



# Documentation

## Foreman's Development Series

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When?

Where?

Why?

What?

Who?

Documentation  
Objectives

How?

# Group Activity #1

## Class Shout Out:

- Name some of the items or events that you think should be documented on a typical construction project.
  - Both daily and over the course of the whole job



# What is Documentation?

## **DOCUMENTATION:**

The process of providing evidence in the form of recorded details.

It can provide confirmation of an event or statement through supporting documents.

“Documents create a paper reality we call proof.”

Mason Cooley (English Professor)

# Why Do We Document?

DILBERT By Scott Adams



# Forms of Documentation



## Written

- Daily Logs, Journals, Forms, E-Mail



## Audio

- Tape Recorder, Voice Mail



## Visual

- Pictures, Video, Drawings



## Physical

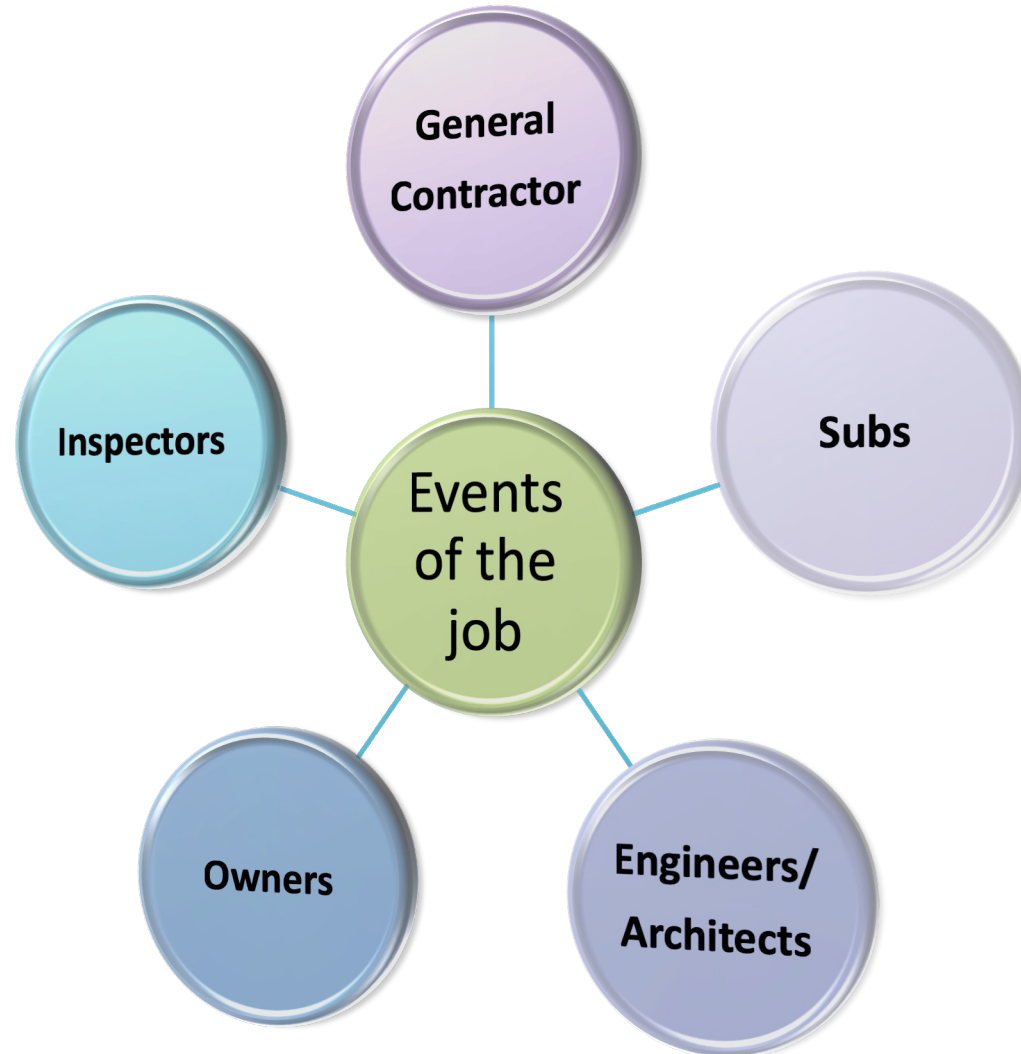
- Models, Materials Samples, Test Samples



## Digital

- Cloud connected Construction Management Software

# Who Documents?



# Documentation Scenario

- **Listen carefully to the description of the following “typical” workday . . .**





# Group Activity #2

**Examples of important items might be:**

- 1) The cut hand (#1 Priority)
- 2) Men late and missing
- 3) The 3<sup>rd</sup> floor stairway
- 4) Housekeeping pads
- 5) Damaged transformer
- 6) Time Cards?



# Documents We Work With

## Daily

- Daily Job Reports
- Pre-Task Plans
- Time Sheets
- Prints
- As-Builts
- Specifications

## Weekly

- Safety Meetings
- Subcontractor Meetings
- Schedules – Look Ahead

## As Necessary

- Tool Inventories
- Change Orders
- RFI'S
- Commissioning Documents
- Submittals
- Deliveries

# How Should We Document?

- Documents should be:
  - Factual
  - Objective
  - Detailed
- Care should be taken to ensure the documentation is not perceived as detrimental to the Contractor or to yourself.





When?

Where?

What?

Documentation  
Objectives

Who  
Why  
How




# Activity #3

## Things to keep in Mind:

**ALL** of the details and events contained in the Scenario are items that need to be documented in some form or fashion.

**- The key to this activity is how the items are documented.**

- Remember to keep a positive attitude and to be truthful.
  - Write clearly; print if necessary.
  - Include all information that is relevant to your entries:
    - Such as time of day, people's names, manufacturer's info, etc.
- 

## Completed Foreman's Daily Log

Project: <b>New Building</b>	Date: <b>03/23/19</b>
Job Number: <b>0001</b>	Submitted by: <b>Joe Foreman</b>

### When filling out your Daily Log:

- Remember to include **ALL** of the items that you think affect your work.
- **Even the most insignificant detail may have lasting implications on your job.**
- **The way that you write your Daily Report is important.**
  - Keep a positive attitude / half-full glass
- **As the Foreman you must represent the Contractor's best interests.**
  - Keep any information that is detrimental to your Contractor's interest out of the Daily Report.
- **Remember to write clearly, and honestly.**
- **When writing your Daily Reports, include information that is easily recognizable to you.**

# Job Journal

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Monday  
3/20 Joe + Sean - (Kitchen all day 8 hrs. each)  
Mike Garcia - (7 hrs. on temp lts. + power)  
1 hr. on rough in.  
Mike + Harrison - Underground at entrance canopy + Mike doing Foremans duty.  
Gillie - Branch circuit rough at back of house  
Pat + Ray - Run 2" Feeders in casino area.  
Johnny, Melvin, Leonard - Pull Feeders wire for Parsons Elect.  
Chris Namoki + Tina + Chris Romero - sick  
2-lifts showed up at 7:00 AM + we sent one back because it had the small wheels. The second one showed up at 2:30 PM.  
Scott worked 1½ hrs. with Parsons

Tuesday  
3/21 Joe + Sean<sup>+ Chris Romero</sup> - Worked 8 hrs. ea. in kitchen  
Mike<sup>Garcia</sup> + Harrison - Worked 2 hrs. ea. on temp lts. + power + 6 hrs. on branch circuit rough casino ceiling.  
Gillie - branch circuit rough  
Pat + Ray - Run 2" Feeders in casino.  
Johnny, Melvin, Leonard - Pull Feeder wire for Parsons Elect.  
Chris Namoki - Installed gutter above kit. panel  
Gary - branch circuit rough back of house.  
Scott - 7 hrs. on prints + 1 hr. for Parsons  
Tina - is having therapy all week + won't be in.  
Cal From Parsons called with answers to some your questions + received 7 page Fax of changes from Parsons.  
Rained + Snowed + windy all day.

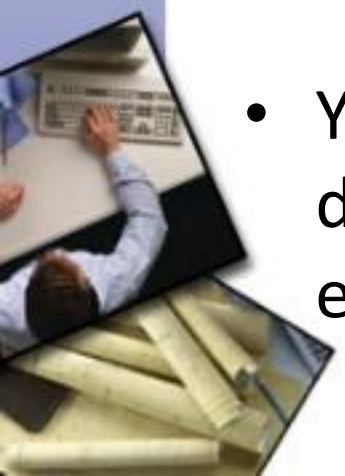
RECO

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# When Should We Document?

## When do you find the time to Document?

- Ideally you should be constantly documenting the issues and events of the day.
  - Ideally you should document the issues and events of the day as they happen when everything is fresh in your mind.
  - You should make notes and do the formal documentation (Time Sheets, Daily Logs, Pre-tasks etc.) before or after working hours.
- 





# Digital Documentation & “No Paper” Jobs

There is now an explosion of Digital Documentation software available to the Construction Industry with more popping up every day.

- Any internet connected devices can have access to all project documents: contracts, drawings, submittals, RFIs and schedules and more.
  - Storage and network can be “Cloud” based.

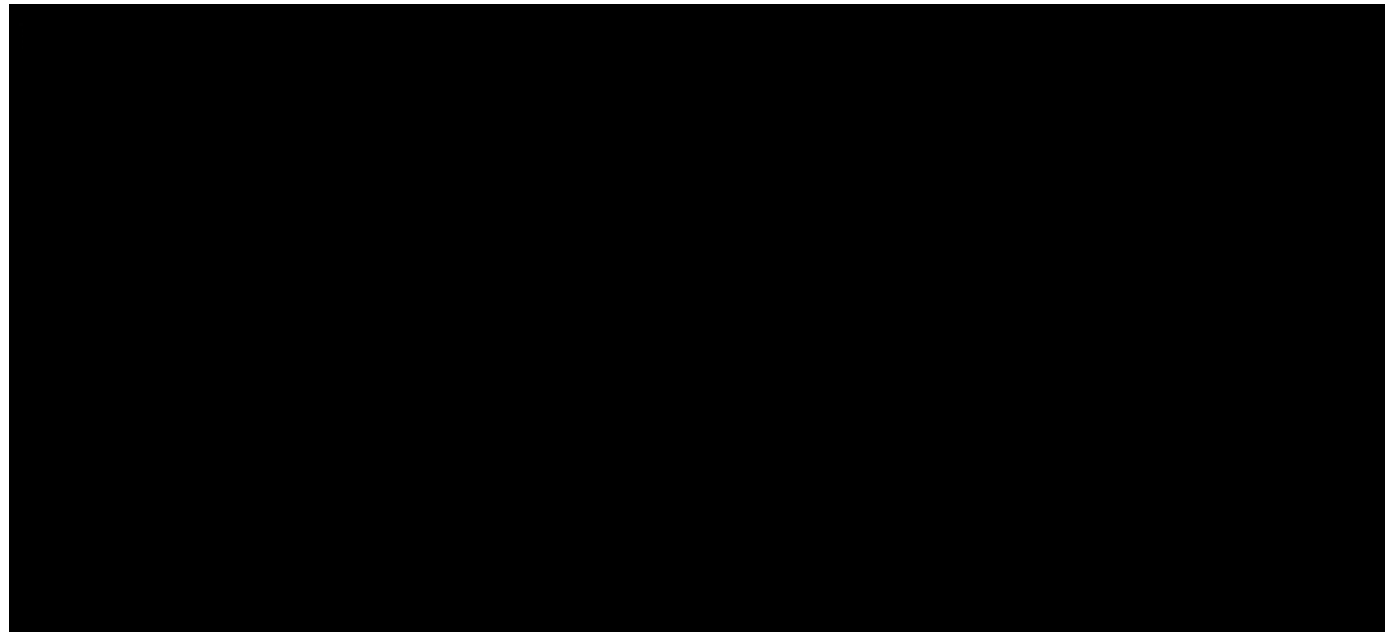
Check out software like:

- ProCore, Aconex, Buildertrend, Bluebeam, BIM360 by Autodesk



# BIM 360 Coordinate

BIM 360 is a cloud-based BIM management software that connects your entire project team – Designers, Office Staff and Project Management as well as Journeymen and Foremen in the field via their mobile devices.



# PlanGrid and Bluebeam Revu

- It allows field workers to store, view, and communicate with construction blueprints.
- PlanGrid can replace paper blueprints






# Construction Apps for the Field

- This “Cloud” based software and storage can be used across a variety of mobile devices.
- Many are SaaS – “Service as a Subscription”. You don’t buy the software - just pay a monthly fee and use their cloud based software on the internet.

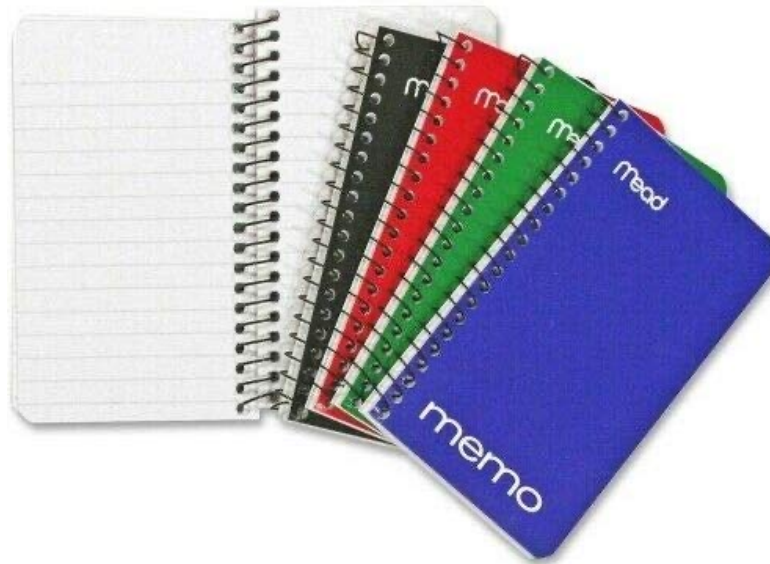
**Raken** is a web app that self-performing contractors use to get real-time performance data on their projects.

- This allows crews to immediately know what is impacting productivity and increase production
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# Brain Book?

**When things get really crazy on the job (and they will):**

- Always keep a pen and notebook with you at all times during the day.
  - So you can write down the things you need to take care off without trying to keep them in your head!



- A smart phone, voice recorder or some sort of iPad or tablet will also work great here.

# Time Card

## SPARKS AND ARCS ELECTRIC

CLASS	Time sheet week of <input type="text"/> to <input type="text"/>													
			Truck # <input type="text"/>		Mileage <input type="text"/>									
	Name	Job #		Mon	Tue	Wed	Thur	Fri	Sat	Sun	Totals			
			RG								0.0			
			OT/DT											
			code											
			RG											
			OT/DT											
			code											
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ELECTRICAL

03	Site Superintendent
04	Testing
05	Commissioning
07	Temporary Power
08	warranty
09	demolition

ELECTRICAL

10	Underground
11	Raceway / misc
12	Wire
13	Fixture
14	Gear
15	Close out

# Activity #4

Using the blank time card and the  
scenario provided,  
Fill out the time card.

(note: cost codes located at the bottom of time card),



# Completed Timecard

Class	Time sheet week of: <input type="text" value="1/16/2018"/> to <input type="text" value="1/22/2018"/>										
	Truck# <input type="text"/> Mileage: <input type="text"/>										
	Name	Job#		Mon	Tue	Wed	Thur	Fri	Sat	Sun	Totals
FMAN	T. Herman	25-09	RG	8.0	8.0	8.0	8.0	8.0			40.0
			OT/DT						8.0		8.0
			Code	03	03	03	03	03	03		
JW	I.M. Noone	25-09	RG	8.0	8.0	8.0	8.0	8.0			40.0
			OT/DT						8.0		8.0
			Code	14	14	14	14	14	14		
JW	D. Best	25-09	RG	8.0	8.0	8.0	8.0	8.0			40.0
			OT/DT						8.0		8.0
			Code	14	14	14	14	14	14		
JW	G. Zerbuckin	25-09	RG	0.0	8.0	8.0	8.0	8.0			32.0
			OT/DT								
			Code		11	11	11	11			
APP	D. Ontno	25-09	RG	8.0	8.0	8.0	7.5	8.0			39.5
			OT/DT						8.0		8.0
			Code	14	11	11	11	11	14		
IJ	J. Youngblood	25-09	RG	8.0	8.0	8.0	8.0	8.0			40.0
			OT/DT								
			Code	12	12	12	12	12			
IJ	V. Greene	25-09	RG	8.0	8.0	8.0	8.0	8.0			40.0
			OT/DT								
			Code	12	12	12	12	12			



# Transmittal

## LETTER OF TRANSMITTAL

**Boondock Electric, Inc**  
**PO BOX 11592**  
**ALBUQUERQUE, NM 87192**  
**(505) 884-0155**

TO: **Really Tough General Contracting, Inc.**  
**P.O. Box 222**  
**Albuquerque, NM 87125**  
**(505) 345-8000**

DATE:	10/16/09	JOB NO:	1210
ATTENTION:	Matt Anderson		
REF:	UNM Children's Hospital		
	Boondock Project #1308		

WE ARE SENDING YOU:  Attached  Under separate cover via \_\_\_\_\_ the following items:

Shop Drawings     Prints     Plans     Specifications  
 Copy of Letter     Change Order     As Builts     Submittals  
 Other \_\_\_\_\_

QTY	DATE	NO.	DESCRIPTION
9	10/16/2009		3rd floor NBICU Fire alarm shop drawings for Fire Marshall approval
9	10/13/2009		3rd floor NBICU Fire alarm device submittals
1	10/13/2009		Pallet Fire Alarm Spare Parts

THESE ARE TRANSMITTED as checked below:

- For Approval     Approved as submitted     Resubmit copies for approval  
 For your use     Approved as noted     Submit \_\_\_\_\_ copies for distribution  
 As Requested     Returned for corrections     Return \_\_\_\_\_ approved copies  
 For review and comment     \_\_\_\_\_  
 FOR BIDS DUE \_\_\_\_\_, 20 \_\_\_\_     PRINTS RETURNED AFTER LOAN TO US

REMARKS:

Jed Clampet, Field Superintendent

SIGNED:

Really Tough Const. Representative

# Field Authorization

- A document that authorizes a verbal change to the plans and/or specs.
- This change in scope may or may not involve cost.
- Every Contractor handles this differently. You need to follow the guidelines of your Contractor.

## Field Order / Field Authorization

### Definition

Written instructions for making a minor change in a contract not involving an adjustment to the contract amount or any change in its completion time.

Field Order # \_\_\_\_\_

Project: \_\_\_\_\_ Location: \_\_\_\_\_

Description of Change: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Justification of Change: \_\_\_\_\_  
\_\_\_\_\_

### SIGNATURES:

Contractor: \_\_\_\_\_ Date: \_\_\_\_\_

Designer / Owner: \_\_\_\_\_ Date: \_\_\_\_\_

NOTE: if the Work described above constitutes a change, a Change Order that will include the scope of the change in the Work and any actual adjustments of the Contract Sum and the Contract Time will supersede this Field Order. Field Orders shall only be used for Work currently under contract.

# Organization


- You must have some system of organization!
  - Job Box
  - 3 Ring Binders
  - Filing Cabinet
  - Computer
- Size and type of project determines filing system.



# Saving Documentation



## What happens to your construction documentation at the end of the job?

- Most likely the Contractor will have procedures in place concerning how all construction documents are saved and for how long.
  - Personal documents can be saved at your own discretion. (Personal journals/notebooks)
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# Summary

- **Generally... everything on the job should be documented.**
- Documentation should be objective and factual.
- Accuracy is top priority.
- Documentation needs to be organized and done in a timely manner.

