**Daily Field Reports and Time Entry (PO’s)**

**Effective January 11, 2021, Daily Field Reports and Time Entry must be submitted using Sage Service Operations (SSO).**

**To create purchase orders:**

1. After logging into SSO and clicking on the “Jobs” link, choose the project you want to create the PO for (for our example below, we will be using 1043).

 

1. In the Job you clicked on, you will see a second set of options beside the main ones on the left. Click “Field Reports” and then “Generate Field Report” will open – click that:



Note: When you click on “Field Reports” all previous field reports for that project are listed.

1. The following screen will then come up:



**Date**: Change to today’s date.
**Phase**: Choose “None”
**Weather**: Provide description of the weather
**Temperature**: Enter in temperature (you can put a range)
**In the User Def1/2 fields**: you can put anything you want

Then click: “Generate Field Report”

1. You will then get the screen as shown on the next page. Here are the instructions for each of the items listed:
	* **Overview** – you can click on this to see the Overview and then choose “Update” if you want to update what you put on the first screen.
	* **Assignments** – please do not use this tab!
	* **Notes** – you can enter any notes you want to put on for the project.
	* **Labor** – this will be covered off separately in section 5.
	* **Subcontractors** – when you click this tab, you will have to click “Add Subcontractors” to enter information on each Subcontractor that was onsite.
	* **Incidents** – click this link to add an incident reports (full incident reports shodl still be attached to this report).
	* **Meetings** – enter all meetings that occurred onsite during the day.
	* **Reports** – when you have completed everything else, you can click this link to generate the field report.
	* **Attachments** – please add any relevant attachments here including pictures.
2. Employee Time Entry

For entering employee time into the system, please click on “Labor” and “Add Labor” to get the following screen:



Please fill out the cells as follows:

**Employee** - choose the employee from the drop down list.
**Cost Code** – for employee time, the code is always going to be 10000
**Pay Type** – choose regular or overtime – if OT hours you must do a separate “Add Labor”
**Notes** – Add any notes you want to provide
**Absence reason** – Enter a reason from the drop down box if the employee was absent for any reason.
**Required Training** – leave blank

Once complete, press “Save Labor”

If you notice an error, you can change the information by clicking the down arrow and choosing “Update”

