

Surveyor 3D Pre-Site Checklist

Site Number: _____ Site Address: _____

Scope and Documentation Review

- Understand the objectives and deliverables outlined in the scope. Confirm any specific tasks, extents, or requirements provided by the PM.
- Thoroughly review the Teams channel & quickbase for scope notes, kick-off call notes, and any additional comments from the PM.
- Check Dropbox for client-provided documents located in the 'Client Provided' or SOW folder.
- Review the 'SC Responses' tab on the Quickbase site page to gather critical site information, including access details, parking, hours, roof access, ceiling heights, and ladder availability.
- Internal kickoff call with either BIM Manager or Project Manager (This can be covered in the Project Coordinator meeting each Monday)

Site Contact and Access Confirmation

- Reach out to the site contact within 24 hours of the scheduled survey to verify site readiness and clarify any last-minute details.
- Confirm specific site requirements, including access logistics, equipment needs, and special accommodations.
- Save the site contact's details in your phone or notes for easy access.
- If a ladder is required and the site cannot provide one, make arrangements for a ladder rental. For assistance, contact the Project Coordinator.

Travel Arrangements

- The project coordinator can assist in travel research and booking. Any additional travel arrangements (this may include flights, hotels, and rental cars) will be submitted to the project coordinator for approval within 24 hours of survey assignment.
- Confirm your arrival time at the destination and the site. Ensure the Project Coordinator has all the required details to avoid scheduling conflicts.

Equipment Readiness

- Verify that all survey equipment is accounted for, functional, and fully charged. Perform any necessary pre-survey maintenance or calibration. (Do not survey with damaged equipment.)
- Double-check all relevant documentation, including site notes and responses, are accessible during the survey.

Matterport

- Confirm if there is a Matterport by checking the site in Quickbase. There is a checkbox under the Site ID that will be checked if a Matterport is required.

Ready to Survey

- Verify the survey date, time, and location.
- Ensure alignment with the client's and PM's expectations.
- Compile and send any last-minute questions to the PM for clarification before heading out.
- Any outstanding equipment issues or site questions are brought to the attention of the PM.
- Upload *signed* Pre-Site Checklist to dropbox (in the project folder)

Signature: _____

Surveyor 3D On-Site Checklist

Site Number: _____ Site Address: _____

Arrival at Site

- Confirm access to the survey area and discuss any special instructions with the site contact.
- Identify unique conditions that may affect scanning or photography (obstructive or reflective surfaces).

Scan Coverage

- Entire survey area, 20-30 feet beyond scope boundaries unless otherwise instructed by the PM.
- Above grid: Focus near structural columns, beams, HVAC equipment, ducts, avoiding obstructions
- Exterior walls and adjacent seating areas (if within scope).
- Back of house areas and corridors.
- If areas are locked or inaccessible, contact the PM immediately.

360-Degree Photos

- Take one photo per small room and a photo every 10 feet in larger spaces.
- Exterior areas extending 20+ feet beyond the scope extent.
- Ensure all 360 photos are captured with HDR enabled.

Matterport

- Confirm if there is a Matterport by checking the site in Quickbase.
- Matterport is completed and uploaded while on site.

Still Photos

- Exterior building photos documenting building entry and existing signage - NOT to be taken at night.
- Exterior of the space (may differ from building exterior). To include all adjacent rooms and spaces within 25 feet of the annotated space.
- All interior spaces and rooms (including closets, restrooms, MEP rooms, corridors, vestibules, etc.) in the café, back of house, and back engine/bar.
- Context and close up documentation of all panels, switchgear, HVAC equipment, and telecom equipment serving the space. If a label is visible, it must be photographed clearly so the label is legible.
- Close up documentation of all existing equipment including a label photo.
- Path of Travel to common/shared restrooms (if not within the space)
- Interior of common/shared restrooms
- Path of travel to remote electrical/telecommunication/mechanical rooms
- Interior of electrical/telecommunication/mechanical rooms
- Path of travel to remote storage
- Interior of remote storage
- Path of travel to trash area
- Interior of trash area
- Delivery path from loading dock/delivery area to space
- Loading dock/delivery area
- Unique conditions
- Existing furniture
- Areas of concern
- Above ceiling photos
- Exterior and shared seating areas
- Photo of water and sewer line sizes, if accessible.
- Photos below the bar (if possible) so we can see any floor drains.
- Below space (if necessary - check the scope).
- Manager's office (if applicable)

Water Sample Test

- Collect a sample from an unfiltered source. Seal and label the sample kit appropriately.

Site Survey Report (SSR)

- Complete the SSR onsite using the Fast Fields App.

- Upload the completed SSR from the site or as soon as possible if internet access is unavailable.
- Directly send a photo of water/sewer lines with a caliper to the SSR PM via Teams before leaving the site.

Finalizing on site

- Ensure all required deliverables (photos, 360-degree photos, laser scan data, and Survey Report (SSR)) are captured. Pay extra attention to any areas with potential coverage gaps.
- Verify that all equipment is accounted for and securely packed for transport.
- Review Teams or Dropbox to confirm that all surveyed areas are complete and no revisit is necessary.
- Upload signed On-Site Checklist to dropbox (in the project folder)

Signature:

Surveyor 3D Post-Site Checklist

Site Number: _____ Site Address: _____

Water Test

- Ship the completed water test kit to Pentair.
- Email proof of shipping to the Project Coordinator and Revit PM.
- Upload Water Test shipment proof to Dropbox in the Working Folder.

Upload Data and Documentation

- Upload all laser scan data to Dropbox or the designated storage platform (e.g., S3 bucket). Ensure proper file naming and organization. This should be completed within 24 hours of survey completion. If there is any reason for delay, contact the project manager and BIM manager *immediately*.
- Upload the still and 360-degree photo keys (with photo keys) to Dropbox.

Survey Report (SSR)

- If any SSR items are incomplete or require clarification, send an email to the site contact with the Project Manager (PM) and SSR assignee copied. Use a clear subject line (e.g., *Project Name* Site Survey – SITE NAME - Outstanding Questions). Request the site contact to "Reply All" with answers.

Final Steps

- Go into Quickbase into the site and then into the assignment tab, and input the date that all deliverables have been uploaded. This will trigger the status to change and the rest of the team will know they can begin their portion of the work.
- Discuss any issues or observations encountered on-site that could impact the project, such as coverage concerns, with the Project Manager immediately.
- Input site feedback into Quickbase for the project manager and project coordinator.
- Ensure all timecards are input accurately.
- Upload all expenses to the project manager within 24 hours of survey completion. If there is any reason for delay, contact the project manager.
- Upload *signed* Post-Site Checklist to dropbox (in the project folder)

Signature:
