SiteProc Site Manager Guide

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Getting Started

Welcome to SiteProc! As a Site Manager, you're the eyes and ears of the project on the ground. This guide will help you manage daily operations efficiently.

Your Role

As a Site Manager, you can:

- ☑ Create purchase orders for materials
- ☑ Track deliveries and confirm receipt
- ☑ Manage subcontractors and contractors
- ☑ Submit change orders for approval
- ☑ Monitor daily project progress
- ☑ Document issues and resolutions
- ☑ Communicate with suppliers and team
- ☑ Manage site expenses within budget
- ☑ Upload photos and site reports

Daily Dashboard

Morning Routine

When you start your day:

1. **Check Deliveries**
    - View today's expected deliveries
    - Confirm delivery times
    - Prepare site for receiving
2. **Review Alerts**
    - Overdue items
    - Low stock warnings
    - Pending approvals
    - Team messages
3. **Quick Actions Widget**
    - Create urgent order
    - Check weather
    - View crew schedule
    - Recent activity

Dashboard Overview

Today's Deliveries

- Supplier name
- Expected arrival time
- Items being delivered
- Delivery driver contact
- Track delivery status

Active Orders

- Orders awaiting delivery
- Order status
- Days since ordered
- Supplier contact

Budget Status

- Spent this week
- Remaining budget
- Pending orders value
- Variance alert

Team Activity

- Who's on site
- Active tasks
- Recent updates
- Messages

Creating Orders

When to Create an Order

Create orders for:

- Materials running low
- Upcoming phase requirements
- Tool or equipment rental
- Subcontractor services
- Emergency replacements

Step-by-Step Order Creation

1. Click "New Order"

- From dashboard or Orders page
- Mobile: Tap + button

2. Select Project

- Choose your project
- Confirm correct project code

3. Choose Supplier

- Search by name or category
- View supplier rating
- Check lead time
- Confirm contact details

4. Add Items

For each item:

- Description (be specific!)
- Quantity needed
- Unit (bags, meters, tons, etc.)
- Unit price
- Total auto-calculates

Example:

```
Item: Portland Cement Type I
Quantity: 50
Unit: 50kg bags
Unit Price: $12.50
Total: $625.00
```

5. Delivery Details

- Delivery address (default: site address)
- Requested delivery date
- Preferred time window
- Special delivery instructions
- Site contact person and phone

6. Add Attachments (optional)

- Specifications
- Product drawings
- Reference photos
- Previous orders

7. Special Instructions

- Unloading requirements
- Storage location
- Quality requirements
- Safety concerns

8. Review & Submit

- Check all quantities
- Verify total amount
- Confirm budget available
- Add order notes
- Submit for approval (if required)

Order Approval Process

Within Budget:

- Orders under your approval limit: Auto-approved
- Goes straight to supplier

Requires Approval:

- Orders over your limit
- Goes to Project Manager
- You'll receive notification when approved
- Then sent to supplier

Tracking Approval:

- View status in Orders page
- "Pending Approval" badge
- Can view approver comments
- Receive notification on decision

Quick Reorder

For frequently ordered items:

1. **Find Previous Order**
    - Go to Orders history
    - Search by item or supplier
2. **Click "Reorder"**
    - Pre-fills all details
    - Update quantities as needed
    - Adjust delivery date
3. **Submit**
    - Much faster than creating from scratch!

Tracking Deliveries

Expected Deliveries

View Upcoming Deliveries:

1. Dashboard → Today's Deliveries
2. Or Orders → Filter "Out for Delivery"

Information Available:

- Supplier name
- Driver name and phone
- Vehicle details
- Expected arrival time
- Items to be delivered
- GPS tracking (if available)

Receiving Deliveries

When Delivery Arrives:

1. **Verify Items**
    - Check against delivery note
    - Count quantities
    - Inspect for damage
    - Verify specifications
2. **Check Quality**
    - Look for damage
    - Check expiry dates (if applicable)
    - Verify grade/specifications

- Test samples if needed

3. **Document Receipt**

   - Take photos (wide shot + close-ups)
   - Note any issues
   - Get driver signature
   - Sign delivery note

4. **Update System**

   - Open the order in app
   - Click "Confirm Delivery"
   - Upload photos
   - Add any notes about condition
   - Rate delivery (time, quality, driver)
   - Submit confirmation

Handling Delivery Issues

Partial Delivery:

1. Note what was received
2. Note what's missing
3. Photo evidence
4. Update system as "Partial"
5. Contact supplier for balance

Damaged Goods:

1. DON'T ACCEPT damaged items
2. Take detailed photos
3. Note damage on delivery note
4. Get driver to acknowledge
5. Reject damaged items
6. Update system immediately
7. Contact supplier

Wrong Items:

1. Check against order
2. Photo the wrong items
3. Note on delivery note
4. DON'T sign as correct
5. Contact supplier immediately
6. Arrange collection/replacement

Late Delivery:

1. Check expected time
2. Contact supplier if delayed >1 hour

3. Note impact on schedule
4. Update team if work affected
5. Rate delivery accordingly

Delivery Documentation

Always Photograph:

- [x] Overall view of delivery
- [x] Close-up of items
- [x] Labels and specifications
- [x] Damage (if any)
- [x] Signed delivery note
- [x] Storage location

Best Practices:

- Good lighting
- Clear, in-focus images
- Multiple angles
- Include something for scale
- Upload within 24 hours

Managing Contractors

Contractor Overview

Types of Contractors:

- Subcontractors (electrical, plumbing, etc.)
- Labor hire
- Equipment operators
- Specialists (welders, riggers, etc.)

Adding Contractors to Project

1. **Go to Project → Contractors**

2. **Add Contractor**

   - Contractor company name
   - Primary contact
   - Trade/specialty
   - Team size
   - Daily rate / contract value
   - Start and end dates

3. **Upload Documents**

   - Insurance certificate

    - Licenses and certifications
    - Safety induction sign-off
    - Contract agreement

Daily Contractor Management

Sign-In/Sign-Out:

- Record contractor arrivals
- Log hours worked
- Note crew size
- Document tasks assigned

Progress Tracking:

- Update completed work
- Note any issues
- Track against schedule
- Photo documentation

Safety Compliance:

- Verify PPE usage
- Check permit to work
- Monitor safety practices
- Report incidents

Contractor Performance

Rate Contractors: After each project phase:

- Quality of work (1-5 stars)
- Timeliness
- Communication
- Safety compliance
- Value for money

Documentation:

- Progress photos
- Issue reports
- Resolution notes
- Completion sign-off

Change Order Management

What is a Change Order?

A Change Order is any modification to the original project scope, including:

- Additional work requested by client
- Design changes
- Unforeseen site conditions
- Material substitutions
- Scope reductions

Creating a Change Order

1. Identify the Change

- Describe the change clearly
- Explain why it's needed
- Note who requested it

2. Assess Impact

Cost Impact:

- Additional materials needed
- Labor hours required
- Equipment rental
- Total cost estimate

Schedule Impact:

- Days added/saved
- Impact on milestones
- Critical path effect

3. Document Everything

- Photos of current condition
- Drawings or sketches
- Specifications
- Site measurements

4. Create Change Order

- Go to Project → Change Orders
- Click "New Change Order"
- Fill in all details:
  - Change order number (auto-generated)
  - Description
  - Reason
  - Cost impact
  - Schedule impact
  - Attachments

5. Submit for Approval

- Internal approval (Project Manager)

- Client approval (if required)
- Track approval status

Change Order Workflow

```
1. Site Manager creates CO
   ↓
2. Project Manager reviews
   ↓
3. Cost estimate validated
   ↓
4. Sent to Client for approval
   ↓
5. Client approves/rejects
   ↓
6. Budget automatically adjusted
   ↓
7. Work can proceed
```

Tracking Change Orders

View Status:

- Pending internal approval
- Pending client approval
- Approved and active
- Rejected
- Completed

Financial Tracking:

- Original budget
- Approved change orders
- Current budget
- Actual spend
- Variance

Project Progress Monitoring

Daily Progress Updates

End of Day Checklist:

1. **Update Tasks**
    - Mark completed tasks
    - Update in-progress status
    - Note delays or issues
    - Add tomorrow's plan

2. **Record Progress**
    - Percentage complete by area
    - Key achievements today
    - Issues encountered
    - Resolutions implemented
3. **Photo Documentation**
    - Overall site progress
    - Completed work
    - Work in progress
    - Issues or concerns
4. **Weather Log**
    - Conditions today
    - Impact on work
    - Lost time (if any)

Weekly Reporting

Week-End Summary:

1. **Progress Report**
    - Work completed this week
    - Percentage complete overall
    - On schedule / behind / ahead
    - Next week's plan
2. **Issues & Resolutions**
    - Problems encountered
    - How they were resolved
    - Outstanding issues
    - Required support
3. **Safety Report**
    - Incidents or near-misses
    - Safety improvements
    - Training conducted
    - PPE compliance
4. **Quality Control**
    - Inspections completed
    - Test results
    - Non-conformances
    - Corrective actions

Milestone Tracking

Key Milestones:

- Foundation complete
- Structure topped out
- Weather-tight
- Fit-out complete
- Handover ready

When Milestone Reached:

1. Update status in system
2. Upload completion photos
3. Get sign-off if required
4. Notify stakeholders
5. Trigger next phase

On-Site Documentation

Types of Documentation

Daily:

- Site diary
- Progress photos
- Delivery receipts
- Contractor hours

Weekly:

- Progress report
- Safety inspection
- Quality checks
- Team meeting notes

As Needed:

- Incident reports
- Issue logs
- RFIs (Requests for Information)
- Test results

Site Diary

What to Record:

- Date and weather
- Crew on site (numbers)
- Contractors present

- Work performed
- Materials received
- Visitors
- Issues encountered
- Photos taken

How to Update:

1. Mobile app → Site Diary
2. Add entry (end of day)
3. Fill in template
4. Attach photos
5. Submit

Why It's Important:

- Legal record of work
- Progress documentation
- Issue tracking
- Claims protection
- Audit trail

Photo Documentation

Photo Types:

Progress Photos:

- Take from same angle weekly
- Shows progression over time
- Useful for client updates

Detail Photos:

- Close-up of quality work
- Showing specifications met
- Documentation of installations

Issue Photos:

- Problems identified
- Damage or defects
- Safety hazards
- Before/after repairs

Best Practices:

- Date stamps on photos (automatic in app)
- Multiple angles
- Include reference (measuring tape, person)
- Good lighting

- Organize by area/date

Issue Logging

When to Log an Issue:

- Safety hazard identified
- Quality concern
- Delay cause
- Client complaint
- Design conflict

Issue Log Entry:

1. Issue title (brief)
2. Description (detailed)
3. Location
4. Photos
5. Impact (safety/cost/schedule)
6. Priority (low/medium/high/critical)
7. Assigned to
8. Due date

Issue Resolution:

- Update with actions taken
- Mark as resolved
- Attach evidence
- Get sign-off if needed

Budget & Expense Management

Understanding Your Budget

Budget Components:

- Materials
- Labor
- Equipment
- Subcontractors
- Allowances
- Contingency

View Your Budget:

1. Go to Project → Budget
2. See breakdown by category
3. View spent vs. remaining
4. Check variance

Approval Limits

Typical Limits:

- Under $1,000: Auto-approved
- $1,000 - $5,000: Your approval
- Over $5,000: Project Manager approval

Your limit: Check with Project Manager

Tracking Expenses

Daily Expenses:

- Petty cash purchases
- Material pick-ups
- Emergency supplies
- Tool purchases

How to Record:

1. Keep receipts
2. Mobile app → Expenses
3. Photo the receipt
4. Enter details:
   - Amount
   - Category
   - Project
   - Description
5. Submit for approval

Receipt Requirements:

- Must be legible
- Show date and vendor
- List items purchased
- Show amount paid
- Include tax if applicable

Petty Cash

Petty Cash Guidelines:

- Maximum amount: $500
- For small, urgent purchases
- Always get receipt
- Reconcile weekly

Reconciliation:

1. Count remaining cash

2. Add up receipts
3. Should equal starting amount
4. Submit in system
5. Request reimbursement

Cost Savings

Look for Opportunities:

- Bulk purchase discounts
- Alternative suppliers
- Material substitutions (with approval)
- Waste reduction
- Efficiency improvements

Suggest Cost Savings:

1. Document current situation
2. Propose alternative
3. Calculate savings
4. Submit to Project Manager
5. Get approval before implementing

Team Collaboration

Daily Communications

Morning Briefing:

- Today's priorities
- Safety reminders
- Expected deliveries
- Visitors
- Special requirements

Team Check-Ins:

- Mid-morning: Progress check
- Lunch: Issue resolution
- End of day: Wrap-up

Using the App for Communication

Messages:

- Send to individual or group
- Mark as urgent if time-sensitive
- Attach photos or documents
- Get read receipts

Announcements:

- Site-wide notifications
- Safety alerts
- Schedule changes
- Delivery updates

Task Assignment:

1. Create task
2. Assign to person
3. Set due date
4. Add description
5. Attach reference materials
6. Track completion

Client Communications

Regular Updates:

- Weekly progress report
- Photos showing progress
- Milestone achievements
- Issue resolution

How to Update Client:

1. Project → Client Updates
2. Create update
3. Add photos
4. Write summary
5. Send (goes through PM first)

Client Visits:

- Log in system
- Prepare site
- Photo documentation
- Note any requests/concerns
- Follow up on action items

Mobile App Usage

Why Use Mobile App

Benefits:

- Create orders from site
- Confirm deliveries instantly
- Take and upload photos

- Update progress in real-time
- Receive push notifications
- Work offline (syncs later)

Key Mobile Features

Quick Actions:

- Scan barcode to confirm delivery
- Voice-to-text for notes
- GPS location tagging
- Offline mode

Camera Integration:

- Take photos directly
- Auto-tags with date/location
- Annotate images
- Compress for faster upload

Notifications:

- Delivery alerts
- Approval updates
- Team messages
- Issue assignments

Mobile App Tips

☑ **Do:**

- Keep app updated
- Enable notifications
- Use camera for documentation
- Sync at end of day

❌ **Don't:**

- Delete app data (loses offline work)
- Share login credentials
- Disable GPS (needed for location tagging)

Offline Mode

When Working Offline:

- All data stored locally
- Can view existing data
- Can create new entries
- Photos saved to device
- Auto-syncs when online

Sync Process:

1. Connect to WiFi/data
2. App auto-syncs
3. Notification when complete
4. Check for sync errors

Best Practices

Morning Routine

⏰ **Start Your Day Right:**

1. Check dashboard (5 min)
2. Review deliveries (5 min)
3. Check messages (5 min)
4. Brief team (15 min)
5. Site walk-around (20 min)

During the Day

✅ **Stay Organized:**

- Update progress as you go
- Photo document everything
- Respond to messages promptly
- Log issues immediately
- Confirm deliveries on arrival

End of Day

📝 **Close Out Properly:**

1. Update site diary (10 min)
2. Upload today's photos (5 min)
3. Review tomorrow's plan (10 min)
4. Submit expense receipts (5 min)
5. Check pending items (5 min)

Weekly Tasks

📅 **Week-End Checklist:**

- [ ] Submit weekly report
- [ ] Review budget status
- [ ] Check upcoming deliveries
- [ ] Plan next week
- [ ] Clean up photo folders
- [ ] Update task list

- [ ] Review safety compliance

Quality Tips

🎯 **Maintain Standards:**

- Follow specifications exactly
- Get sign-offs when required
- Document any deviations
- Test before covering up
- Keep materials clean and dry
- Store tools properly

Troubleshooting

Common Issues

"Can't create order - budget exceeded"

Solutions:

- Check available budget
- Wait for pending orders to complete
- Request budget increase
- Split order across budget periods
- Contact Project Manager

"Delivery not showing as received"

Solutions:

- Check internet connection
- Refresh app
- Try submitting again
- Check if photos uploaded
- Contact support

"Can't upload photos"

Solutions:

- Check file size (compress if >10MB)
- Verify internet connection
- Try one photo at a time
- Check storage space on device
- Clear app cache

"Task not syncing"

Solutions:

- Ensure online
- Force sync (pull down to refresh)
- Check for app updates
- Restart app
- Re-login if needed

"Forgot to confirm delivery"

Solutions:

- Go to Orders → Past Deliveries
- Find the order
- Click "Confirm Delivery"
- Add receipt date
- Upload photos (if available)
- Submit

Safety Reminders

Site Safety Basics

Always:

- ✅ Wear required PPE
- ✅ Follow safety procedures
- ✅ Report hazards immediately
- ✅ Keep site organized
- ✅ Brief contractors on safety

Never:

- ❌ Skip safety steps
- ❌ Use damaged equipment
- ❌ Work alone in hazardous areas
- ❌ Ignore safety violations

Emergency Procedures

In Case of Emergency:

1. Ensure safety first
2. Call emergency services (if needed)
3. Secure the area
4. Notify Project Manager
5. Document incident
6. Complete incident report

Emergency Contacts:

- Emergency: 911
- Project Manager: [Number]
- Safety Officer: [Number]
- Site First Aid: [Location]

Quick Reference

Daily Shortcuts

Task	Location
New Order	Dashboard → + button
Confirm Delivery	Orders → Order → Confirm
Upload Photos	Camera icon anywhere
Update Progress	Project → Progress
Log Issue	Issues → + button
View Budget	Project → Budget
Site Diary	Reports → Site Diary
Messages	Bell icon (top right)

Contact Info

📧 **Support:** support@siteproc.com 📞 **Phone:** 24/7 hotline 💬 **Live Chat:** In-app 📚 **Help:** help.siteproc.com

Training Resources

🎓 **Available Training:**

- Video tutorials
- Weekly webinars
- On-site training
- Mobile app guide

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Remember: When in doubt, document it! Photos, notes, and reports protect you and the project.

For support: support@siteproc.com