



Daily Reports Training Guide

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About

A Daily Report contains vital documentation of the events taking place on the project site including: the report date, shift, notes, the companies, equipment, material received on the project, the day's weather, and any relevant attachments such as photos.

Workflow Diagram

No workflow diagram associated with daily reports

Process Overview

A CM Firm creates the Daily Report. The report date is auto-filled with the current date, and the author is auto-filled with the creator of the report. The location and shift are selected from a drop down. Labor, equipment, and materials received are recorded in item tables. Weather information is automatically populated based on the configured project zip code and capture frequency. Images and documents are uploaded to Media and References.

Notes

- Locations, Weather, and the time for each day's report to be generated can be set up prior to the project. Kahua automatically saves the weather details regularly, so you have a full record of the daily weather conditions on the job site. To ensure this is set up, work with your Domain Admin, who will need to set the postal code and enable this feature at the start of the project.
- An entirely new daily report does not have to be created each day. Once a daily report has been created, it can be copied and updated with any relevant information or changes from that day.

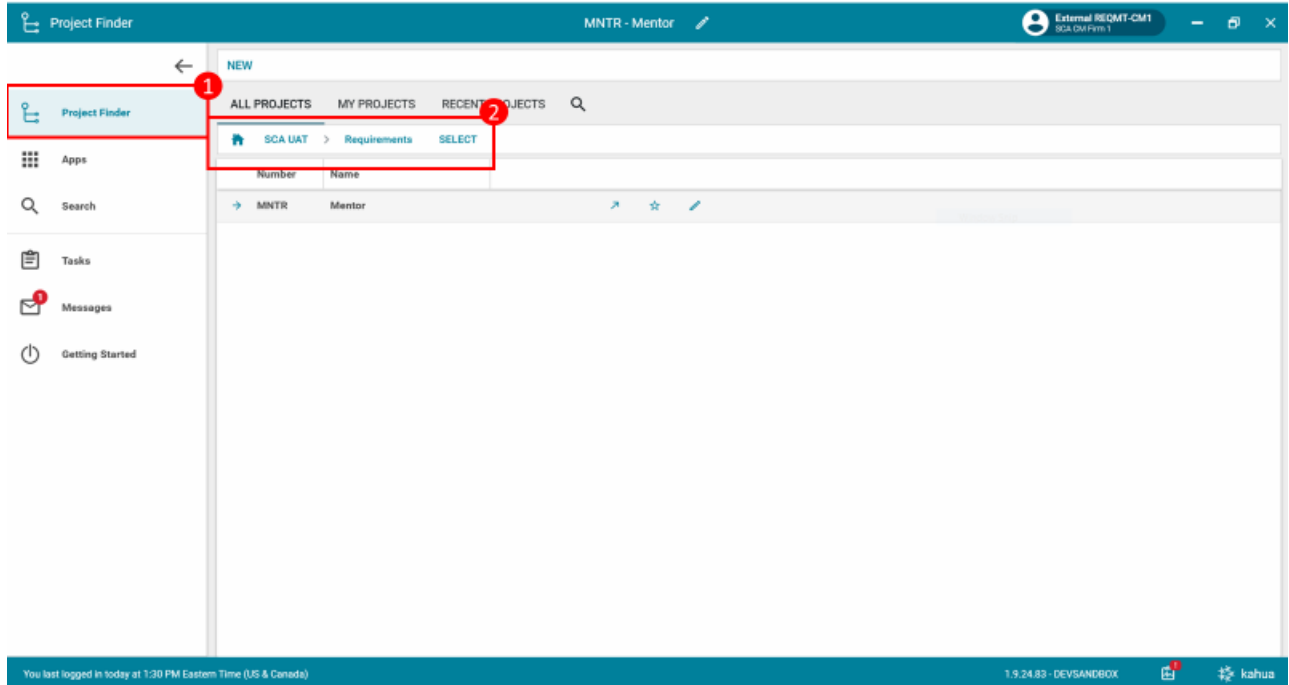
Step-by-Step Instructions

Create Daily Report

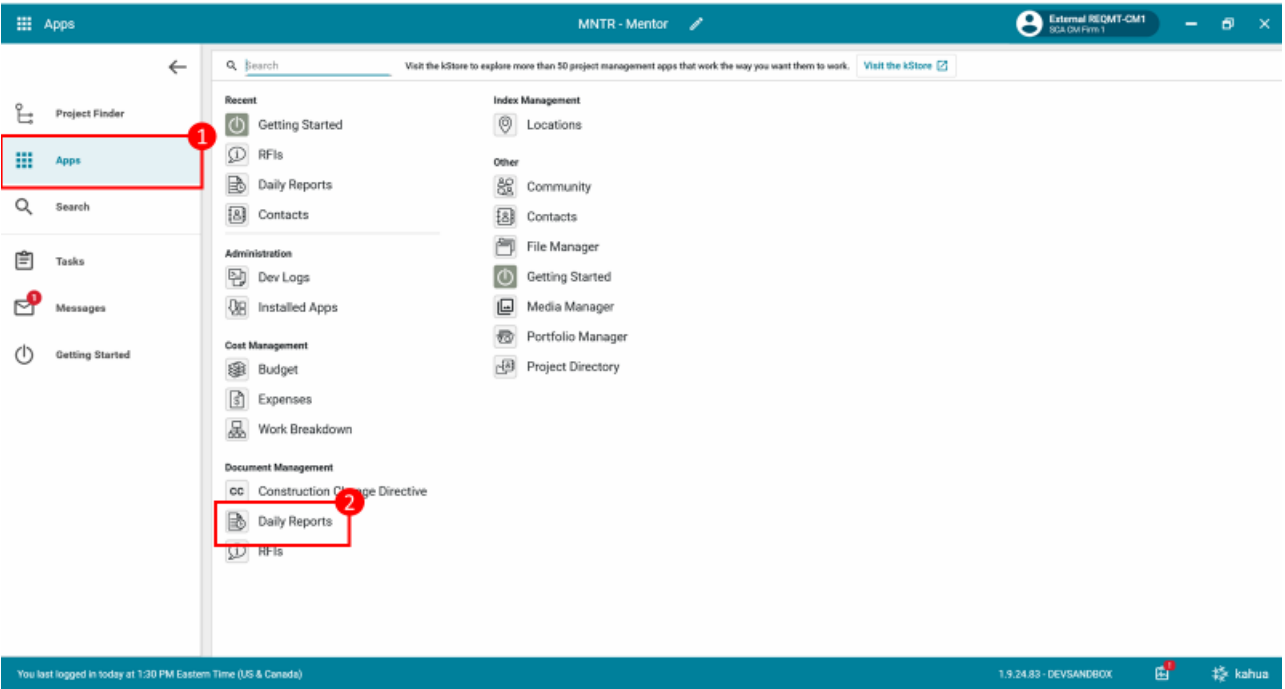
Role	Preceding Steps	Outcome
CM Firm	Daily Report information is known by CM Firm.	The daily report is created but the record is not finalized.

Steps

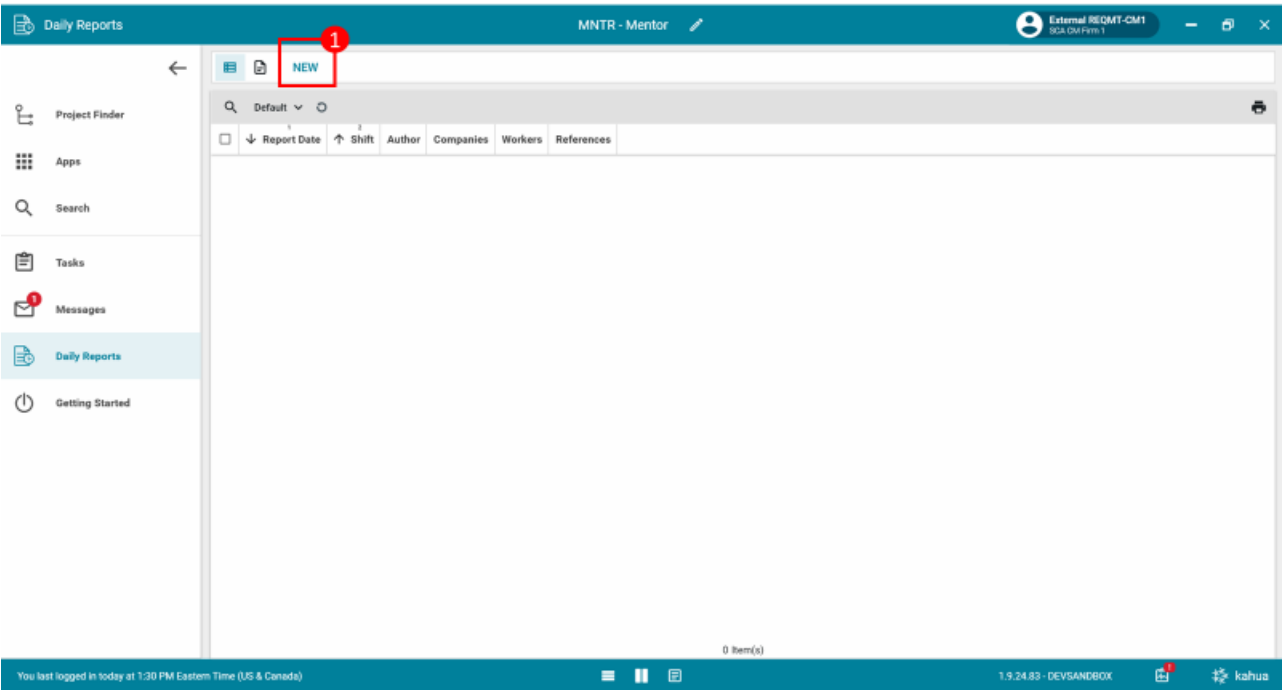
1. Go to 'Project Finder' > Select desired Subproject/Project



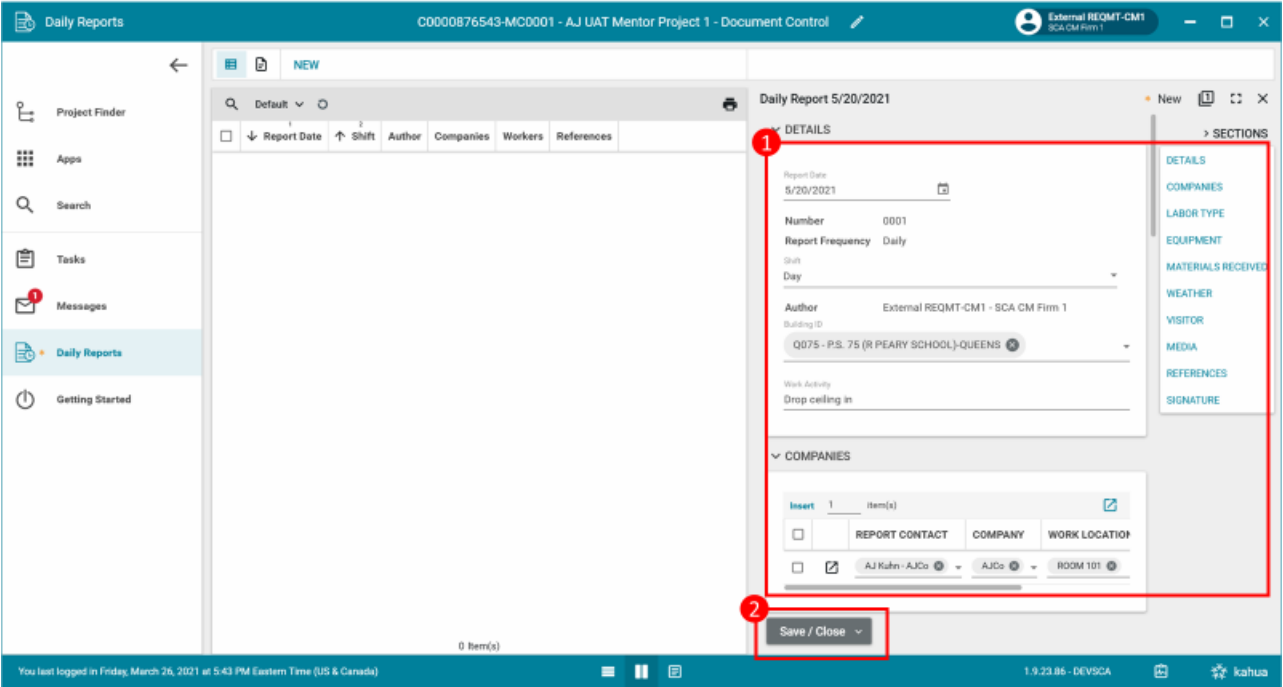
2. Go to 'Apps' > Select 'Daily Reports' application



3. Click 'New'



4. Enter required fields > Enter additional fields > Click 'Save/Close'

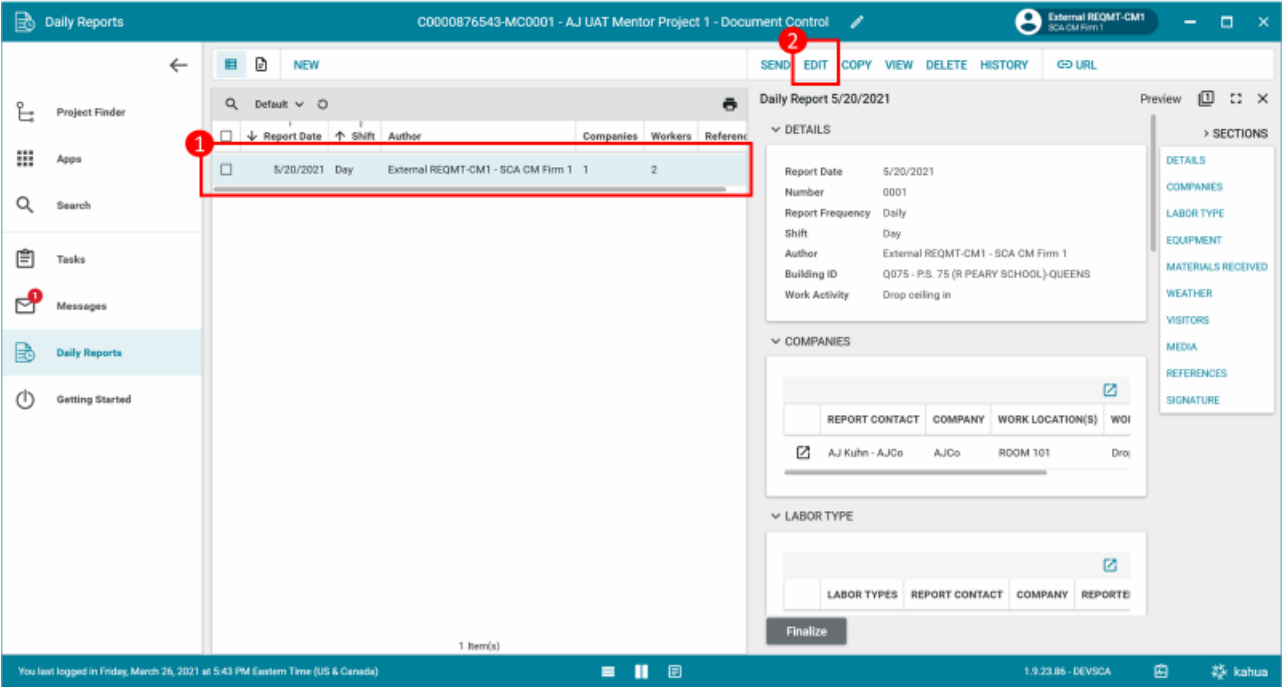


Update Daily Report

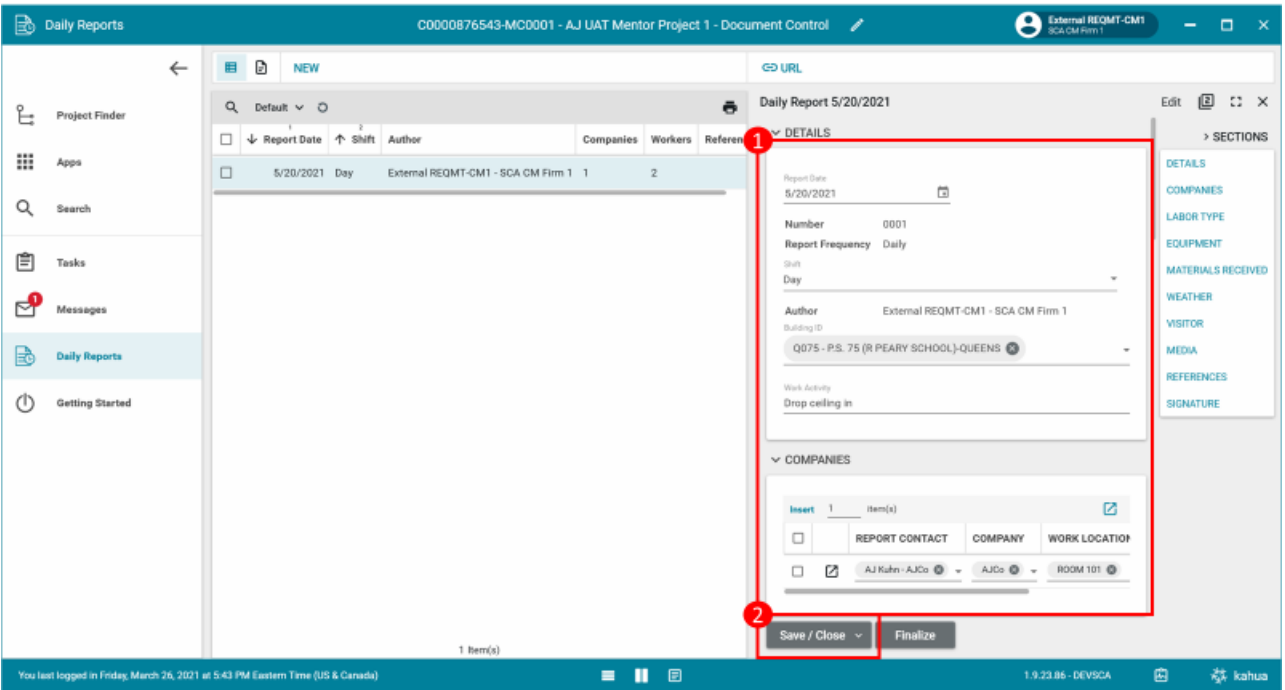
Role	Preceding Steps	Outcome
CM Firm	→ A Daily Report has been created and populated with information but was not finalized.	→ The Daily Report is updated but the report is not finalized.

Steps

1. Go to 'Project Finder' > Select Subproject/Project containing Daily Report > Go to 'Apps' > Select 'Daily Reports' application > Select Daily Report requiring update > Click 'Edit'



2. Update required fields > Update additional fields > Click 'Save/Close'

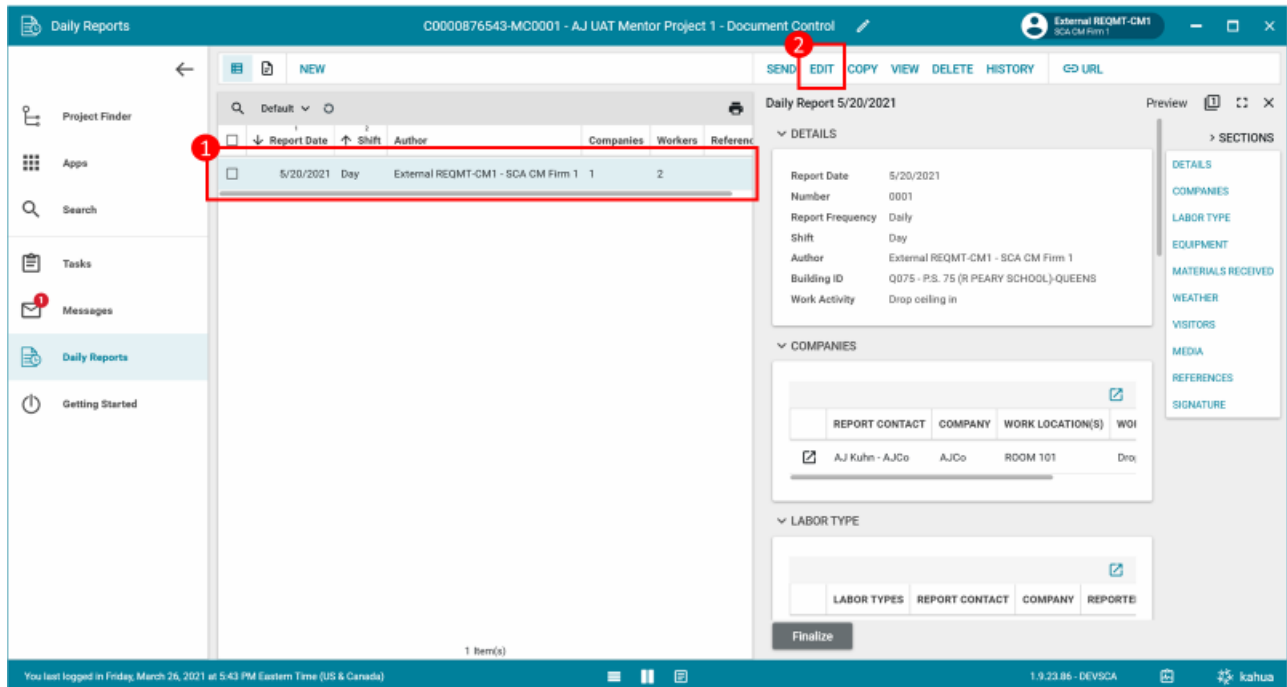


Sign Daily Report and Finalize

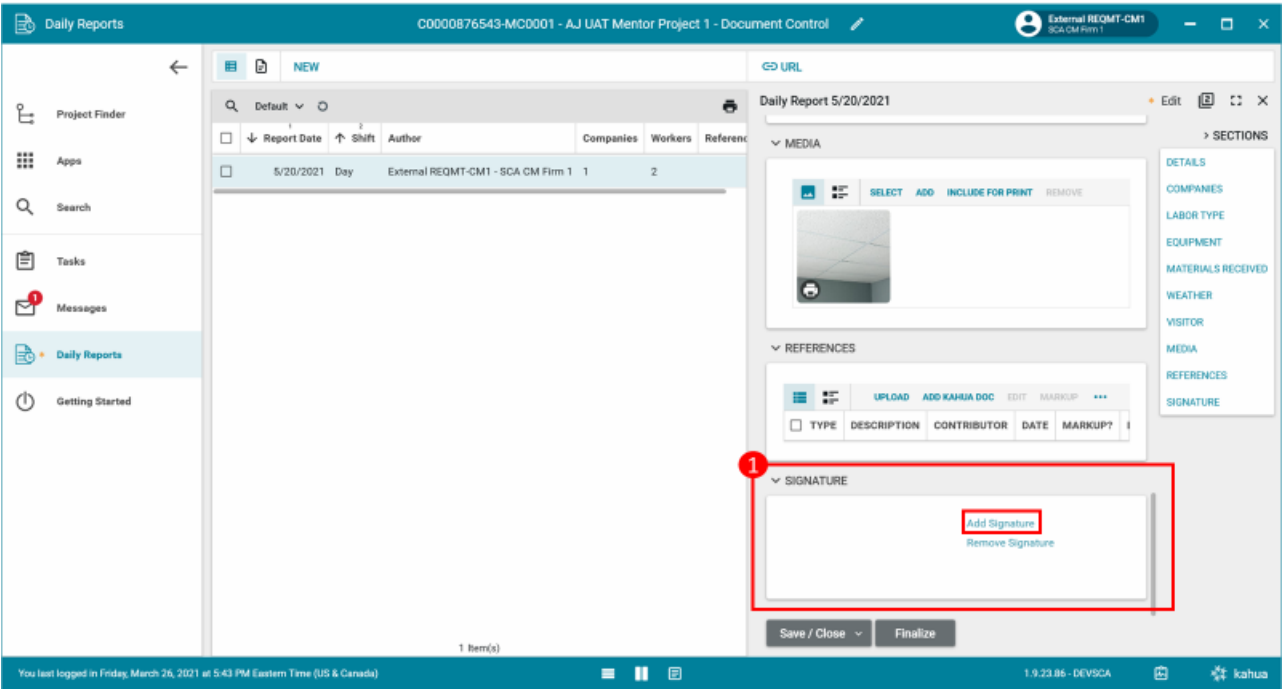
Role	Preceding Steps	Outcome
CM Firm	→ A Daily Report exists but has not been finalized.	→ A Signature is added to the Daily Report and the record is finalized. The daily report is now read-only and must be unlocked to make further updates or edits.

Steps

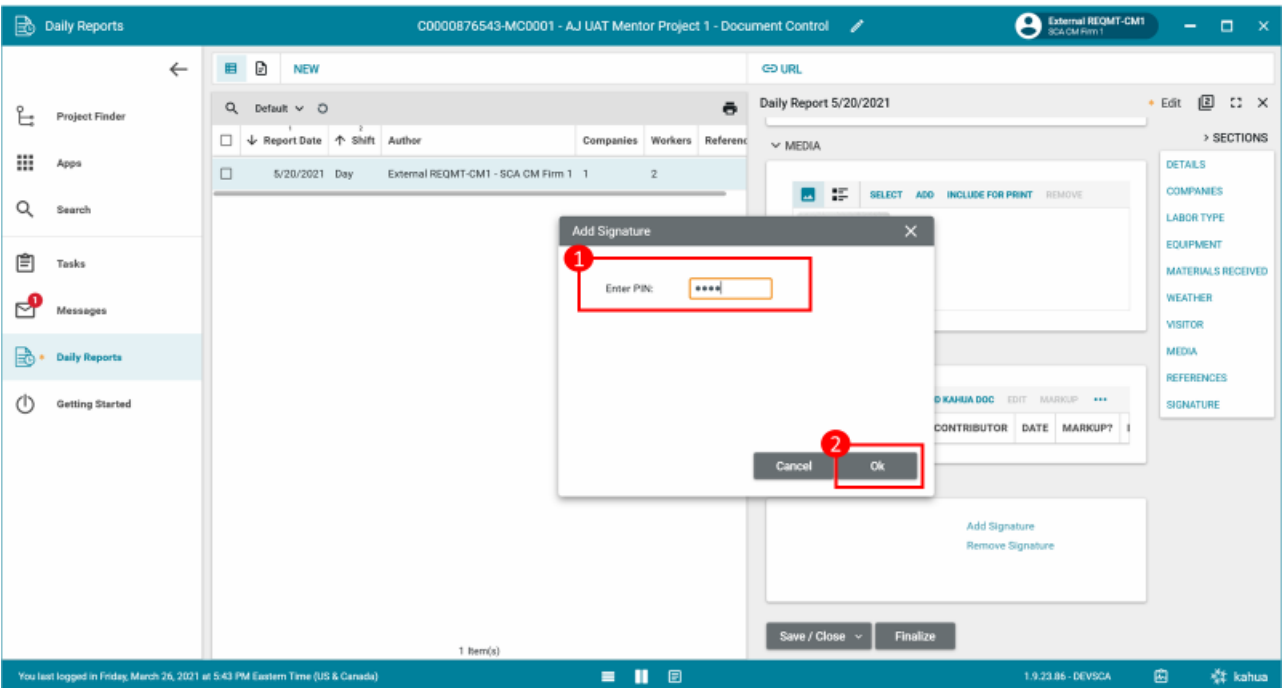
1. Go to 'Project Finder' > Select Subproject/Project containing Daily Report > Go to 'Apps' > Select 'Daily Reports' application > Select Daily report requiring signature > Click 'Edit'



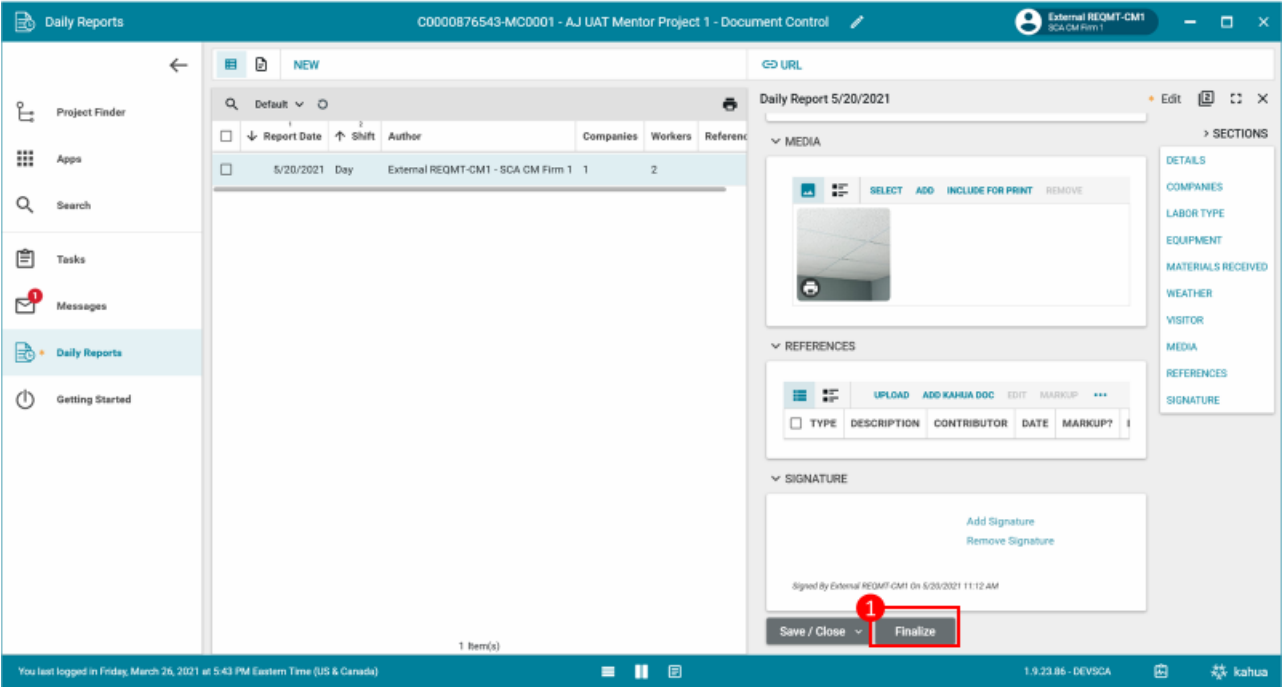
2. Scroll down to 'Signature' section > Click 'Add Signature'



3. Enter PIN code when prompted > Click 'Ok'



4. Click 'Finalize'

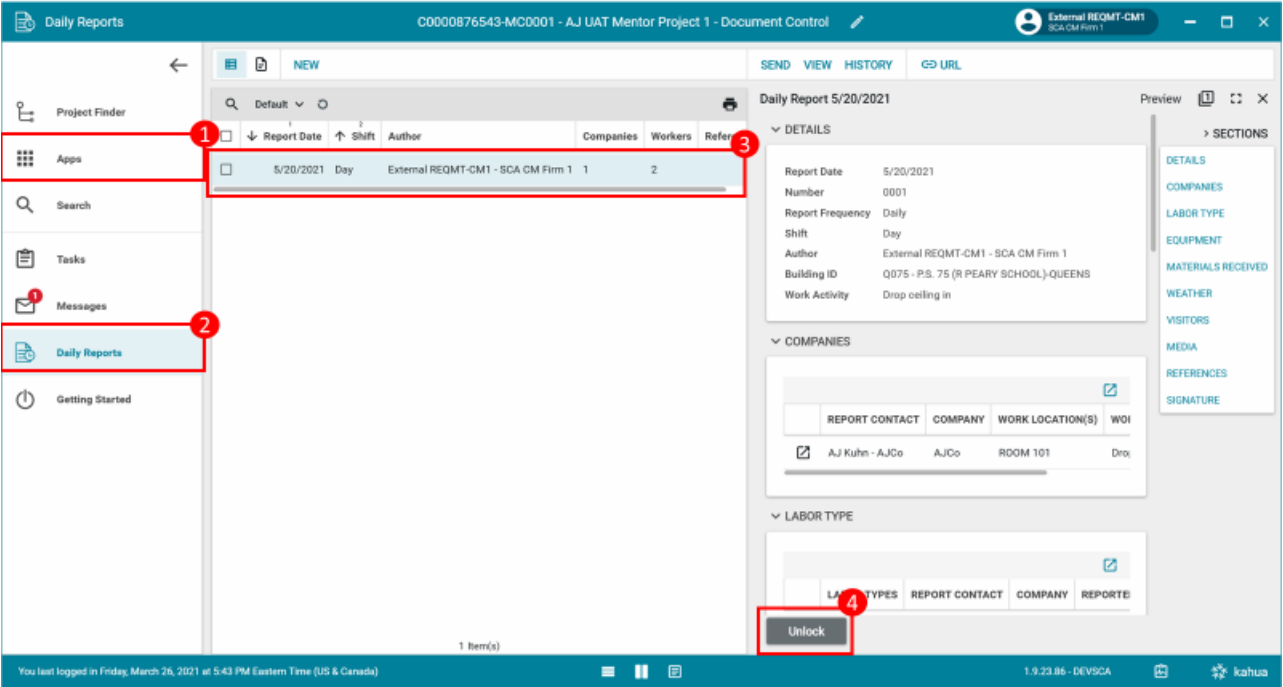


Unlock Daily Report

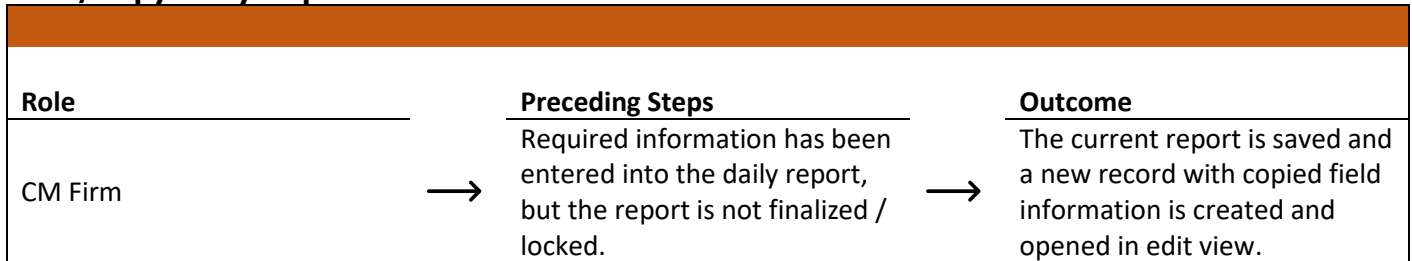
Role	Preceding Steps	Outcome
CM Firm	→ The Daily Report is in the finalized status.	→ The report is opened for updates or edits. The report is no longer read only.

Step

Go to 'Project Finder' > Select Subproject/Project containing Daily Report > Go to 'Apps' > Select 'Daily Reports' application > Select Daily Report requiring unlock > Click 'Unlock'



Save/Copy Daily Report



Step

Go to desired record > Enter required information in desired record > Click 'Save/Copy'

