



# Project Documentation



# Project Documentation Process

Last Updated: 10/07/2025

## Purpose

To establish standardized procedures for managing project documentation using Procore, ensuring consistency, accessibility, and compliance across all Keller Construction Ltd. projects.

## Scope

This SOP applies to all Project Managers (PMs) and designates at Keller Construction Ltd. responsible for overseeing construction projects in Western Canada.

## Responsibilities

### 1.1 Document Upload & Organization

- It is the Project Manager's responsibility to ensure all project-related documents are stored in Procore within 24 hours of receipt or distribution.
- Organize documents in Procore using the company's standardized folder structure.

 01 Preconstruction

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 02 Construction

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 03 Safety

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 04 Post Construction

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 05 Templates

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 Schedules

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- Ensure proper and consistent naming conventions are followed for all uploaded files.

### 1.2 SALES HANDOFF TO PRECONSTRUCTION

- Maintain version control by using Procore's built-in versioning system.



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- Always work with and distribute the latest version of documents.

### 1.3 Permission Management

- Set appropriate access permissions for project team members, subcontractors, and clients.
- Regularly review and update permissions as project roles change.

### 1.4 Document Review & Approval

- Utilize Procore's workflow features for document reviews and approvals.
- Ensure all required parties complete reviews and approvals within designated timeframes.

### 1.5 Mobile Access

- Ensure field teams have mobile access to Procore for real-time document updates and access.

### 1.6 Quality Control

- Regularly audit project documentation for completeness and accuracy.
- Address any documentation gaps or inconsistencies promptly.

### 1.7 Training and Support

- Provide guidance to team members on proper document management practices.

### 1.8 Project Closeout

- Conduct a final documentation review before project closeout.

## Mandatory Documentation (Project Folders and/or Procore)

### Pre-Construction Phase Documentation

- Tender Information (IFTs, RFQ docs, addenda, post-tender documentation, drawings, estimate, trade quotes etc.)
- Prime Contract
- Subcontracts and Supplier Agreements
- Bonds (Performance, Labor, and Material Payment Bonds)
- Insurance Certificates (General Liability, Workers' Compensation, Builder's Risk)
- Project Plans and Schedules



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- Permits and Approvals (Building, Environmental, Zoning, Occupancy)
- Consultant Schedules (A+B Schedules)
- Safety Plans (Including Hazard Identifications and Emergency Response)

### During Construction Phase Documentation

- Invoices, Pay Applications, and Payment Certificates
- Change Orders with Approvals and Cost Impacts
- Purchase Orders
- Budgets
- Meeting Minutes and Correspondence
- Contract Admin (RFI, SI, CCN)
- Claims Information (Notices in Writing, etc.)
- Progress Reports and Site Logs (Daily/Weekly Diaries)
- Inspection and Test Reports (Quality, Materials, Third-Party Verifications)
- Safety Records (Incident Reports, Training Logs, Toolbox Talks)
- Drawings and Specifications (Original and Revisions)
- Material Submittals and Product Data

### Project Closeout Phase Documentation

- Certificate of Substantial Performance
- Certificate of Completion/Final Acceptance
- Consultant Schedules (C Schedules)
- As-Built/Redline Drawings
- Operation & Maintenance (O&M) Manuals
- Warranties & Guarantees
- Final Financial Documents (Lien Waivers, Statutory Declarations, Holdback Releases)
- Punch List & Resolution Records
- Final Inspection & Test Reports (Including Occupancy Permits)

## 1 Procedure

- 1.1 Upload all existing project documents and continue to add new documents as they are created or received.



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- 1.2 Configure document permissions based on team roles and responsibilities.
- 1.3 Implement and monitor document review and approval workflows.
- 1.4 Address any documentation issues or team member concerns promptly.
- 1.5 At project closeout, ensure all documentation is complete and accurate.

### END OF DOCUMENT

<b>Revision History</b>		
<b>Version No.</b>	<b>Effective Date</b>	<b>Description</b>
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