

EEBACS USER GUIDE 1.0

Appendix I: Construction Work Activity Template Tool

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I.1 Work Activity Template Tool

While creating Daily Reports you may use the work activity template tool. This is an unique time saving tool that allows users assigned to a project to create a work activity template that includes a variety of details and then saves it for reuse for themselves and for others. Since many activities are performed regularly on a project, the template saves users having to reenter all the common information so they only need to update or fill in what items are changing. Templates are specific to a project.

A template is basically a work activity information block that has been partially filled in and saved for use in future daily reports. The template may include any combination of work activity fields. It is recommended that the description field always be included in the template and that specific production time, idle time, and idle codes are not included in templates. The location may be filled in if it is a static location (Miller Gravel Pit) or you may just establish a format (M.P. to M.P.). Remember that all information included in the template will be copied to the daily report when it is selected - consider what is unchanging, what is variable, and what is helpful formatting when creating the template. Users may edit all information that is copied from a template but those changes will not automatically update the template. Templates may be edited the Templates tab.

Templates may be created by any member of the project team that can create daily reports. All templates are shared to all team members. If templates are used, it can assist with uniform reporting format even if the reporting person changes (ex. the description would always be worded the same). Templates can also assist to insure that no equipment or labor are overlooked for an activity. If templates are carefully created to include all the typical crew and crew's equipment, it will be more likely that each day the production time and idle codes will be documented rather than over looking an item.

Use of templates is not required and the use of a template still requires the reporting person to include, verify, and update all information. It is intended to be a time saving and data standardization tool.

First, this appendix will explain how existing templates are used when creating a daily report & then it will explain the different methods for creating new templates.

I.1.1 Using an Existing Template on a Daily Reports

Most commonly new users will first use templates created by others and then eventually start creating new ones as needed. Start a daily report normally. When you get to the work activities section:

- Click on the drop down arrow under "Copy from Template".

This will show you all the templates available for use in this project. The Templates are shown first by the template name & then by the creator of the template.

- Select a template from the drop down list to use on this work activity.

Daily Report

Type*: IDR CDR

Contractor/SubContractor*: Lego Builders (Contractor),Millionaire Corp

Date*: 09-15-2011

Shift Start*: 07

Shift End*: 04

Weather/Temperature: Sunny, Clear 56/27

Amount of Precipitation: 00

Work Activities

Work Activity #1

Work Activity Code*:

Location*:

Description*:

Work Activity Pay Items:

Labor:

Classification *	Number *	Production Time (hrs) *
<input type="text"/>	<input type="text"/>	<input type="text"/>

Equipment:

Labor Total: \$0.00 Equipment Total: \$0.00

Work Activities

Work Activity #1

Work Activity Code*: A

Location*:

Description*: Silk Fence Installation - created by Lorell K. Duteil
Pilot Car & Flagger setup for OLR - created by Lorell K. Duteil

Work Activity Pay Items:

Labor:

Classification *	Number *	Production Time (hrs) *
<input type="text"/>	<input type="text"/>	<input type="text"/>

Equipment:

Labor Total: \$0.00 Equipment Total: \$0.00

You can only use one template on each work activity. After you select a template, the screen will update with the saved information from the template and you can then fill in the rest of the work activity information.

Work Activities

Work Activity #1

Work Activity Code*: A

Location*:

Description*: Pilot Car & Flagger setup for OLR - created by Lorell K. Duteil

Work Activity Pay Items:

Labor:

Classification *	Number *	Production Time (hrs) *
<input type="text"/>	<input type="text"/>	<input type="text"/>

Equipment:

Labor Total: \$0.00 Equipment Total: \$0.00

The template chosen in this example includes the activity description, pay item, typical labor and equipment with quantities, and the desired formatting for the location. Only information include in the template will be populated. If that information was not included, it will be blank when the template copies to your daily report.

Work Activities

Work Activity #1

Work Activity Code*: Save as Template

Location*: Lane Closed Sta. to

Description*:
Close one lane & run pilot car with flaggers on each end. 15min max delays.

Work Activity Pay Items:
A0560: 63509-1000 N TEMPORARY TRAFFIC CONTROL, FLAGGER

Labor:

Classification*	Number*	Production Time (hrs)*	
Flagger	2	0	Delete
Pilot Car Driver	1	0	Delete

Add Labor

Labor Total: \$0.00

Delete

Add Work Activity

Equipment:

Type*	Number*	Production Time (hrs)*	Idle Time (hrs)*	Idle Code	
Pickup Toyota 2wd	1	0	0		Delete

Add Equipment

Equipment Total: \$0.00

- Complete the rest of the activity information as you would regularly.

You can make changes, add or delete items, or fill in information as needed including a work activity code. The template has not changed and is available for you or others to use again.

Work Activity #1

Work Activity Code*: A Save as Template

Location*: Lane Closed Sta. 1+50 to 4+25 RT

Description*:
Close one lane & run pilot car with flaggers on each end. 15min max delays.

Work Activity Pay Items:
[select] clear
A0560: 63509-1000 N TEMPORARY TRAFFIC CONTROL, FLAGGER

Labor:

Classification*	Number*	Production Time (hrs)*	
Flagger	2	9.5	Delete
Pilot Car Driver	1	09.5	Delete

Add Labor

Labor Total: \$0.00

Delete

Add Work Activity

Equipment:

Type*	Number*	Production Time (hrs)*	Idle Time (hrs)*	Idle Code	
Pickup Toyota 2wd	1	09.5	0		Delete

Add Equipment

Equipment Total: \$0.00

Additional work activities can be added normally. For each activity you then have the option to manually fill-in the information or use a template. A template can be used in multiple activities for the same report if needed (ex. There are 2 lanes closures on the project). Finish and submit the daily report normally.

I.1.2 Create a New Template from a Daily Report Activity

When a user is creating a daily report, they may decide that the activity is going to be repeated frequently and the information is worth saving for reuse. The user may complete the activity either partially (suggested) or completely before saving it as a template.

To create a template, fill in a work activity as much or little as needed.

The screenshot shows the 'Work Activity #1' form. At the top left, there is a 'Work Activity Code*' dropdown set to 'E' and a 'Save as Template' checkbox. The 'Description*' field contains the text: 'Install decorative boulders. Load boulders in pit. Tandem haul & dump at placement location. Excavate, place, and grade around boulder.' Below this is a 'Labor:' table with columns for Classification, Number, and Production Time (hrs). It lists 'General laborer', 'Backhoe Operator', and 'Truck Driver CDL class A', each with a 'Number' of 1 and 'Production Time' of 0. To the right is an 'Equipment:' table with columns for Type, Number, Production Time (hrs), and Idle Time (hrs). It lists 'Backhoe 350s #45-567' and 'Tandem Dump', each with a 'Number' of 1 and 'Production Time' of 0. At the bottom, there are 'Labor Total: \$0.00' and 'Equipment Total: \$0.00' fields, along with a 'Delete' button.

When the activity is ready to save as a template:

- Click “Save” on the report, and a new option will appear at the top of the work activity to save the item as a template.
- Click the “Save as Template” box at the top of the selected activity.
- Click “Save” on the daily report again; the template will be created and available for use on other work activities or daily reports.

After the template is saved, the work activity can be completed the rest of the way without changing the template that was just created. You may notice that the Save as Template box appears again if you want to save a different version of the template.

This screenshot is similar to the previous one but highlights the 'Save as Template' checkbox with a red arrow. The checkbox is now checked, indicating that the user has selected to save the activity as a template. The rest of the form, including the description and labor/equipment tables, remains the same.

The next time you create a work activity you will see the new template is available on the drop down list. The template is automatically named based on the date created and the person who created it. The template name may be edited on the template tab.

The screenshot shows a form titled "Work Activity #2". It has several fields: "Work Activity Code*" with a dropdown menu set to "Copy From Template"; "Description*" with a text area; "Location*" with a dropdown menu; and "Work Activity" with a "[select]" button. A dropdown menu is open, showing a list of templates: "New Template - Feb 01 2012 - created by Sam Central CCSManager", "silt fence - Aug 2009 - created by Marty Flores", and "H...base - created by Lorell K. Duteil". A red arrow points to this list.

I.1.3 Create a New Template or Edit an Existing Template using the Template Tab

Sometimes it may be desirable to create the template from the Template tab. One benefit of using the Template tab is that you are not including the information on a daily report while creating the template. You can also name the template while creating it rather than the generic auto naming convention used in the other method.

To create or edit a template:

- Go to the Templates tab under Daily Reports. You will see a list of all templates currently stored for this project.
- Click on "Add New". Templates can be edited on this tab in a similar manner as described here for creating a new template. Simply select the template's edit icon from the list of existing templates rather than "Add New" and then follow the instructions described here.

The screenshot shows the "Templates" tab in the software interface. It displays project information at the top: "Project Number: KS CFL TEST 10(1)", "Project Name: CFL Construction test 9/30/10", "Contract Number: DTFH70-10-C-CFLTEST", and "States: KS". Below this is a table of templates with columns for "Actions", "Display Name", "Description", "Location", and "Created By". There are two templates listed: "Pilot Car & Flagger setup for OLR" and "Silt Fence Installation". A red arrow points to the "Add New" button at the bottom left of the table.

Actions	Display Name	Description	Location	Created By
	Pilot Car & Flagger setup for OLR	Close one lane & run pilot car with flaggers on each end. 15min max delays.	Lane Closed Sta. to	Lorell K. Duteil
	Silt Fence Installation	Dig trench by hand & with ditch witch. Install posts & silt fence with wire backing. Tamp & backfill fabric in trench.		Lorell K. Duteil

An input screen will open.

- Fill in each blank as needed with the information you want to show for the template.

The display name is the name that shows on the drop down list when you select a template from the daily report. The only two items required are the display name and at least 1 labor entry. Do not use the "Save Current Description" unless you will be making several templates with the similar descriptions.

Work Activity

Display Name*:

Location:

Description:

Save Current Description

Work Activity Pay Items: clear

[select] ▼

Labor:	Classification*	Number	Production Time (hrs)
	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
	<input type="button" value="Add Labor"/>		

Labor Total: \$0.00

Equipment:

Equipment Total: \$0.00

Here is a completed template ready to be saved. Note that no date specific information is included.

- Click "Save & Close".

Work Activity

Display Name*:

Location:

Description:
 Save Current Description

Work Activity Pay Items:

Labor:

Classification*	Number	Production Time (hrs)	
Blade Operator Joe Carson	<input type="text" value="1"/>	<input type="text" value="0"/>	Delete
Roller Operator Maria Wilson	<input type="text" value="1"/>	<input type="text" value="0"/>	Delete
General Laborer	<input type="text" value="1"/>	<input type="text" value="0"/>	Delete

Labor Total: \$0.00

Equipment:

Type*	Number	Production Time (hrs)	Idle Time (hrs)	Idle Code	
Motor Blade Deere 345	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>		Delete
Smooth steel drum Roller Cat SX-54 22ton	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>		

Equipment Total: \$0.00

The template is now created and appears in the master list of project templates.

Project Info | Design | Acquisition | **Construction** | Account | Team | Event Log

Core | Contract Status | Progress Payment | SubContractors | Labor/Equipment | **Daily Reports** | Daily Diary | Claims | Contract Modifications

Existing Daily Reports | **Templates**

Project Number: KS CFL TEST 10(1) Project Name: CFL Construction test 9/30/10 Contract Number: DTFH70-10-C-CFLTEST States: KS

Actions	Display Name	Description	Location	Created By
	Grade subbase to blue tops	Final grade aggregate subbase course to blue top elevation. Laborer clears & resets blue tops as needed, motor blade is grading, and roller compacts a section when complete.	Sta. to Sta.	Lorell K. Duteil
	Pilot Car & Flagger setup for OLR	Close one lane & run pilot car with flaggers on each end. 15min max delays.	Lane Closed Sta. to	Lorell K. Duteil
	Silt Fence Installation	Dig trench by hand & with ditch witch. Install posts & silt fence with wire backing. Tamp & backfill fabric in trench.		Lorell K. Duteil

The template will also immediately be available to copy into a daily report.

Work Activity #2

Work Activity Code*:

Description*:

- Silt Fence Installation - created by Lorell K. Duteil
- Grade subbase to blue tops - created by Lorell K. Duteil
- Pilot Car & Flagger setup for OLR - created by Lorell K. Duteil