

## 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 [support@hh2.com](mailto:support@hh2.com).

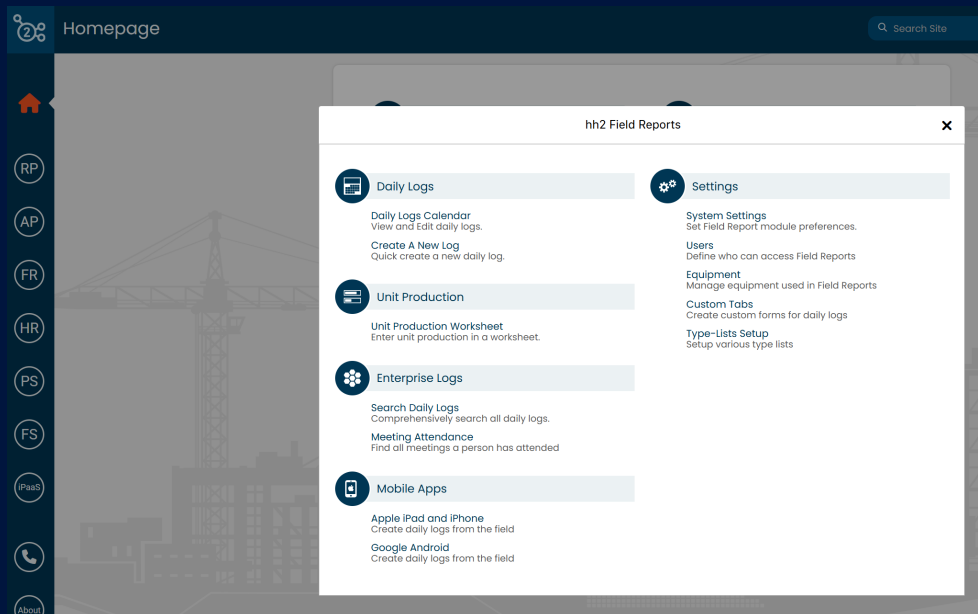
### Field Reports: Overview

#### 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.

**Daily Log** Search Site

**(#2-993) Project 1**  
Jun 17, 2025

Log Details

\* Job (#2-993) Project 1 Location 123 S Lane

\* Log Date Jun 17, 2025 Description

\* Log Type Change In Scope Enter Any Custom Description About This Log

Log Number Automatically Assigned

Create Log

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

**(#2-993) Project 1**  
Tue Jun 17, 2025 - General

Log Details Remote Payroll Remote Payroll (Eq) Activities Finalize Vikings isActiveTest JIR Assessment

\* Job (#2-993) Project 1 Location 123 S Lane

\* Log Date Jun 17, 2025 Description

\* Log Type General Not Specified

Log Number 501

HA Modified By hh2 Admin (hh2\_admin) on Jun 17, 2025 at 10:07 am .

### 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.

**Field Reports Settings Administration**

General Settings Data Management Field Report Sections PDF Reports Unit Production **User Preferences** Mobile App Preferences

Calendar View Monthly

**Log View** Single-Page

Default Log Type Superintendent

Default Journal Type General

Attachment Layout Medium (4/page)

Labor ☒ Pre-Fill on New Log

Equipment ☒ Pre-Fill on New Log

Subs ☒ Pre-Fill on New Log

Activities ☒ Pre-Fill on New Log

## Settings and Configuration

### 1. How do I select the sections that show on the report?

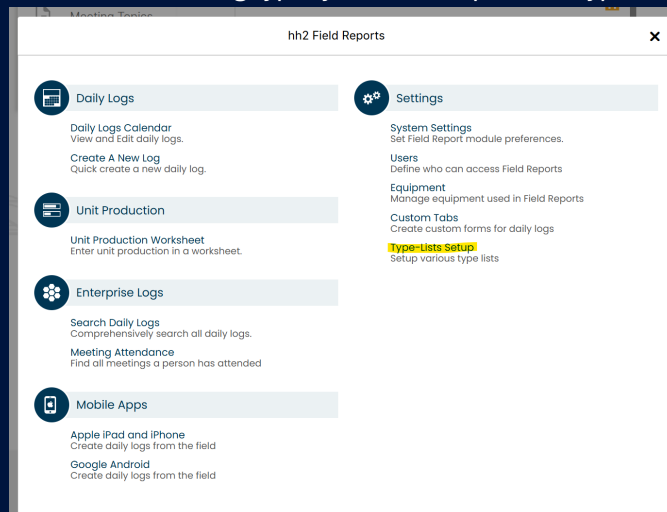
- Under System Settings, select the option for Field Report Sections.



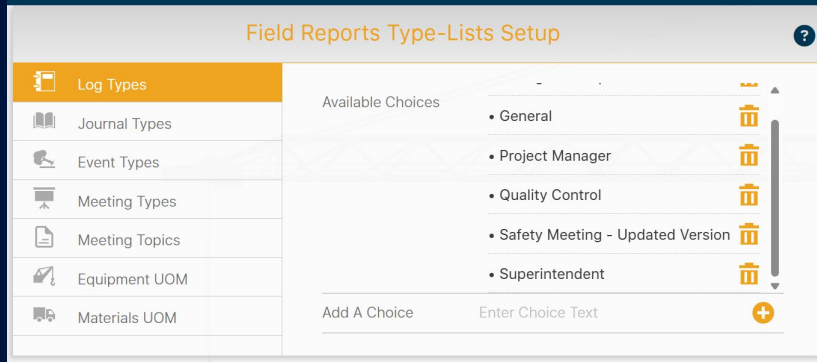
From here, you can select which sections are active and organize them to best fit your company's needs.

### 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.



- 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.



### 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, click on the add icon  and follow these steps:

- 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.
- 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.
- 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.

#### 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.

- 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.