PlanGrid: Advanced Field Workflows

Jackson Sensat
Implementation Specialist
Applied Software Technology, Inc.
About the speaker

Jackson Sensat

- Texas A&M University
  - BS in Construction Science
- Experience with General & Subcontractor
- Past Project Experience
  - Marriott Cesar Chavez Hotel
  - CyrusOne Datacenter
  - Molecular Templates Cleanroom
  - Austin Baptist Church Expansion
The Field
The Field Experience

• Emphasis on efficiency and installing work on schedule, within budget, and at the specified level of quality
• Where the money is made
• Labor is your biggest risk
• No two days on the construction jobsite are the same
• Several different companies coexisting in the same environment
# What Causes Low Productivity in the Field?

## Trades Not Being on Same Page
- Lack of single source of truth
- Insufficient planning
- Results in rework

## Rework
- Results in unforeseen costs
- Delays schedule
- Causes low morale among field teams

## Paper Reports
- Paper reporting and checklists waste time in both office and field
- Take time away from the important tasks

## Lack of Procedure and Standards
- Procedure and standardization lower risk
- Improper procedure and standardization can result in a high amount of safety infractions and even incidents
What Makes a Job Successful?

• Finishing ahead of schedule due to a well executed plan
• Finishing below budget through efficiency in the field
• Great safety record through well executed safety plan
• High quality through standardization and well executed quality plan
How PlanGrid Helps the Field

PROVIDES SINGLE SOURCE OF TRUTH
Virtually eliminates risk of rework by ensuring field team is working off of the most current documentation. Universal markups on drawings champions standardization and transparency.

ELIMINATES PAPER WORKFLOWS
Digitizes drawings, timecards, safety checklists, quality checklists, RFIs, and submittals. Eliminates need to scan and file away paper documentation.

MOBILE APP IS EASY TO USE
PlanGrid’s intuitive user interface is designed with the field in mind. Using PlanGrid, field personnel can perform virtually any field workflow from directly on their phone or tablet.

GIVES ABILITY TO PERFORM PROJECT AND FIELD MANAGEMENT WORKFLOWS DIRECTLY FROM FIELD
PlanGrid allows superintendents, foreman, and project management to easily create RFIs, manage issues, and execute checklists.
FIELD WORKFLOW - DAILY PROGRESS REPORT

1. GRAB PAPER PROGRESS REPORT TEMPLATE FROM FIELD OFFICE
2. HIGHLIGHT DRAWING AS DAY GOES ON TO TRACK WORK INSTALLED THAT DAY
3. TAKE PICTURES OF WORK COMPLETED
4. FILL OUT PAPER REPORT AND ATTACH HIGHLIGHTED DRAWING TO REPORT
5. PLACE IN COMPLETED BIN IN JOBSITE OFFICE
6. PROJECT MANAGEMENT STAFF SCANS IN REPORT, FILES, AND ATTACHES PHOTOS
FIELD WORKFLOW - PRE-POUR CHECKLIST

1. GRAB PAPER PRE-POUR CHECKLIST FROM FIELD OFFICE
2. HIGHLIGHT POINTS ON PENETRATION DRAWING TO CONFIRM THEY ARE THERE AND IN CORRECT SPOT
3. TAKE PICTURES OF SLEEVES, DRAINS, AND BLOCKOUTS
4. FILL OUT PAPER REPORT AND ATTACH MARKED UP DRAWING TO REPORT
5. PLACE IN COMPLETED BIN IN JOBSITE TRAILER
6. PROJECT MANAGEMENT STAFF SCANS IN REPORT, FILES, AND ATTACHES PHOTOS
FIELD WORKFLOW - ISSUES

- Walk in the field and mark issues on a piece of paper and take a picture.
- Put issues noted in the field on Excel document in company drive.
- Let responsible super or foreman know via phone call and/or email.
- Once task is completed and verified, close task in Excel sheet on company drive.
FIELD WORKFLOW - RFIs

1. Discover field issue that can't be solved without RFI
2. Log in notepad and take photos
3. Notify project management staff via phone/email
4. Project management fills out Excel RFI template, attaches photos, sends to reviewers

Notify project management staff via phone/email
Live Demo