

Adopt Digital Workflows to Improve Construction Management with Plangrid

Jim Rogers

LinkedIn Learning Instructor & Construction Educator



About the speaker

Jim Rogers

- ✓ An experienced construction industry trainer and educator that stresses the importance of integrating safety, quality, and productivity into all operations
- ✓ An [In]structor on [LinkedIn Learning](#) creating construction management courses viewed on-line and around the World
- ✓ Creator of **The Construction Collaborative** at [CMSocial.net](#) where like minded AEC professionals come together to better the industry



Agenda



Digitizing Paper-based Processes vs. Digital Workflows



Ensure the Field is ALWAYS using the correct Plan Revisions



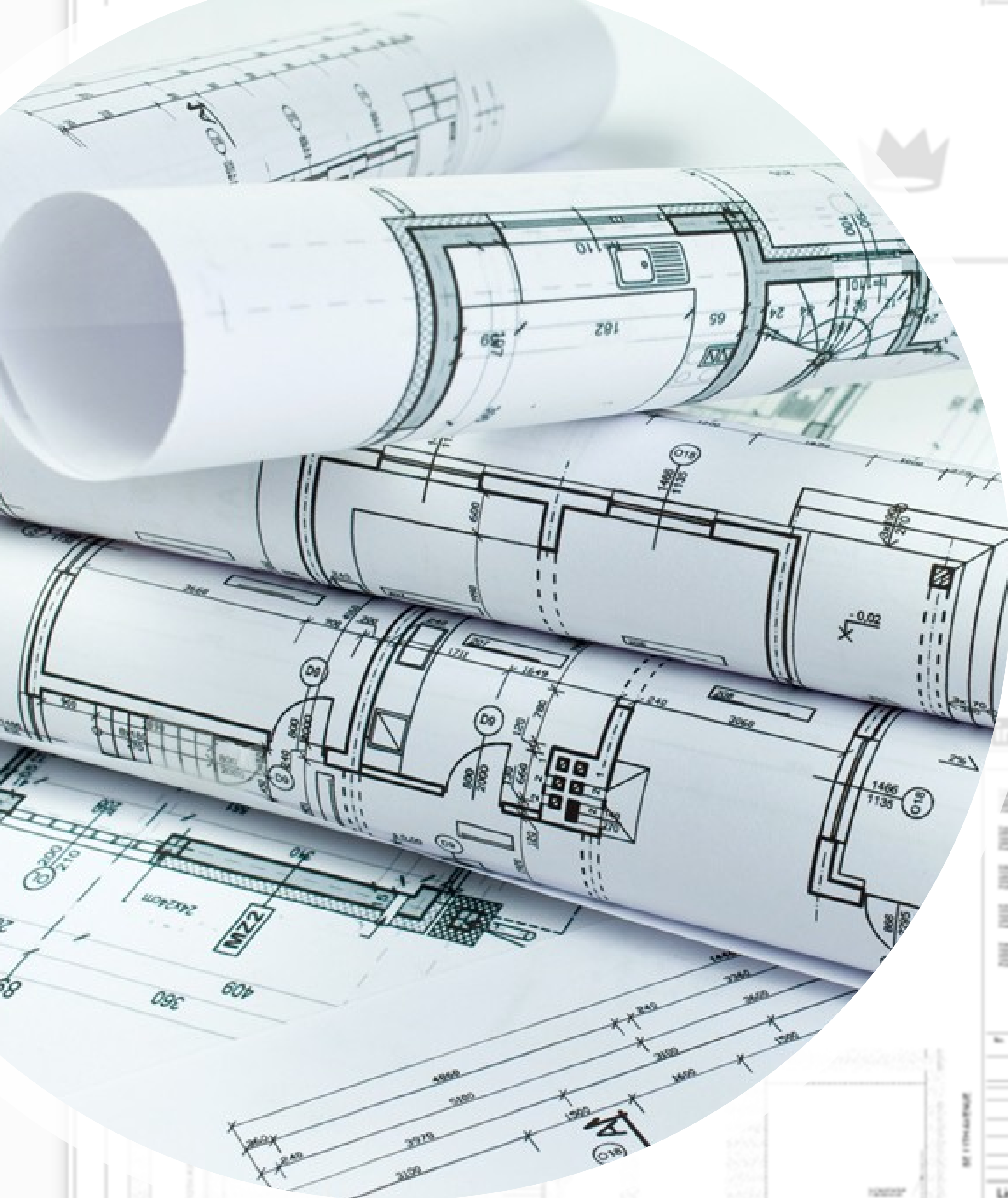
Adopt a new (digital) workflow for Submittals



Adopt a new (digital) workflow for RFI's

Digitizing Paper-based Processes vs. Digital Workflows





A0.1

SYMBOLS, NOTES, AN...

Paper -v- Digital

bevel
in LEARNING



bevel
in LEARNING



Description:	
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Location & Limits: _____

References: _____

Signature:  Date: _____

Response:

[illegible]

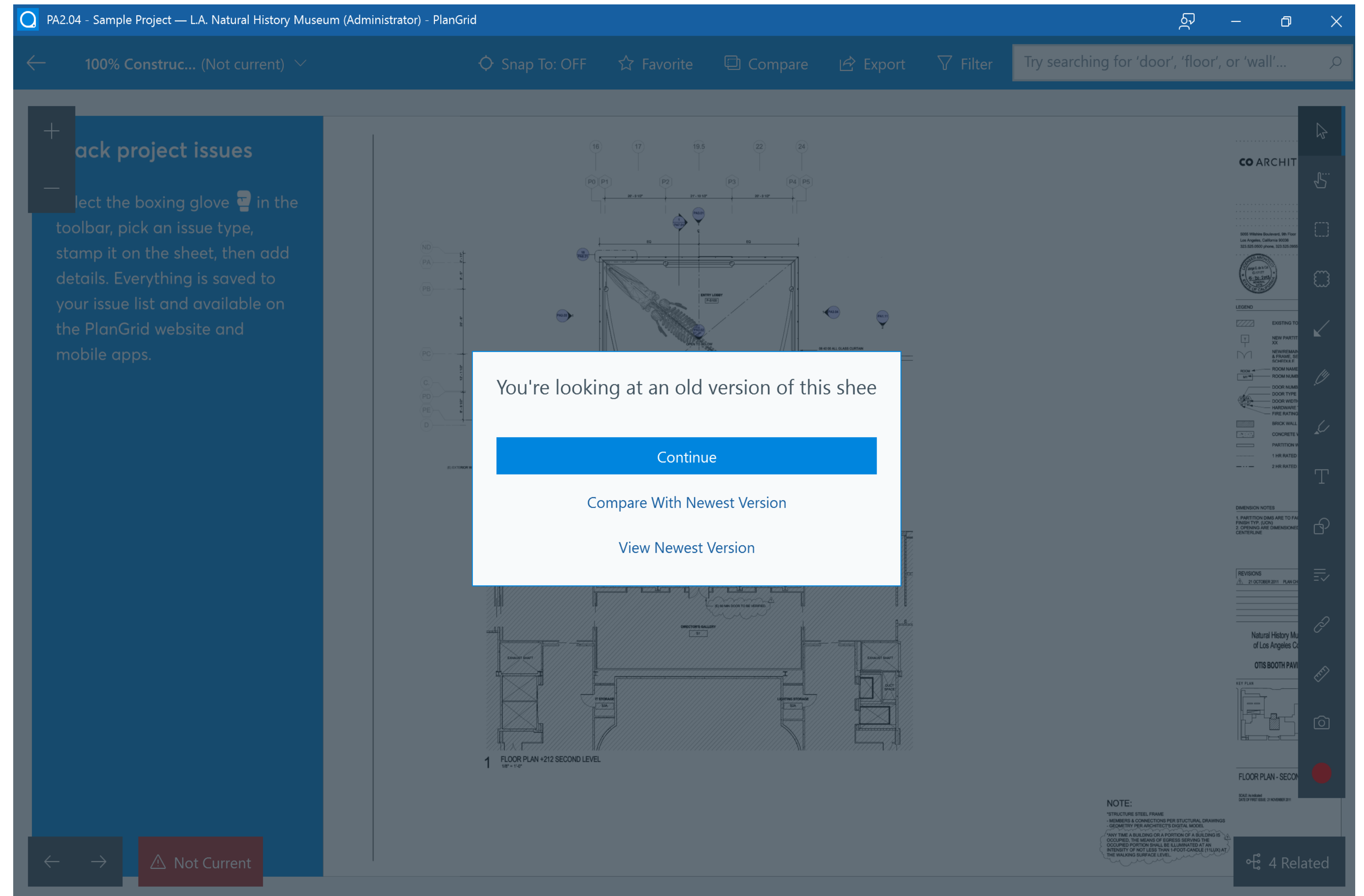
PDF's, Spreadsheets, Digital Checklists, Safety Apps...
theses are all examples of paper processes that have been digitized

Its nice, but its time to move on...

Use Plangrid to Keep Everyone
Up To Date



- ✓ Create Log Entry
- ✓ Slip-sheet
- ✓ Transfer Markup
- ✓ Notify Everyone



Plangrid logs, slip-sheets, transfers markups, and notifies everyone at the same time – there is no need to do anything more.

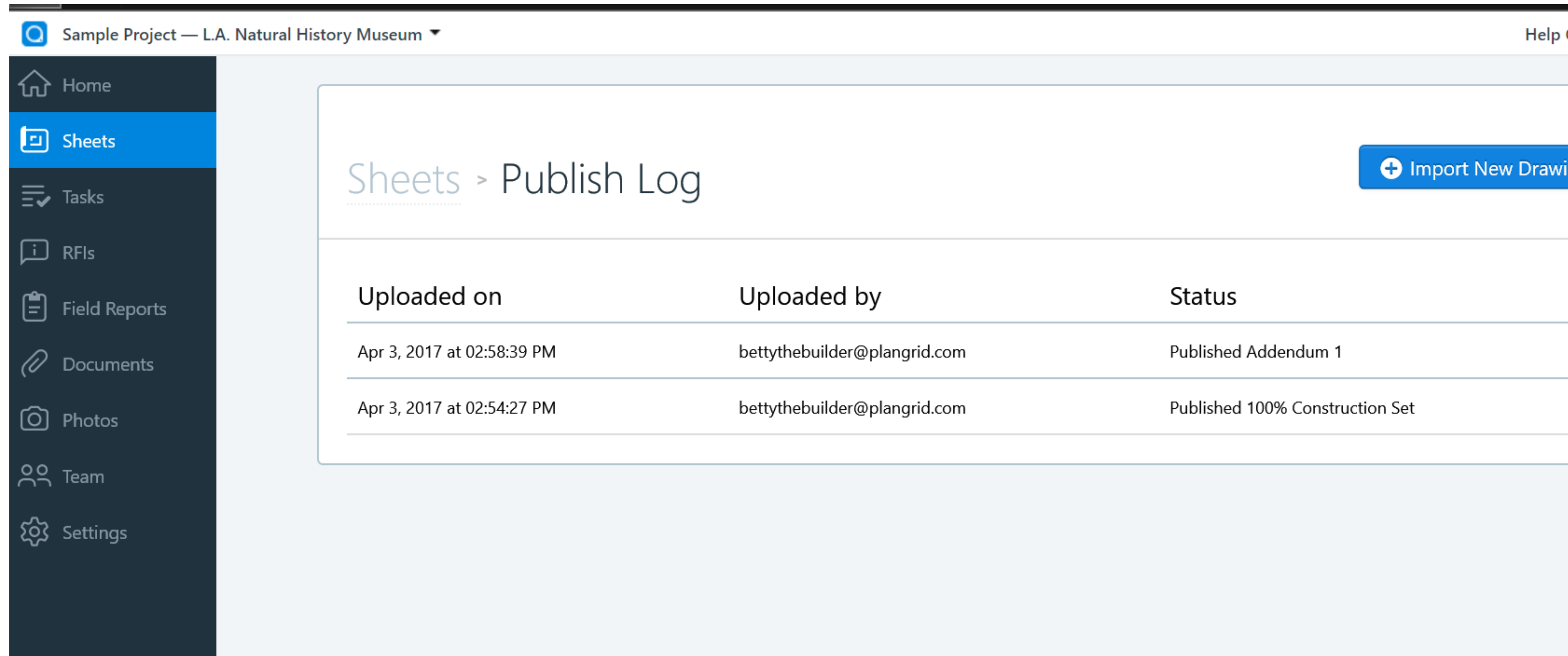
✓ Version Control is Automatic

The screenshot shows the PlanGrid web application interface. The browser tab is titled 'PlanGrid - the construct'. The address bar shows the URL: <https://app.plangrid.com/projects/71c78ab9-2082-44cc-b163-7a90f5473652/sheets/versions>. The page header indicates the project is 'Sample Project — L.A. Natural History Museum'. The left sidebar contains navigation links: Home, Sheets (highlighted), Tasks, RFIs, Field Reports, Documents, Photos, Team, and Settings. The main content area is titled 'Sheet log > Version sets'. It features a green 'Create Version Set' button and 'Edit' and 'Delete' buttons. Below these is a table with two columns: 'Issue date' and 'Set name'. The table contains two entries, both dated 'Apr 3, 2017': '100% Construction Set' and 'Addendum 1'.

	Issue date ▾	Set name
<input type="checkbox"/>	Apr 3, 2017	100% Construction Set
<input type="checkbox"/>	Apr 3, 2017	Addendum 1

Plangrid logs, slip-sheets, transfers markups, and notifies everyone at the same time – there is no need to do anything more.

✓ Logs can be generated any time because the data has been captured

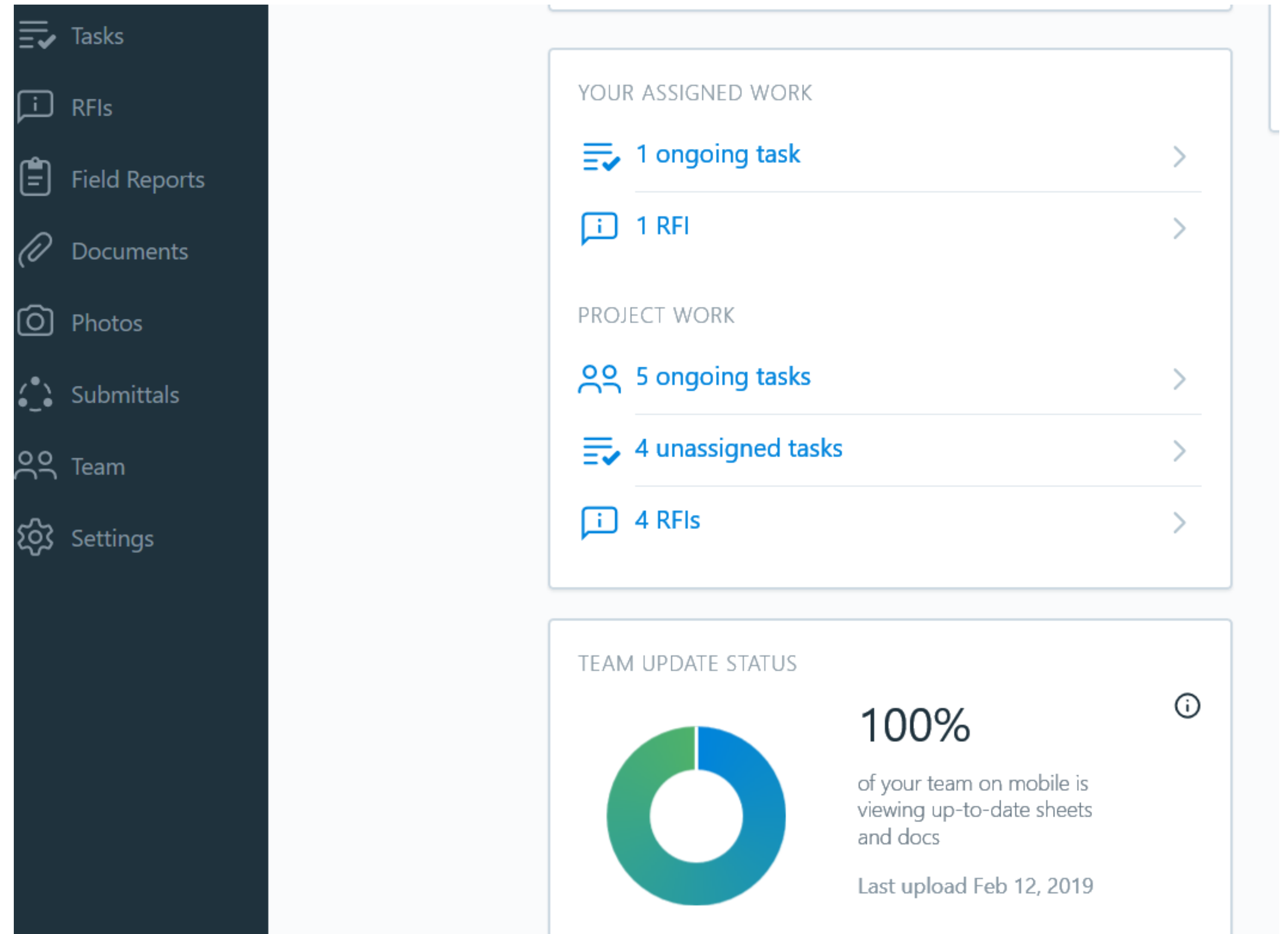


The screenshot displays the Plangrid web application interface. On the left is a dark sidebar with navigation links: Home, Sheets (highlighted), Tasks, RFIs, Field Reports, Documents, Photos, Team, and Settings. The main content area is titled 'Sample Project — L.A. Natural History Museum' and 'Sheets > Publish Log'. A blue button 'Import New Drawing' is in the top right. Below the title is a table with two columns: 'Uploaded on' and 'Uploaded by', and a 'Status' column. The table contains two entries, both uploaded by 'bettythebuilder@plangrid.com' on April 3, 2017.

Uploaded on	Uploaded by	Status
Apr 3, 2017 at 02:58:39 PM	bettythebuilder@plangrid.com	Published Addendum 1
Apr 3, 2017 at 02:54:27 PM	bettythebuilder@plangrid.com	Published 100% Construction Set

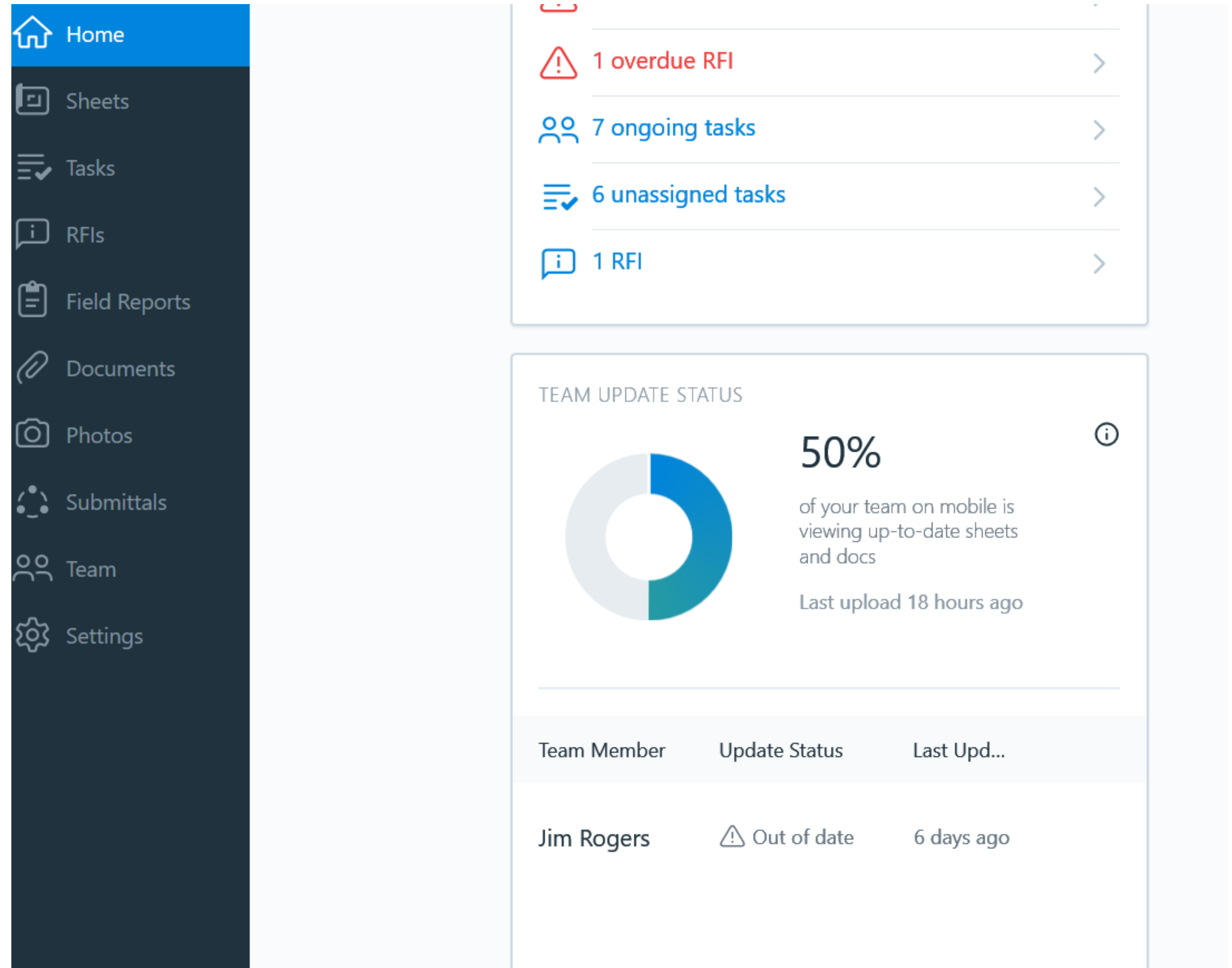
Plangrid logs, slip-sheets, transfers markups, and notifies everyone at the same time – there is no need to do anything more.

Know that
the ENTIRE
team is using
the correct
drawings

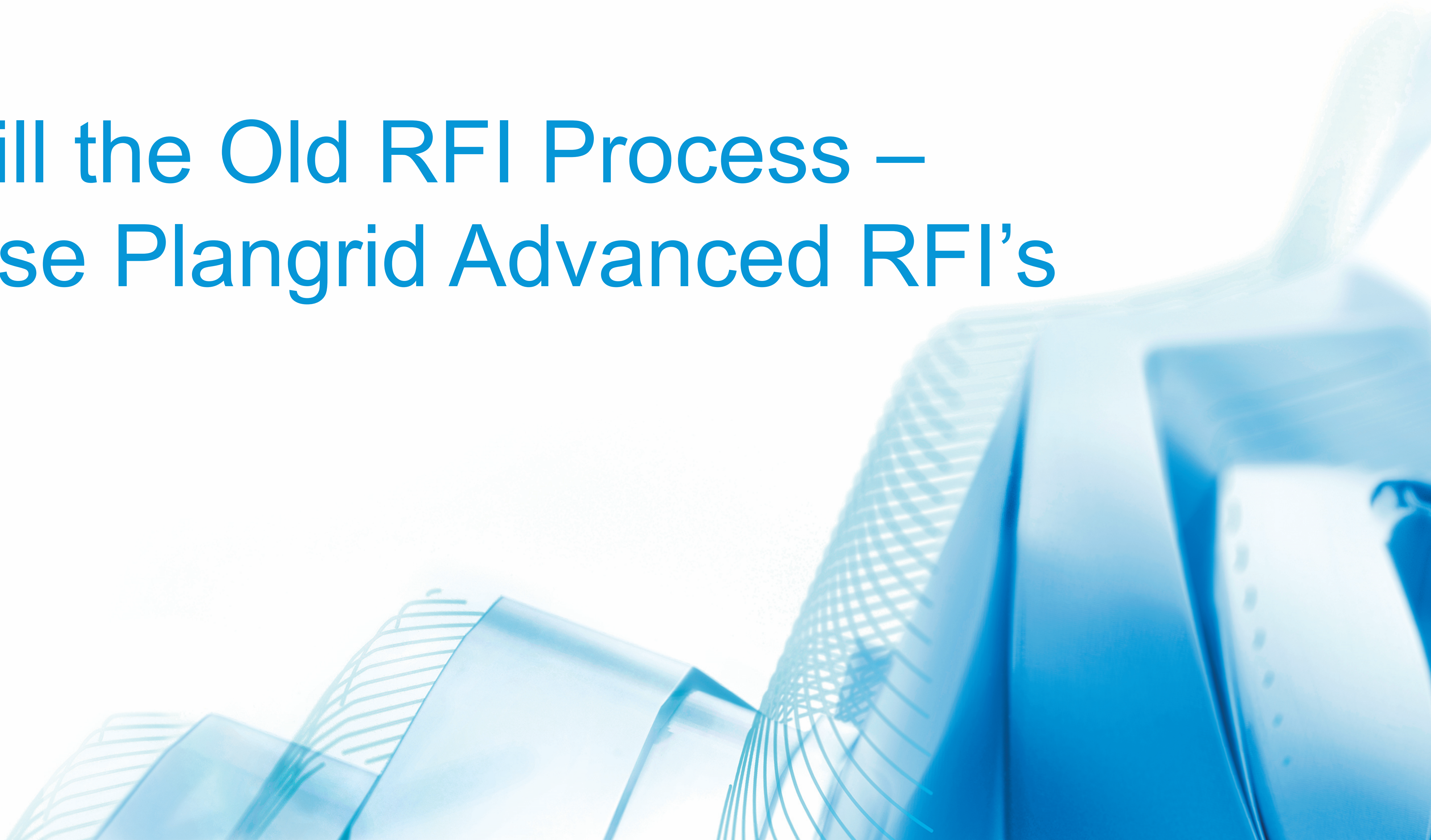


Know that
the ENTIRE
team is using
the correct
drawings...

or not



Kill the Old RFI Process –
Use Plangrid Advanced RFI's



PlanGrid - the construct

1031 SE Madison - 2

Home

Sheets

Tasks

RFIs

Field Reports

Documents

Photos

Submittals

Team

Settings

Live ChatHelp CenterJim Rogers

INTRO

MANAGER

REVIEWER

REVIEW PERIOD

Welcome to Advanced RFIs

Track the status of questions on your project, and simplify the process of getting answers. Get started by setting up the default roles and review period you will use.


Draft question

Finalize question

Provide answer


Distribute answer

Distributed




Submitter

The submitter drafts the question and submits it to the manager for review.




Manager

The manager reviews the question, adds additional information, and sends it to the reviewer.




Reviewer

The reviewer provides an answer and sends it back to the manager.



Manager

The manager distributes the answer with directions on how to proceed.

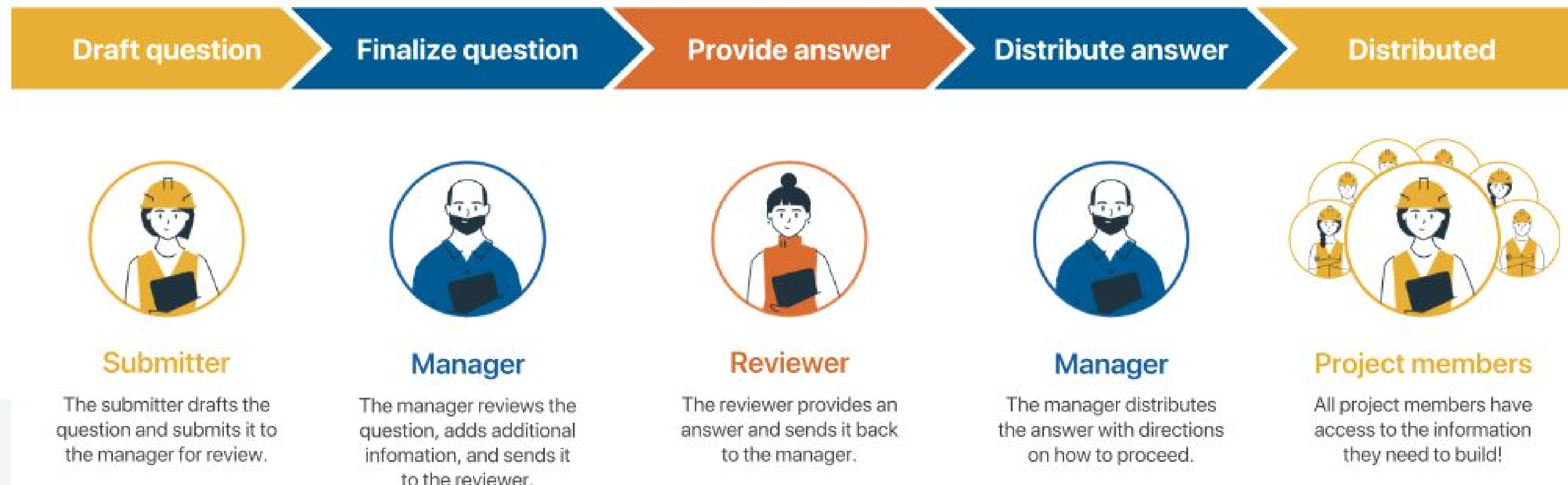


Project members

All project members have access to the information they need to build!

Welcome to Advanced RFIs

Track the status of questions on your project, and simplify the process of getting answers. Get started by setting up the default roles and review period you will use.



Hands-on Demonstration

<https://vimeo.com/374183934/1df26c4a26>

The screenshot displays an email interface from Plangrid. At the top, a toolbar contains icons for back, forward, search, and other actions, along with a 'More' dropdown. The email header shows the subject '[Natural History Museum] Answer requested: RFI 0065' and the sender 'Ray James (via Plangrid) <support@plangrid.com>' dated 'Apr 23'. The main body of the email is a white card with a blue header bar containing the Plangrid logo and the date 'Apr 23, 2019'. The card's content includes a title 'You've been assigned to answer an RFI', a metadata table, a 'Question' section, and a 'References' section.

RFI	0065 - ADA Restroom Issue
Project	Natural History Museum
Submitter	Hillary Acosta (Stile's Tiles)
Manager	Ray James (Nova GC)
Due	May 8, 2019

Question

Upon further investigation, there is a dimensional bust in all ADA restrooms when wall tile thickness is taken into account. It is physically impossible to maintain the specified dimensions in all regular restroom stalls and the ADA restroom stalls.

Possible solutions are to:

- a) shift the installed ADA wall plan south 2 inches (adjacent regular restroom stall gets slightly smaller) - potential cost impact
- b) change the finish from tile to paint (preferred) - no cost solution.

Please advise and confirm on the direction.

References:


The RFI process is broken and responsible for lots of re-work! Throw that old process away and use Advanced RFI's on Plangrid




Adopt a Digital Workflow Using Plangrid Submittals





Concrete Mix Design Submittal


 Export package

 Void

 Submitted Submitted: Feb 12, 2019 Jim Rogers (LinkedIn)	 Manage: Approved Reviewed: Feb 12, 2019	 Review: Approved Reviewed: Feb 12, 2019
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 Publish or send to next reviewer

 Next reviewer

 Publish

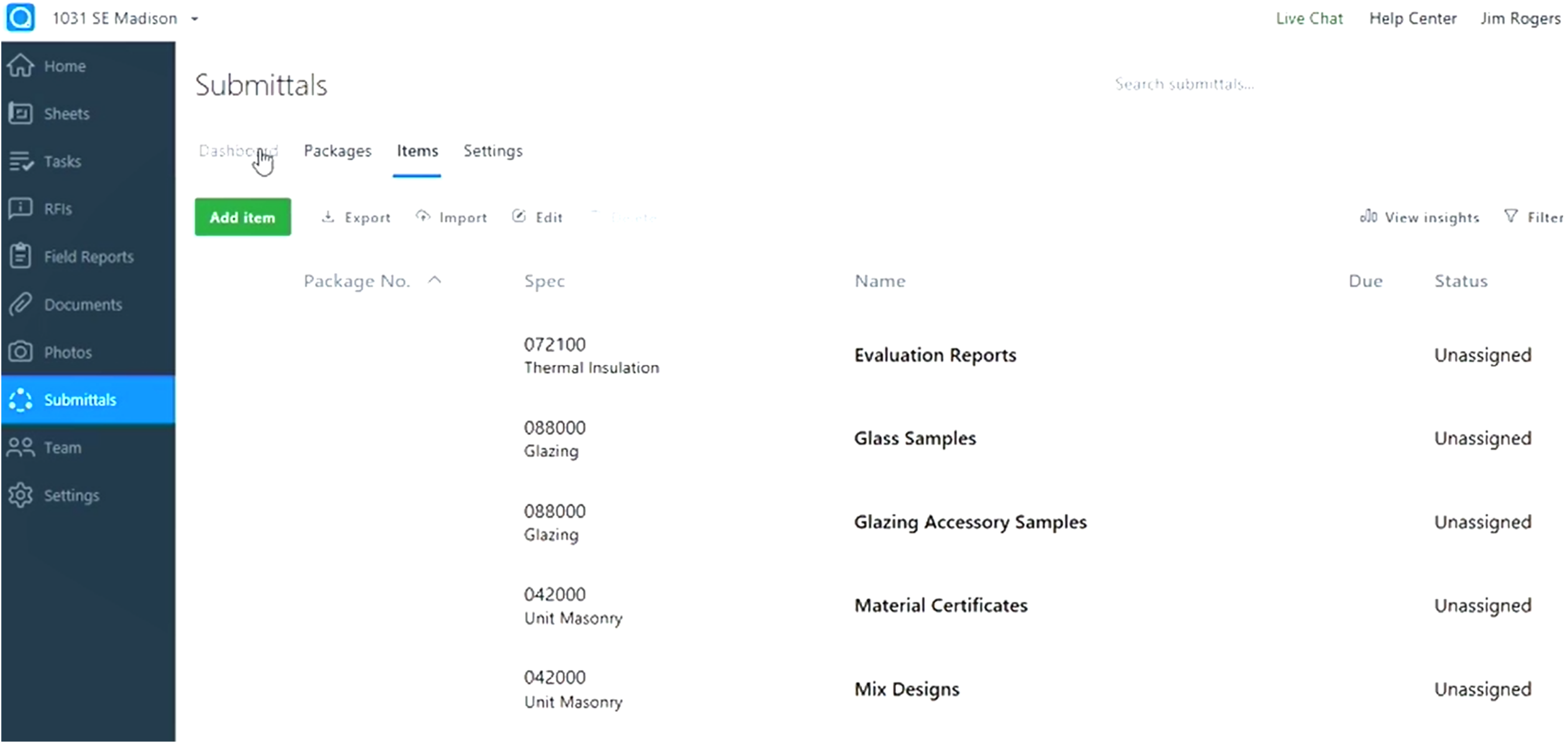
Information			Edit
Ball-in-court Jim Rogers (LinkedIn)	Submittal No. 072100-1	Submitter	
	Spec 072100	Manager Jim Rogers (LinkedIn)	

History	
FEB 12	Reviewed by designreviewer@outlook.com - Approved. Marked as official review

Plangrid Submittals


Hands-on Demonstration


<https://vimeo.com/374184793/d/b9ce827a1>





The Plangrid Submittals feature enables a truly digital workflow to allow everyone to focus on what matters instead of focusing on the process.


<https://linkedin-learning.pxf.io/pgsubmittlas>






Browse


 Search for skills, subjects or software

 Home

 In Progress

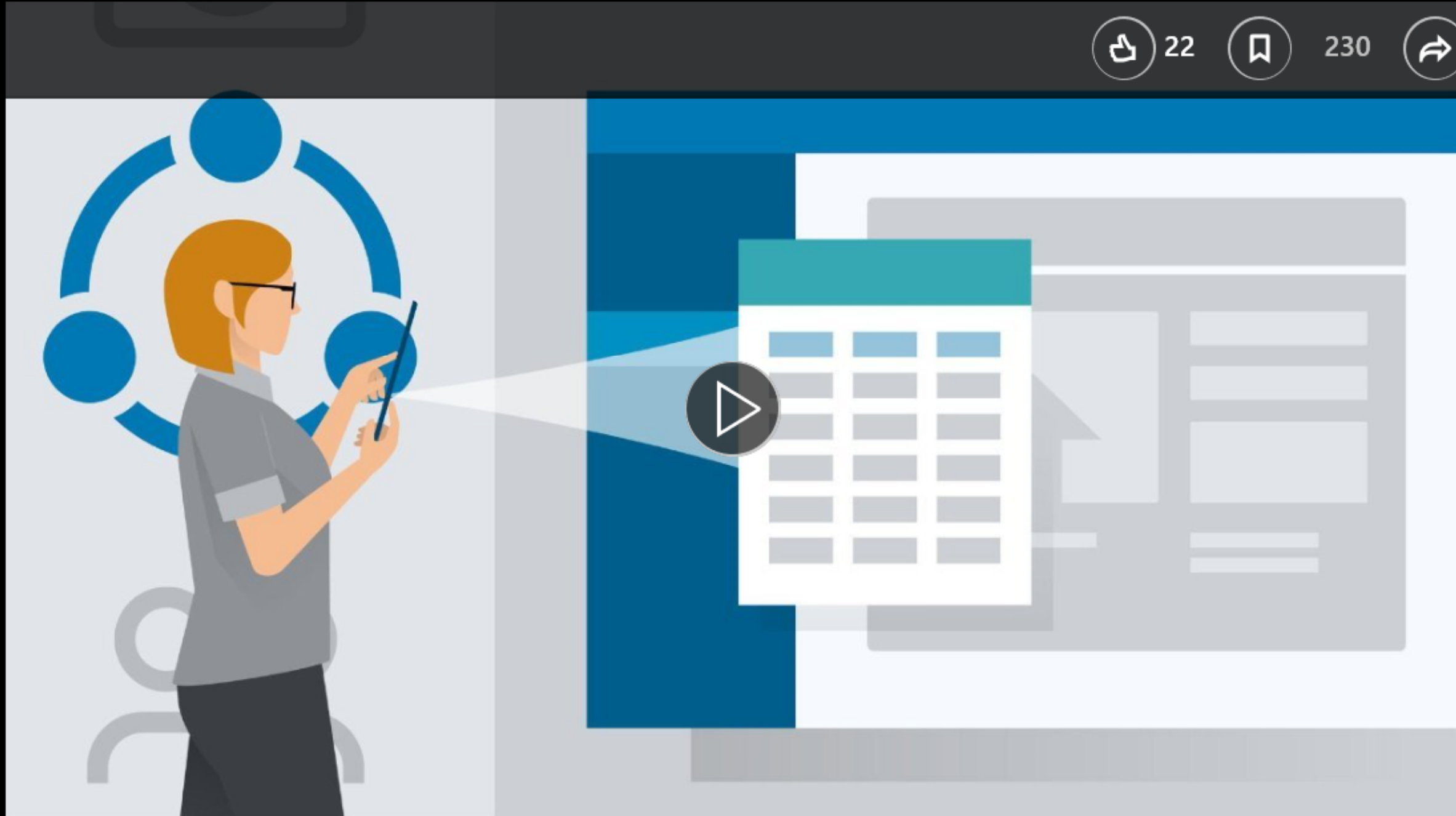
 Saved


 My Org


 Me


Watching: Tame the submittals beast with PlanGrid

From the course: **PlanGrid: Managing Construction Submittals**



 22

 230




Overview

Contents

Q&A

New

Tr

 See Exercise Files

Introduction

- Tame the submittals beast with PlanGrid
1m 32s
- What you should know
3m 13s
- Using the exercise files
51s

1. Rethinking Submittals for a Digital Workflow

- The submittals workflow in PlanGrid
3m 19s
- Import a submittal log from a spreadsheet
4m 40s
- Manually create a submittal item
2m 46s

Let PlanGrid create your submittal log

Help/Feedback

QUESTIONS & DISCUSSION





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