Working with Daily Diaries

PROJMGR, BOOKPR

Contents

Managing Daily Diaries

Background

A daily diary is a collection of all the authorized Daily Work Reports (DWRs) submitted on one day by all inspectors working on a contract. The project manager usually submits one daily diary per day per contract. In the daily diary, the project manager authorizes the DWRs and records the time charge information for the day. The system does not allow more than one diary to be created per day per contract, and a diary may not be created for a future date. Diaries can be created for days when no DWRs are collected.
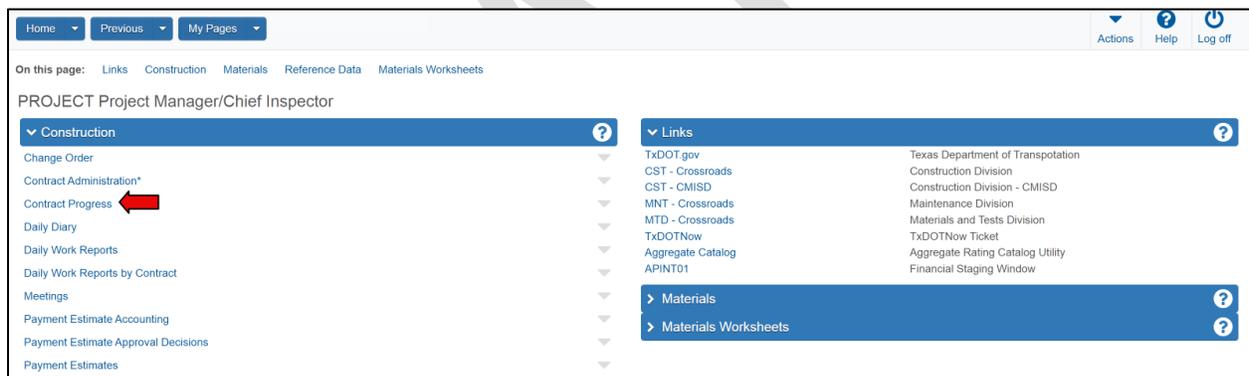
Adding a Daily Diary

Navigation: Construction > Contract Progress

1. From the **Construction** component, select the **Contract Progress** link.

2. Search for and select the **Contract ID**.

3. Click the **Diaries** tab.

4. Click **Add**.

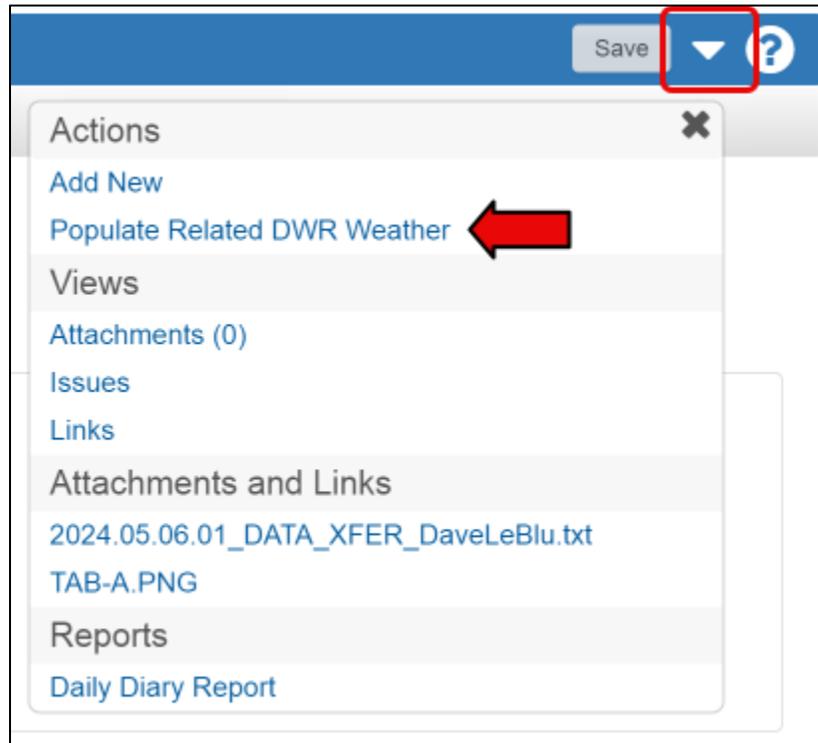5. In the **Diary Date** field, enter the date for the diary. Current date will populate automatically.

6. In the **Author** field, the user ID of the logged in user will populate automatically.

7. In the **Weather** field, click the drop-down arrow and select the weather condition for the diary date. Entering weather information is optional.

   - **Note:** If you want the weather information related from the DWR, skip the weather fields. After saving the record, click the component **Actions** menu and select the **Populate Related DWR Weather** action.

8. In the **Low Temperature** field, enter the low temperature recorded for the diary date.
9. In the **High Temperature** field, enter the high temperature recorded for the diary date.
10. Click the **Save** button.
11. In the **Remarks** section, in the Remarks Type field, click the drop-down arrow and select the remark type.

12. In the **Remark** field, enter a remark for the diary date.

13. Click the **Save** button.

- **Note:** Weather, Temperature and Remark fields are not necessary to create a diary entry and should not contradict Daily Work Report information recorded.

Viewing DWRs on a Daily Diary

Navigation: Construction > Daily Diary > Select Diary Date Link

1. From the Contract Daily Diary Summary, click the **DWRs** tab.

2. Click the **Sequence** link for the Daily Work Report you wish to view.
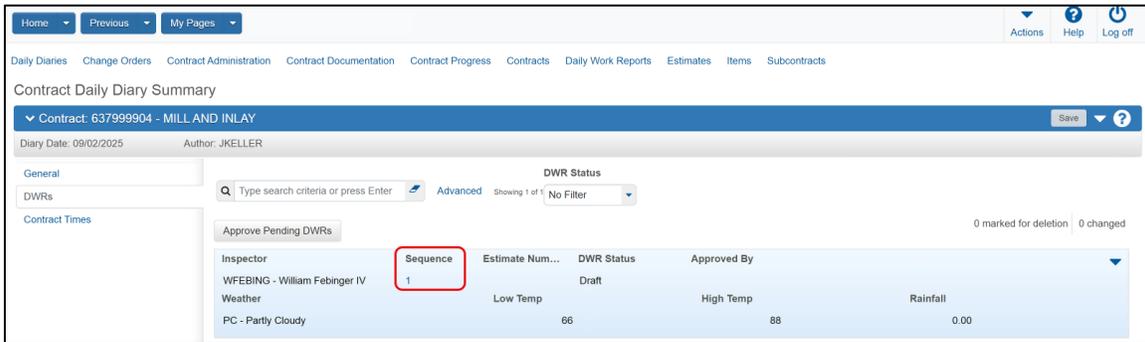
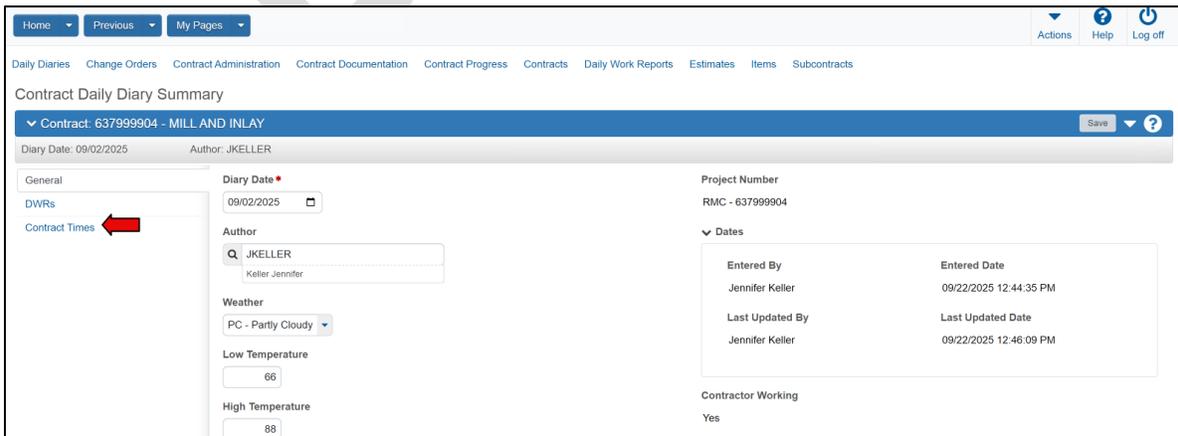
- **Note:** To view the DWR Report, open the row **Actions** menu and select DWR Report.
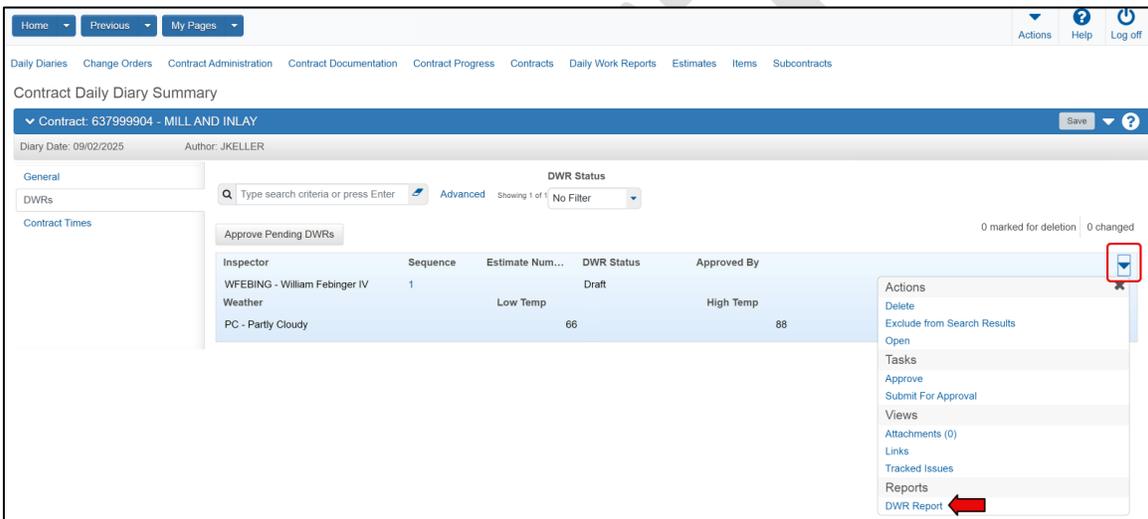
Recording Time Information on a Daily Diary

Navigation: Construction > Daily Diary > Select Diary Date Link

1. From the Contract Daily Diary Summary, Click the **Contract Times** tab.

2. Expand the **Time ID** for the Diary Date needing to make a record.

3. For the contract time record, click the **Time Charged** drop-down, select the 0 or 1 value.

- **Note:** If 0 time charged value is selected for the **Time Charged** field, the required **Credit Reason** field will appear to select the impeding progress to work reason.

4. Click the **Save** button.

Approving DWRs on a Daily Diary

Navigation: Construction > Daily Diary > Select Diary Date Link

Note: You can approve a single DWR, or all the DWRs in a diary with a status of *Pending Approval*.

To approve all pending DWRs in a Daily Diary:

1. Click the **DWRs** tab.

2. Click the **Approve Pending DWRs** button above the list of DWRs.

3. Click the **Save** button.

To approve individual DWRs in a Daily Diary:

1. Click the **DWRs** tab.

2. Click the row **Actions** menu for the DWR to approve.
3. Click the **Approve** task.

Rejecting DWRs on a Daily Diary

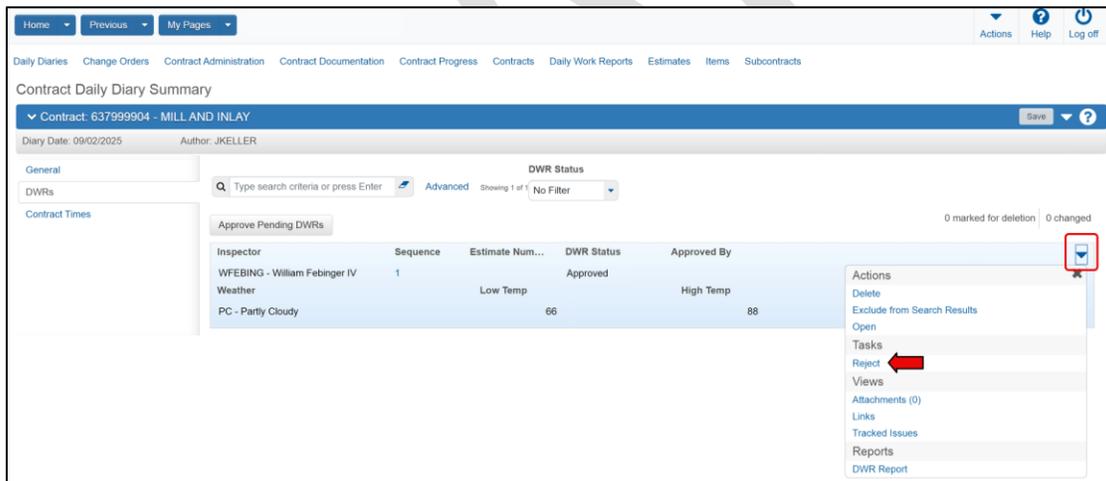**Navigation:** Construction > Daily Diary > Select Diary Date Link

Note: DWR can be rejected if it has previously been approved.

1. Click the **DWRs** tab.
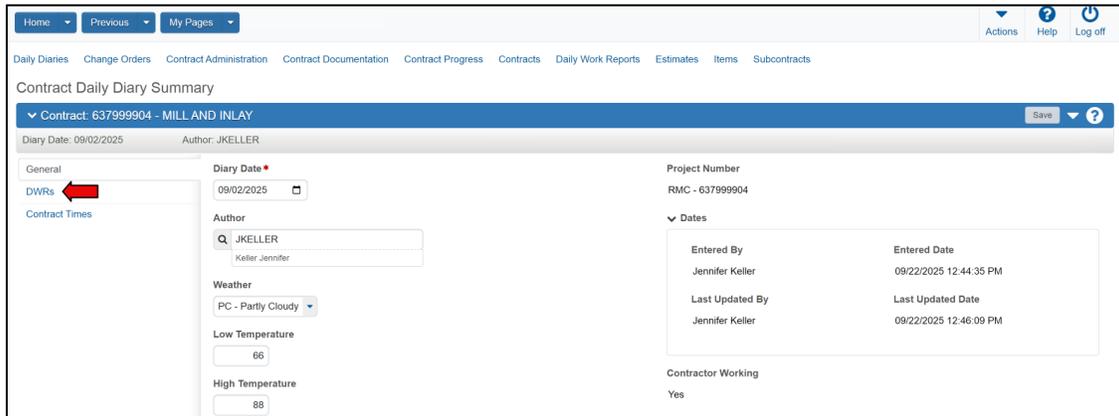
2. Click the row **Actions** menu for the DWR to reject.
3. Click the **Reject** task.

4. Verify the **DWR Status** as Rejected.
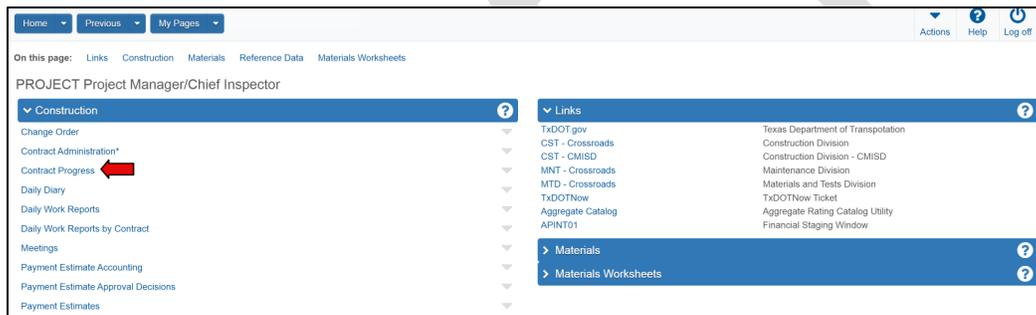
Managing Diary Adjustments

Background

The Diary Adjustments tab on the Contract Progress Summary enables you to make changes to contract times in a contract diary after the estimate has been created and the diary locked.

Managing Diary Adjustments

Diary Adjustments can only be created after an estimate has been processed.

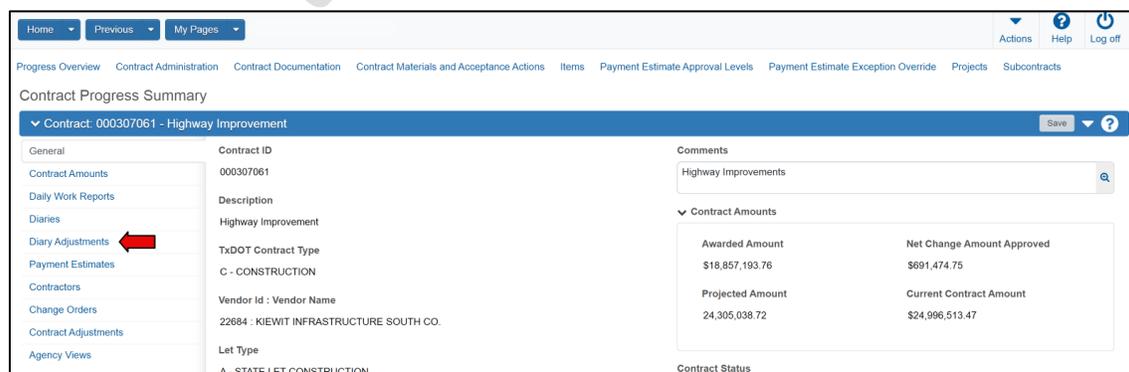**Navigation:** Construction > Contract Progress

1. From the **Construction** component, click the **Contract Progress** link.

2. Search for and select the **Contract ID**.

3. Click the **Diary Adjustments** tab.

4. Click the **Select Diary Contract Time Charges** button.

5. Search for and select the time charge(s) to adjust.
6. Click the **Add to Diary Adjustments** button.

7. In the **New Charge** field, click the drop-down arrow and select the new charge for contract time.

8. In the **Credit Reason** field, click the drop-down arrow and select the reason.

9. In the **Comments** field, enter additional information about the diary adjustment.

10. Click the **Save** button.