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 <u>not</u> 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.
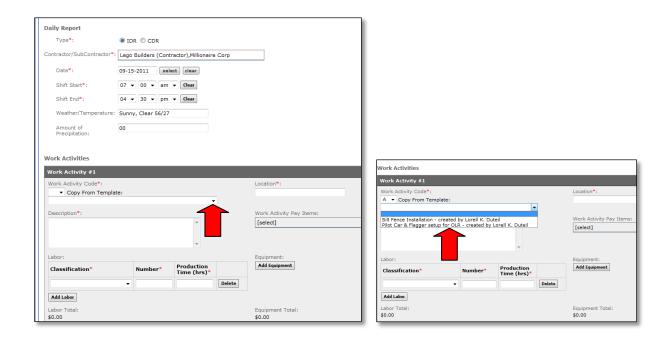
I.1.1 Using an Existing Template on a Daily Reports

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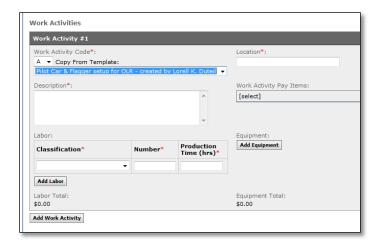
- Click on the drop down arrow under "Copy from Template".

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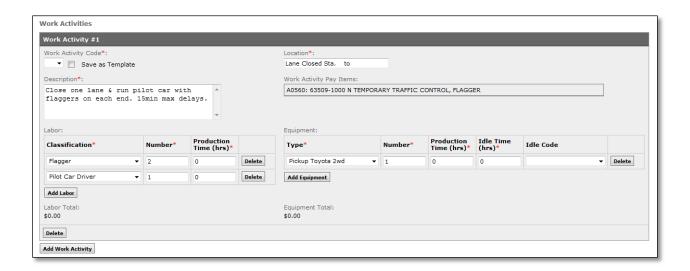
- Select a template from the drop down list to use on this work activity.

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.
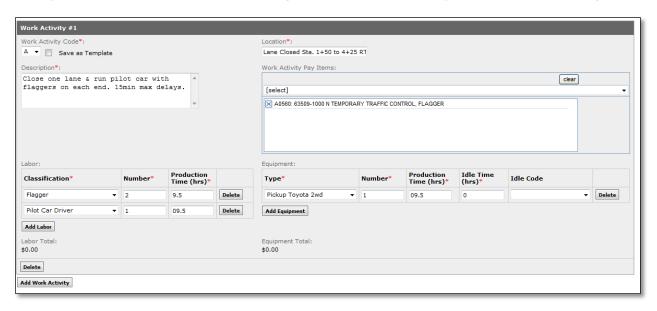

The template chosen in this example includes the activity description, pay item, typical labor and equipment with quantities, and the desired formatting for the location. Only information include in the template will be populated. If that information was not included, it will be blank when the template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

- 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.
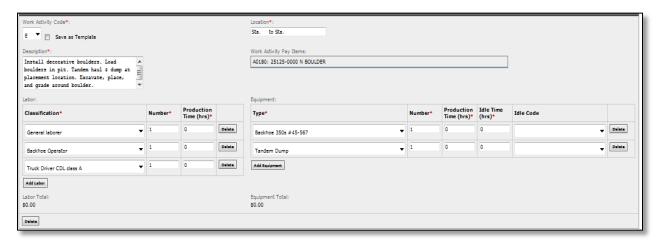

Additional work activities can be added normally. For each activity you then have the option to manually fill-in the information or use a template. A template can be used in multiple activities for the same report if needed (ex. There are 2 lanes closures on the project). Finish and submit the daily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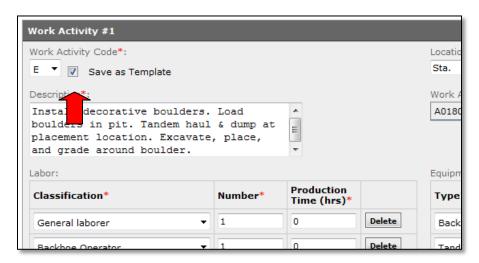
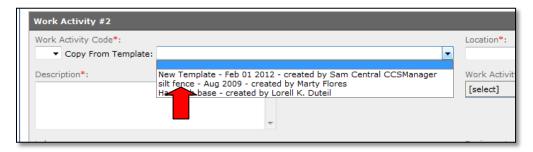To create a template, fill in a work activity as much or little as needed.

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.

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.
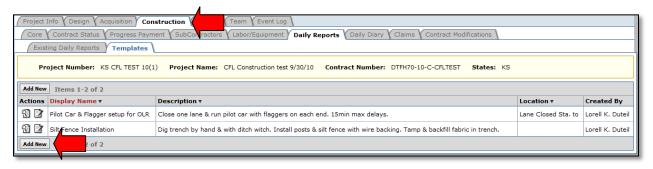

I.1.3 Create a New Template or Edit an Existing Template using the Template Tab

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.
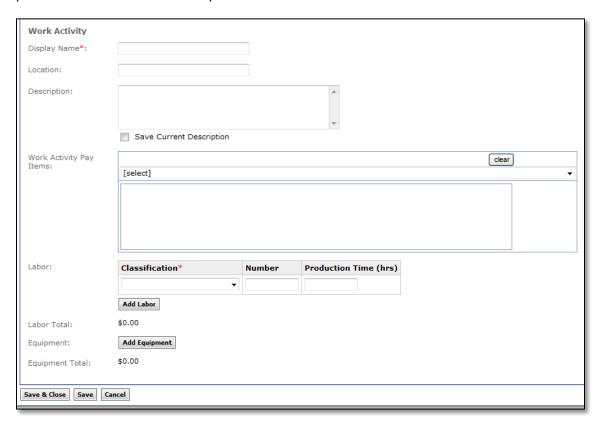
To create or edit a template:

- 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.
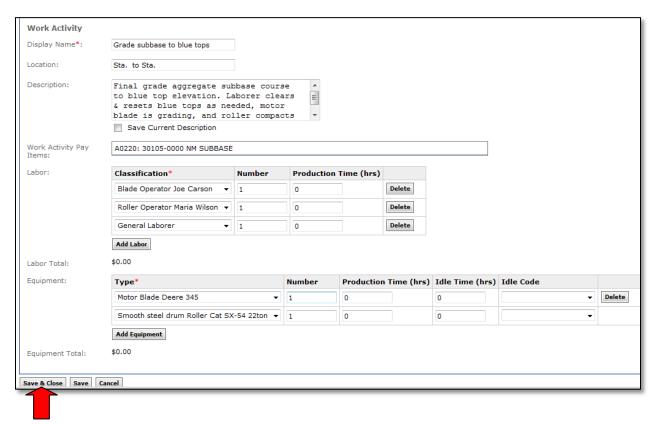
 An input screen will open.

- 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.

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

- Click "Save & Close".

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

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