

## Workshop #15: hh2 Field Reports

This guide is designed to provide you with information on the capabilities of our Field Reports module, as well as an overview of the setup and configuration. If at any time you would like assistance modifying your settings or would like to explore adding Field Reports, please contact <a href="mailto:support@hh2.com">support@hh2.com</a>.

## Field Reports: Overview

- 1. What are Field Reports?
  - A field report is a log of any activity that happens on a jobsite during a specific day. This activity could be weather, people on the job, work done, etc.
  - We call them 'Daily Logs' and provide options to enter all this info and more.

## 2. How do I create a Daily Log?

• You can click "Create A New Log" under the Daily Logs section of the Field Reports homepage, or you can open the Daily Logs Calendar and create a log there.



• When you are creating a log, keep in mind that the log type matters. You can use and create different log types that will allow different options and tabs to use for reporting.

ීම	Daily Log						
		(#2-993) Project 1 Jun 17, 2025     Log Details     * Job   (#2-993) Project 1 * Log Date   Image: Comparison of the second	* 0	1			
		Log Details					4
RP		* Job	(#2-993) Project 1	RQ	Location 123 S Lane		
AP		* Log Date	Jun 17, 2025		Description		
(FR)		* Log Type	Change In Scope	~	Enter Any Custom Description About This Log		
		Log Number	Automatically Assigned				
(HR)				Creat	te Log		
PS							2

• Once you create and open the daily log, you can begin filling out the report to track job activity for the day.

	₽		<mark>(#</mark> Tu	<b>2-993)</b> e Jun 17, 202	Project 1 25 - General			京 🗘
Log	Details Re	mote Payroll	C Remote Payroll (Eq)	200 Activities	الله المعالم معالم معالم معالم معالم معالم معالم معالم	<b>R</b> Vikings	isActiveTest	JR Assessment
*	Job	(#2-9	93) Project 1	Q	Location	123 S L	ane	
*	Log Date	Jun 17	7, 2025	a*a*a	Description	1		
*	Log Type	Gener	al	~	Not Specified	i		
	Log Numbe	r 501						

- 3. Do I have to use the 'Tabbed' view, or is there another option?
  - Users have the option to use either the default 'Tabbed' view, or they can switch to the 'Single-Page' view. This can be configured per user or locked as a Global setting for all users.

\$	General Settings	Calendar View	Mo	nthly	~	
Q	Data Management		Sin	ale-Page	-	A
ŝ	Field Report Sections		0	gie-Page		
2	PDF Reports	Default Log Type	Sup	berintendent		9
	Unit Production	Default Journal Type	Default Journal Type General		*	
2	User Preferences	Attachment Layout	Me	dium (4/page)	*	
	Mobile App Preferences	Labor		Pre-Fill on New Log		Â
		Equipment		Pre-Fill on New Log		T
		Subs		Pre-Fill on New Log		
		Activities		Pre-Fill on New Log		A

## **Settings and Configuration**

- 1. How do I select the sections that show on the report?
  - Under System Settings, select the option for Field Report Sections.

	Field Re	eports Settings Administration ?
\$	General Settings	Active Sections
	Data Management	Page 1
8	Field Report Sections	Log Details Weather Remote Payr Equipment Activities Events Safety For* Materials
A	PDF Reports	Page 2
	Unit Production	Attachments Finalize
-	User Preferences	Unused Sections
6	Mobile App Preferences	Labor Subcontract Visitors
		Custom Tabs Custom Tabs
		Section Order 🔮 Locked for all Users

From here, you can select which sections are active and organize them to best fit your company's needs.

- 2. How do I create different log types and customize the options available on individual sections?
  - To create a new log type, you would open the Type-Lists Setup page.

hh2 Fiel	d Reports	×
Daily Logs Daily Logs Calendar View and Edit daily logs. Create A New Log Quick create a new daily log.	Settings System Settings Sk Field Report module preferences. Users Define who con access Field Reports Equipment Manage equipment used in Field Reports Custom Tabs	
Unit Production Worksheet Enter unit production in a worksheet.	Create custom forms for daily logs <b>Type-Liste Setup</b> Setup various type lists	
Enterprise Logs Search Daily Logs Comprehensively search all daily logs. Meeting Attendance Find all meetings a person has attended Mobile Apps Logh Tandard Tan		
Apple IPad and IPhone Create daily logs from the field Google Android Create daily logs from the field		

• From here, you can customize the Log Types that are available, or the different event and meeting types that your field users will have access to choose from on their report.

Field Reports Type-Lists Setup									
1	Log Types Available Choices Journal Types	<u></u>							
	Journal Types	Available Choices	• General	<b>1</b>					
<u>e.</u>	Event Types		Project Manager	â					
*	Meeting Types		Quality Control	π					
	Meeting Topics		Safety Meeting - Updated Version	π					
	Equipment UOM		Superintendent	<b>a</b> !					
	Materials UOM	Add A Choice	Enter Choice Text	0					

- 3. What is a custom tab and how do I create one?
  - From the Field Reports homepage, select the option for Custom Tabs. From this page,

Cancel	Create	Custom Tab		
Tab Icon		* Name	Safety Form	
		Full Name	Specify Full Name	
		Туре	Multiple Entries per Log	
		Is Active?	Yes	
		Description		
★ ☆		Describe what	this tab is used for	
	<b>D</b>	Availability	Change In Scope	î
			General	
				w
		Fields	Create Tab First	>

**1. Create a name for your tab.** (This can be modified until the point that it has been used on a Daily Log.

**2. Select a Tab Icon.** This is what will display on the Field Report in if using the "Tabbed" format.

**3.** Once the name has been added, you can click the **Create Tab** button at the bottom. This will give you access to the other options.

**4. Description** is optional, but it will show on the report so that your users can read any details or instructions that you add.

**5. Availability** is what allows you to determine which Log Types this tab shows on. Your custom tabs can be included for all report types or can be created for a specific Log Type like a Safety Checklist or Compliance log.

**6.** From here, you can click into the **Fields** section to begin creating your custom elements and the fields for the data you need captured.

**7. Customizing fields** is pretty simple; just drag a field group over and then drag and drop the elements from the left side into the field group. Once you have the element moved over,

click the Settings icon to rename the field and customize the drop-down options, multiple choices, and labels for any text boxes.

Jack To Tab Details	Custom T	ab Fields
setup your custom tab, drag e lids can be re-ordered within a u no longer wish to use a field,	ements from the left side to the re field group, but you cannot move please click on that field's options	ight side. NOTE: All fields must be placed within a field group. a field from one field group to another. Fields cannot be deleted. s and uncheck the "Is Active" box.
	ĺ	Job Info
		Time 12:00 AM*
	Text Value	Textbox Text Value
	Option 💌	

- 4. What is Unit Production and how does it work?
  - Unit production is designed for clients to keep track of the usage of materials daily. In your accounting system when you set up a cost code on a job, typically an estimated amount of units for that material is added.

For example: If you want to keep track of how much piping is needed for plumbing. You would enter an estimated amount of that pipe and the unit of measure (i.e. feet for pipe.)

• To keep track of the units, there are two options. You can choose to use the 'Unit Production Worksheet' or create an event under the 'Activities' tab on a daily log.

<u> </u>		OITWOIKSHEE														
						.20b (#2-990) Project 1		Week EQ 66/15/2025 to 66/2	1/2025	Log Type General		*			eee in More Ex	siore Defres
						(#2-993) F	Project 1	< SUN 6/15	MON 6/16	TUE 6/17	WED 6/18	THU 6/19	FRI 6/20	SAT 6/21	>	2 Feat
						(#1-000) GENERA (#1-035) Modification F	L CONDITIONS	units							0.00	8.00
)																
)<																
			(	#2-993)	Project 1		5		0							
	_		Т	ue Jun 17, 20:	25 - General		_									
	Log Details	Weather	Remote Payroll	Equipment	Activities	Events	Materials	Attachm	ents							
(																
1	Enter Keyn							ا لک ل								
			Thor		ity optrion or	optod										
			Ther	e are no activ	ity entries cre	eated.										
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• If you add units on the 'Unit Production Worksheet', it will automatically create a Daily Log if there isn't one for that job on the date selected. It will also add an event under 'Activities' with the amount you enter.

NOTE: We offer support for Unit Production for Sage 100 and Sage 300 but only write data back to Sage 300.