TVET CERTIFICATE V IN MASONRY

MASONRY CONSTRUCTION SITE RECORDS

MASSR501

Make site records

Competence

Credits: 4

Learning hours: 40

Sector: Construction

Sub-sector: Masonry

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Purpose statement

This module describes the knowledge, skills and attitudes required for the mason supervisor to keep necessary records in his work.

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Total Number of Pages: 48

Learning unit 1 Identify site documents

LO 1.1 –Differentiate sites documents

- *Content/Topic1: Introduction to the site records*

Records are generated when written instructions are followed. In other words, after data, information, or results are recorded onto a form, label, etc, then it becomes a record.

- ✓ A record is a collection of fields, possibly of different data types, typically in fixed number and sequence.
- ✓ Records are recorded information that is a vital information or knowledge resource for your organization.
- ✓ Records are often created and kept because they are needed in order to conduct business, as evidence of past business, because they are required to meet legal obligations or because the community expects that they will be kept.
- ✓ Can be in any form such as: paper, any digital formats, or in other forms like Photographs, video footage, audio recording or microfilm.

Two categories of site records:

All records that are created during the administration of a construction project can be placed in one of the following categories:

Permanent Records, records kept by the Headquarters and State Archives for future reference, and
Temporary Records, records kept by the Region for a limited period of time after which they are discarded by the Region.

a. Permanent Records consist of the following, Records provided by Headquarters:

- ✓ Contracts
- ✓ Change Orders
- ✓ Contract Estimate Payments

b. Examples of Temporary Final Records include:

- ✓ Item Quantity Tickets
- ✓ Project Engineer's Copy of Estimates
- ✓ Project Correspondence
- ✓ The original Project Personnel and Signature Listing
- ✓ Inspector's Record of Field Tests
- ✓ Concrete Pour Records
- ✓ Approval of Source of Materials
- ✓ Quantity Computation Sheets
- ✓ Surfacing Depth Check Records
- ✓ Contractor's Payroll

Importance of site records

The goal of maintaining site records is to provide the right information to the right person at the right time at the lowest possible cost. Records to be maintained at construction sites play important role in construction activities.

It is a document required to prove any construction activity has taken place at site during billing or any other claims. These records have all the data of various aspects of construction activities carried out at site

a. For providing evidence in case of disputes: Construction site records maybe used for your own protection in disputes
b. Keeping field records may be beneficial for your client
c. Site diary helps in refreshing our memory about activities at construction site
d. Record keeping in construction projects helps you get clearer in sight to what happened on site
e. To ensure continuity in administration
f. To ensure tax-payer's interest is protected at all times
g. For planning & scheduling organization activities
h. For historical value
i. To make available needed facts, figures, correspondence etc
j. Documentation of workforce performance
k. Provide evidence about past actions and decisions
l. For accountability and transparence purpose

- Content /Topic1: Site documents to be kept

A. Introduction

The documents used in construction projects can vary from project to project and according to the size of the project. The paperwork required to build a house is not going to be the same as for large commercial project. However, there are documents that are common to every legal construction project, no matter what kind. Site supervisors must complete the daily report or site diary on daily basis to record down what has been happened on each day during the Contractual systems, separate sets of records are typically kept by the two main parties on the construction site: the contractor and the supervisor.

The following are the various records that need to be maintained at construction site:

1. Drawings and Drawing Register

A Drawing Register is the controlled register of a list of drawings relating to a project and is used in the distribution of formal drawings to Architects, Engineers, Sub-contractors, Vendors, Fabricators, Government bodies and other parties in the form of a document identifying the information that is included in the drawings being delivered.

Changes to drawings often signify important changes to the contract and if these changes are not communicated quickly additional costs of millions could be acquired.

This Document enables the easy identification of the latest revision of each drawing and captures key drawing information such as the Drawing Number, the Drawing Revision, the Drawing Status, the Drawing Title, the Date Received, and the Originator of the Drawing, the Discipline, and the Type and is easy to maintain.

First and foremost, important records to be maintained on site are the working drawings approved by the clients and design engineer, based on which all the construction activities take place on site. There are different types of drawings required for construction; some of the basic required drawings are,

- Architectural drawing
- Structural drawing
- Plumbing & sanitary drawing
- Electrical drawing
- Finishing drawing etc…

2. Contract Agreement

Contract agreement documents including all sets of drawings, including amendments, a copy of approval of municipality, corporation or urban development authorities need to be maintained at construction sites still the completion of construction projects. This document provides permission and guidelines for all the activities carried out at the construction.

3. Time and progress charts

These charts help in tracking the construction activities from time to time and help in effective planning, scheduling and controlling the construction projects activities. These charts need to be approved from the concerned authorities.

4. Work order book

All the orders given by clients to the contractors need to be maintained with serial numbers, signatures and dates. These orders should be specific for works. This order should also have a compliance column.

5. Work diary (logbook)

A site diary is a document of first record; a site diary is where a competent site supervisor initially records any occurrences on site. Some items would then be further copied in secondary documents site diary are also a place for supervisors to record contact details and other items specifically related to a given project for quick referencing. It is essential that a site diary must be filled out daily and incidences occur.

The roles of work diary

1. A site diary is admissible in court in case of disputes as documentary evidence.
2. Work cover will request to see the site diary in accident investigation.
3. A site diary helps maintain and monitor hire equipment, it is crucial to record off-hire numbers to save further hire changes.
4. It can be used to records attendances to allow for invoicing and charge out rates for contractors
5. All lines not used must be crossed out so that daily records are not altered after an event or a work day has ended.
6. A site diary is also known as construction log, site journal, company log.

Works diary of a construction project should indicate contract agreement number, name of work, amount of contract, date of commencement of work, date of completion and extension time granted.

All the relevant details need be entered daily in the works diary. This serves an authentic record. Following details need to be entered in this diary with due care;

- ✓ Weather at site
- ✓ Important materials brought to site with their approximate quantity
- ✓ Type of transport working at site
- ✓ Types of tools and plants being used at site important items of works completed and passed on the particular date.
- ✓ Important items of works completed and passed on the particular date
- ✓ Visits of VIPs and their remarks if any.

- Content /Topic4: Discussion on RFI's, RFP's and RFQ's

Requests for information (RFI)

A Request for Information (RFI) is a standard business process whose purpose is to collect written information about the capabilities of various suppliers. Normally it follows a format that can be used for comparative purposes.

A Request for Information (RFI) (occasionally referred to as a Technical Query) is a formal question asked by one party to a contract on a construction project to the other party.... The nature of the information being requested. The date by which a response is required. Any supporting explanatory documents provided.

The goal of the Request for Information (RFI) is to act as a partnering tool to resolve these gaps, conflicts or subtle ambiguities during the bidding process or early in the construction process to eliminate the need for costly corrective measures.

To begin addressing some of the key challenges many companies face, let's start with the definitions of some basic concepts.

There are, of course some basic differences between RFI, RFP and RFQ. These differences and their impact on how to respond are an important starting place.

The fundamental principles described below, are widely accepted across the globe.

A. **RFI (Request for Information).** An RFI is typically used by procurement agencies and government bodies to identify what is on the market, what the current market conditions are, and who are the companies providing the required products and services. In other words, an RFI does not result in a contract, but helps the RFI issuer gather enough information to subsequently release an RFP.

Responding to an RFI is a great opportunity to influence the content, the methodologies, and the expectations of the coming RFP. Writing an RFI response is the most flexible way to demonstrate convincing values and unique capabilities of a company

B. **RFP (Request for Proposal).** An RFP on the other hand, can be a very comprehensive document and varies greatly in type, size, and content. The main purpose of an RFP is to obtain the best value for the issuer's business. By best value I mean the overall value of the products and services in exchange for the price paid.

The evaluation criteria of an RFP are heavily commercially driven.

Responding to an RFP is often resource intensive and extremely time-consuming.

RFPs are often prepared by a Procurement Department and not by the actual user of a product or service. This frequently results in these proposal requests being released at the last minute without allowing sufficient time to respond to them.

C. **RFQs (Request for Quote).** RFQ's have been used for tangible, 'off-the-shelf' products with preset specifications, widely available in the market place.

Today, RFQs are primarily used to simplify the bidding process and qualify vendors and suppliers by one criterion only: price.

Use of RFQ's has been gaining momentum in recent years. You can expect to see more RFQs in the near future.

- *Content /Topic5: Confirmation of verbal instructions (CVI)*

Confirmation of verbal instructions (CVI).

Construction contracts generally give the contract administrator the power to issue instructions to the contractor.

Broadly, instructions may be given:

- To vary the works.
- To postpone the works.
- To remedy workmanship, goods or materials which are not in accordance with the contract
- To sanction a variation made by the contractor.
- In relation to the expenditure of provisional sums.
- To open up work for inspection.
- To carry out tests.
- To exclude persons from the site.

The contractor must comply with the instructions within certain limitations. They have the right to 'reasonably object' to an instruction, and instructions can only be given as empowered by the contract.

Generally, instructions must be made formally, in writing, following a procedure set out in the contract. However, it is common for contracts to allow instructions to be given verbally, for example during a meeting, a site visit, or in an emergency situation. In this case, either the contract administrator should then confirm the instruction in writing to the contractor, or the contractor should confirm the instruction in writing to the contract administrator. If the receiving party does not dissent from the written confirmation, then the instruction will take effect.

This confirmation is referred to as a **confirmation of verbal instruction** (CVI) or an oral confirmation sheet. The contract should set out the exact procedures and the timescales for issuing such an instruction and dissenting from it.

Contracts can be vague about the nature of such confirmations, other than that they should be given in writing. Generally, they should include:

- Details of who it is issued by and who it issued to.
- The date.
- Details of the contract that permits the instruction.
- The number of the CVI.
- Details of the instruction.
- The signature of the party issuing the CVI.

It is sensible to send an instruction by recorded delivery, or to confirm its receipt in the minutes of subsequent meetings. On some projects, there may an automated system in place for capturing and managing CVI's and other instructions.

If a formal procedure is not followed for confirming verbal instruction, there can be disputes about:

- ✓ Work that has not been done which the contract administrator believes has been agreed.
- ✓ Work that the contractor has done but the client does not wish to pay for.
- ✓ Whether the instruction has been given to the right person, by the right person.
- ✓ Whether the instruction is allowed under the contract.
- ✓ Whether it has been properly valued and the value agreed.
- ✓ Whether the consequences on the program have been properly considered.
- ✓ Whether an extension of time should be awarded.

Some contracts may make it a condition precedent to works being carried out that instructions are issued in writing. However, this can put the contractor in a difficult position, and whether to proceed with the works or to wait for a written instruction may be a commercial rather than a legal decision.

It is important that any instruction given by the contract administrator, rather than, for example, by the client, otherwise the instruction may constitute a new contract.

- Content /Topic 6: Recording tests results and pictures at the site

Tests results record

This is an important record to be maintained at construction site as a proof for construction quality. This record consists of tests of various materials such as cement, sand, aggregates, water, steel reinforcement used at construction site, test records of concrete cubes, concrete cylinders' slump tests, etc.

These records are arranged as an index page with details of each material, page numbers of records etc. individual pages consist of each material, with their test dates, results etc.

All the tests carried out at site or in laboratory are recorded in the record book. Some of the tests carried out at construction sites for civil works are:

- ✓ Cube tests for concrete works for each location or structural members.
- ✓ Sieve analysis of coarse aggregates, impact or abrasion tests.
- ✓ Sieve analysis of coarse sand for concrete works, masonry sands for masonry works, plastering and pointing works etc.
- ✓ Tests for impurities of aggregate and sands
- ✓ Bulking of sand test for concrete and masonry works.
- ✓ Slump tests and compacting factor tests for concrete works.
- ✓ Crushing strength test, tolerance, water absorption test, efflorescence tests of bricks stones or masonry work
- ✓ Moisture contents of timber.
- ✓ Manufacturer tests reports provided by the vendors for admixtures, reinforcing steels etc…

Photographs

Keeping track of progress and issues out on the jobsite is an essential part of your project. And while many things can be put into words, sometimes the power of a picture can speak volumes. Everyone involved on the jobsite should be keeping track – and that means using photography to document. Taking photos doesn't just have to be about showing your clients the site progress – they are useful for far many more reasons than that.

Today we are taking a look at why you need to be documenting daily with your trusty camera, Smartphone and tablet photography or Aerial photography by the drones**,** while out on site.

The importance of construction photo documentation

a) **Photos can provide site updates for head office**

By tracking team progress on site, construction managers can make decisions based on photos, site reports, and first-hand accounts from staff on the ground. Documenting the progress via photos here is essential in the decision making process for those that can't attend.

b) **Dated pictures keep a visual timeline of site progress**

When site photos are taken regularly, and always time stamped, they provide a visual timeline of your construction works from the very beginning of the projects. Here you can easily see whether you are sticking to planned schedules for delivery, are ahead or behind, and identify when important features start and end.

This documented visual timeline is especially important to keep when dealing with client and contractor disputes about schedules!

c) **Photos can be produced as evidence to protect you from damage claims**

"This lift is all chipped! Your contractors have damaged it!"

"It wasn't my team; it must have been the plumbers"

"The plumbers said it was you!"

Avoid the he said/she said and guard yourself against fake claims. When photo-documenting the worksite before you start work, as well as during, and after, you can protect yourself from the sort of conversations like the above. You'll have proof of the condition of the site before, during, and after your contract should any situations regarding damage arise.

d) **A picture captures all the little details**

Let's say that you need to go back in six months' time to a jobsite to make some further alterations. With photos captured already of all the details, you can check them out beforehand to know exactly

what materials you will need and what you need to do before you even get onsite. This can save a lot of time and money – especially if it happens often!

e) **Well-taken site captures are brilliant for your marketing efforts**

The pictures that you take can be used on your website, glossy brochures, and even in daily snaps for your social media accounts. The world is now documenting it's every move online – and your business should be too!

Site photography tips

Use scale in your pictures

Whether it's with a measuring tape, your phone, or a hard hat, put an object in your picture that will show the image scale.

Make notes and annotations

If your picture needs explaining – then do so! Annotate your picture with arrows and free drawing if needed.

Use a flash

If you have a dark jobsite, then you will need to invest in a flash to ensure that the image quality in your picture captures everything that you need.

Keep your photos organized

You don't want to be sifting through every jobsite picture you've ever taken, just to find the right one. Arrange your photos in folders by project and date or milestone.

- *Content /Topic 7: Other Site documents to be filled*

Work program (planner)

A plan of action aimed at accomplishing a clear site activity, with details on what work is to be done, by whom, when, and what means or resources will be used.

Instruction books

This instruction book provides an ideal paper line for onsite instructions to minimize professional-client misunderstandings. It offers an ideal tracking mechanism for instructions that are recorded by the site foreman and signed and dated by the instructing party.

A site instruction is a formal instruction typically issued by the head or lead contractor with instructions and directives to other contractors or subcontractors. These instructions must be written and formalized because they fall outside the original project scope or plan - and hence require additional 'instruction'. Instruction types can also be customized for your specific project environment to include architect instructions, client instructions, site instructions, and more. You can also create a customized prefix and numbering scheme for each instruction type.

This tool provides team members on a construction project with the ability to capture and record all types of instructions (i.e., architect instruction, client instructions and site instructions for contractor)

Getting the format of your site instructions is important. Site instruction carries weight and importance, and can be important for legal and financial matters. In order to protect yourself against unfair claims and disputes, it's important to keep a thorough and standardized site instruction template which you can issue every time.

In your site instructions, you will want to cover some basic logistical information which serves as evidence and organizational indicators such as:

1. A form number for that particular site instruction
2. The date of the instruction
3. The type of instruction (contractor, subcontractor etc.

Outside of these obviously important details, your site instruction needs to contain the necessary detail for your records and so that the site instruction receiver can understand what is required of them. These additional details include:

a. A description of the instruction outside of contract scope
b. The reason for requesting works outside of the contract scope
c. Photos of the work area (defects etc.) Which are critical to providing proof

Later on down the line

d. Name the relevant subcontract or supplier being issued the site instruction
e. Label and document the fore casted resources required
f. Final checklist questions around whether or not an official site instruction is warranted and required
g. Engineer/foreman and senior project engineer sign off for the actual issuing of the instruction

Site Reports

Summary of hourly- and daily- constructions and events at a worksite on every workday, prepared for the offsite project administrators. An essential document in construction projects, it records the number of workers/ employees and work equipment at the construction site, exact time the work began and ended, job progress, whether accidents if any, etc. on no-work days it reports NO-WORK DAY and serves as an evidence in case of disputes.

Importance of site reports

- ✓ When the super intendant files reports, they tell the story of the project.

- ✓ They list the short comings and triumphs, acting as a historian for the project essentially.
- ✓ The construction daily report, while tedious, shows the transformation of the project from start to finish.
- ✓ Reporting in construction might seem like it is just for stakeholders since they are typically used to update them.
- ✓ The report was supposed to be a way to connect stakeholders who don't see the site every day and might not be familiar with the construction process to the project.
- ✓ The construction report helps everyone involved understand the performance, progress, and productivity on a project.
- ✓ They can see the cost estimate and compare it to actual.

Cement Register

This record is maintained with details of receipts, daily consumption and remaining bale of cement at site. This record also consists of manufacturing dates of cement, date of receipt and test reports of cement at site or manufacturers test reports.

Register for Approval of Samples

This record provides details of all samples for construction materials that has been approved or rejected by the clients. An approval from the client is necessary for the construction materials to be used before commencement of the project. All the samples approved by the clients need to be kept separately along with their tests reports with approvals of the clients and contractors till the completion of the work.

Records of Changes, Deviation Orders and Amendments

Many times during the construction projects, there are deviations or changes or amendments to the contract documents and work activities from time to time during construction project as required by the clients. These changes can be in a drawing, specifications or additional works.

A record of all such deviation orders and amendments to contract agreement together with their financial effect should be maintained along with approval or signatures from the clients. If these changes involve in any extension of time of the contract, these should also be recorded.

Measurement books

The measurement book is record for all the construction activities carried out and approved by the client. These records are important for a contractor to maintain and help during billing claims. Any extra work done is also recorded in this book with notes.

Labor attendance record and daily wages sheet

Generally, for labor contractor payments, daily or every shift attendance record is kept. Apart from the above, technical staff attendance, engineers, supervisors, and peon attendance register is kept.

Periodic bills record

Bills on work till date from the previous bill and work checked by engineer-in- charge put up for the payment

Purchase order

A purchase order, or PO, is an official document issued by a buyer committing to pay the seller for the sale of specific products or services to be delivered in the future.

The advantage to the buyer is the ability to place an order without immediate payment.

A purchase order is a source document used by the purchasing department to place an order with a vendor or supplier. In other words, this is the contract that a buyer drafts to purchase goods from a seller.

Goods receipt note

Goods receipt note is a document created by a buyer on receipt of merchandise and which describes each good and details the quantity of each received.

Record of goods received at the point of receipt. This record is used to confirm all goods have been received and often compared to a purchase order before payment is issued.

Approvals and inspection books

A building inspection is an inspection performed by a building inspector, a person who is employed by a city, township or county and is usually certified in one or more disciplines qualifying them to make professional judgment about whether a building meets building code requirements.

- *Content /Topic 8: Making meeting minutes*

A. Definition: Written account of what went on and was discussed during a meeting. They help members of an organization to remember decisions and plans they have made.

B. Parts of a minute

The minutes basically follow the same format as the agenda.

- ✓ They include the date and time of the meeting,
- ✓ The participants,
- ✓ The agenda,
- ✓ Summary of notes (optional),
- ✓ Apologies (people who couldn't make it),

- ✓ The approval of the last meeting's minutes,
- ✓ A summary of the agenda items (including actions taken, results, next steps),
- ✓ Any other business
- ✓ The date of the next meeting.

C. Example:

Minute
Trust group
Minutes: trust group board meeting
Date……..
Time……..
Chairperson……..
Participants…….
Minute taker……..
Agenda……..

1. Welcome
2. Apologies (those not in attendances)
3. Approve minutes of previous meeting
4.Agenda items:
   i. Review and accept minutes from previous (date of the previous meeting)
   ii. Review budget
   iii. Discuss new equipment to be purchased
   iv. Discuss new customers
5. Any other business
6. Next meeting
7. Close meeting

D. Summary of Notes:

1. The minutes of (date of previous meeting) were approved.
2. The budget was approved.
3. A request to purchase a new computer was made. Decision: Peter and Diane will research the costs of a new computer and the trade in value of our old computer by the next meeting.
4. Betty reports a new customer for pigs: (name of the customer).
5. Next meeting: (date and time of next meeting)

E. Approval of Previous Meeting's Minutes:

Minutes of July 14th meeting was read by John Peter. All approved except for Kagabo who abstained because she was absent from that meeting.

F. Agenda Items:

1.The budget was reviewed and approved for another month.2. New equipment: It was discussed whether or not to buy a new, larger computer and the amount of money we could get if we sold our current computer. It was determined that new computers are expensive so for now we will continue

with the one we have. PeterandDianearegoingtokeeplooking.Theywilltrytofindausedcomputerthat is newer than the one we have.
3. New customers and selling on credit: Betty found another restaurant that would like to buy pigs but wants to pay on credit. Peter is very worried that if we give those pigs and they don't pay us immediately, we may never be paid. Betty said that the restaurant has a good reputation, many customers, and will pay. Peter said if they have so many customers they can pay for their pigs. Kagabo said that it seems risky. If we take the risk, we should charge them extra for the pigs. In the end we voted against extending credit. We are too small to take such a risk.

G. **Any other business (AOB):** Betty raised the issue of buying more pigs in the next 5 months. The older ones are starting to slow down in their production. This will be discussed further during the next meeting.
H. **Next meeting:** (time of next meeting).

LO. 1.2: Identify data to be recorded

- Content /Topic1: Data to be recorded on site

1.2.1. Data to be recorded on site

a. Information on workforce (number of workers, titles…)
b. Information on work done (activities, work progress…)
c. Meeting schedules and meeting notes
d. Information on plant and equipment usage
e. Information on material usage
f. Suppliers and deliveries
g. Any other aspects of recording work related Information (Ex: incident, challenges etc.)
h. Weather conditions

LO. 1.3: Select necessary documents

- Content /Topic3: Identification of specific forms:

1.3.1. Identification of specific forms

a. Work force form (attendance list….)
b. Equipment & plant form
c. Material request form
d. Material receipt form
e. Meeting minute form
f. Site instruction form

g. Suppliers and deliveries form
h. Measurement sheet

1.3.2. Elaboration of forms for particular cases:

a. Incident/ challenge form
b. Claim form
c. Weather
d. Emergency form

1.3.3. **Criteria in creating records**

a. Is it necessary?
b. What constitutes adequate documentation?
c. Is it desirable to have it in a consistent format?
d. What is its future life?
e. What is the best way to store and retrieve it

Learning unit 2: Use site documents

LO 2.1 - Collect data about works done.

- Content /Topic1: Information about activities and Methods of site data collection

As a project is made up of a group of interrelated work activities, every construction project should have a series of activities that should be characterized by the following information.

2.1.1: Information about activities to be recorded

a) **Quantities of works done:** this refers to how many tasks performed? And how many resources used to perform?

b) **Procedures of work done:** this refers to what steps and techniques have been adopted to perform a certain activity?

2.1.2: Methods of site data collection

The Data Collection is a process by which the searcher collects the information from all the relevant sources to find answers to the research problem, test the hypothesis and evaluate the outcomes.

i. Site Investigation

A site investigation simply is the process of the collection of information, the Appraisal of data, assessment, and reporting with the use of interview, Questionnaire, etc... About how the works were performed.

ii. Field Measurement

It is a method of collecting data for finished works.

iii. Site Observation

It is the methods of collecting data in construction work at the time of work is been performed. And this method is very important and precise because they provide exact data.

LO 2.2 - Collect data about site resources

- Content/Topic1: Site resources and Forms used to Collect data on site resources

Site resources can be defined as those requirements needed to perform tasks in project implementation.

a. Workforce or Human resources.
b. Material and Products used
c. Plant, tools and equipment in use
d. Suppliers/deliveries
e. Finance (Petty cash)
f. Space and facilities.
g. Transportation means

Forms used to collect data onsite resources

a. Work force form
b. Material request form
c. Material receipt form
d. Equipment forms
e. Suppliers/delivery form

LO 2.3 - Fill site forms

- Content/Topic1: Site documents to be filled

1. Daily diary (work force & work done form)

Daily Activity Report and Time Record

Paid With ☐ **Hourly** Employee *or* Paid With ☐ **Regular** Employee

(***Check One***. Destination of time sheet depends on which one you check.)

Employee Name: Employee Name **Program:** Program Name

Month Type Month Year **Prog. Acct. No.** **Employee Number:**

Day	Activities and Location	Total Hours Worked	Authorized Overtime Hours	Sick Leave Hours	Annual Leave Hours	Other Hours	Explain Other
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
Totals for first half of month		Total Hours Worked	Authorized Overtime Hours	Sick Leave Hours	Annual Leave Hours	Other Hours	
		0	0	0	0	0	

Employee's Certifying Signature

Supervisor's Verifying Signature

Full-Time employees please COPY this page, sign and turn in COPY on 15th of each month, then complete and turn in ORIGINAL form on the last day of the month.

Daily Activity Report and Time Record (Page 2)

Paid With ☐ **Hourly** Employee *or* Paid With ☐ **Regular** Employee

(***Check One***. Destination of time sheet depends on which one you check.)

Month: Type Month Year **Employee Name:** Employee Name

Day	Activities and Location	Total Hours Worked	Authorized Overtime Hours	Sick Leave Hours	Annual Leave Hours	Other Hours	Explain Other
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30							
31							
Totals for Entire Month		Total Hours Worked	Authorized Overtime Hours	Sick Leave Hours	Annual Leave Hours	Other Hours	
		0	0	0	0	0	

Hours Annual Leave 0
(Approved Leave Request Must be Attached)

Hours Sick Leave 0
(Approved Leave Request Must be Attached)

Hours Military Leave 0
(For Active Duty Only)

Hours Leave W/O Pay 0
(Approval Must be Attached

Other Hrs. Leave W/Pay 0
(Administrative Leave Must be Approved by Ex. Dir.)

Form approved 11/4/13

By signing below I hereby certify the total number of hours reported represents all hours worked during month.

Employee Signature

Supervisor Signature

2. **Requests for information (RFI)**

Request for information (Original)	No: _____
To: _____	
_____	
Attention: _____	Date: _____
Project: _____	
The following information is requested by the dates indicated to prevent delay to the contract works program.	
Description	**Date required**
Purpose These forms are to be used in lieu of verbal requests and in addition to requests recorded in site meeting minutes. The original copy is to be signed by site staff and issued to the architect.	

Fig 4.1 Example of a request for information form

3.

4. Confirmation of verbal instructions (CVI)

To	**Site/Contract**
Attention of:	Contract:

Issue Date:	Issue No: CVI

Confirmation of instruction

This work will be charge date: ☐ Schedule of rates prices ☐ Day work rates ☐ Specified price of: ☐ Price to be agreed. Our quotation will follow ☐ As	Please note: We are making the necessary arrangements to carry out this work and request that your formal written instructions be issued within 5days. ☐ We will not proceed with this work until a formal written instruction is received.
Issued by:	Confirmation of Instruction
Signature:	Please proceed with the works as detailed on
Date:	Signature:
For and on behalf of Eiro tech Engineering	Date:
Original distributed Hand Fax Post	For and on behalf of:

Distribution

☐ Contract File ☐	☐ ☐ ☐	☐	

5. Drawing register

A drawing register is used to record this information and, in addition to showing the project title and number, should record the following for each drawing:

a) Title of drawing
b) Drawing reference number
c) Source
d)Scale
e) Date received
f) Number of copies received
g) Date of distribution
h) To whom distributed
i) Details of amendments (modifications).

(The drawing register may later prove to be a useful document when the final account is being prepared.)

DRAWING REGISTER				
ContractTitle:IBMKosovoProjectCommonCrossingPointMutivoda“Measured Price Construction Contract”				
ContractNo:UNOPS-PRPC-IBM-97057-2017-001				
Work Area: Common Crossing Point-Mutivoda				
Section: Architectural Drawings				
Drawing info			Issued for Construction	
#	Drawing Name	Drawing No	Rev No	Rev Date
1	Site Clearance	MTV_AD_001	Rev A	12.12.2016
2	Site Plan Hard Landscaping	MTV_AD_002	Rev A	12.12.2016
3	Site Plan- General Presentation	MTV_AD_002.1	Rev A	12.12.2016
4	Site Plan-Building with Coordinates	MTV_AD_003	Rev A	12.12.2016
5	Site Layout Plan for Construction on Phases	MTV_AD_004	Rev A	12.12.2016
6	Site Layout Plan for Construction	MTV_AD_004.1	Rev A	12.12.2016
7	SitePlan3DView	MTV_AD_005	Rev A	12.12.2016
8	Site Fence-Detail	MTV_AD_006	Rev A	12.12.2016
9	Service Block Fence &Gate	MTV_AD_007	Rev A	12.12.2016
10	Urban Furniture-Bench, Garbage Container, Waste Bins	MTV_AD_008	Rev A	12.12.2016
11	Administration Building (AB_a)-Foundation	MTV_AD_009	Rev A	12.12.2016
12	Administration Building (AB_a)- Ground Floor with Furniture	MTV_AD_010	Rev A	12.12.2016
13	Administration Building (AB_a)-Ground Floor-Ceiling Plan	MTV_AD_011	Rev A	12.12.2016
14	Administration Building (AB_a)- Ground Floor without Furniture	MTV_AD_012	Rev A	12.12.2016
15	Administration Building(AB_a)-Flat Roof	MTV_AD_013	Rev A	12.12.2016
16	Administration Building(AB_a)-Sections	MTV_AD_014	Rev A	12.12.2016
17	Administration Building(AB_a)-Façades	MTV_AD_015	Rev A	12.12.2016

18	Administration Building(AB_a)-Façades	MTV_AD_016	Rev A	12.12.2016
19	Administration Building(AB_a)-Perspectives	MTV_AD_017	Rev A	12.12.2016
20	Administration Building(AB_b)-Foundation	MTV_AD_018	Rev A	12.12.2016
21	Administration Building(AB_b)- Ground Floor with Furniture	MTV_AD_019	Rev A	12.12.2016
22	Administration Building(AB_b) –Ground Floor-Ceiling Plan	MTV_AD_020	Rev A	12.12.2016
23	Administration Building(AB_b)-Ground Floor without Furniture	MTV_AD_021	Rev A	12.12.2016
24	Administration Building(AB_b)-Flat Roof	MTV_AD_022	Rev A	12.12.2016
25	Administration Building(AB_b)-Sections	MTV_AD_023	Rev A	12.12.2016
26	Administration Building(AB_b)-Façades	MTV_AD_024	Rev A	12.12.2016
27	Administration Building(AB_b)-Façades	MTV_AD_025	Rev A	12.12.2016
28	Administration Building(AB_b)-Perspectives	MTV_AD_026	Rev A	12.12.2016
29	Administration Building-Wall Details	MTV_AD_027	Rev A	12.12.2016
30	Administration Building-Ventilated Façade Detail	MTV_AD_028	Rev A	12.12.2016
31	Administration Building-Roof Parapet Detail	MTV_AD_029	Rev A	12.12.2016
32	Administration Building-Foundation Detail	MTV_AD_030	Rev A	12.12.2016
33	Administration Building-Window Details	MTV_AD_031	Rev A	12.12.2016

DRAWINGREGISTER				
Contract Title: IBM Kosovo Project Common Crossing Point Mutivoda “Measured Price Construction Contract”				
ContractNo:UNOPS-PRPC-IBM-97057-2017-001				
Work Area: Common Crossing Point-Mutivoda				
Section: Architectural Drawings				
Drawing info			Issuedfor Construction	
			Rev	

#	Drawing Name	Drawing No	No	Rev Date
34	Administration Building-Fixed Access Ladder	MTV_AD_032	Rev A	12.12.2016
35	Administration Building- Doors &Windows schedules	MTV_AD_033	Rev A	12.12.2016
36	Checking Booth for Cars-Typical Design	MTV_AD_034	Rev A	12.12.2016
37	Insurance Booth-Typical Design	MTV_AD_035	Rev A	12.12.2016
38	Insurance, Bank, Exchange Office& Toilets(IBT_a)-Foundation &Ground Floor	MTV_AD_036	Rev A	12.12.2016
39	Insurance, Bank, Exchange Office &Toilets(IBT_a)-Roof Plan	MTV_AD_037	Rev A	12.12.2016
40	Insurance, Bank, Exchange Office &Toilets(IBT_a)-Sections	MTV_AD_038	Rev A	12.12.2016
41	Insurance, Bank, Exchange Office &Toilets(IBT_a)-Facades	MTV_AD_039	Rev A	12.12.2016
42	Insurance, Bank, Exchange Office &Toilets(IBT_a)-Facades	MTV_AD_040	Rev A	12.12.2016
43	Insurance, Bank, Exchange Office &Toilets(IBT_a)-Perspectives	MTV_AD_041	Rev A	12.12.2016
44	Insurance, Bank, Exchange Office& Toilets(IBT_b)-Foundation &Ground Floor	MTV_AD_042	Rev A	12.12.2016
45	Insurance, Bank, Exchange Office &Toilets(IBT_b)-Roof Design	MTV_AD_043	Rev A	12.12.2016
46	Insurance, Bank, Exchange Office &Toilets(IBT_b)-Sections	MTV_AD_044	Rev A	12.12.2016
47	Insurance, Bank, Exchange Office &Toilets(IBT_b)-Facades	MTV_AD_045	Rev A	12.12.2016
48	Insurance ,Bank, Exchange Office &Toilets(IBT_b)-Facades	MTV_AD_046	Rev A	12.12.2016
49	Insurance, Bank, Exchange Office &Toilets(IBT_b)-Perspectives	MTV_AD_047	Rev A	12.12.2016
50	Insurance, Bank, Exchange Office &Toilets(IBT typical)-Section Detail	MTV_AD_048	Rev A	12.12.2016
51	Insurance, Bank, Exchange Office &Toilets(IBT_typical)-Doors &Windows Schedules	MTV_AD_049	Rev A	12.12.2016
52	Service Block- Basement	MTV_AD_050	Rev A	12.12.2016
53	Service Block lock-Ground Floor	MTV_AD_051	Rev A	12.12.2016
54	Service Block- Roof Design	MTV_AD_052	Rev A	12.12.2016
55	Service Block-Sections	MTV_AD_053	Rev A	12.12.2016

56	Service Block lock-Façade	MTV_AD_054	Rev A	12.12.2016
57	Service Block-Perspective	MTV_AD_055	Rev A	12.12.2016
58	Service Block –Section Detail	MTV_AD_056	Rev A	12.12.2016
59	Service Block-Doors& Windows Schedules	MTV_AD_057	Rev A	12.12.2016
60	Generator Shelter-Entire Design	MTV_AD_058	Rev A	12.12.2016
61	Generator Shelter-Fuel Reservoir Design	MTV_AD_059	Rev A	12.12.2016
62	Inspection Garage(IG_a)-Foundation	MTV_AD_060	Rev A	12.12.2016
63	Inspection Garage(IG_a)-Ground Floor	MTV_AD_061	Rev A	12.12.2016
64	Inspection Garage(IG_a)-Flat Roof Floor	MTV_AD_062	Rev A	12.12.2016
65	Inspection Garage(IG_a)-Sections	MTV_AD_063	Rev A	12.12.2016

6. Minutes of meeting- minutes

PROJECT PROGRESS MEETING

Meeting Minutes- 013

Project Name:	**PROPOSED BAKHRESA GRAIN MILLING PHASE 2 (SILOS, SERVICE GARAGE & PARKING)**		
Date of Meeting:	26TH JUNE, 2019	**Start Time:**	1105 hrs.
Location:	BGM Phase 2 Site Offices	**End Time:**	1200 hrs.
Chair:	Soita WAMBETE	**Minute Taker:**	Andrew Kaita KAGAZI

ATTENDANCE		
Present	**Organization**	
1. Julius NDUNGA	Bahkresa Grain Milling (BGM)	JD
2. Fred ODHIAMBO	Bahkresa Grain Milling (BGM)	FO
3. Soita WAMBETE	Quest Africa Ltd (QA)	SW

4. Andrew Kaita KAGAZI	Quest Africa Ltd (QA)	AKK
5. Raphael AMUTETE	Quest Africa Ltd (QA)	RA
6. Bruce MACDONALD	Roko Construction (RC)	BM
7. Damien MURWANASHYAKA	Roko Construction (RC)	DM
8. Donatien NGIRIMANA	Roko Construction (RC)	DN
9.Christian BIKAMIRO	Roko Construction (RC)	CB
10. Eric TUYIZERE	Roko Construction (RC)	ET

AGENDA

01. Site Inspection
02. Approval of minutes from last meeting
03. Open Issues
04. New Issues
05. Project Progress Report
06. AOB
07. Date for next meeting

MINUTES

Minute 01: Site Inspection

An inspection of the ongoing works on site was done.

Minute 02: Approval of minutes from last meeting

SW called the meeting to order at 1150 hrs.

AKK read the minutes from the last meeting. The minutes were approved as read.

Minute 03: Open Issues		
Issue	**Responsible**	**Due Date**
A) DESIGN 1. RC to provide specifications of the pumps to be installed that day; 26/06/19. **B) CONSTRUCTION AND SITE MANAGEMENT** 1. RC mentioned that they had received an official letter from QA the previous day, 25/06/19. 2. RC mentioned that a project review meeting would be held that Friday, 28/06/19 and an official response about the project status and way forward for the project to the client/consultant shared on the same day. 3. Permanent supports for the existing conveyor to be cast after casting of silo 2. Method statement for these works to be shared with consultant the next day, 27/06/19. 4. RC mentioned that concrete test results were done but still awaiting signing. RC mentioned that the unsigned results have been submitted for the time being. 5. QA stated that for purposes of consistence, the contractor should keep using the same lab for carrying out tests on materials. 6. RC reiterated the need for coordination between the client MEP team and the RC team on site. **C) CONTRACTURAL**	ROKO ROKO ROKO	26/06/19 28/06/19 27/06/19
Minute 04: New Issues		

A) DESIGN

B) CONSTRUCTION AND SITE MANAGEMENT

1. BGM mentioned that the cast-in items for the silos are to be provided by the client.
2. RC mentioned that with cash flow issues on their side resolved, works will be accelerated in order to meet the project deadline.
3. RC also mentioned that incase need arose, a request for an extension of time would be put in on the 10/07/19.
4. BGM raised a concern about the accuracy of the overall project progress status presented in the contractor's project report.
5. RC suggested that the overall project progress be deduced from the percentage of certified works (+5-10%).
6. It was estimated that payment of IPCs (works done) was at 32% therefore, overall project progress is estimated at approximately 45%.
7. BGM mentioned that an evaluation of the power consumption was done. A monthly charge of 280,000 fcs (for the first 3 months) was set. The charge for power consumption for June to be reviewed since consumption has been low this month.
8. This amount to be deducted from the next IPC.
9. BGM stated that the progress in the past month has been extremely slow causing unrest from the client side.
10. BGM reminded the contractor how any delays on the project would affect procurement and logistic plans. Therefore, requested RC to provide a quick response (at the beginning of July) on the way forward for the project for planning purposes.
11. BGM mentioned how MEP works would now be expedited since the client MEP specialist/ team was now available on site.
12. SW requested the consultant and contractor team to facilitate the client MEP specialist will all necessary information to bring him up to speed with the project.

C) CONTRACTURAL

1. QA reminded the contractor that all four silos foundations will have to be handed over at the same time for the Frame specialists to start erection of the silos.		

Minute 05: Project Progress Report

DN presented the progress report from contractor.

Ongoing Activities;

1. Concrete bollards casting – 70%
2. Casting for water channel – 50%
3. Casting columns and ring beam for garage 1st floor – 100%
4. Fixing of angle line around service pits- 100%
5. Casting top slab for soak pit – 100%
6. Leveling back of garage – 60%

Overall project progress _ 51% **Planned Progress _ 73%**

Project duration: **120 days**

Elapsed time: **92 days**

Remaining Period: **18 days**

Minute 06: AOB

1. There was no AOB.

Minute 07: Date for next meeting

Next Progress meeting to be held on 03.07.19

For Bakhresa Grain Milling Ltd: Signature……

Date……..

For Roko Construction Ltd: Signature……
Date……..

For Quest Africa Ltd: Signature……
Date……..

7. Approvals and inspections books

Remote Group			
Quality Control Checklist			
Project	**Rebero 6 Villas**		
Villa nr:			
Area			
Date			
Discipline	**Concrete Slab Pre-pour Inspection**		
Nr	**Inspections**	**Passed Y/N**	**Comments**
1	All Props plumb and secured		
2	All Shutter boards level and secured		
3	All Shutter boxes square and straight		
4	Shutter boards oiled and or greased		
5	No voids anywhere for Concrete water to drain		
6	Bottom steel as per Eng. Details		
7	Top Steel as per Eng. Details		
8	All splicing as per Eng. Details		
9	Binding wire utilized as per Eng Details		
10	All side and bottom Spacers as per Eng Details		
11	All External Side Shutter support to Beams Checked and secured		
12	All Corners Squared and checked		
13	Depth of Beam Shutters Confirmed		
14	Bottom Steel to Beams as per Eng Details		
15	Top Steel to Beams as per Eng Details		
16	All Stirrups installed as per Eng Details		

17	All Re-bar inspected to ensure correct Sizes are installed		
18	All re-bar strength certificate received from Supplier		
19	All spacing between Rebar as per Eng. Details		
20	Top mesh installed as per Eng. Detail(if required)		
21	Correct size mesh installed (if required)		
22	Overlap of mesh as per Eng. Detail(if required)		
23	Correct quantity of Rebar in slab as per Eng. Details		
24	Is area clean of debris		
25	Plumbing 1st fix installed(if required)		
26	Mech 1st fix installed		
27	Sleeves installed (if required)		
28	Level of Floor Slab confirmed as per Design Levels		
29	Slab is Plumb and Square		
30	All Beams are level, square and plumb		

Inspection confirmed by :

Name	**Designation**	**Signature**
	Site Foreman	
	Site Land Surveyor	
	Site QS	

8. Work program (planner)

Contract: AN Other

Location: Anywhere

PROGRESS CHART

Period: _____

Activity	**14/7**	**15/7**	**16/7**	**17/7**	**18/7**	**19/7**	**20/7**	**21/7**	**22/7**	**23/7**	**24/7**	**25/7**	**26/7**	**27/7**	**Remarks**
Fixing carpenter	- - -	- - -	- - -	- - -	- - -										
Plumber		- - -	- - -	- - -						- - -					Delay caused by late material arrival.
Electrician															
Wall tiler				- - -	- - -			- - -	- - -						Team size reduced.
Floor tiler			- - -	- - -	- - -										
Painter											- - -	- - -	- - -		Worked Saturday to complete.

Proposed ——— Actual - - - -

9. Instructions book

PENN & SCALES, ARCHITECTS 2 Board St, Perth WA 6000	CONT. VAR DOCUM. NO.	
	INSTRUCTION DOCUM. NO.	
	OP. CTR. NO.	
	CONTR. NO.	
SITE INSTRUCTION	IR	No. 505
TO:	DATE	
	BUDGET CODE	
	APPROX VALUE	
	S/C NAME	
	ADJ. ADV. NO	

DESCRIPTION		ACTION BY

☐ Submit quotation of costs. Do not proceed without approval.	Instruction issued by:	Date:
☐ Proceed with the work. Submit quotation of costs later.	Instruction issued by:	Date:
☐ Instruction only. Does not involve a contract variation.		

10. Site Reports

Creating daily reports for construction is one of the most important parts of the job for any contractor. Not only do they keep you up-to-date with project progress and delays, they also protect you and your company from expensive legal action and inform owners and management about the happenings on a construction site.

Luckily, the days of collecting pen and paper (or even worse, memorized) daily reports are gone. Top construction firms have turned to mobile apps like Raken to capture and share their daily reports.

Parts of a Daily Report for Construction

There are a few key components that make up a good daily report for construction sites. They are summarized below, followed by a daily report example which brings them all together.

Project and Day Info

Good construction daily reporting documentation requires consistency and organization. Standardize the project and date naming convention to make it easy to find old reports.

Weather Reporting

Bad weather? Beautiful day? It's important to record because it might impact the
Work for that day or week.

Work Logs

Make sure to track who was on site and what they did.

Notes, Issues, and Concerns

Something behind schedule? Make a note to explain what went wrong.

Photos and Attachments

Seeing believes. Did your delivery arrive on time? Snap a photo to prove it.

Site Safety Observations

Safety first. Be sure to record went wrong and what can improve for next time

Daily Survey

Be sure to get all your critical questions answered such as "did the weather cause delays?"

Weekly site report

A weekly site report, which summarises resources used etc over the period, may be produced as a complementary record to the daily site diary.

	Weekly site report (Original copies to be returned weekly by mail with progress reports)	**138800**

CONTRACT: _____ **CONTRACT no:** _____

Weather and lost time: _____ **Date:** _____

Visitors to site: _____

Important instructions received: _____

(Name the instructing party)

No. of workers on site:

SUBCONTRACTORS:

DEMOLITION		PLUMBER		PLASTERER, FIBRO	
EXCAVATOR		ROOFER, METAL		TILER, VITREOUS	
REINFORCING FIXER		ROOFER, A/CEMENT		TILER, VINYL	
CONCRETOR		ELECTRICIAN		PAVIOR	
DRAINER		MECHANICAL		PAINTER	
STRUCTURAL STEEL		GLAZIER		CLEANER, BRICK	
BRICKLAYER		PLASTERER, HAND		CLEANER	
CARPENTER		SPRINKLERS			
FORMWORKER		SUSP. CEILINGS			

Other trades: _____

Number of tests taken: _____ Number of items delivered: _____ Number of items used: _____

PLANT ON SITE (MECHANICAL)	HOURS WORKED	DOWNTIME	PLANT HIRED FROM (COMPANY)

SITE REPORT (PROGRESS/DELAYS)

Project manager's signature:

City Views Stage 'B'

Construction progress report no. 7

Date:

General

Progress of the works has been recorded to the finish of work on Thursday, 20 September 20##, and shows the project three (3) days behind the updated construction program.

Current projected completion is 4 April 20##.

The most critical activity in progress is the cleaning down and making good of external brickwork and concrete. This activity must regain schedule and, if possible, improve on program, as some critical external ground works are controlled by this activity.

Other areas of concern are the plasterboard ceiling and bulkheads, which are holding program at the moment but must continue to do so until all floors are complete.

Glazing kitchen sashes is in progress with only two days float available and should maintain this status.

Kitchen cupboards to floors 2, 3 and 4, where scheduled to be fixed, have not started. The float available has now been reduced to five days.

As the current update program is a tight one, made to minimise the delays experienced to date, we should ensure that works generally start as scheduled and the float available is jealously guarded and used when necessary.

Works in progress		
Activity	**Floor/s**	**Float available**

Work completed last period	
Activity	**Floor/s**

Work scheduled that has not started		
Activity	**Floor**	**Float available**

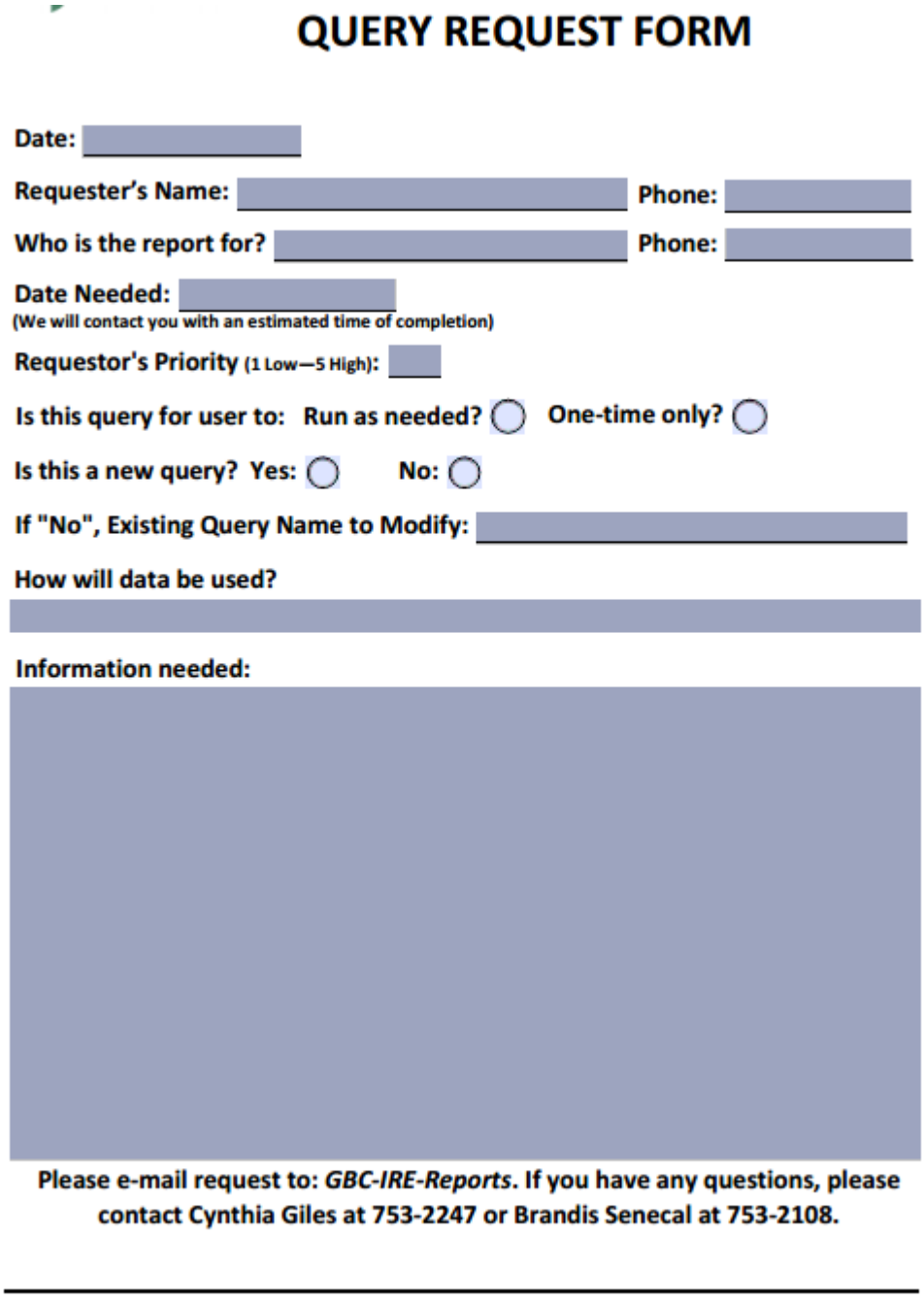
Contract status		
Contractual completion date		29 March 20##
Ahead/(behind) schedule		(– 3) days
Contingency period (updated)		12 days
Contingency period remaining		12 days
Projected completion date		4 April 20##
Total contract period updated (working days)		207 days
Elapsed time to 20 September		94 days – 45%
Delays to date:	industrial	16 days 1.5 hours
	inclement weather	4 days 5 hours
	Total	20 days 6.5 hours

Note: Does not include delays experienced since 31 August.

Delays approved – nil

End of report

11. **Query and request forms**



QUERY REQUEST FORM

Date:

Requester's Name: **Phone:**

Who is the report for? **Phone:**

Date Needed:
(We will contact you with an estimated time of completion)

Requestor's Priority (1 Low—5 High):

Is this query for user to: **Run as needed?** ◯ **One-time only?** ◯

Is this a new query? **Yes:** ◯ **No:** ◯

If "No", Existing Query Name to Modify:

How will data be used?

Information needed:

Please e-mail request to: *GBC-IRE-Reports*. If you have any questions, please contact Cynthia Giles at 753-2247 or Brandis Senecal at 753-2108.

VARIATION REQUEST No. _____

ORIGINAL

TO: _____

_____

ATTENTION: _____ **DATE:** _____

PROJECT: _____

THE FOLLOWING VARIATION IS SUBMITTED FOR YOUR ATTENTION.
WE REQUEST THAT AN OFFICIAL VARIATION ORDER BE ISSUED FOR THIS WORK.

Drawing/other references	Description
	Signature:

Fig 5.7 Typical form for variation request from builder to architect

Learning unit 3: Manage site records

LO 3.1 - Arrange site documents

- Content/Topic1: Introduction to the Records arrangement

Managing records on a project is an essential activity that makes it possible to handle and use project documentation in the way that ensure smooth capturing of documents and papers by seniors, team members, and other stakeholders. Being a part of overall document management, records management allows a project manager to direct and control document flows throughout the project lifecycle, while ensuring that every single document or record serves the operational needs and helps teams capture and retrieve necessary information. It creates a framework for running project activities and procedures and paves the way for analysis, lessons learned, historical reviews, etc.

3.2. Definition

Project Records Management is a process of creating, directing and controlling document flows within a project, through using an administrative system, to provide effective development, versioning, filing, storing and retrieving of records, while ensuring that every record designed is utilized administratively and legally. The process creates a framework for managing the project activities and delivering necessary information to teams.

As a process, project records management is **characterized** by the following items:

- Inputs: any essential information to be recorded and saved for the project
- Resources: equipment, systems, software, communication tools, HR etc.
- Guidelines: document management policies, document standards, filing procedures, etc.
- Outputs : document flow, files, catalogues, record sheets, etc.

When you start managing your project, first you must be sure that there's a framework for documenting and filing events occurring within the project (the inputs). By using systems and software (the resource), your teams can record activities and events and create documents. They follow prescribed procedures for event recording and documenting (the guidelines). Finally running the process allows you to develop necessary documentation, files and records (the outputs). In this regard, project records management seems to be cyclical – when records are created, treated, filed and documented.

The process of managing project files and records is **important** because of the following aspects:

- Supporting ease and efficiency of the project activities
- Allowing teams can find required information you when they need
- Protecting the project data from unauthorized access and use

- Saving time and effort
- Reducing costs, including space costs
- Keeping files up-to-date and versioned

Three Steps

Step 1. Create Project Files

When you create a project file, you must be sure you do it in accordance with the standards and requirements of file management within your organization. There're five common requirements to project file creation:

- **Prompt.** A file is to be created as early and quickly as possible.
- **Simple.** File content should have a structure that is as simple as possible.
- **Separate.** Every file is a single and separate record; two or more files can't be combined; if there's a need to combine the content of several files, a new file should be created.
- **Up-to-date.** When a project file is updated, a versioning number as well as the date revised should be added to the file header.
- **Confidential.** A file should be maintained with complete confidentiality; only authorized personnel can access the file and its content.

In any project and program these 5 requirements should be treated with great care because otherwise the project/program is likely to fail with creating reliable, comprehensive, complete and relevant project files.

Step 2. File Project Documents

Once you have created a file according to your file management policy and requirements, now you can proceed with filing project documents. It means you must put all your documents and white-papers into respective files. Below I list the key **documents and data** you should add to your project files:

- Official mail and email correspondence, including letters, attachments, pictures
- Papers of project meetings
- Project request, proposal, brief.
- Stakeholder contact details
- Change and variance requests
- Project diary
- Issue logs/risk logs/decisions made
- Status reports and summaries
- Procurement papers
- Team guidelines, instructions, notes, etc.
- Handover/closure documents

You should be sure that every piece of this data is put into a file. There should be version control to ensure that the project files are updated and changed properly.

Step 3. Archive and Destroy Project Records

Once all of your project documents and relevant data have been filed, your next step is to manage the records and move them to archive. Archiving project records means making documents no more available within the given environment while ensuring that the records are retrievable for further projects and lessons learned.

When you project is over, you may need to destruct the records, instead of archiving them. Anyway, you must refer to the archiving and destructing procedures of your organization when treating your project records.

3.3. Records life cycle

AbasicconceptinRecordsManagementistherecordslifecycle.Thelifeofarecord goes through phases starting from when it is created or received by the Agency, through to its use, maintenance and temporary storage before finally being destroyed or archived permanently.

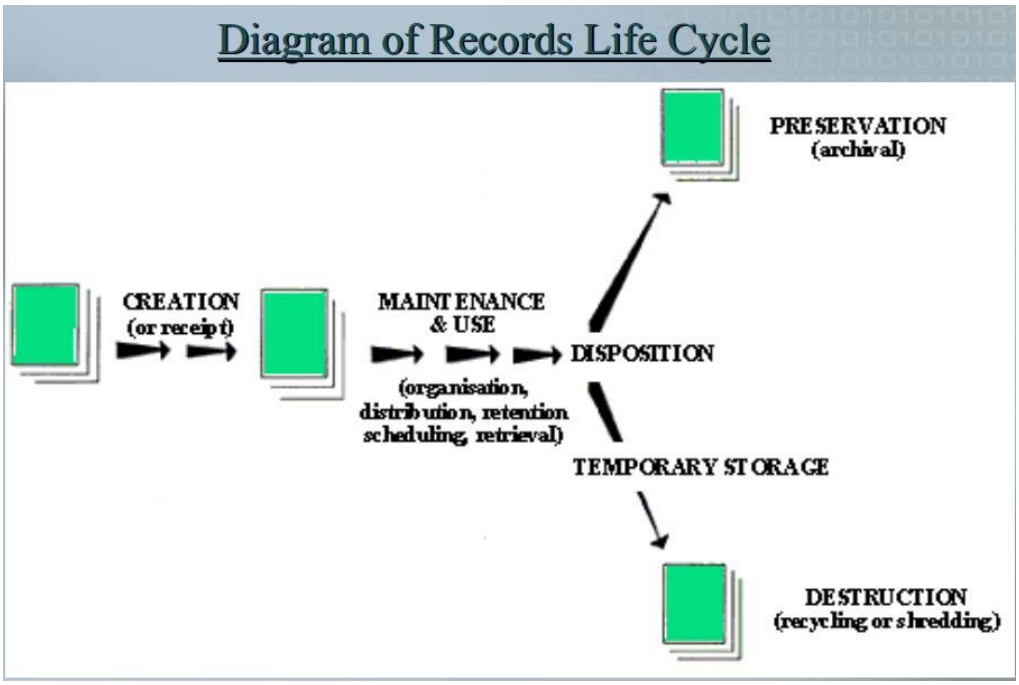
Life-cycle of a Record is summarized in the following steps:

a. Creation &receipt; capture into RM system b.

Distribution &use

c. Storage and maintenance

d. Retention and disposition



Benefits of a Records Management Program

Some benefits maybe:

1. To increase efficiency and productivity;
2. To protect the organization from litigation;
3. To have evidence of transactions/ events for audit purposes;
4. To preserve the institutional memory of the organization;
5. To facilitate the resumption of operations in the event of a disaster; and
6. To ensure that employee benefits can be supported via information maintained in personal records.

Records Centers and Archives

The difference between a **Records Center and an Archives** is that a **Records Center** is a building specially designed for low-cost storage and maintenance of semi- current records pending their ultimate destruction or transfer to an archive repository. **An Archive** may be either a collective of records, usually but not necessarily non-current records of continuing value selected for permanent preservation or a building housing such a repository.

The Purpose and Functions of the Records Center (and an Archive, as well),is to ensure that correspondence are properly arranged and stored, so that they can be located easily and promptly.

Content/Topic2: Methods of document arrangement:

1. **Chronological method**; arrangement based on time

2. **Subject method;** arrangement according to the name of subjects
3. **Alphabetical filling:** based on alphabets
4. **Numerical filling;** arranged according to town, districts, region, countries, Zones…
5. **Geographical filling:** according to town, districts, regions, country, zones,…

LO. 3.2 - Safeguard site documents

A. Ways of keeping Safe data storage

a. Binding
b. Filing
c. Electronic data storage; scanning, mailing, photocopying….)

LO 3.3 - Report site records

- Content/Topic1: Content of site report

Reporting is part of the progress control system. Progress on the site should be recorded and reported to senior management on a regular basis. Progress reports will contain the following information:
1. Name of project
2. Report number
3. Date of report
4. Work in progress
5. Work completed since last report
6. Work which was scheduled to start but has not
7. Contract status at time of report
8. Workforce
9. Stock situation
10. Supplystatus
11. Weather conditions
12. Materials usage
13. Work quality
14. Financial situation
15.General comments
16. Etc…

3.3.2. Parts of site report

✓ **Header:** company logos and company address and title

- ✓ **Project details:** project title, project start date, completion date, projects mangers names
- ✓ **Report details:** report number, reporting period (daily date, weekly dates…) report author, reviewer.
- ✓ **Site details:** overall site information (safety& health, security issues, damages, supervision information.

Construction activities: Work that is carried out, progress made, planned work & achieved work, difficulties that affected, quality of work done, labor & subcontractors, financial issues.

Reference(s):

1. Chandler, I.E. (1987). Material Management on Building Site. The Construction Press, London.
2. Harris, F. (1989). Construction Equipment and Methods. Longman Group, UK.
3. Hedley, G., and Garrett, C. (1983). Practical Site Management: An illustrated Guide. 2nd edition, London
4. Heap, A. (1987). Improving Site Productivity in the Construction Industry. International Labor office, ILO, Geneva.