

Construction & Field Service Operations

Version 1.0 | October 5, 2026

Purpose

Coordinate invented planning, crew handoffs, materials, change reviews and cost exceptions. Five SOPs and four templates connect visible task evidence to an owned decision.

Boundary

Fictional portfolio demonstration only. No real site access, dispatch, safety clearance, engineering approval, contract advice or authorization to perform field work. Approval examples are mock records; published procedures do not configure dispatch, safety systems or customer messages.

Operating roles

Project Coordinator owns readiness. Field Lead reviews mock execution prerequisites. Materials Coordinator reviews supply dependencies. Change Reviewer records scope decisions. Finance Reviewer reconciles synthetic costs. Sending roles retain ownership until a named receiver accepts.

Cadence and control

Review freshness, blocked tasks and missing evidence each cycle. Review scope, handoffs and matched costs weekly. Mock owner: Field Operations Lead. Record document versions and review again after source or rule changes.

Metric Dictionary

Separate administrative task progress from physical work and commercial commitments.

Task metrics

Open = total DEMO | tasks minus Done. Completion = Done / total, rounded. Needs attention counts Stuck tasks only; overdue tasks require a separate due-date review. These are coordination measures, not proof of a service outcome.

Financial measures

Reported budget and spend sum known amounts and disclose missing values. Comparable utilization = matched spend / matched budget; only rows with both values enter the matched set. Matched remaining budget = matched budget minus matched spend. Unknown is not zero. The general task display currently falls back to 0% when matched budget is zero; treat this as an undefined ratio, not evidence of efficiency.

Charts and dates

Workstream progress shows the three largest groups by task count. Cost comparison shows the three largest by reported budget. Upcoming work counts task due dates in six weeks from Monday of the current UTC week, including Done tasks. Undated and out-of-window records are excluded. This is a due-date distribution, not a historical trend or capacity forecast.

Completeness

Required task fields: Status, Workstream, Next Action, Due Date, Budget and Actual Spend. Presence does not prove acceptance or accuracy. Keep 20-30 unarchived DEMO tasks, at least six open and 2-4 labeled demonstration gaps per board. Do not reopen Done work or infer missing amounts.

Refresh discipline

Inspect schemas, current values, recent activity and DEMO CYCLE date/slot markers. Advance 2-3 eligible tasks; resolve one missing field while preserving deliberate gaps. Create at most one task per board per local day. Read back writes, run the existing Make publisher once, inspect pending execution IDs and retry failed syncs without repeating successful board writes.

Proposed measures

Crew utilization, job margin, earned value, cost to complete, safety performance, physical percent complete and dispatch reliability require separate records. Due-date charts and open-task budgets do not calculate them.

SOP 01 Job Readiness and Mobilization Review

Owner: Project Coordinator

Trigger and inputs

A fictional job-readiness coordination task reaches review. Inputs: invented scope, service window, dependencies, evidence checklist and receiving-role criteria.

1 Define the work

Record included/excluded mock scope and the role receiving the plan. A task name does not establish a contract or field authorization.

2 Check prerequisites

Review the fictional material, access, crew and instruction references. Preserve missing evidence; do not assert a safety or permit clearance.

3 Record gaps

Assign each unresolved dependency a role, next action and review date. Mark the coordination task Stuck if it cannot progress.

4 Review decision

Field Lead records Ready, Conditional or Hold in the mock readiness log with reasons. Conditional does not authorize real field work.

5 Accept the record

Close only the accepted review task with all required fields. Physical job completion is a separate evidenced outcome.

Exception

Missing prerequisite evidence produces a mock Hold or owned exception, not assumed readiness.

Completion evidence

Scope/version, prerequisite evidence, reviewer decision, conditions and receiving-role acceptance.

Dashboard connection

Planning progress, Stuck tasks, due dates and missing fields.

SOP 02 Crew Scheduling and Field Handoff

Owner: Field Lead

Trigger and inputs

A mock dispatch or crew-handoff improvement is ready for review. Inputs: invented service window, roles, skills assumptions, constraints and receiving-role checklist.

1 Plan roles

Define sample responsibilities and handoffs; use a separate mock availability sheet. Task count alone does not establish crew load.

2 Review constraints

Record missing availability, access or instruction evidence. Do not allocate actual people or make real dispatch commitments.

3 Prepare the handoff

Include the sample scope, evidence references, known limitations and escalation owner.

4 Confirm receipt

Receiving role records Accepted or Returned. The sender retains ownership until acceptance is explicit.

5 Update coordination

Record the next action and supported cost values. Close the handoff only after acceptance and complete fields.

Exception

Missing acceptance or availability keeps the relevant work open. A Done task is not proof of a completed site visit.

Completion evidence

Role plan, constraints, mock instructions, receiver acknowledgment and remaining actions.

Dashboard connection

Crew/field coordination tasks; no dispatch SLA or utilization measurement.

SOP 03 Materials and Supplier Exceptions

Owner: Materials Coordinator

Trigger and inputs

A fictional supplier delay, missing quantity reference or materials-readiness review affects planned work.
Inputs: invented requirement, vendor reference, mock acknowledgment and dependency dates.

1 Define requirement

Record the item/specification reference, required sample quantity and target window in a mock materials log.

2 Check evidence

Distinguish requested, acknowledged and observed receipt. Missing delivery evidence is unknown, not received.

3 Assess dependency

Identify affected mock tasks and the next decision owner. Do not infer production delay duration from a Stuck label.

4 Record response

Change Reviewer or Field Lead records a mock resequence, request-for-evidence or alternative for review. No real purchase is placed.

5 Confirm acceptance

Verify the receiving-role result and preserve unresolved exceptions. Close only the administrative review with complete fields.

Exception

Unverified substitution or receipt prevents an asserted readiness result.

Completion evidence

Requirement/version, acknowledgment, observed mock result, impact and accepted next step.

Dashboard connection

Supplier/material task status, dates and gaps; no live inventory or procurement data.

SOP 04 Change Scope and Approval Record

Owner: Change Reviewer

Trigger and inputs

A mock scope clarification or proposed change affects an invented job. Inputs: original scope, proposed difference, evidence and separate schedule/cost assumptions.

1 Establish baseline

Reference the approved mock scope/version and describe the proposed addition, omission or substitution.

2 Compare evidence

Trace the difference to supplied fictional documents. Separate facts, estimates and unknowns.

3 Evaluate consequences

Record assumed cost, dependency and acceptance implications in a separate mock change log. Do not turn task budget into an approved quote.

4 Record decision

Name the reviewer and state Accepted, Returned or Deferred with rationale and conditions. This is not a binding customer authorization.

5 Reconcile tasks

Update affected open tasks only after the mock decision is accepted. Never reopen Done work; retain decision history and use a new follow-up where needed.

Exception

Missing baseline or approval remains an open exception; it cannot be reported as an approved change order.

Completion evidence

Baseline/proposed versions, cited difference, assumptions, decision and follow-up.

Dashboard connection

Scope-review tasks, status and budgets; no commercial approval system.

SOP 05 Field Cost and Completion Review

Owner: Finance Reviewer

Trigger and inputs

A weekly fictional cost review or budget exception needs action. Inputs: covered scope, recorded budget/spend, mock cost evidence and separately recorded physical-progress/remaining-cost estimates.

1 Confirm basis

Define which sample costs and period the amounts represent. Separate incurred spend, commitments and estimates.

2 Reconcile known amounts

Disclose missing budget/spend and use matched pairs for comparisons. Known zero is distinct from a blank.

3 Separate outcomes

Compare accepted administrative task progress with the separate mock physical-completion evidence. Neither implies the other.

4 Review forecast

Only calculate estimated final cost when a separate remaining-cost estimate exists; disclose assumptions. Current open-task budget is not cost to complete.

5 Record action

Agree an owned mock decision and review date. Validate changed values and verify published data before reporting success.

Exception

No earned-value, margin or final-cost conclusion is supported by task counts alone.

Completion evidence

Cost basis, matched amounts, excluded rows, separate estimates, decision and next review.

Dashboard connection

Task budget/spend and remaining matched budget; cost-to-complete is a proposed additional measure.

Working Templates

Copy into a fictional operating log. Do not insert actual patient, client or site information.

Readiness record

Reference: ____ | Scope/version: ____ | Required evidence: ____ | Supplied/missing: ____ | Dependencies: ____ | Review outcome and rationale: ____ | Reviewer: ____ | Next owner/action/date: ____

Handoff acceptance

Sending role: ____ | Receiving role: ____ | Included scope: ____ | Evidence/version: ____ | Exceptions: ____ | Accepted/Returned and reason: ____ | Acceptance date: ____ | Remaining actions: ____

Exception and decision log

Issue: ____ | Observed evidence: ____ | Assumptions/unknowns: ____ | Affected tasks: ____ | Decision owner: ____ | Decision and reason: ____ | Required evidence: ____ | Next review: ____

Matched-cost worksheet

Task: ____ | Cost basis/period: ____ | Budget: ____ | Spend: ____ | Both known?: ____ | Matched remaining: ____ | Missing evidence: ____ | Separate remaining-cost estimate: ____ | Review owner/date: ____

Worked cost example

Task A has \$50,000 budget and \$32,000 spend; Task B has \$20,000 budget and unknown spend. Reported budget is \$70,000; reported spend is \$32,000 with one missing-spend row. Matched utilization is 64%, and matched remaining is \$18,000. Task B is excluded from matched ratios. A separate \$22,000 remaining-cost estimate for A produces \$54,000 estimated final cost; the dashboard does not supply that estimate.

Closure example

A mock field handoff has complete fields but no receiving-role acknowledgment. Keep it open. A reviewer may complete an administrative review with a documented Hold, while the underlying blocked work remains open. Never equate a review outcome with real-world authorization.