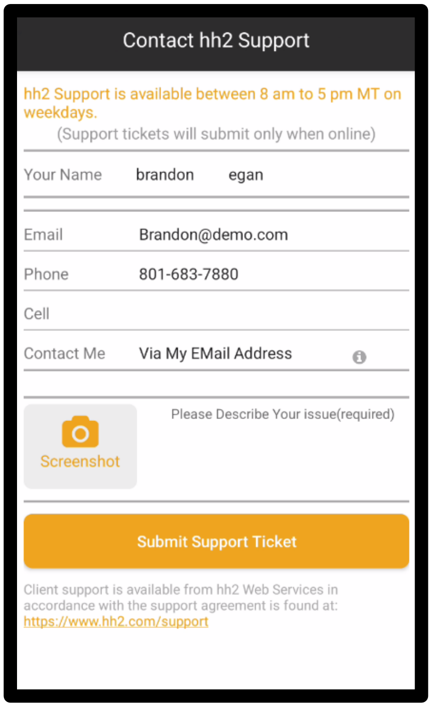
The Help Tool

The Help  icon provides the user access to hh2 Support, the user's construction company hh2 administrator, FAQs, and Instructional Videos.



To Contact hh2 Support:

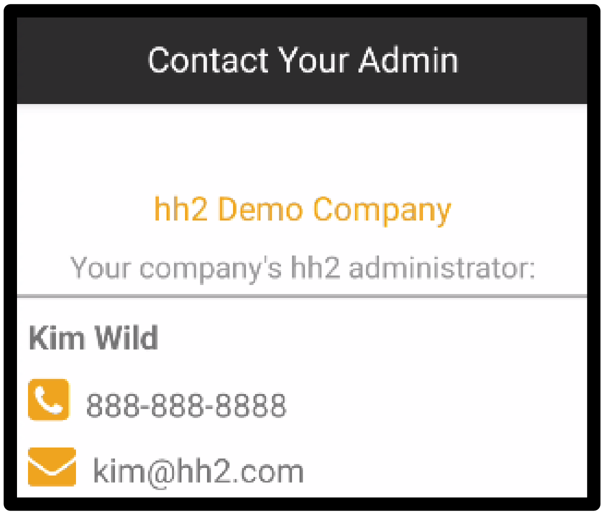
1. Select the Help  icon.
2. Select Contact hh2 Support.



3. Enter Name, Email, Phone and Cell Information.
4. Select a contact method in the Contact Me field (Via my cell, phone, email address).
5. Describe the issue or reason for needing assistance.
6. Take a screenshot with the device.
7. Select Screen shot and either select Existing Photo (for a single photo) or Batch Import (for more than one photo).
8. Select the photo(s).
9. Select Submit Support Ticket.
10. The Support Team will reach out as soon as the next representative is available.

To Contact Your Administrator at the Construction Company:

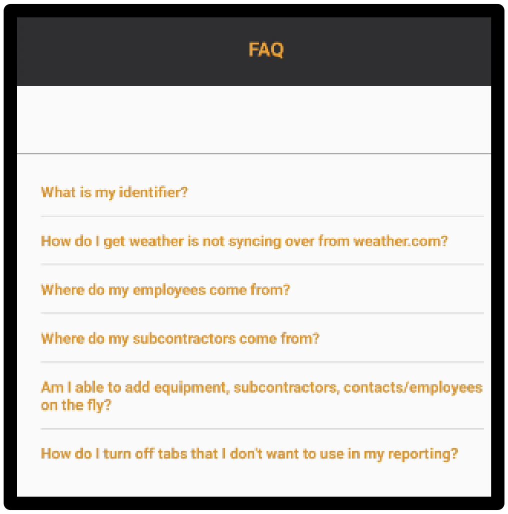
1. Select the Help icon.
2. Select Contact Your Admin.



3. Select the Phone icon to call the administrator.
4. Select the Email icon to start an email to the administrator.

To Access FAQs:

1. Select the Help  icon.
2. Select FAQs.



3. Select the specific FAQ for additional information.
4. Select Back to return to the Field Report mobile application.

   Select Done.

To Access Instructional Videos:

1. Select the Help icon.
2. Select Instructional Videos.
3. Select Play.

Overview of the Field Reports Process

The Field Reports module allows individuals in the field and others to report on regular tasks and job conditions on the job site. The module is mostly used by mid-level managers in the field. **Note:** Field Reports may also be referred to as Daily Logs.

The Field Reports Process involves four steps:

1. **Creating Daily Logs:** After downloading, logging in, and synchronizing, the field user may easily create Daily Logs/Field Reports. Tabs, also known as sections, reflect the contents of the report and will vary based on the construction company's business needs. Tabs may include, but are not limited to, reporting on weather conditions, meetings, visitors, and materials. And, in fact, the construction company may create customized tabs.

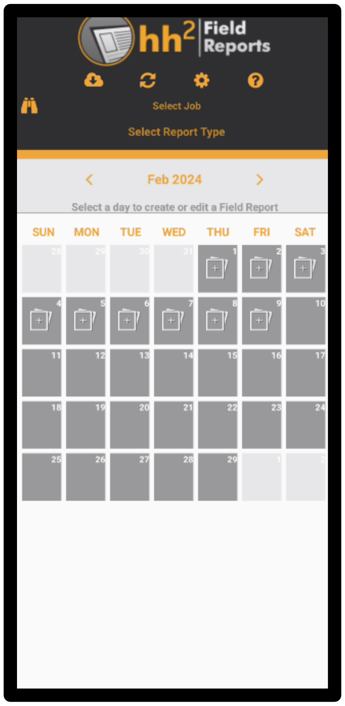
2. **Viewing and Editing Daily Logs:** Logs may be reviewed and edited.

3. **Finalizing Daily Logs:** Daily Logs must be finalized either manually or automatically. Daily Logs, not finalized within a certain period of time, will automatically be finalized by the hh2 Field Report system. In order to maintain the integrity of the Daily Log/Field Report, as a whole, they may not be edited once finalized. However, addendums can be added.

4. **Reporting on Daily Logs:** PDF reports can be created by Daily Log.

The Field Reports Home Page

Each user will start on the Home Page.

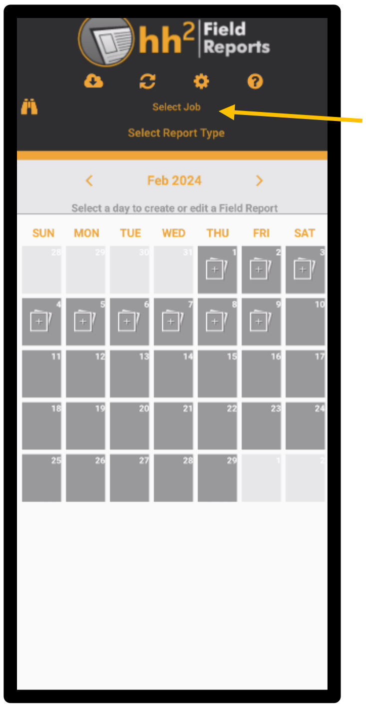


From the Home Page:

- Jobs are selected.
- The Report Type is selected.
- The Job Explorer is available to view Jobs and their related Cost Codes and Categories.
- The Field Report date may be selected using < and >.
- Field Reports may be added or edited.

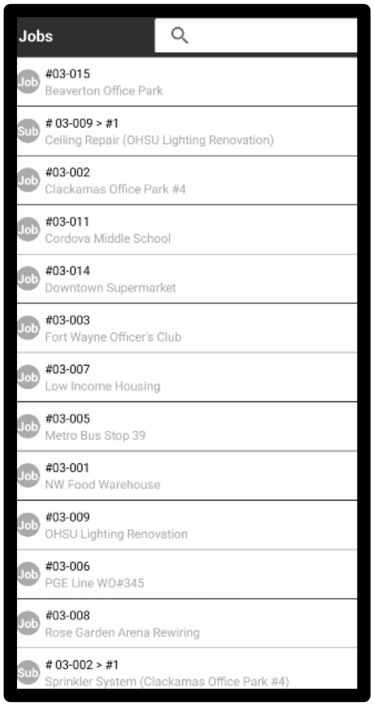
Selecting Jobs

Prior to adding, editing, or reporting on any Field Report (Daily Log), the user will need to select the associated Job. The Job may default into the Select Job field based on the construction company's set up.



To Select a Job:

1. Select the Select Job field. **Note:** If a Job was previously selected or defaulted in, that job name will be in the field.

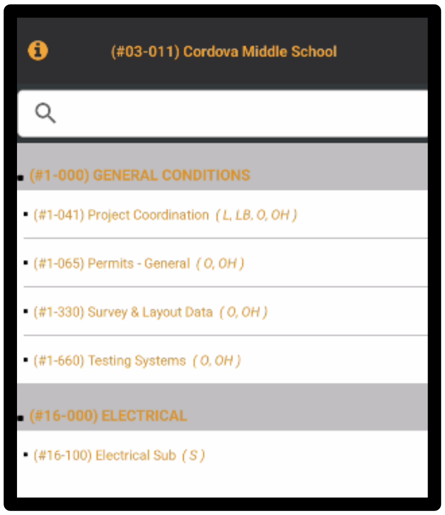


2. The search field may be used to find a Job from the Master Job List that follows.
3. Once the Job is found, select it.
4. The newly selected Job will populate the Select Job field on the Home Page.

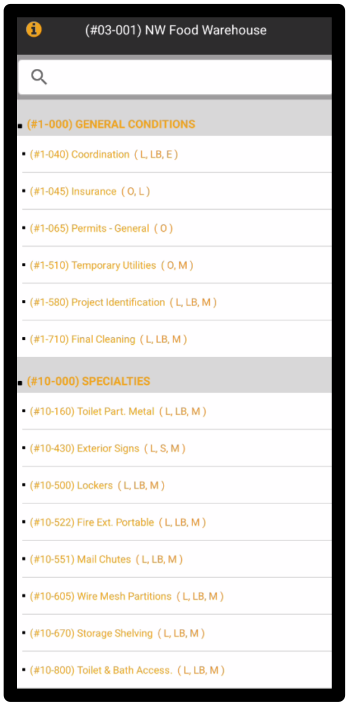
The Job Explorer:

The Job Explorer allows the user to view both detailed Cost Code information, as well as detailed Job information, including mapping details. Further details about a Job may be accessed utilizing the Job Detail Page. This is not a required action. Rather, it is a feature that is available to display further information, and may not be used by the construction company.

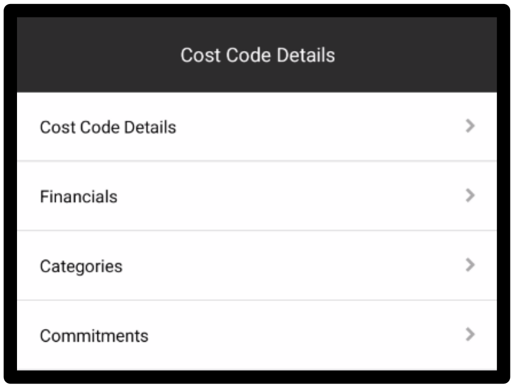
1. From the Home Page, select the Job Explorer icon.



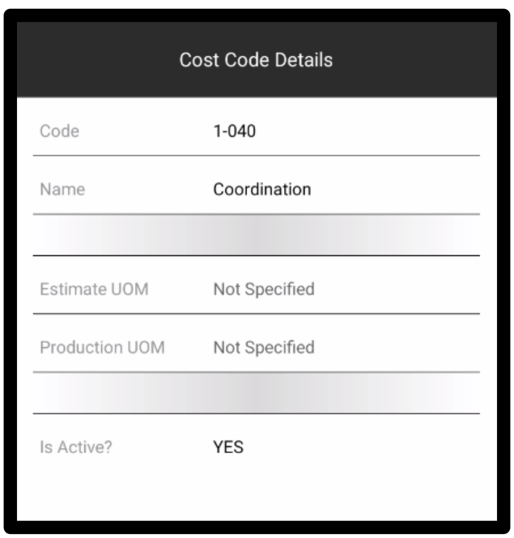
2. Cost Codes and Categories associated with the Job display. **Note:** The search tool may be used to search for Cost Codes.



3. Select a Cost Code to view further Cost Code Details.
4. This will take the user to the Cost Code Details Page. Here information such as Cost Code Details, Financial estimates, Categories, and Commitments can be accessed.
5. Select the carrot > next to each for additional detail.

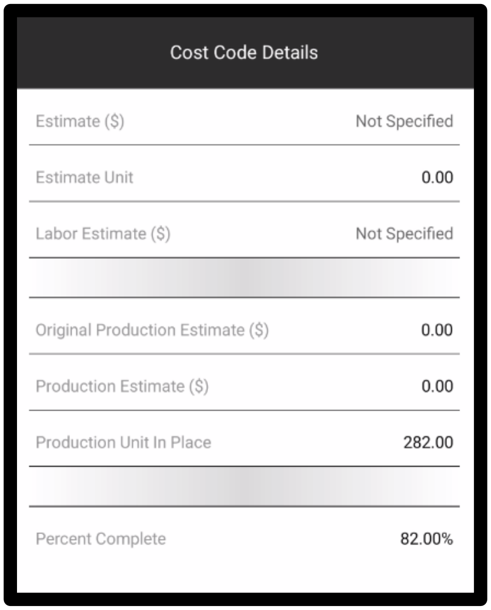


6. When Cost Code Details is selected from the Cost Code Details Page, the following displays:

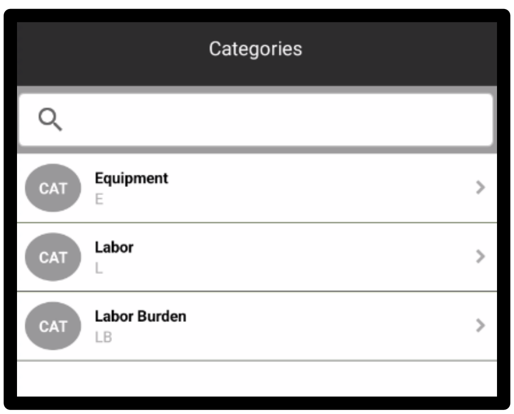


7. The Code number, Name, Estimated Units of Measurement (UOM), Production Units of Measurement (UOM) and whether the Cost Code is active or not displays. **Note:** This is primarily used by construction companies utilizing Unit Production.

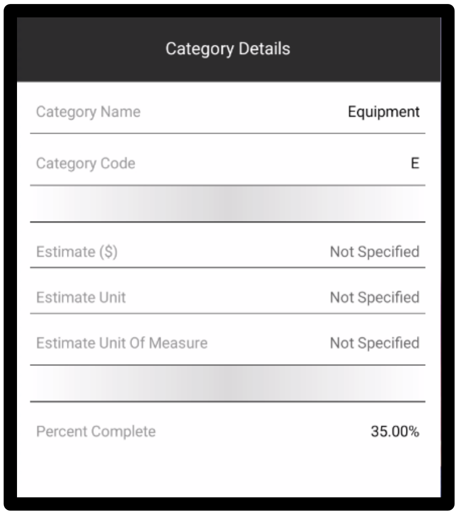
8. When Financials is selected from the Cost Code Details Page, the following displays:



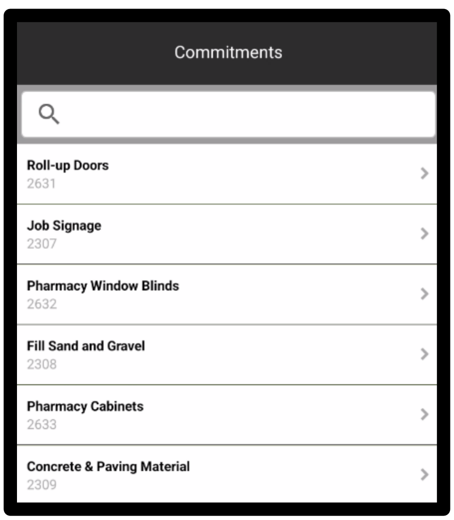
9. When Categories is selected from the Cost Code Details Page the following displays:



10. When > is selected from the Categories Page, further Category Details display:

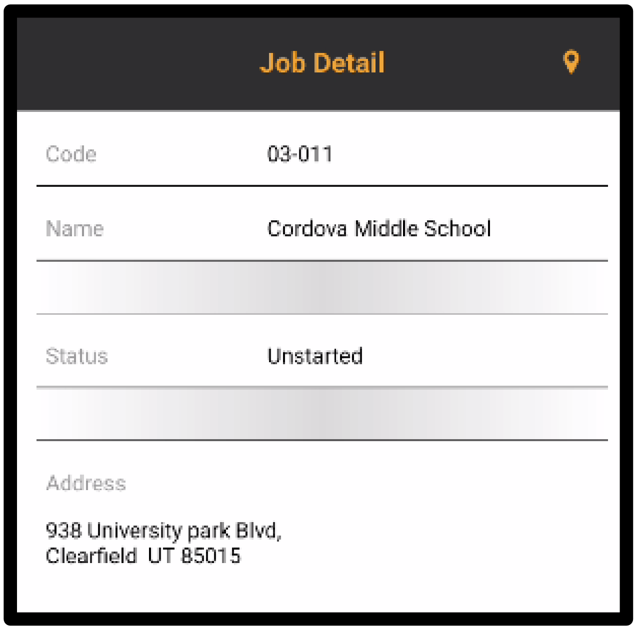


11. When Commitments is selected for the Cost Code Details Page, the following information displays:



The Job Detail Page:

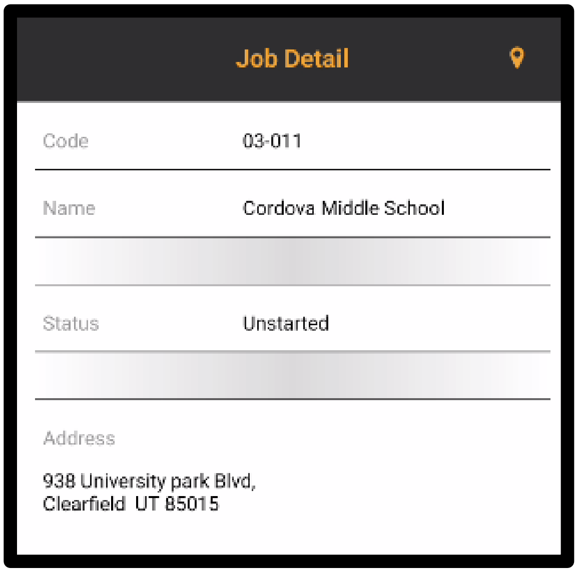
1. From the Home Page, select the Job Explorer icon.
2. Select the Information icon to view more information about a Job on the Job Details Page.



To Map a Job Location:

Job locations may be mapped.

1. From the Home Page, select the Job Explorer icon.
2. Select the Information icon to view more information about a Job on the Job Details Page.

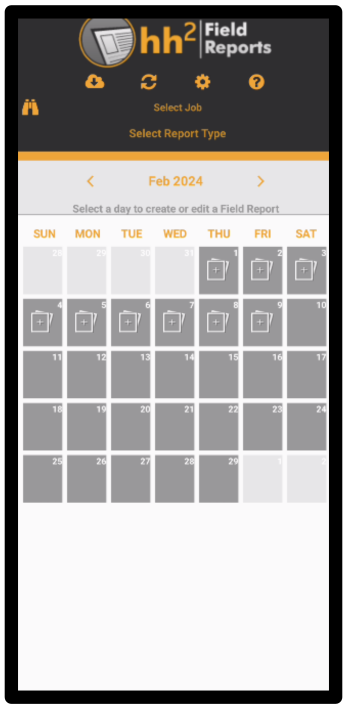


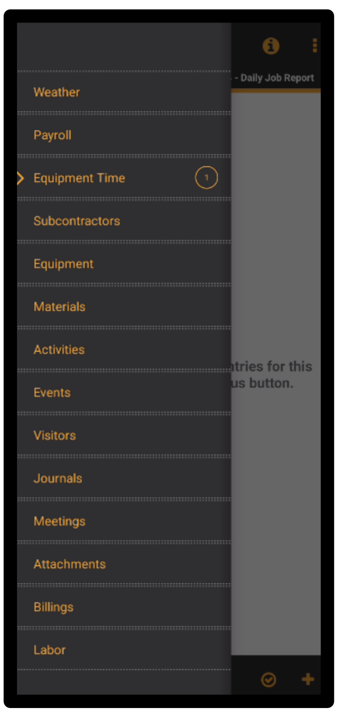
3. From the Job Detail Page, select the Map icon.
4. Latitude and Longitude display at the top of the page.
5. Select Set Job Coordinate to map a job location.
6. Select Standard, Hybrid or Satellite to view job locations.
    a. Standard mapping displays basic cartographic features.
    b. Hybrid mapping combines street maps with satellite imagery for a comprehensive view.
    c. Satellite mapping provides detailed, real-world views captured by satellites from above.
7. Select Find Coordinate to find a job location.
8. To Copy a job location, select Copy Coordinate. Do so by toggling with Find Coordinate.
9. Select Finish when complete.

Log View

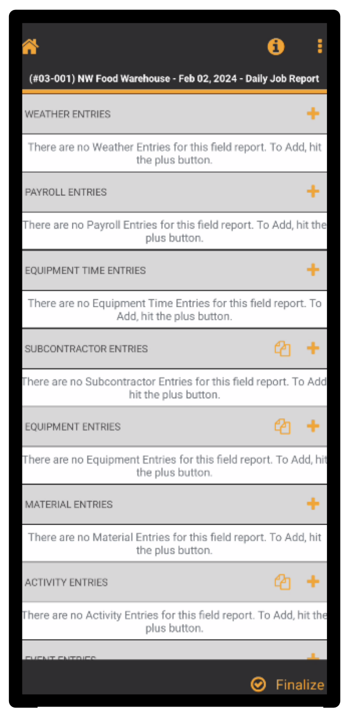
Based upon Tab Configuration settings in the Mobile Application System Configuration, Field Reports (Daily Logs) may be viewed in with Tabbed or Single-Page view. The user may select their preference for viewing. See Tab Configuration. This user guide will demonstrate the Tabbed view. However, functionality with the Single-Page format is the same.

From the Home Page, select any day to create or edit a Field Report:





Tabbed View



Single-Page View

Differences in Function Icons-Tabbed View versus Single-Page View

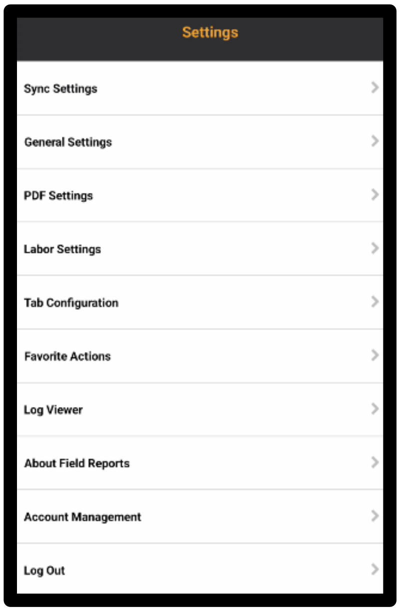
Function	Tabbed View	Single-Page View
Return to the Home Page	Home icon in the upper left corner	Home icon in the upper left corner
Report Information	Information icon in the upper right corner	Information icon in the upper right corner
Access to additional features	The More icon in the upper right corner	The More icon in the upper right corner
Copy Data from a previous Field Report (Daily Log)	The Copy icon at the bottom of the Tabbed Page	The Copy icon next to the Daily Report tab
Add a new Field Report (Daily Log)	The Add icon at the bottom of the Tabbed Page	The Add icon next to the Daily Report tab
Finalize	The Finalize icon at the bottom of the Tabbed Page	The Finalize icon at the bottom of the Single-Page View
Return to the Tabbed List	The Hamburger icon at the bottom of the Tabbed Page	Not applicable
Collapse the Tabbed List	>	Not applicable
Universal Add	Not applicable	Both Single-Page View and Universal Add must be enabled in the Tab Configuration of the Mobile App System Configuration

Universal Add

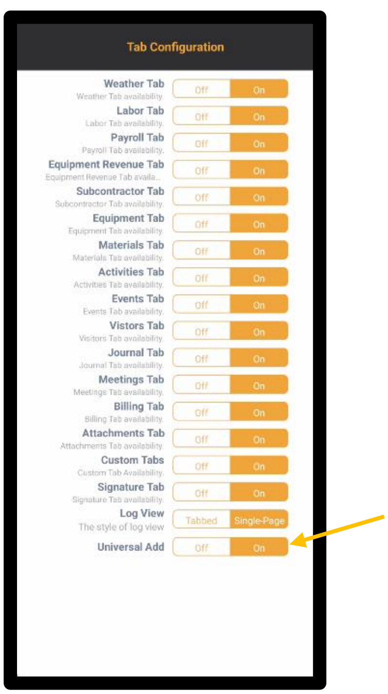
When the Single-Page View is enabled, the Universal Add feature is available. The Universal Add provides the user a means to quickly add logs, allowing the user to move down a list of log topics (tabs).

To Enable the Universal Add feature:

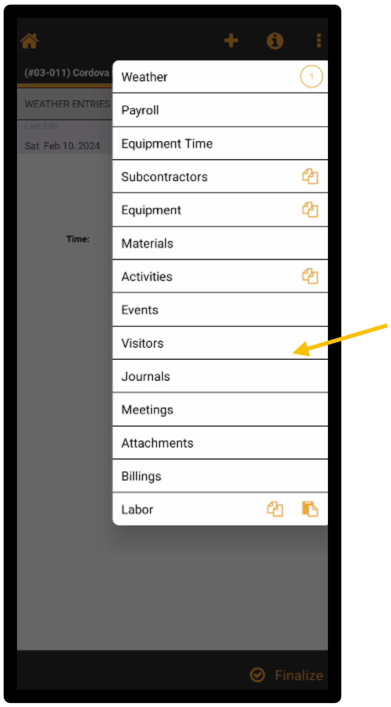
1. Select the Settings icon from the Home Page.



2. Select Tab Configuration.

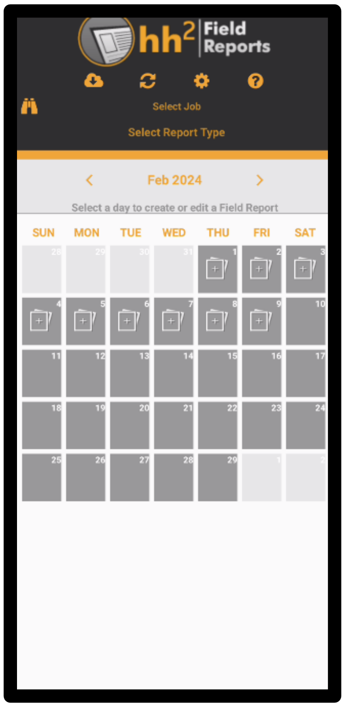


3. Select Single-Page from Log View.
4. Universal Add will display. Select On.
5. Enabling the Universal Add then makes the Daily Log Tabs list available when selecting a day.

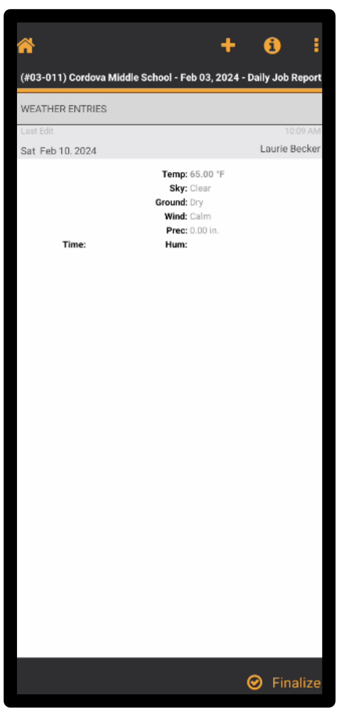


To Work with the Universal Add feature:

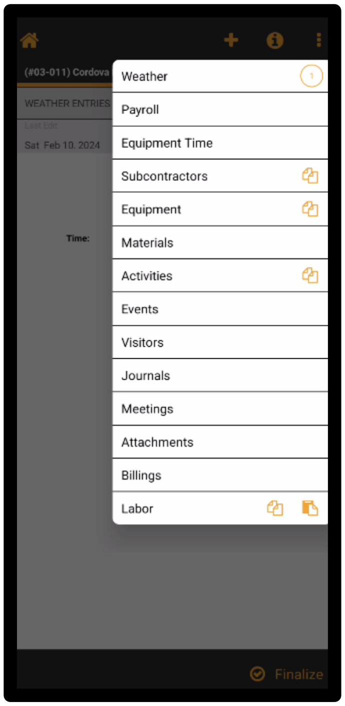
1. Select any day from the Home Page.



2. The Single-Page View will display.



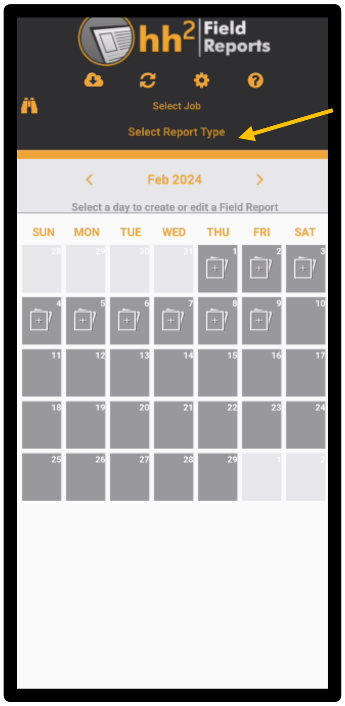
3. Select the Add icon at the top of the page. The Universal Add feature will display, as shown in white below. From here each of the Daily Log Tabs may be managed. See Field Report Tabs.



4. Move from one Daily Log tab to the next. Perform the necessary function in each tab, such as adding weather information in the Weather tab. Then select the next tab that requires information from the list, like Payroll. Repeat as needed. This process allows for rapid log entry. **Note:** The tabs available may vary based upon construction company and even user.

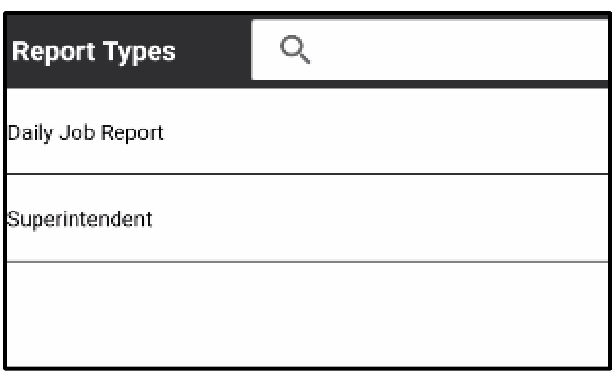
Report Types

Construction companies may create a variety of Report Types. These are created on the hh2 website by a system administrator or manager. Examples of Report Types may be an Accident Report, a Weekly Inspection Report, or a Quality Control Report. Report Types may be customized by job role such as a Superintendent Report, for example. Again, these are completely customizable and will vary based upon the construction company's needs.



To Select a Report Type:

1. From the Home Page, choose the Select a Report Type field or the name of the Report Type, if already populated. The reports available will vary by construction company and even users within the construction company. **Note:** There may be only one Report Type available for the user. If more than one is available, select from the Report Types Page. The search tool may be utilized. Upon selection, the report type will populate the Report Type Field on the Home Page.

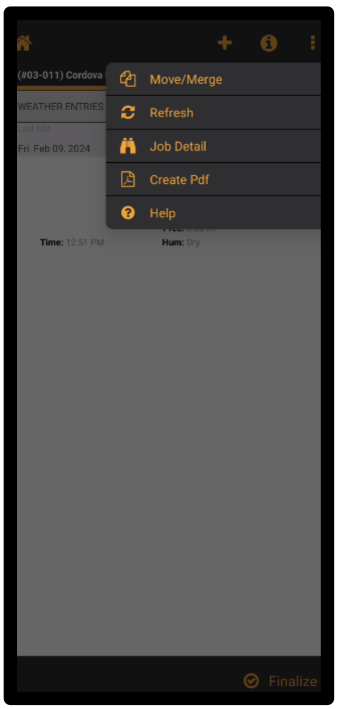


Field Report Tools

Once a date is selected from the Home Page, the user is brought to either the Tabbed or Single-Page View. See Log View. At the top of either, an assortment of tools is available.

To Access Field Report Tools:

1. From the Home Page, select a date.
2. Select the More icon in the upper right corner.



The following tools are available:

- Header Information
- Unit Production
- Move/Merge
- Refresh
- Job Detail
- Create PDF
- Help

Note: The tools available may vary by user based on company settings on the hh2 website. Likewise, each user may select up to two Favorite Actions in the settings. See Favorite Actions.

Return to Home Page

When available, the Home icon in the upper left corner will return the user to the Home Page.

Header Info

The information entered here will serve as a report description, and will be added to the log details tab on the hh2 website. Up to 150 characters may be added, along with location details.

Unit Production

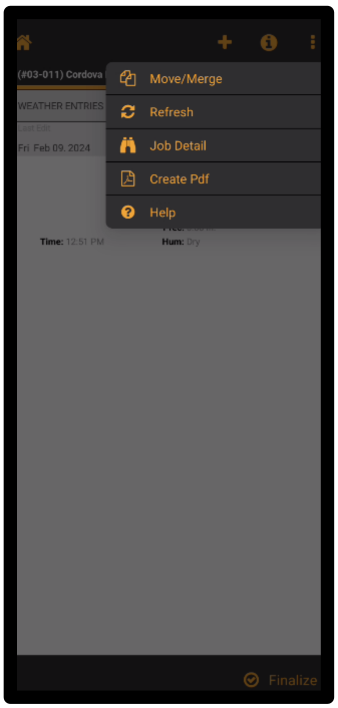
Unit production involves quantifying work tasks using standardized units, such as square footage or linear feet. An example of unit production is tracking the square footage of drywall installation. This method allows for precise measurement, tracking, and management of construction activities. By breaking down tasks into measurable units, construction professionals can more accurately estimate costs, assess project progress, and allocate resources efficiently. For accuracy, it is best practice to regularly enter unit production data. Otherwise, the numbers become irrelevant and inaccurate. This feature is for customers using Sage 300 only. This is utilized in conjunction with the Activities tab to assist in tracking how close a job is to completion.

Move/Merge

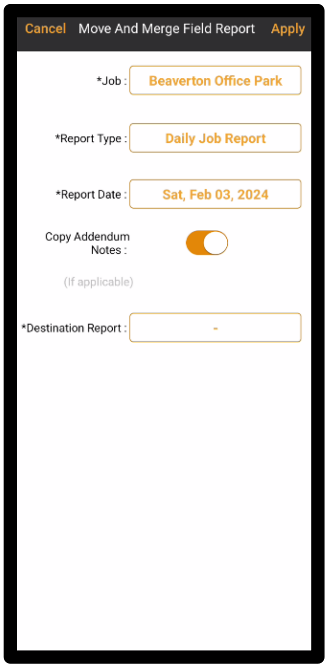
The purpose of this feature is to move a non-finalized daily log to another day or merge it with another log. **Use Case:** This is a convenient feature to utilize in the event a user accidentally creates a log on the wrong day. The user may then easily move the log to the appropriate day.

To Move/Merge a Daily Log with Another Daily Log:

1. From the Home Page, select a date.
2. Select the More icon in the upper right corner.



3. Select Move/Merge.



4. Enter the Job of the Field Report (Daily Log) to move in the Job field.
5. Enter the Report Type in the Report Type field.
6. Enter the Report Date.
7. Select with at toggle whether to include any addendum notes or not.
8. Select the Destination Report.
9. Select Apply in the upper right corner. **Note:** Move and Merge Field Report is the title of the page (in white), while Apply and Cancel (in color) are functions.

Refresh

Selecting Refresh will refresh the data on the current page.

To Refresh:

1. Go to the Home Page.
2. Select a date, and then the More icon.
3. Select the Refresh icon.

Job Detail

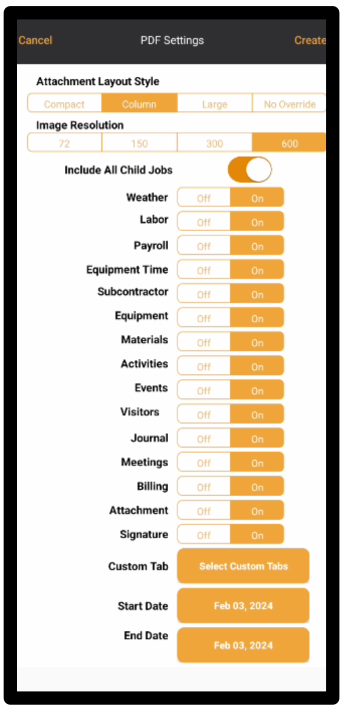
The Job Detail function from the More icon will take the user to the same functionality as the Job Explorer icon from the Home Page. See The Job Explorer.

Create PDF

PDF reports regarding Daily Logs information may be created. The user can select the format, and tabs to include, along with a date range to narrow data include on the report. **Note:** Some selections may be locked and cannot be used based on construction company set up.

To **Create a PDF Report:**

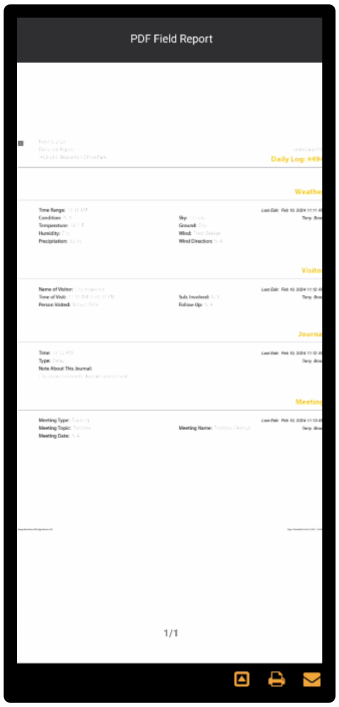
1. From the Home Page, select a date.
2. Select the More icon in the upper right corner.
3. Select Create PDF.



4. Select the Attachment Layout Style (Compact, Column, Large, or No Override-which will retain the default PDF Settings). See PDF Settings.
5. Select the Field Report Tab(s) to include.
6. Select whether to include links to the report or not.
7. Select whether to include time coded to Child Jobs when using Remote Payroll.
8. Select Custom Tabs, if used (Custom Tabs are tabs created by the construction company). Check any to include in the report from the Select Custom Tabs Page that follows.
9. Select the Start and End Date to include in the report.

10. Select Create. The PDF will be created.

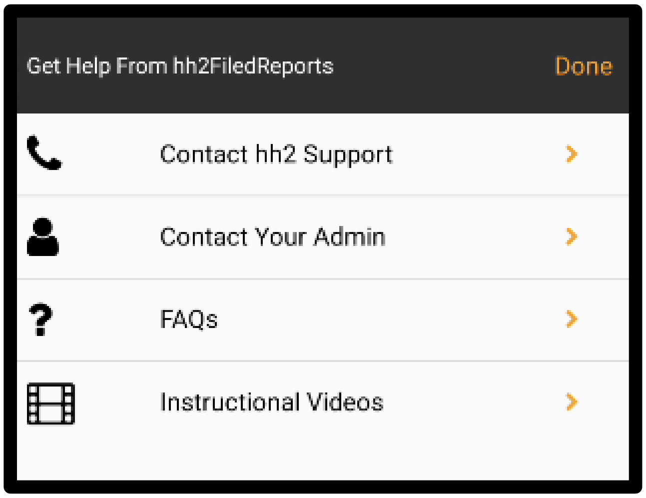
11. This example shows the Column format.



12. The report may be opened, printed, or emailed using the icons at the bottom of the page.

Help

1. From the Home Page, select a date.
2. Select the More icon in the upper right corner.



This takes the user to the same help options offered from the Home Page using the Help icon. See The Help Tool.

Field Report Tabs

Field Report tabs are the core component to the Field Reports module. They are sometimes referred to as Sections. Field Reports allows employees to report on tasks and conditions at the job site. Each Field Report tab provides the user an opportunity to report on various aspects of a job. Construction companies may enable all or just some of the available Field Report tabs. Additionally, the construction company may also create Custom Tabs to meet their business needs.

The most used Field Report tabs are:

- Weather
- Remote Payroll
- Equipment Time
- Equipment-used with Field Reports standalone without Remote Payroll
- Subcontractors
- Materials
- Activities
- Events
- Visitors
- Journal Entries
- Meetings
- Attachments
- Billings
- Labor-not utilized if using Remote Payroll

The functionality for all Field Report tabs is similar, with the ability to add and delete on all sections, using the Add + icon and Delete icon, respectively. The capability to import entries and download data is available for some tabs.

From each Field Report, users will participate in all or some of the following Field Report functions:

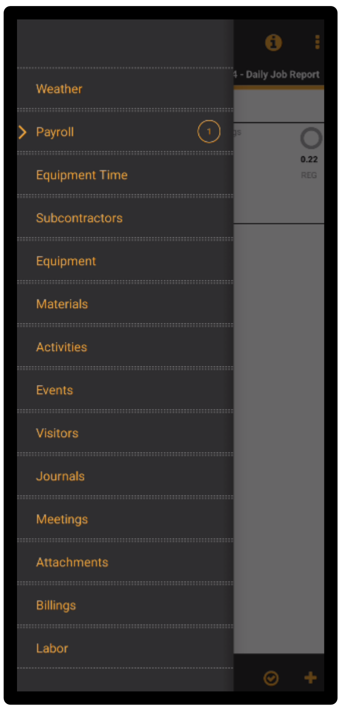
1. Creating Daily Logs.
2. Viewing and Editing Daily Logs.
3. Finalizing Daily Logs.
4. Reporting on Daily Logs.

Weather Tab

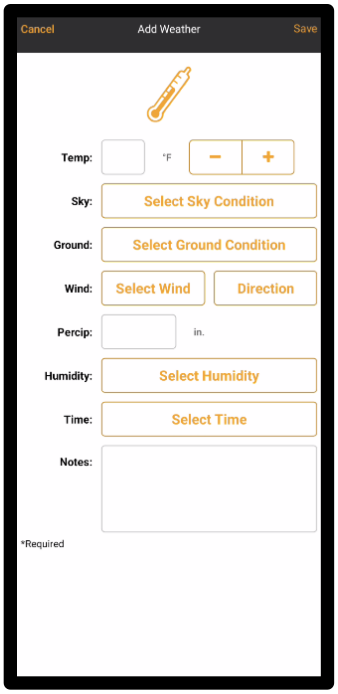
The Weather tab provides the ability to log weather conditions on a job site. It also enables the user to download weather data from Weather.com. **Note:** An address must be associated with the job for this feature to function.

To Add Weather Information to the Daily Log:

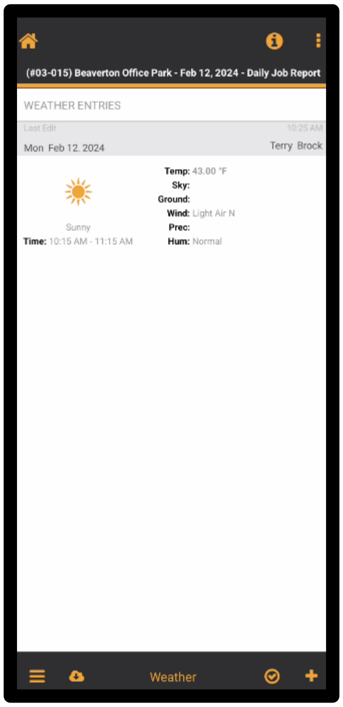
1. Select a Job. See [Selecting Jobs].
2. Select a Report Type. See [Report Types].
3. Select the day from the calendar.
4. Select the Hamburger icon.



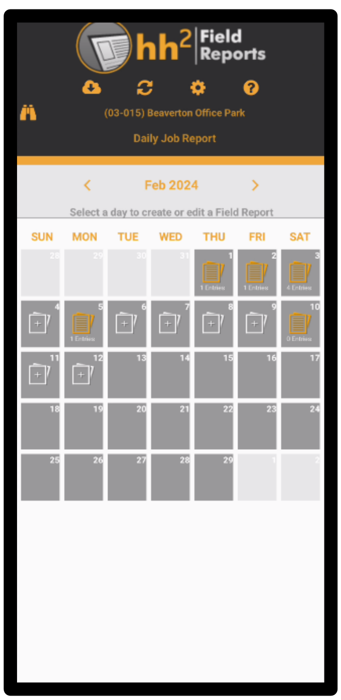
5. Select Weather.
6. Select the Add icon.



7. Select the Temperature.
8. Select the Sky Conditions.
9. Select the Ground Conditions.
10. Select the Wind Conditions and Direction.
11. Select the Precipitation.
12. Select the Humidity.
13. Select the Time.
14. Write notes, as needed.
15. Select Save.
16. The weather entry is made in the Daily Log.
17. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications. .



18. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.

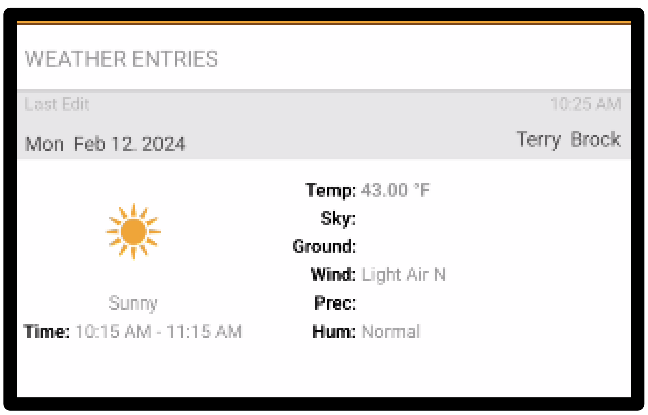


Note: Units of measurement (UOM) for Temperature and Precipitation are set in the General Settings section of the Mobile Application System Settings. See General Settings.

To Download Weather from Weather.com:

Alternatively, weather may be downloaded from weather.com, without having to manually key it into the Field Report. Only weather conditions for the current day may be downloaded.

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.
4. Select the Hamburger icon.
5. Select Weather.
6. Select the Download icon.



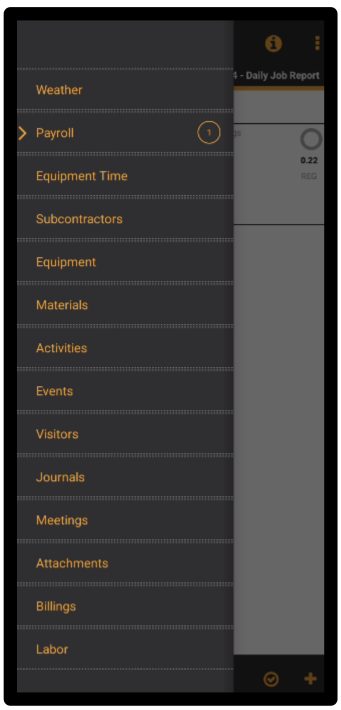
7. The weather conditions populate as Daily Log entries.

Payroll Tab

The Payroll tab in Field Reports will automatically populate time from the Labor Time Sheet in the Remote Payroll module. The Remote Payroll module must be purchased and enabled for this feature to function. Likewise, Labor Settings must be enabled. See Labor Settings. **Note:** The Payroll tab allows for coding related to jobs, cost codes, and other significant cost tracking areas. The Labor tab, on the other hand, is utilized to simply track hours but not coding. The Labor tab is typically used to track time for temporary workers. See Labor Tab.

To Add Payroll Time to the Daily Log:

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.



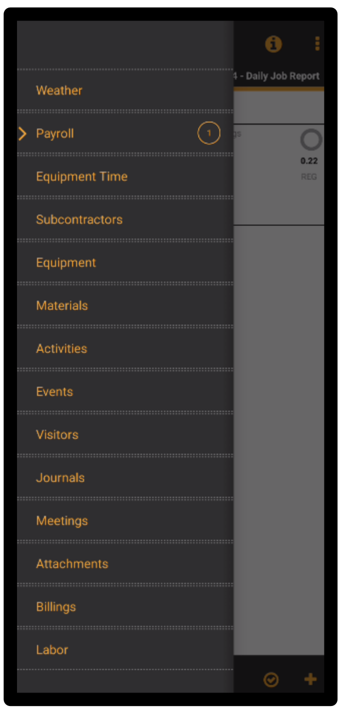
4. Select the Hamburger icon.
5. Select Payroll.
6. Select the Add icon. If enabled, the Remote Payroll module will open so the user may enter time. Enter time as needed. See the User Guide for Remote Payroll Field User. The time will be reflected in Field Reports, as long as the same job, user and date are selected.

Equipment Time Tab

The Equipment Time tab allows the user to connect with the Remote Payroll Mobile Application and enter time for a piece of equipment (Equipment Revenue). This is different from the Equipment tab which allows the user to log equipment information such as odometer readings, active and idle hours, rental information, and notes (often referred to as Equipment Cost). Equipment Revenue must be enabled in the General Settings of the Mobile Application System Settings. See General Settings. Equipment Revenue may be added.

To Add Equipment Time Information to the Daily Log:

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.



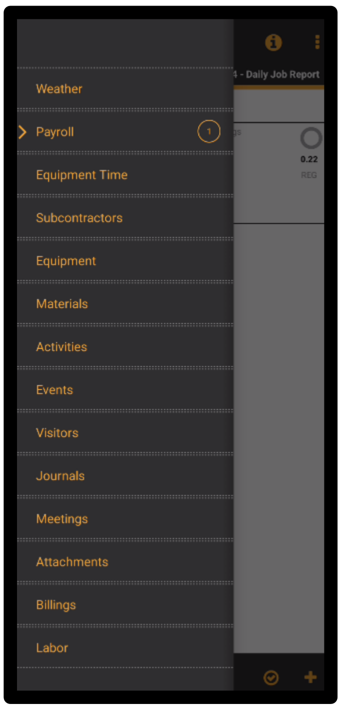
4. Select the Hamburger icon.
5. Select Equipment Time.
6. Select the Add icon. If enabled, the Remote Payroll module will open so the user may enter equipment time. Enter equipment time as needed. See the User Guide for Remote Payroll Field User.

Equipment Tab

The Equipment tab, which differs from the Equipment Time tab (tracking time a piece of equipment was used), allows users to log equipment information such as odometer readings, active and idle hours, rental information, and notes. Equipment may be added and copied.

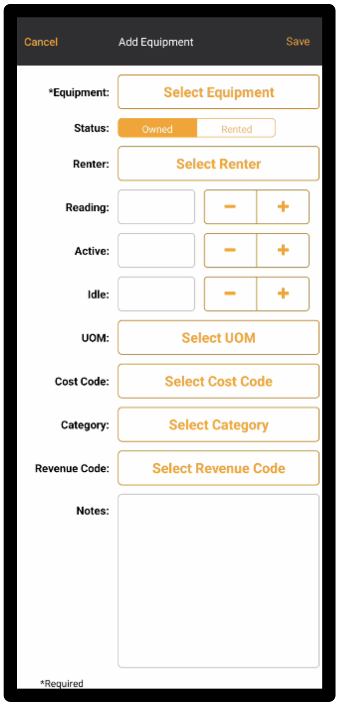
To Add Equipment Information to the Daily Log:

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.

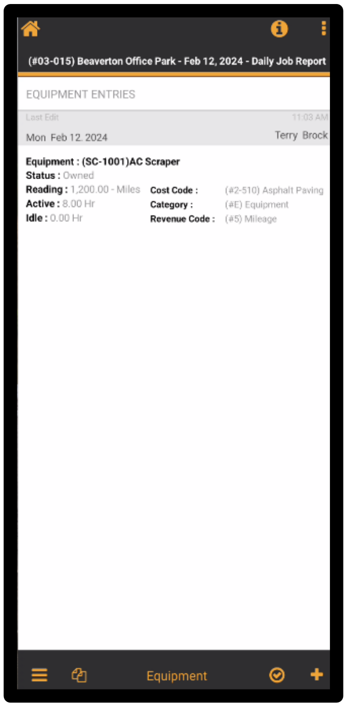


4. Select the Hamburger  icon.
5. Select Equipment.

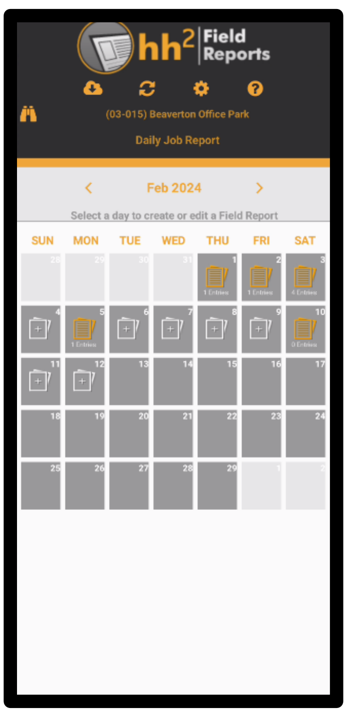
6. Select the Add  icon.



7. Select the piece of equipment from the Equipment field.
8. In the Status field, select if the equipment is Owned or Rented. ‘
9. Select the Renter, if applicable, from the Renter field.
10. Enter an odometer reading in the Reading field.
11. Enter the number of units the equipment was active in the Active field, if applicable.
12. Enter the number of units the equipment was idle in the Idle field, if applicable.
13. Select the units of measurement from the UOM field.
14. Select the Cost Code from the Cost Code field.
15. Select the Category from the Category field.
16. Select the Revenue Code from the Revenue Code field.
17. Write any notes in the Notes field.
18. Select Save.
19. The entry is made in the Daily Log. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications.



20. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.



To Copy Equipment:

This feature allows the user to conveniently copy all equipment information from another Daily Log. This is especially useful in cases where the same entries are made repeatedly. The log being copied from must be finalized in order to have the ability to copy.

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.
4. Select the Hamburger icon.
5. Select Equipment.
6. Select the Copy icon.

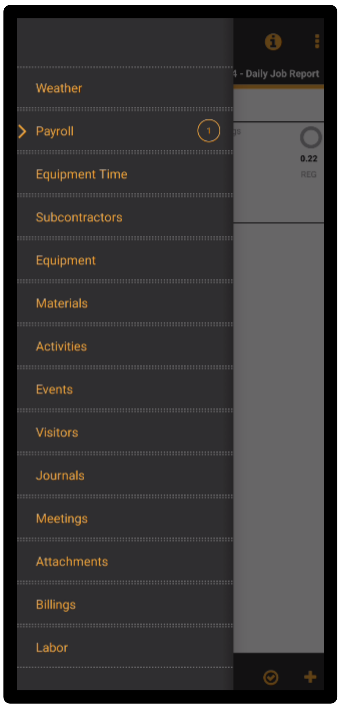
7. Select OK.
8. If there are Equipment entries entered on the previous log for the same job, then the entries will copy to the current log selected.

Subcontractor Tab

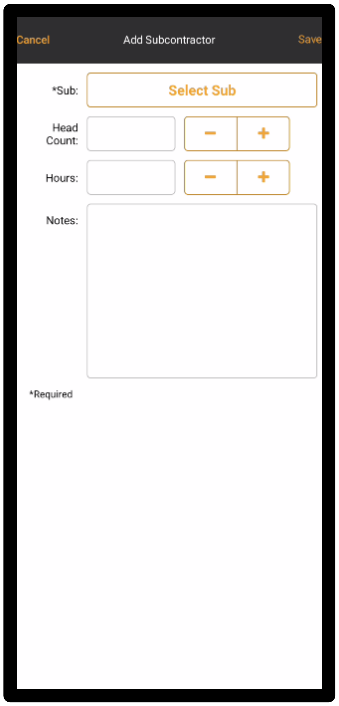
The Subcontractor tab allows the user to log information about a Subcontractor. For instance, when a sub is on the job site, the user can make note of the subcontractor headcount present, along with the number of hours worked. Likewise, notes can be made.

To Add Subcontractor Information to the Daily Log:

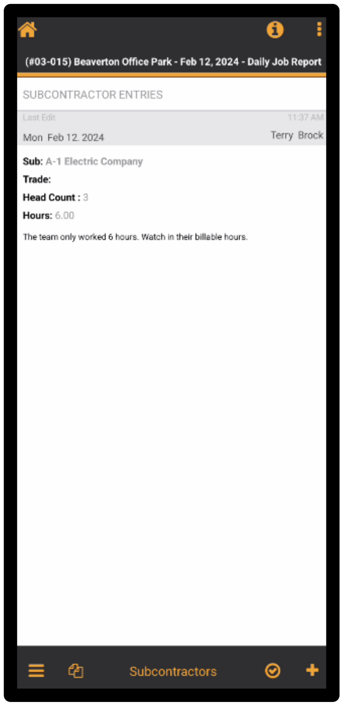
1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.



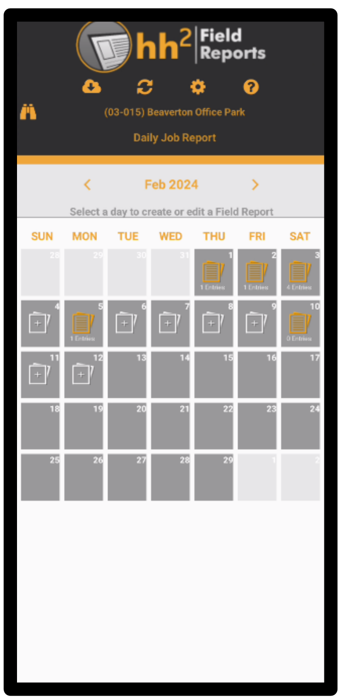
4. Select the Hamburger icon.
5. Select Subcontractors.
6. Select the Add icon.



7. Select the Subcontractor from the Sub field.
8. Enter the Headcount of subcontractors that showed up to the job site in the Headcount field.
9. Select the number of hours the subcontractor worked in the Hours field.
10. Write any notes in the Notes field.
11. Select Save.
12. The entry is made in the Daily Log.
13. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications.



14. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.



To Copy Subcontractor Information:

This feature allows the user to conveniently copy subtractor information from another daily log. **Note:** The log being copied from must be finalized in order to have the ability to copy.

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.
4. Select the Hamburger icon.
5. Select Subcontractor.
6. Select the Copy icon.

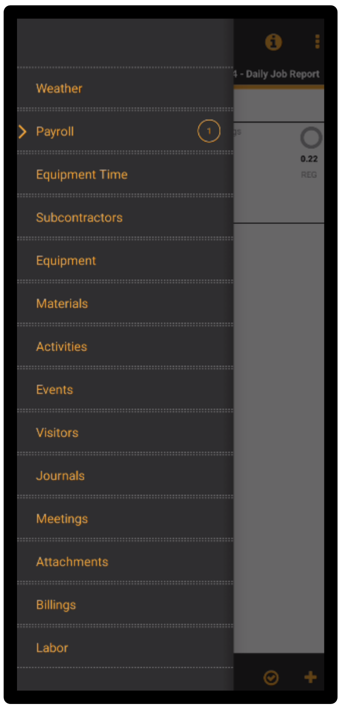
7. Select OK.
8. Once copied, the information will display for the current day on the log.

Materials Tab

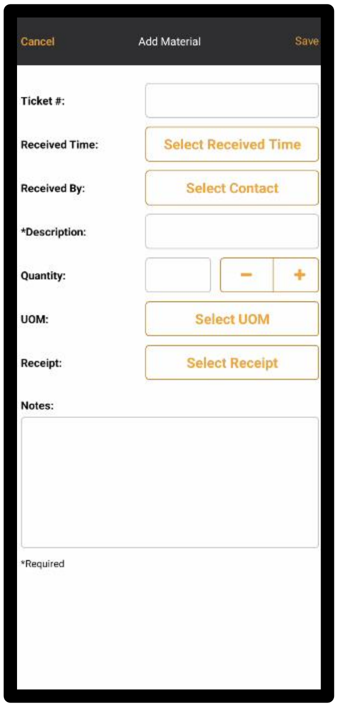
The Materials tab is utilized to track material delivery and related documents or pictures of material delivered.

To Add Material Information to the Daily Log:

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.

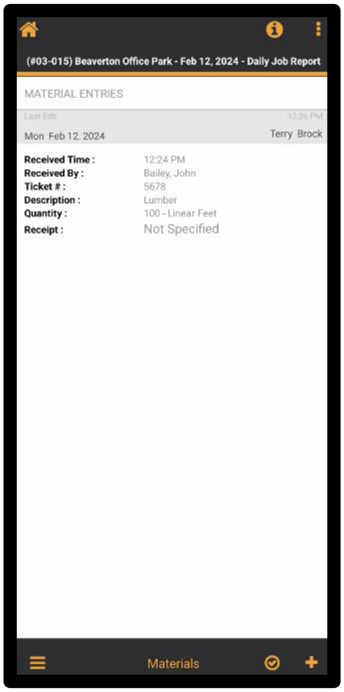


4. Select the Hamburger icon.
5. Select Materials.
6. Select the Add icon.

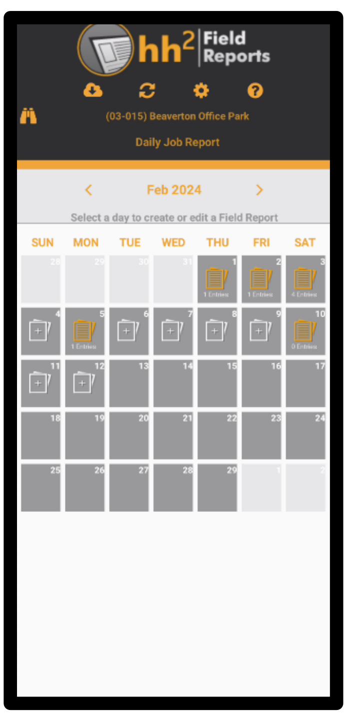


7. Enter the ticket number for the materials received from the vendor in the Ticket# field.
8. Enter the time received in the Received Time field.
9. Enter the name of the person that received the material in the Received By field.
10. Enter the material description in the Description field.
11. Enter the quantity of the material received in the Quantity field.
12. Enter the units of measurement in the UOM field.
13. Select the Receipt Field. Take a photo or upload an existing photo of any documents related to the materials. When Select Existing Photo is selected, the user may select a photo from their device. When Take Photo is selected, the user may take a new photo of the documents or materials themselves.
14. Write any notes in the Notes field.
15. Select Save.

16. The entry is made in the Daily Log. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications.



17. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.

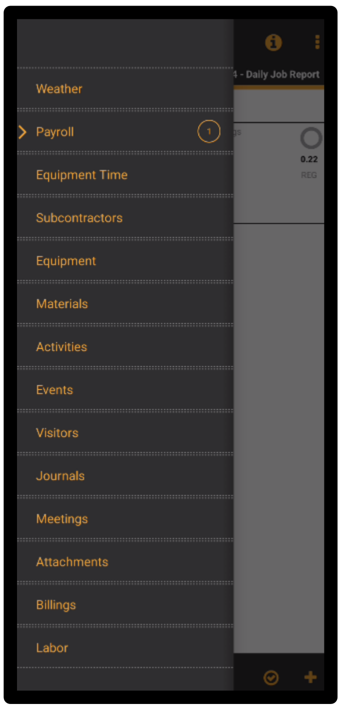


Activities Tab

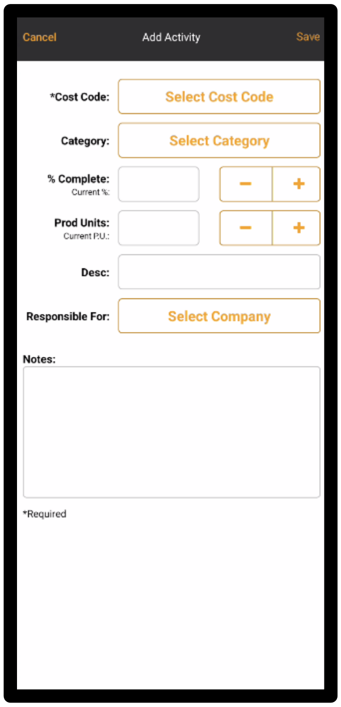
The Activities tab is utilized to track Unit Production. Unit Production tracks completion by either daily units or percentage complete. Unit Production is directly tied Cost Codes and assists in tracking budgets for a cost code. **Note:** Unit Production must be enabled on the construction company's hh2 website.

To Add Activity Information to the Daily Log:

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.



4. Select the Hamburger icon.
5. Select Activities.
6. Select the Add icon.



7. Select the Cost Code field and then select a cost code from the Cost Code Page that follows.
8. Select the Category field and then select a category from the Category Page that follows.
9. Enter the current percent complete in the % Complete field.
10. Enter the current production units in the Prod Units field.
11. Enter a description in the Description field.
12. Enter the company responsible for completion in the Responsible For field.
13. Enter notes, as needed, in the Notes field.
14. Select Save.
15. The entry is made in the Daily Log. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications.
16. On the Home, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.

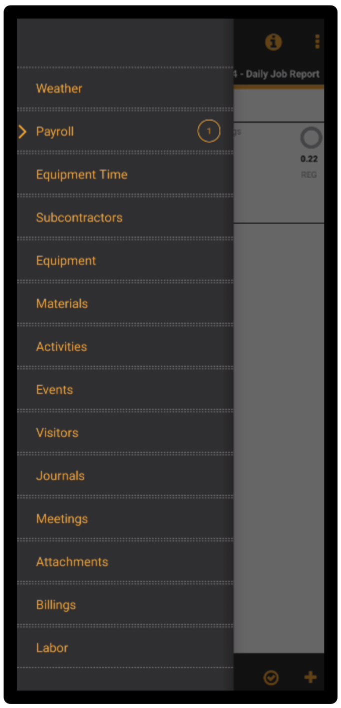
Note: It is important to log Unit Production activities on a regular basis to maintain the relevance and integrity of the data.

Events Tab

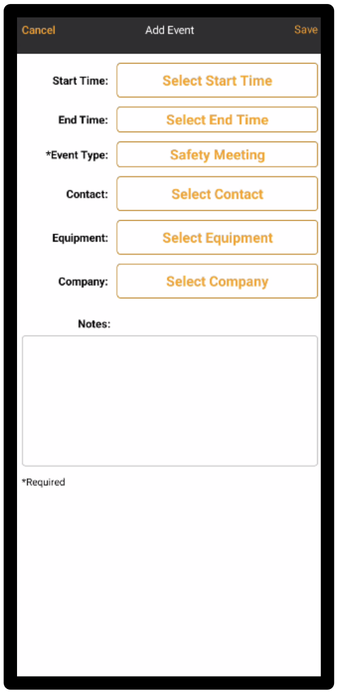
The Events tab can be used to log events such as injuries, inspections, employee dismissals, or ribbon cuttings.

To Add Events Information to the Daily Log:

1. Select a Job. See [Selecting Jobs].
2. Select a Report Type. See [Report Types].
3. Select the day from the calendar.

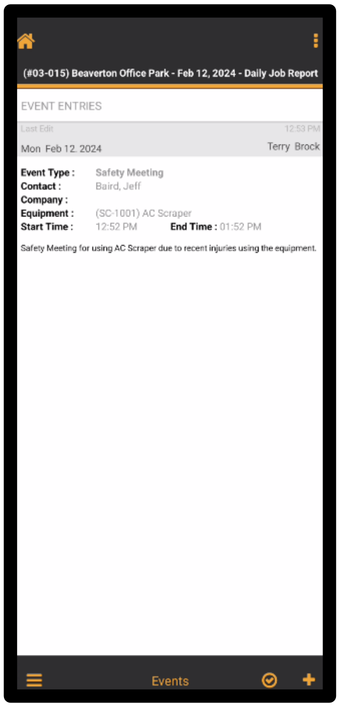


4. Select the Hamburger  icon.
5. Select Activities.
6. Select the Add  icon.

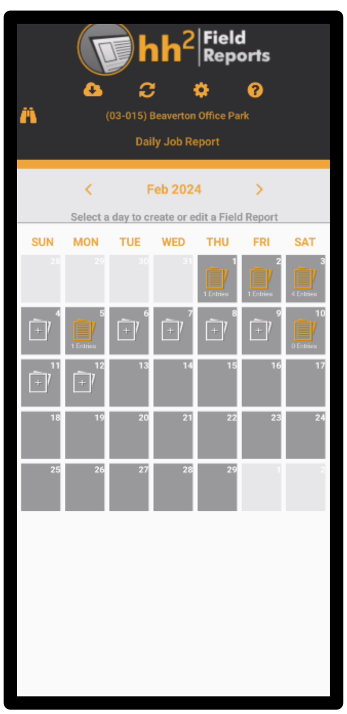


7. Enter the event start time in the Start Time field.
8. Enter the event end time in the End Time field.
9. Select the Event Type field and then select an event type from the Event Type Page that follows.
10. Select the Contact field and then select a contact from the Contact Page that follows.
11. Select the Equipment field and then select a piece of equipment from the Equipment Page that follows, if applicable. This is useful to log trainings or events related to specific equipment.
12. Select a company involved in the event from the Company field, if applicable.
13. Write any notes in the Notes field.
14. Select Save.

15. The entry is made in the Daily Log. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications.



16. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.

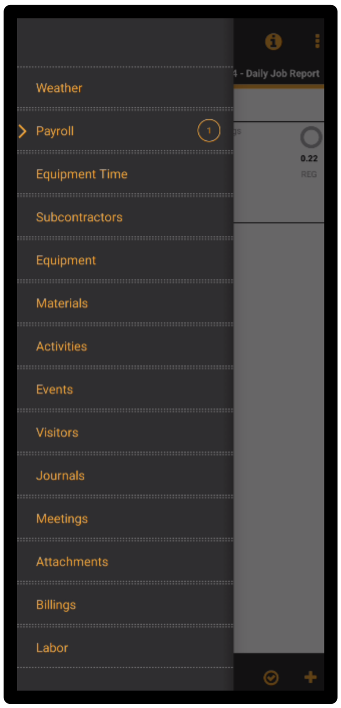


Visitors Tab

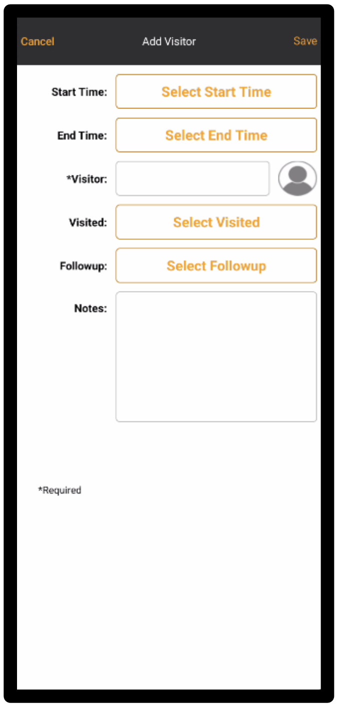
The Visitor tab allows the user to track job site visits and visitors.

To Add Visitors/Visits Information to the Daily Log:

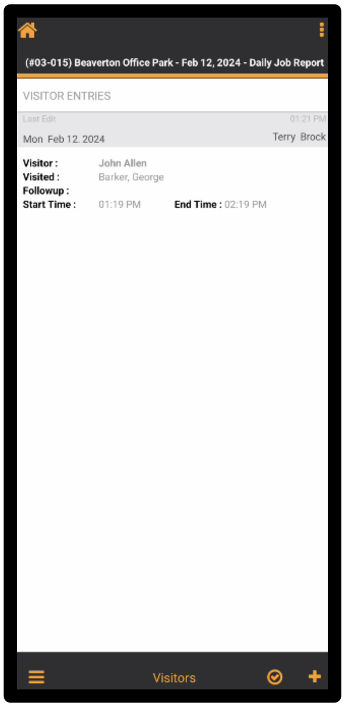
1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.



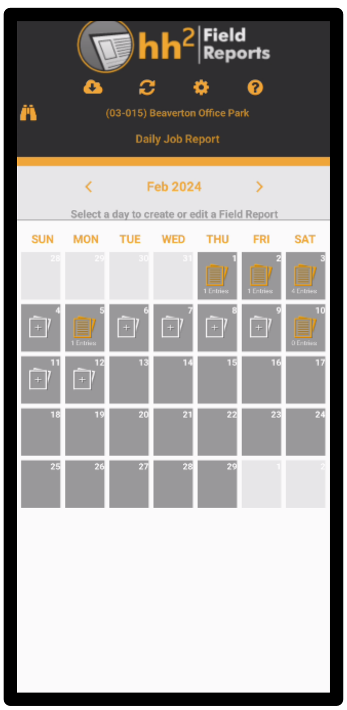
4. Select the Hamburger  icon.
5. Select Visitors.
6. Select the Add  icon.



7. Enter a start time for the visit in the Start Time field.
8. Enter an end time for the visit in the End Time field.
9. Enter the visitor name in the Visitor field. Visitors may be added to the contact list, if needed. See To Add a Contact.
10. Enter the name of the person visited in the Visited field. People who were visited may be added, if needed. See To Add a Contact Name.
11. The Follow up field is used to enter the person in charge of follow up by selecting the Follow Up field. Follow up persons may be added, if needed. See To Add a Contact Name.
12. Select Save.
13. The visit/visitor will be entered in the Daily Log. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications.

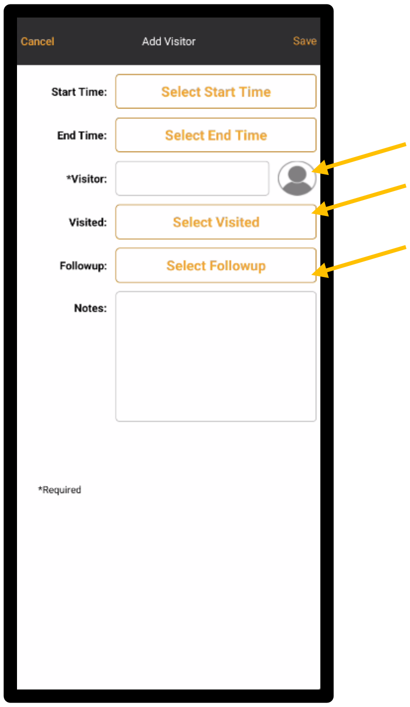


14. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.

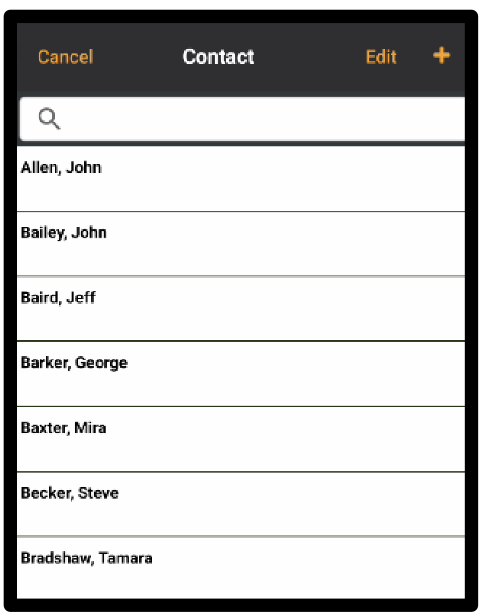


To Add a Contact Name:

On the Add Visitor Page from the Visitor tab, a Contact Name may be added to the Visitor, Visited and Follow-up fields.



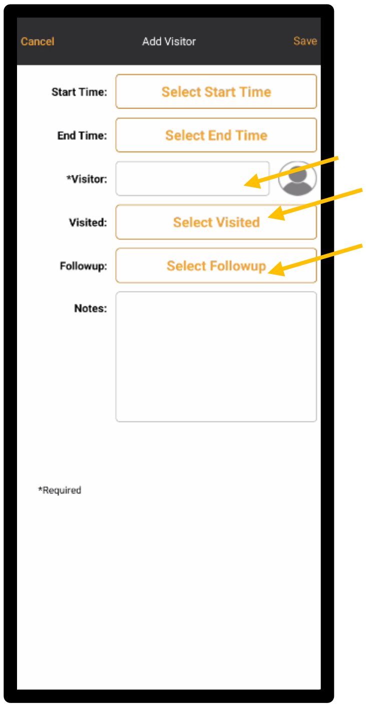
1. Select a day from the Home Page.



2. Select the Hamburger  icon.

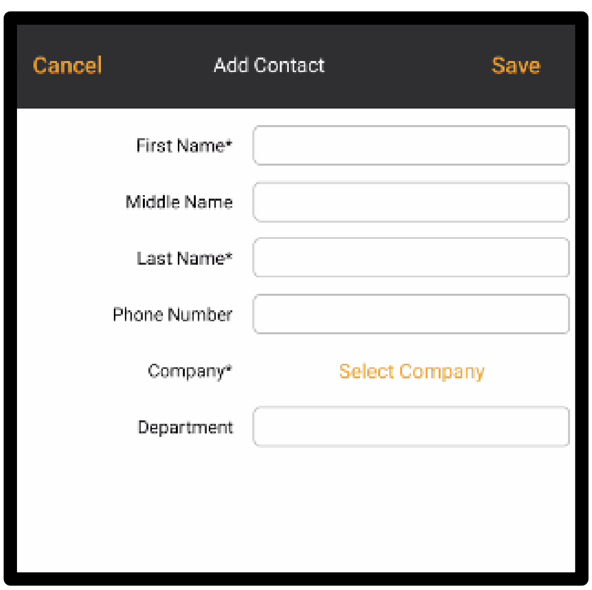
3. Select Visitors.

4. Select the Add icon.



5. Select either the icon next to the Visitor field, the Visited field, or the Follow up field, whichever is needing the contact. This will take the user to the Contact Page.

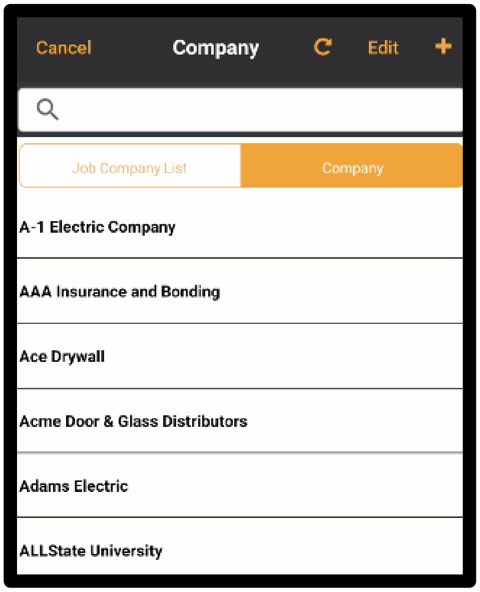
6. Select the Add icon from the Contact Page.



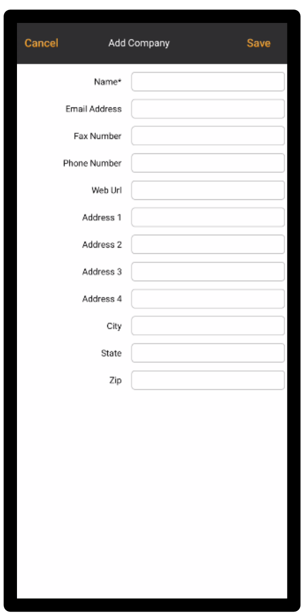
7. Enter the first, middle and last name of the visitor/visited/follow-up person in the respective fields.

8. Enter the phone number and department in the respective fields.

9. Choose Select Company next to the Company field, if needing to add a company. A company name may already populate this field. Companies may be sorted by Job Company List or simply by Company. Select the Company tab.



10. Select the Add icon from the Company Page.

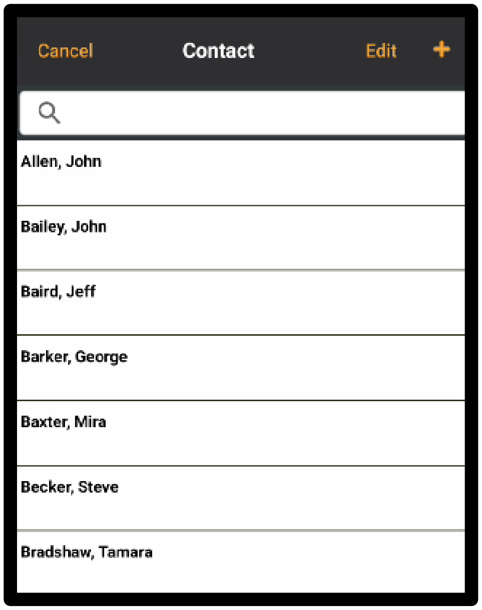


11. After adding all the necessary company information select Save.

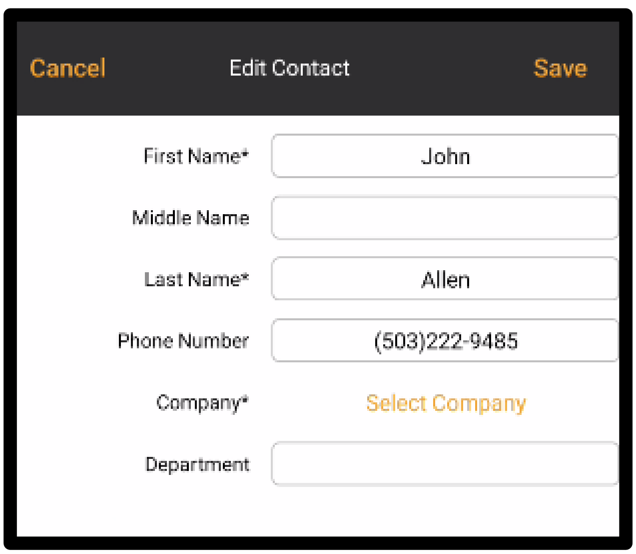
To Edit Contact Information:

1. Select a day from the Home Page.
2. Select the Hamburger  icon.
3. Select Visitors.
4. Select the Add  icon.

5. Select either the icon next to the Visitor field, the Visited field, or the Follow up field, for whichever contact needs to be edited. This will take the user to the Contact Page.



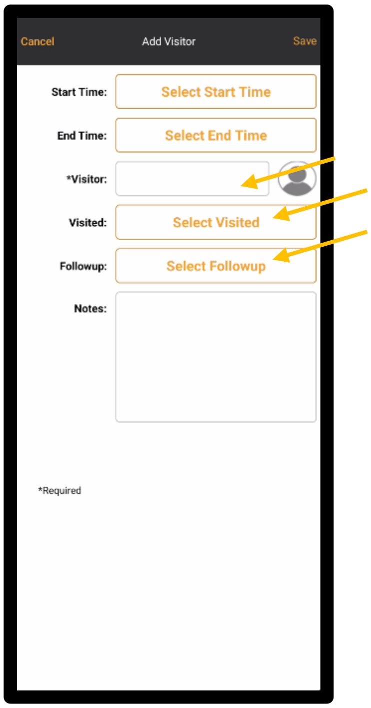
6. Select Edit. Edit MUST BE selected to enable editing.
7. Select the carrot> that displays next to the name of the contact which requires editing. The carrot > will display once Edit is selected.



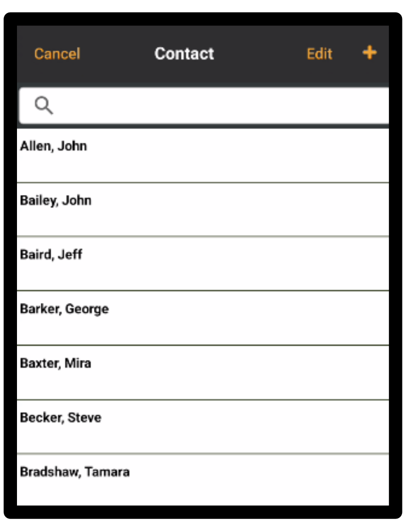
8. The Edit Contact Page displays.
9. Make the modifications.
10. Select Save.

To Edit Company Information:

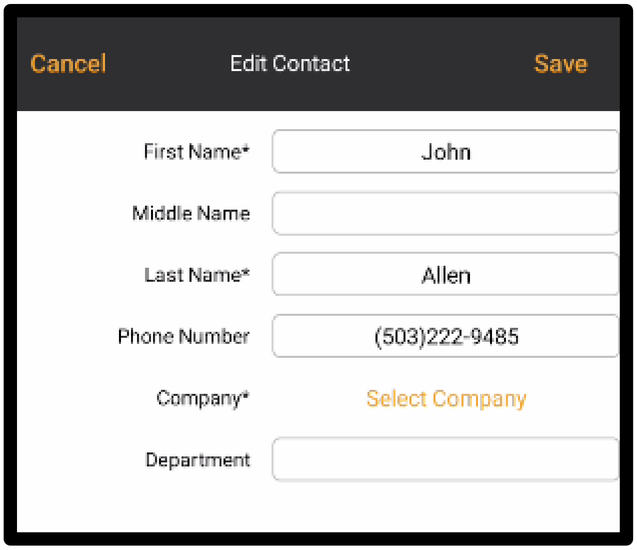
1. Select a day from the Home Page.
2. Select the Hamburger  icon.
3. Select Visitors.
4. Select the Add  icon.



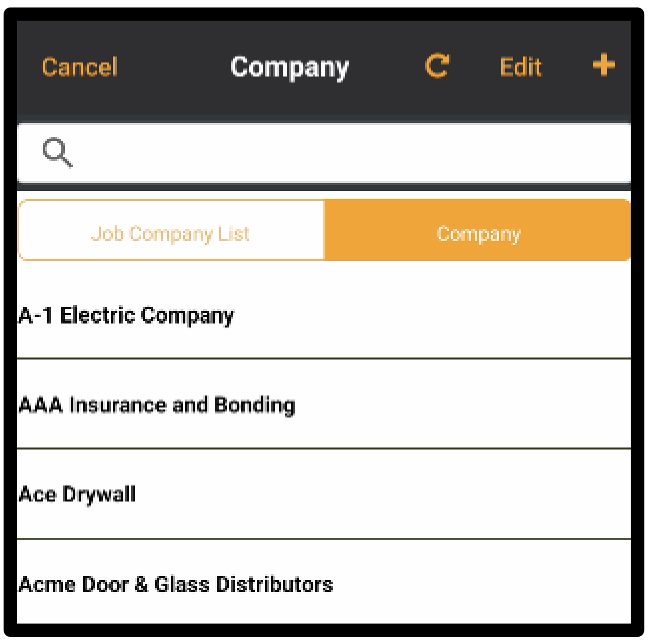
5. Select either the icon next to the Visitor field, the Visited field, or the Follow up field, for whichever company contact needs to be edited. This will take the user to the Contact Page.



6. Select Edit. Edit MUST BE selected to enable editing.
7. Select the carrot > next to the name of the person associated with the company. The carrot > will display once Edit has been selected.

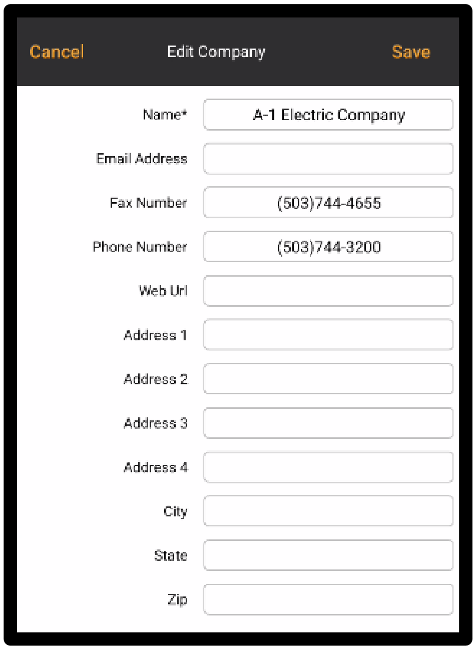


8. Choose the company name in the Company field, or choose *Select Company*, if no company name is populated.



9. Select the Company tab (not Job Company List)
10. Select Edit (Edit MUST BE selected) from the Company Page.

11. Select the carrot > next to the company. The carrot will display once Edit is selected.



12. Make the necessary modifications on the Edit Company Page.

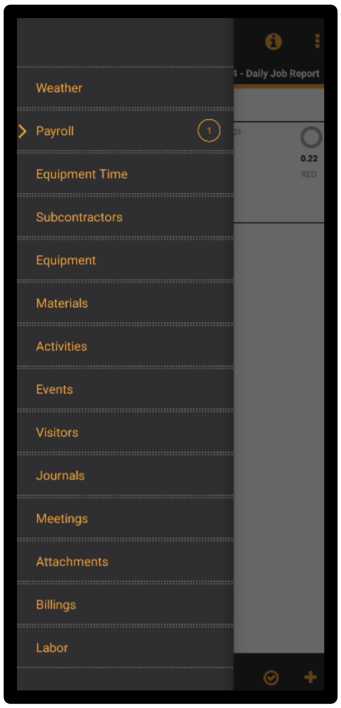
13. Select Save.

Journals Tab

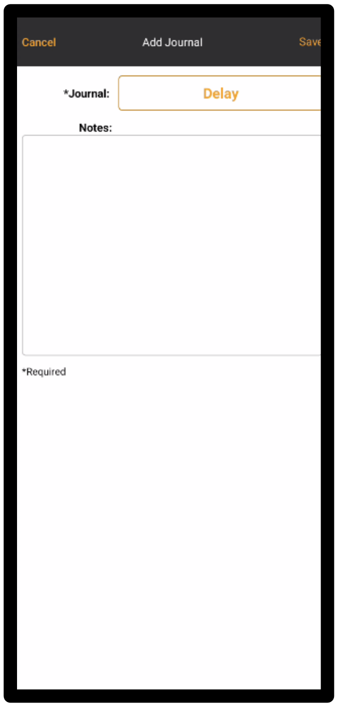
The Journals tab allows the user to log a variety of different Journal Types which are available with the hh2 system and can be customized to the construction company's preference. This can be thought of as a diary to log different types of information.

To Add Journal Information to the Daily Log:

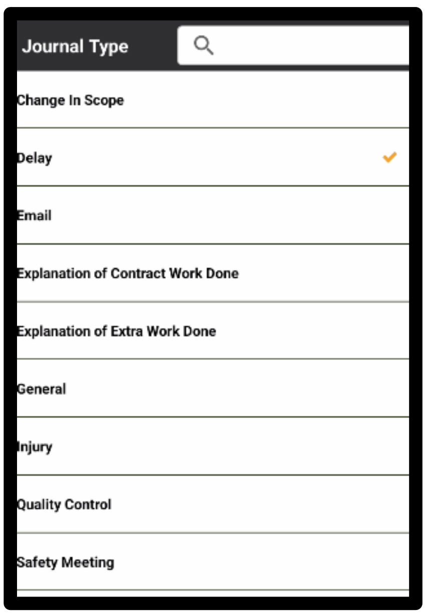
1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.



4. Select the Hamburger icon.
5. Select Journals.
6. Select the Add icon.

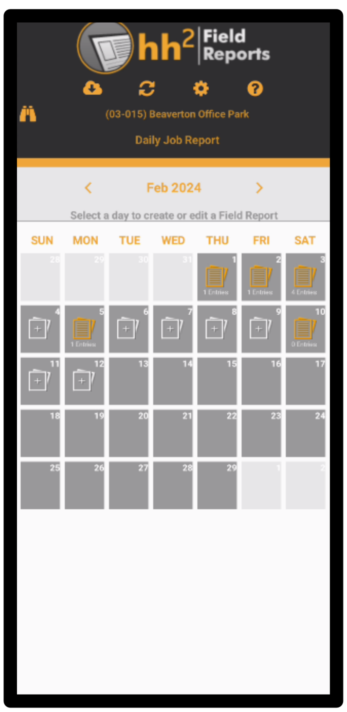


7. Select the journal type from the Journal field.



8. Enter notes in the Notes field.
9. Select Save.
10. The entry will be made in the Daily Log. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications.

11. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.

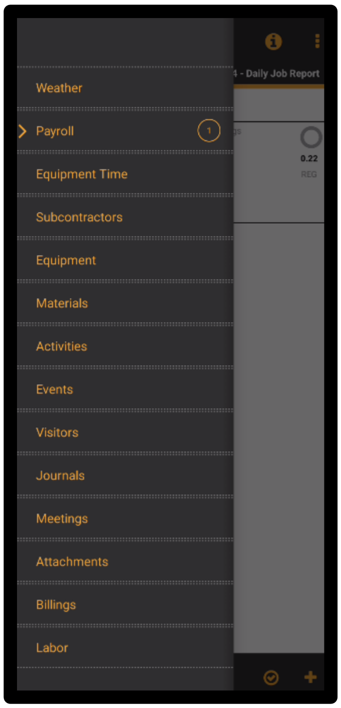


Meetings Tab

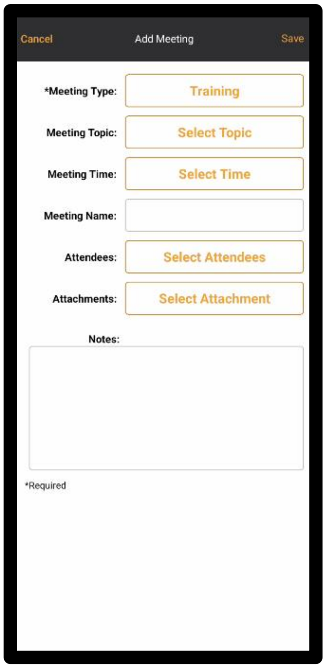
The Meetings tab enables users to document meetings. The Meetings tab allows the user to log a variety of different Meeting Types and Topics which are available through hh2 or can be customized to the construction company's preference.

To Add Meeting Information to the Daily Log:

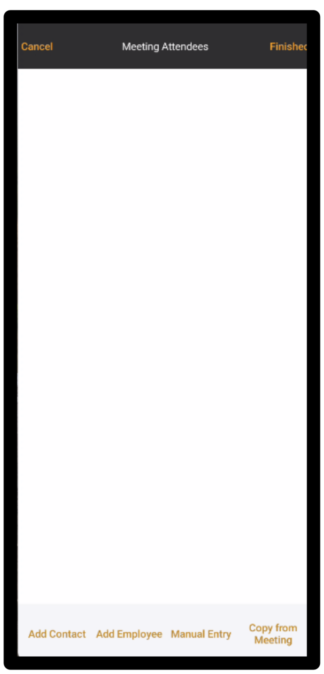
1. Select a Job. See [Selecting Jobs](#).
2. Select a Report Type. See [Report Types](#).
3. Select the day from the calendar.



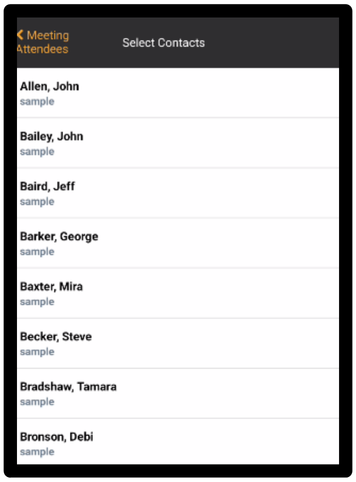
4. Select the Hamburger  icon.
5. Select Meetings.
6. Select the Add  icon.



7. Select the meeting type from the Meeting Type field.
8. Select the meeting topic from the Meeting Topic field.
9. Select the Topic Info field which now displays. Add a summary of the meeting, along with any topic detail on the Summary Page that follows. Attachments may be added. Select Finished.
10. Select the meeting time from the Meeting Time field.
11. Enter the meeting name from the Meeting Name field.
12. Select the meeting attendees from the Attendees field.

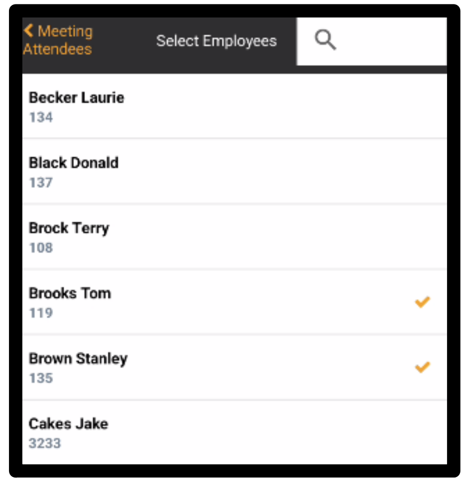


13. This takes the user to the Meeting Attendees Page. On this page, attendees may be added from existing contacts, using Add Contact; from the Add Employee feature; via manual entry using Manual Entry; or by copying attendees from another meeting, using Copy From Meeting.



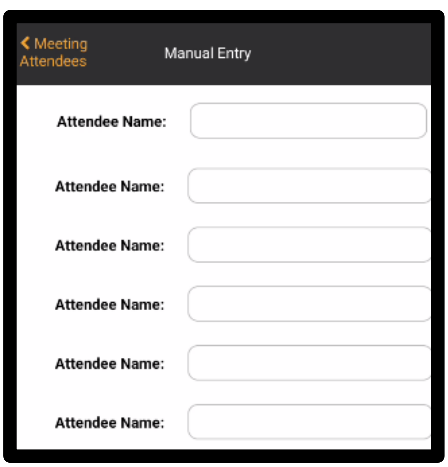
To Use Add Contact:

1. Select Add Contact.
2. Check the contacts to add to the Attendees list from the Select Contact Page.
3. Select Meeting Attendees.



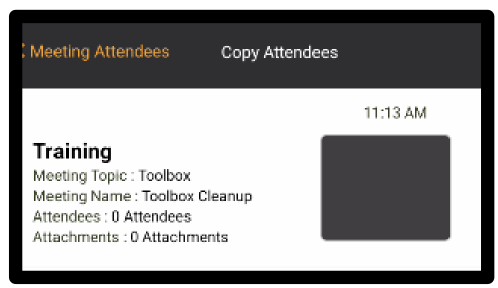
To Use Add Employee:

1. Select Add Employee.
2. Check the employees to add to the Attendees list.
3. Select Meeting Attendees.



To Use Manual Entry:

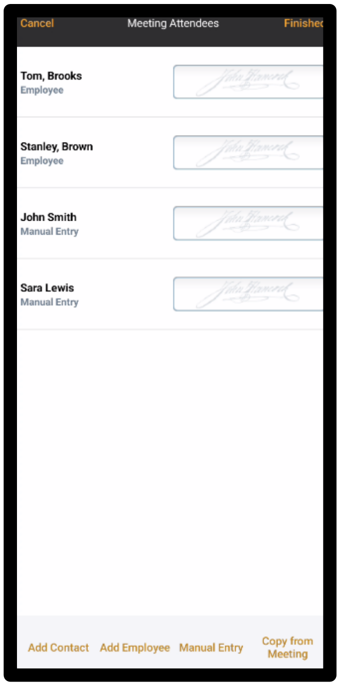
1. Select Manual Entry.
2. Key the names of the attendees.
3. Select Meeting Attendees.



To Copy Attendees:

1. Select Copy from Meeting.
2. Select a <u>finalized</u> meeting to copy attendees from.
3. Check the attendees to copy or select Copy All to copy all attendees.
4. Select Copy.

14. Once the attendee names have been added, no matter the method (Add Contact, Add Employee, Manual Entry or Copy from Meeting), a signature page will display for attendees to sign.

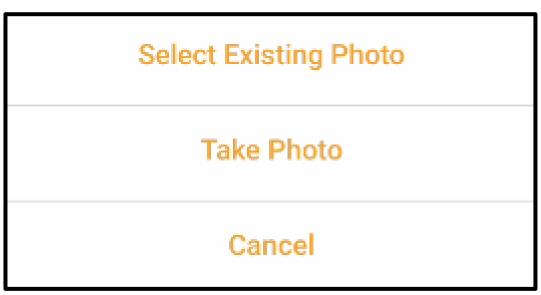


15. Attendees sign and select Save. **Note:** Signatures must be enabled in the Tab Configurations settings. See Tab Configurations.

16. After signed and saved, select Finished.

17. Add attachments by selecting the Attachments field on the Add Meeting Page, and then the Camera icon.

18. Select Existing Photo to select from existing photos on the device or take a new photo by selecting Take Photo.



19. Select Finished.

20. Enter notes about the meeting, as needed, in the Notes field.

21. Select Save.

22. The entry will be made in the Daily Log. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications.

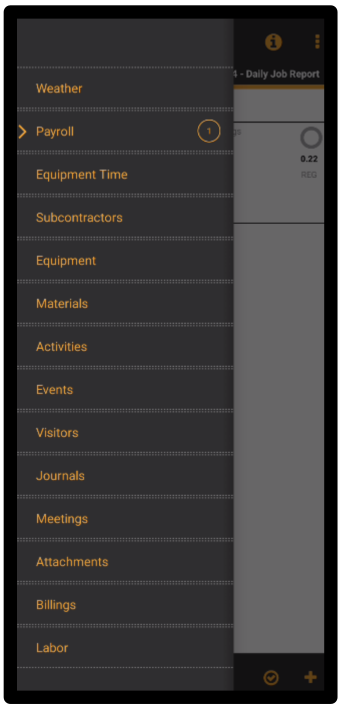
23. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.

Attachment Tab

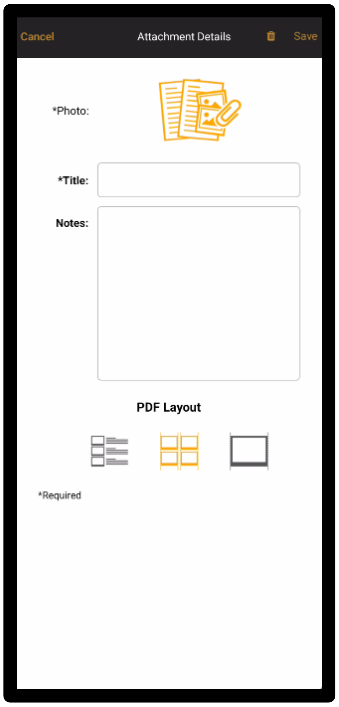
The Attachments tab allows the user to attach documents and specify the title and layout of the document. It includes a notes area for additional information.

To Add Attachments to the Daily Log:

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.



4. Select the Hamburger  icon.
5. Select Attachments.
6. Select the Add  icon.

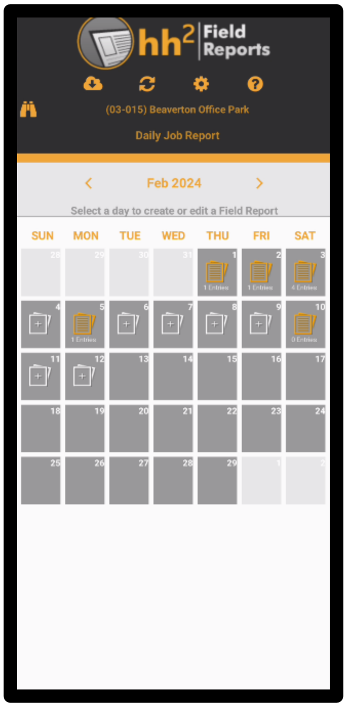


7. Select the Photo field . From there, the user will have a choice to add photos by:
   a. Selecting an Existing Photo from their device.
   b. Take a new photo using Take Photo.
   c. Adding more than one photo using Batch Import by selecting from their device and then selecting Done.
   d. Canceling out of Photos.
8. Enter a Title for the attachment.
9. Enter any notes in the Notes field.
10. Select a PDF Layout (Small, Medium, or Large) The default is set in PDF Settings. See PDF Settings.
11. Select Save to save or the Delete icon to delete the attachment(s).

12. The entry will be made in the Daily Log.

13. If the attachment is selected (<u>directly on the image</u>), the user is taken to the Attachment Details Page. From this page, the attachment may be printed, using the Printer icon; emailed using the Email icon; or opened in a variety of formats using the Open icon in the upper left corner.

14. Select Done when complete.
15. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.

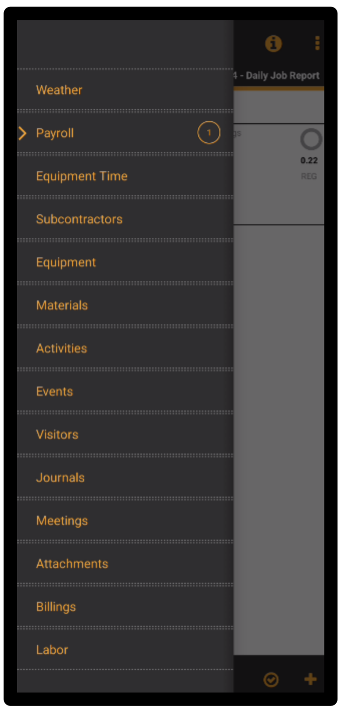


Billing Entries

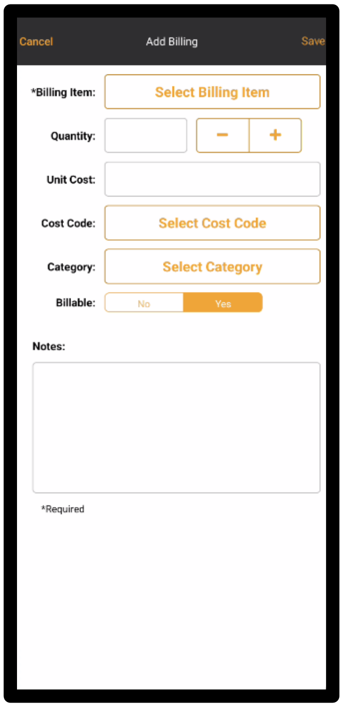
The purpose of the Billing tab is to allow the user to add billing entries to the Daily Log. The Billing tab comes in handy when employees in the field need to track items and item quantities to be billed to a job. For instance, if a shipment of lumber is received, the quantity, cost per unit, and under which cost code and category the cost will be covered can be tracked.

To Add Billings to the Daily Log:

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.

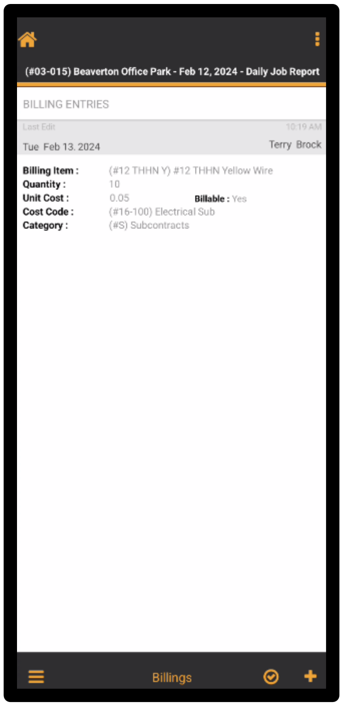


4. Select the Hamburger icon.
5. Select Billings.
6. Select the Add icon.

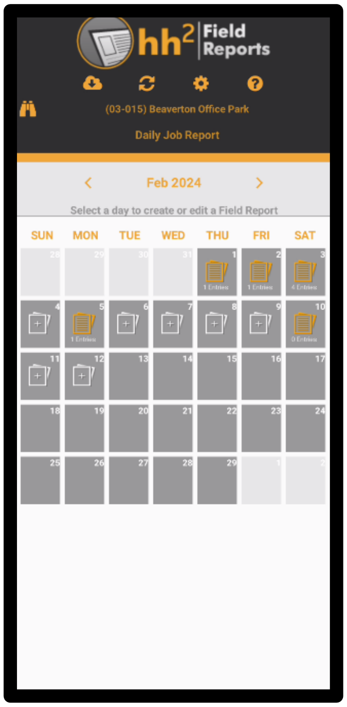


7. Select the Billing item from the Master List that displays when the Billing field is selected.
8. Enter a quantity in the Quantity field.
9. Enter the cost for each unit in the Unit Cost field.
10. Select the Cost Code from the Master List that displays when the Cost Code field is selected.
11. Select the Category from the Master List that displays when the Category field is selected.
12. Select Billable No or Yes.
13. Enter any notes in the Notes field.
14. Select Save.

15. The entry will be made in the Daily Log. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications.



16. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.

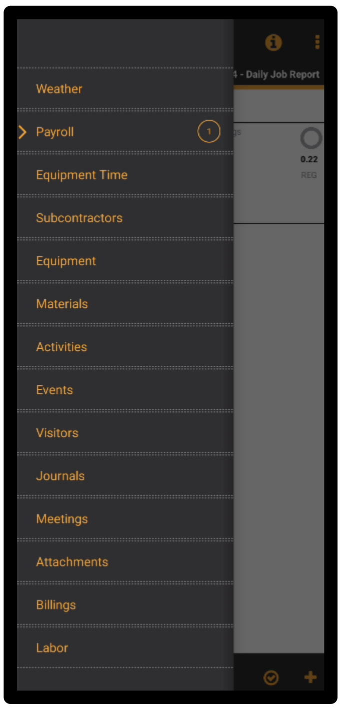


Labor Tab

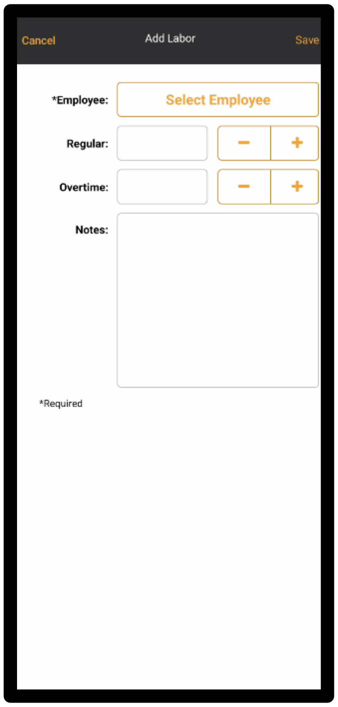
The Labor Section allows users to capture basic time information for construction companies that do not have the hh2 Remote Payroll module. This feature does not code time or export time to an accounting system. **Use Case:** To track time for temporary workers or subcontractors working on a job.

To Add Labor to the Daily Log:

1. Select a Job. See Selecting Jobs.
2. Select a Report Type. See Report Types.
3. Select the day from the calendar.



4. Select the Hamburger  icon.
5. Select Labor.
6. Select the Add  icon.



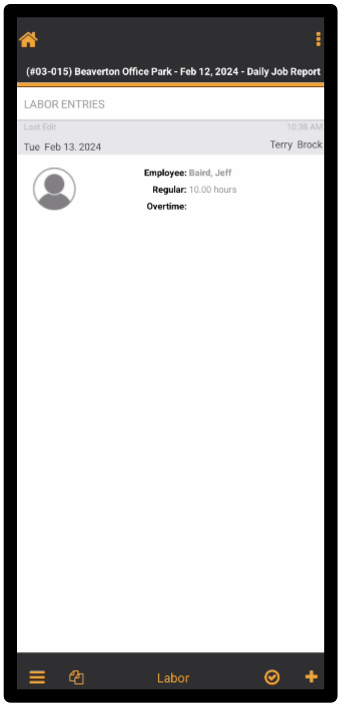
7. Select the Employee field and then select the name from the Contact List that follows. **Note:** The Contact List may be added to or edited. See To Add a Contact Name and To Edit Contact Information.

8. Enter the number of hours in the Pay Type Fields (for instance, Regular or Overtime fields).

9. Enter any notes in the Notes field.

10. Select Save.

11. The entry will be made in the Daily Log. If selected from the Daily Log, the user may make edits to the entry. Then select Save to save the modifications.



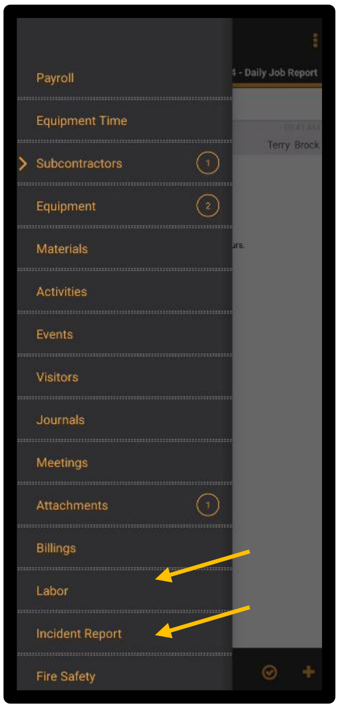
12. Labor Entries can be copied from either a Previous Report or from Payroll (if the Remote Payroll module is enabled), using the Copy  icon.

13. If copying from the previous report, select Copy From Previous Report.

14. Select OK.
15. If copying from Payroll, select Copy From Payroll.
16. Select Copy.
17. On the Home Page, the calendar denotes that an entry exists, as indicated in color. The number of entries for the day is also denoted.

Custom Tabs

Some construction companies create and utilize additional tabs that are customized for their business needs. In the example below, the Incident and Fire Safety tabs are Custom tabs. Custom tabs are created on the hh2 website. **Note:** Custom tabs are linked to Report Type. So, if a user cannot find a Custom tab, it is likely the appropriate Report Type is not selected. Furthermore, if a Custom tab does not display, a synchronization may need to be performed. See Sync Settings.



Finalization

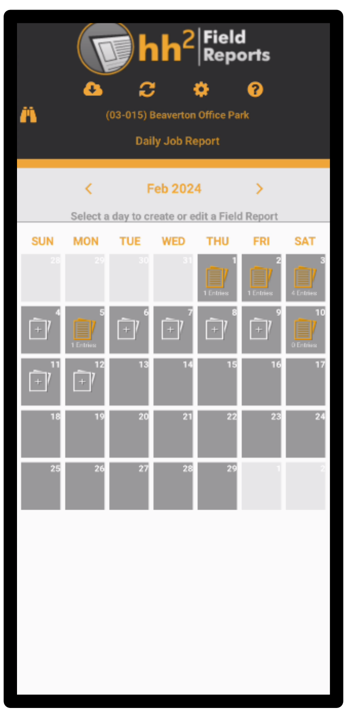
After a Daily Log is entered, it must be finalized. Once a log is finalized it will be locked down and no further edits are allowed. However, an Addendum may be added. This will protect the legal integrity and credibility of original entry on the Daily Log.

Furthermore, the construction company's administrator and the hh2 Implementation team will decide upon a finalization period. Logs not finalized within the period will be automatically finalized by the hh2 system. This is set up in General Settings of the Mobile Application System Configuration.

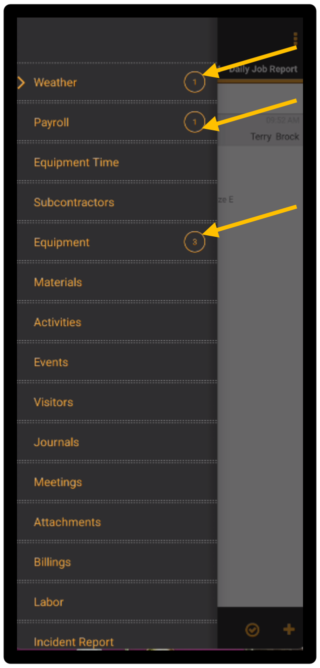
Note: A signature will not be captured if the finalization process is completed by the automated hh2. All logs that are finalized by the automated hh2 process, will read, "This log was finalized by hh2 Admin on [date] at [time]."

To Finalize a Daily Log:

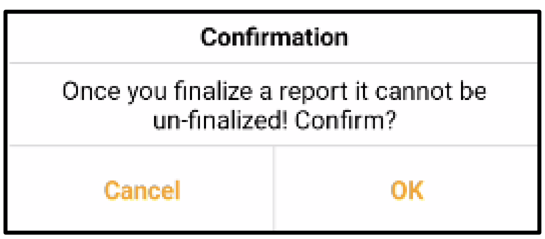
1. Select the Job. See Selecting Jobs.
2. Select the Report Type. See Report Types.
3. Select the day.



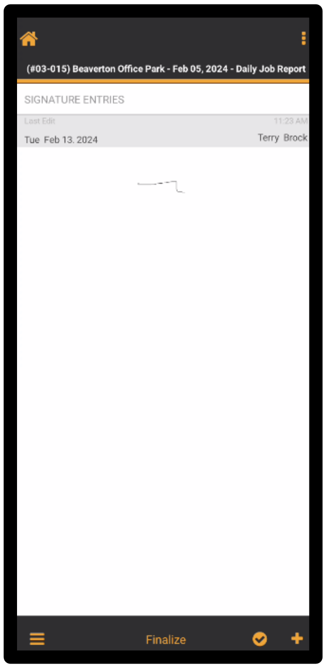
4. Notice in this example, there are Daily Log entries for the Weather, Payroll, Equipment tabs. Finalization will apply to all entries. Once finalized only Addendums may be added.



5. Select the Finalize  icon from any tab to finalize. This will finalize all entries for all tabs on that Daily Log.



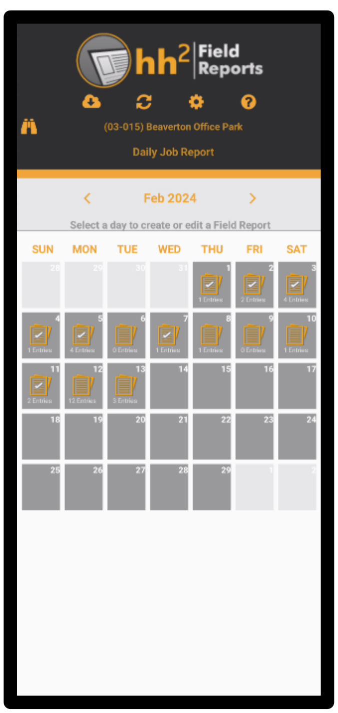
6. Select OK.



7. Sign the report to finalize it. This feature is utilized by the user to confirm the Field Report is complete and confirms that completion with a signature. **Note:** While called a Signature Tab in the Tab Configuration setting, there is no actual Signature tab. Instead, the user will simply sign during the finalization of a Daily Log.

8. Select Save.

9. Finalized Field Reports will be denoted with a check mark on the Daily Log for the day.

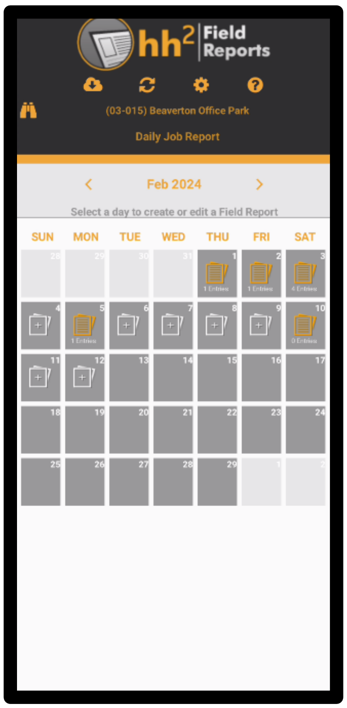


Addendums

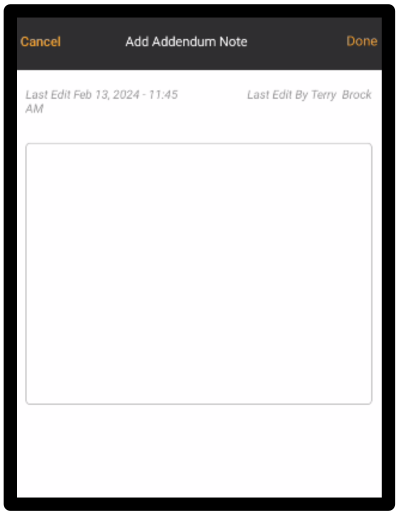
Once finalized, Field Reports may not be modified. However, Addendums may be added.

To Create an Addendum to a Daily Log:

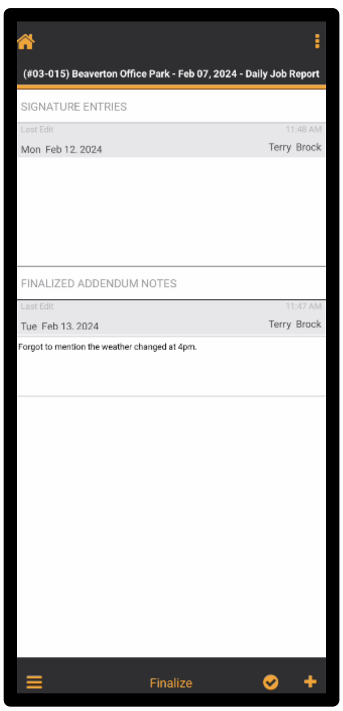
1. Select the Job. See Selecting Jobs.
2. Select the Report Type. See Report Types.
3. Select the day. Finalized days will be denoted with a check mark.



4. Select the Add icon.
5. Enter the Addendum Note on the Addendum Note Page.

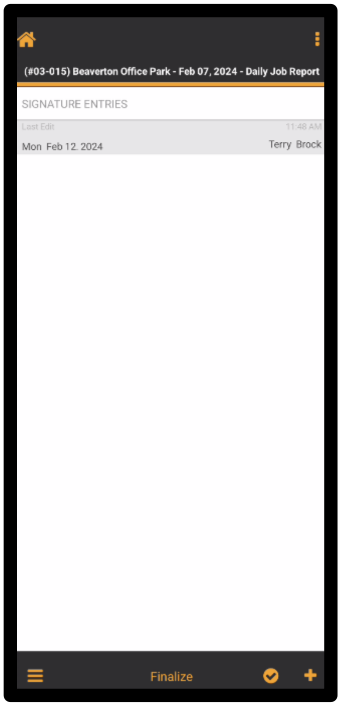


6. Select Done.
7. The addendum will display in the Finalized Addendum Notes.



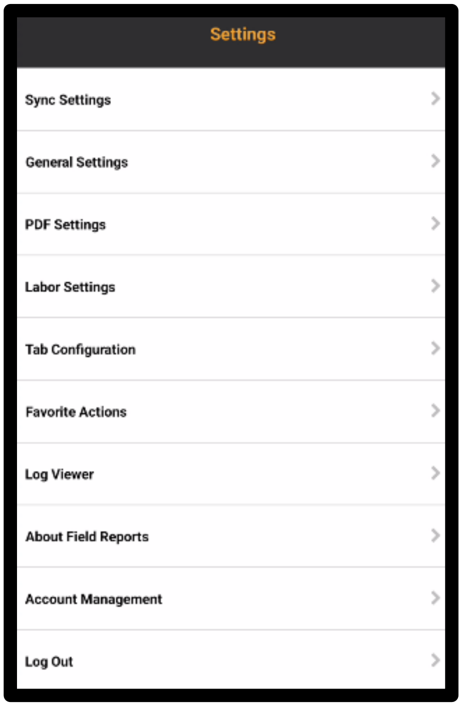
Reporting

PDF reports may be created for any entry in a Daily Log. See Create PDF.



Mobile Application System Configuration

When the Settings icon is selected from the Home Page, the following menu displays:

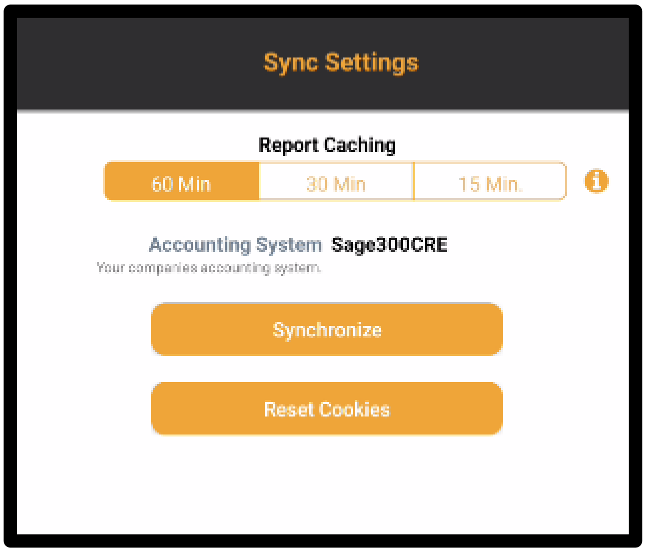


Users may or may not have access to change settings based on permissions granted. If a setting is locked, it is denoted with a Lock icon and the user cannot make changes.

Sync Settings

1. From the Home Page, select the Settings  icon.

2. From Settings, select Sync Settings.



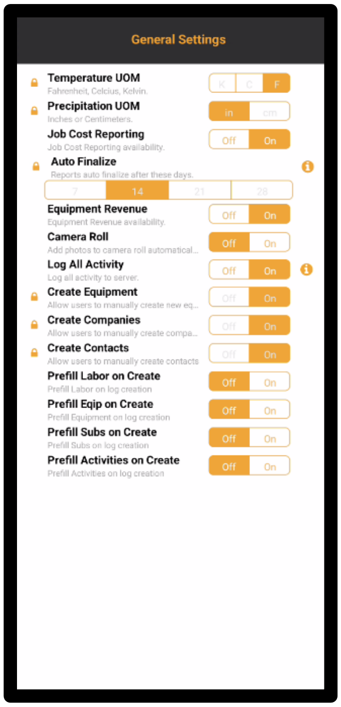
Here the user may:

- Select the Report Caching time (60, 30 or 15 minutes) interval. This is the interval the app will download updated information <u>from</u> the server. **Note:** Updates <u>to</u> the server are made immediately.
- Synchronize their device with changes made on other devices by selecting Synchronize.

General Settings

1. From the Home Page, select the Settings  icon.

2. From Settings, select General Settings.



General Settings allow the user to:

- Set the units of measurement (UOM) for temperature (Kelvin, Celsius, or Fahrenheit).
- Set the units of measurement (UOM) for precipitation (inches or centimeters).
- Select if Job Cost Reporting is available (Off or On).
- Select the period by which Field Reports will auto-finalize (7, 14, 21 or 28 days). See Finalization for details.
- Select if tracking equipment revenue is available (Off or On).
- Select if photos are automatically added to the user's camera roll on their device when taken (Off or On).
- Select if activity is logged to the server (Off or On). When On, this allows the hh2 Support Team to view activity. When Off, only errors are logged.
- Select Create Equipment to allow users to manually create new equipment (Off or On).
- Create companies (Off or On). See To Add a Contact Name.
- Create contacts (Off or On). See To Add a Contact Name.
- Prefill Labor, Equipment, Subcontractors and Activities, respectively upon log creation (Off or On).

PDF Settings

1. From the Home Page, select the Settings  icon.

2. From Settings, select PDF Settings.

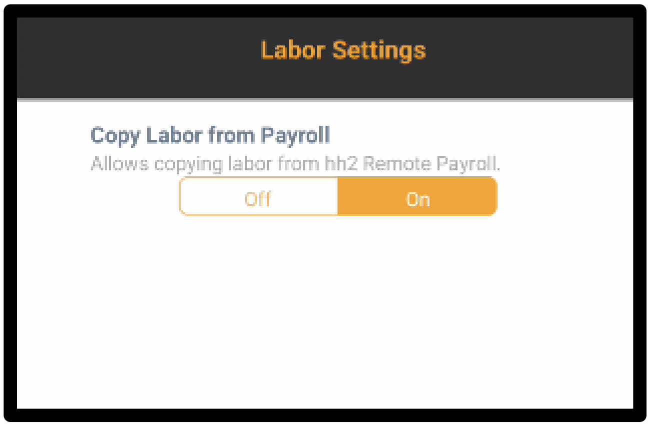
PDF Settings allow the user to:

- Select the Attachment Layout default style (Compact, Column, Large).
- Select whether or not PDF creation is available for each of the tabs.
- Select whether or not to include links in PDF reports (Off or On).
- Select whether or not to include time coded to child jobs (Toggle Off or On).

Labor Settings

1. From the Home Page, select the Settings icon.

2. From Settings, select Labor Settings.

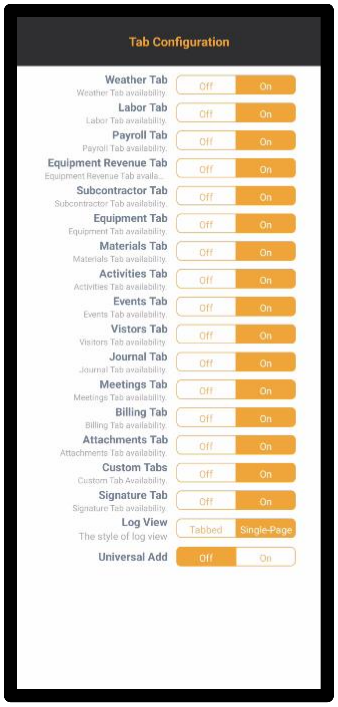


Labor Settings allow the user to:

- Select whether labor time may be copied from the Remote Payroll module to the Labor tab or not.

Tab Configuration

1. From the Home Page, select the Settings icon.
2. From Settings, select Tab Configuration.

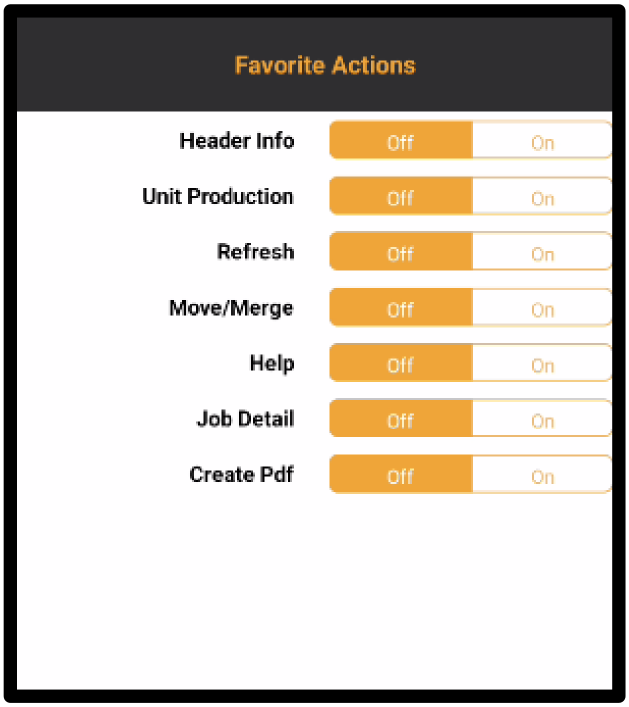


Tab Configuration allows the user to:

- Select which tabs are available.
- Select the Log View (Tabbed or Single-Page). See Log View.

Favorite Actions

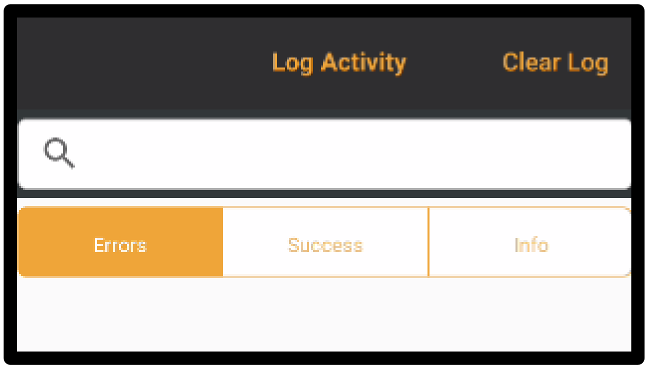
1. From the Home Page, select the Settings icon.
2. From Settings, select Favorite Actions.



Favorite Actions allows the user to select two icons that appear next to the More icon. See [Field Report Tools.](#) **Note:** Only two Favorite Actions may be selected.

Log Viewer

1. From the Home Page, select the Settings icon.
2. From Settings, select Log Viewer.

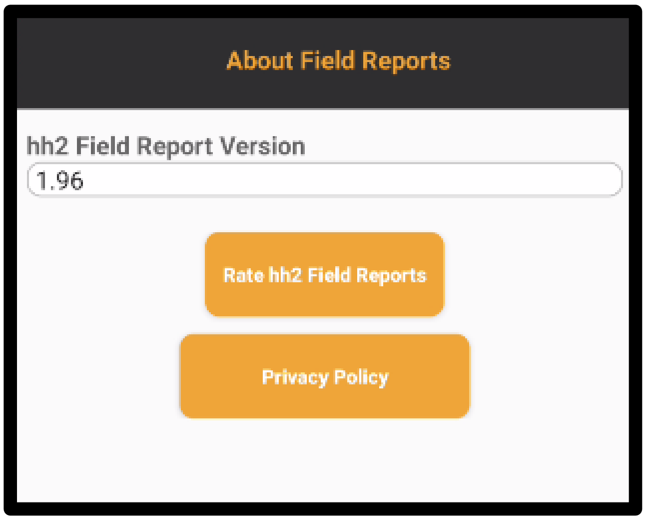


This page is utilized in conjunction with the hh2 Support Team to assist in troubleshooting any syncing issues. From here, the user may:

- View errors, success, and other information.
- Clear logs by selecting Clear Log.

About Field Reports

1. From the Home Page, select the Settings  icon.
2. From Settings, select About Field Reports.

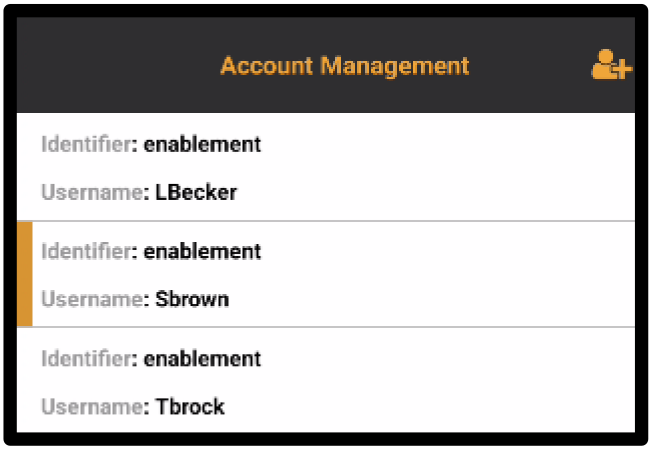


About Field Reports allows the user to:

- View their current version of the hh2 Field Reports mobile application.
- Rate the hh2 Field Reports mobile application.
- Read the Privacy Policy.

Account Management

1. From the Home Page, select the Settings  icon.
2. From Settings, select Account Management.

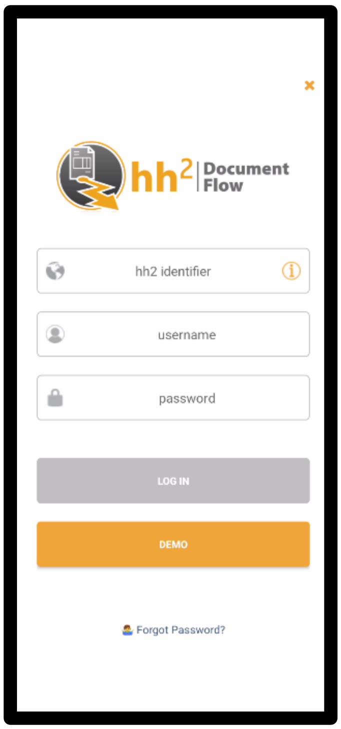


Account Management allows the user to:

- See users associated with the Identifier.
- Add new users, if permitted.

To Add a New User from the Account Management Settings:

1. Select the Settings icon from the Home Page.
2. Select Account Management.
3. Select the Add User icon.



4. Enter the site identifier.
5. Enter the User Name.
6. Enter a temporary Password. The user will have the opportunity to change it, using Forgot Password when logging into hh2.

Log Out

1. Select the Settings icon from the Home Page.
2. Select Log Out.

3. Select OK to log out the user.

Summary

After installing the hh2 Field Reports mobile application, the field user can easily create Daily Logs for Field Reports. Tabs, also known as Sections, represent the different sections of the Field Report. The Tabs available will vary based on the construction company's needs. And, in fact, construction companies may create customized tabs. Daily Logs must be finalized within a certain time, or the hh2 system will finalize the log. Once logs are finalized, they cannot be modified. However, addendums may be added to a log. PDF reports may be created for all or parts of a Daily Log.

Please submit any comments or issues regarding this documentation to documentation@hh2.com.

Change Log

This is the first version of this document, therefore no changes between versions apply.