

Site Visits Quick Reference Guide

This topic provides a reference for the **Site Visits** activity center.

Purpose

Create trip reports for team members who visit the jobsite at regular intervals.

Audience

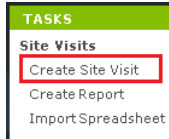
Construction corporate departments, such as Quality Assurance and Safety. Design professionals, such as architects and engineers.

Key Features

- Integration with Field Notes mobile app for collecting observations and photos on the go.
- Series of recurring visits with numbered items that continue between reports.
- Embedded action items to track accountability for follow-up activity.
- Draft and Final status to protect report from inadvertent changes.
- Full functionality through the Info Exchange website interface.

To create a new site visit

1. In the **Site Visits** activity center, select **Create Site Visit** in the **Tasks** panel. This creates a new series of visits.



- In the **Create Site Visit dialog box**, enter the **Visit Name** and **Visit ID**.

For a new series, the series name matches the visit name. After the first save, you can change each visit name, such as "October Regional Safety."

The screenshot shows the 'Create Site Visit' dialog box with the following details:

- Visit Name:** Monthly safety check
- Visit ID:** Required
- Type:** Safety
- Status:** Draft
- Form Template:** Site Visits
- Distribution:** To: [redacted], CC: [redacted]
- Walkthrough:** Start: Monday, June 02, 2014; End: Monday, June 02, 2014; Participants: [redacted]
- Observations tab:** Includes buttons for 'Add from Field Notes', 'Create Action Item', 'Add New', 'Create Similar', and 'Delete'. Below is a table with columns: Item Number, Urgent, Category, Reference, Remarks.

- Select the **Type** of visit.

*The type chosen controls the default form template and the list of categories on the **Observations** tab.*

- Complete the **Distribution** list.
- Enter the **Walkthrough** information including date, time and participants.
- Select **OK** to create the site visit.

To add site observations

You can add observations directly from the **Site Visits** activity center or you can pull them from the **Field Notes** activity center, which includes notes and photos taken in the field through the **Field Notes** mobile app.

- To add from notes taken in the field, select **Add from Field Notes** on the **Observations** tab. This allows you to choose notes from the **Field Notes** activity center.

The screenshot shows the 'Observations' tab with the following details:


- Buttons:** 'Add from Field Notes' (highlighted), 'Create Action Item', 'Add New' (highlighted), 'Create Similar', 'Delete'.
- Table:**

Item Number	Urgent	Category	Reference	Remarks	Discussion
Auto Number	<input type="checkbox"/>	Required		Walkaround	...

- To add new site observations, select **Add New**. This adds a line item to the observation list.

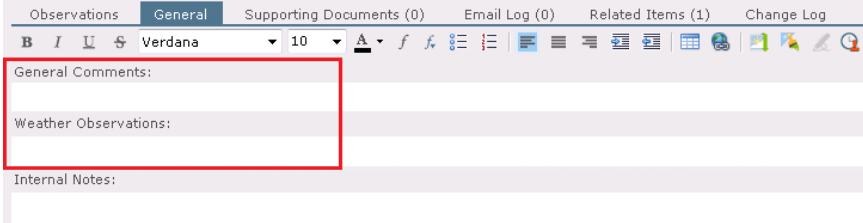
3. Select a **Category** from the drop-down list.

*The categories that appear are based on the **Type** chosen above.*

4. To add discussion notes, click in the **Discussion** field then select the  button. In the **Discussion Items dialog box**, add new remarks or select from existing discussion entries. Select **OK** when finished.



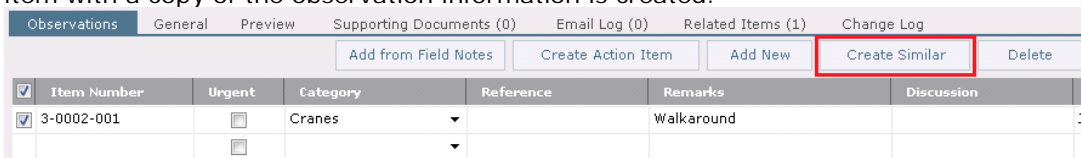
5. To add weather observations and other comments, select the **General** tab and complete notes as needed.



To create similar site observations

You can easily create similar observations that allow information to carry over from observation to observation.

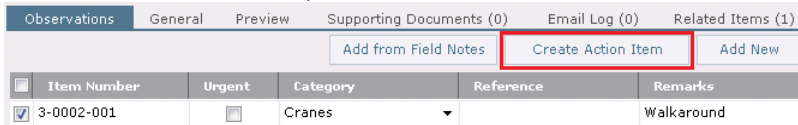
1. On the **Observation** tab, select the check box next to the observation and select **Create Similar**. A new line item with a copy of the observation information is created.



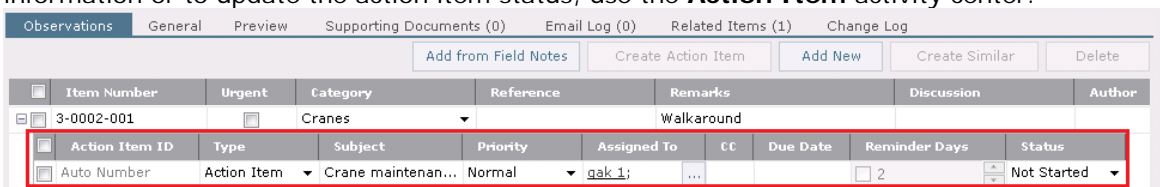
To create action items

You can create action items in the **Site Visit** activity center that are automatically related to the site visit.

1. On the **Observation** tab, select the check box next to the observation and select **Create Action Item**.



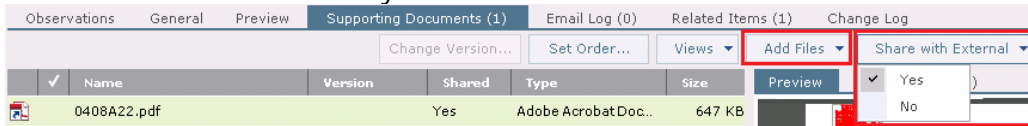
2. The new action item appears in the grid under the observation. The action item pane can be viewed or hidden using the expand/collapse button for the observation. Fill out the minimum fields for the action item. To add more information or to update the action item status, use the **Action Item** activity center.



To add supporting documents

Any files linked on the **Supporting Documents** tab can be included as attachments to the final transmitted site visit. Examples include sketches, referenced spec sections, site photos or OSHA standard excerpts.

1. Select the observation, then select the **Supporting Documents** tab.
2. Select the **Add Files** to add any relevant files.

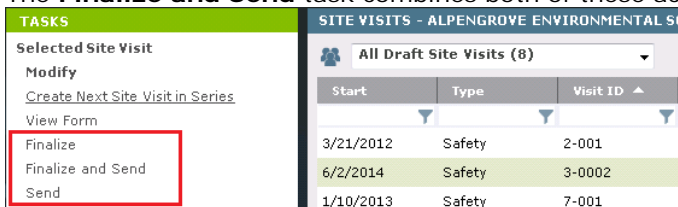


3. In order for external team members to see supporting documents on the Info Exchange website, each file must be specifically shared. Highlight the supporting document file name, select the **Share with External** drop-down and select **Yes** to share the file.

Finalize site visit

The Finalize action changes the status of the site visit report to **Final**. That makes the record read-only and a PDF of the report is saved in the Project Files Record Copies folder. If changes are needed before sending, the report can be reverted to **Draft** (see below).

1. To finalize a site visit, highlight a draft site visit in the **Site Visits** activity center and select **Finalize** from the **Tasks** panel.
2. Once finalized, the **Send** action takes you through the steps of distributing the report via email or Info Exchange. If you decide you are not ready to do this you can close the screen and perform this step later from the **Tasks** panel.
3. The **Finalize and Send** task combines both of these actions together.



To revert a site visit to draft status

If you need to make changes to a finalized report, use the **Revert to Draft** task.

1. Select the finalized site visit in the **Site Visits** activity center and select **Revert to Draft** from the **Tasks** panel.

The screenshot shows the 'TASKS' panel on the left with 'Revert to Draft' highlighted in a red box. The main panel displays a table of 'All Final Site Visits (8)' for 'ALPENGROVE ENVIRONMENTAL SCIENCE CENTER'. The table has columns for Start, Type, and Visit ID.

Start	Type	Visit ID
1/10/2013	Quality	1-002
1/10/2013	Quality	1-003
1/10/2013	Safety	3-001
6/2/2014	Safety	3-0002

2. Make edits, re-finalize, and re-send the site visit. A new PDF of the revised report is saved in the **Record Copies** folder (along with all previous versions) and latest version is displayed on the site visit's **Preview** tab.

*The **Change Log** tab shows the history of each finalization.*

To create the next site visit in the series

Once a site visit is created and saved, you can use it as the basis for the next site visit within the same series.

1. Highlight the site visit in the **Site Visit** activity center and select **Create Next Site Visit in Series** from the **Tasks** panel. This option saves data entry time when creating the next site visit. All information (except the **Visit ID**) copies into the new record and can be edited as needed.

The screenshot shows the 'TASKS' panel on the left with 'Create Next Site Visit in Series' highlighted in a red box. The main panel displays a table of 'All Final Site Visits (8)' for 'ALPENGROVE ENVIRONMENTAL SCIENCE CENTER (1999009.00)'. The table has columns for Start, Type, Visit ID, and Visit Name.

Start	Type	Visit ID	Visit Name
1/10/2013	Quality	1-002	Bug Bash 2
1/10/2013	Quality	1-003	Bug Bash 3
1/10/2013	Safety	3-001	Test
6/2/2014	Safety	3-0002	Monthly safety check

To view site visits on Info Exchange

Both internal and external project team members can view, edit, and create site visits from the Info Exchange website (depending on permissions).

1. Log into the Info Exchange website and select the project. Select **View** > **Field Management** > **Site Visits**.

The screenshot shows the NEWFORMA website interface. The 'VIEW' dropdown menu is open, and the 'Field Management' section is visible. The 'Site Visits' option is highlighted with a red box.

By default external users can only see site visits they are a party to.

2. In the **Site Visits log**, select the site visit **Start** date to see its details. Use the buttons on the **Site Visit page** toolbar to finalize, modify, delete, create next in series and more.

Site Visit [Site Visits](#) [Finalize](#) [Modify](#) [Delete](#) [Create Next In Series](#) [Send Email](#) [View Form](#)

Visit Name: **January QA Visit** Visit ID: **4-002**
 Date Created: **1/17/2013** Type: **Quality**
 Created By: **Chet McFarland (Springfield Construction)** Status: **Draft**
 Start: **1/17/2013 8:00 AM** End: **1/17/2013 11:00 AM**
 Participants: **Chet McFarland (Springfield Construction) and one other** CC: **Chet McFarland (Springfield Construction) and one other**
 To: **Jeff Weber (Springfield Construction)**
 Form Template: **QualitySiteVisits**
 Keywords:

OBSERVATIONS GENERAL EMAIL LOG SUPPORTING DOCUMENTS RELATED ITEMS CHANGE LOG

Item Number	Urgent	Category	Reference	Remarks	Discussion
4-001-001		Roofing		The flashing at the roof vents is not the correct material.	Remove and reinstall the flashing with the correct material per spec.

*Supporting Documents are available by default for internal users on the Info Exchange website. To share them with external users, the file has to be marked to **Share with External** from the site visit in Project Center.*

User Notes

Here are some important notes to remember when working with Site Visits:

- Discussion builds a dated, threaded history of the observation development across visits. The most recent discussion item is displayed in the **Observation** grid.
- Text in the **Internal Notes** section is not included in the final report, and is not visible on the website to external team members.
- Make edits and re-finalize the site visit. A new PDF of the revised report will be saved in the **Record Copies** folder (along with all previous versions) and the latest version is displayed on the site visit's **Preview** tab.
- The **Change Log** tab shows the history of each finalization.