REALITY SYSTEMS

FREE FIELD GUIDE

From Jobsite to Office

Five AI-Assisted Workflows for a Clearer Paperwork Handoff

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Practical AI. More room for life.



Choose one task **Keep a human check** **Make room for life**

A small system. A clear owner. A useful next step.

FREE FIELD GUIDE

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Original instructional examples, not measured customer results. Adapt and test a permitted task with a responsible reviewer. This guide is free to read and download.

Start with the work that already exists

A field observation becomes a phone photo. The photo becomes a text. Someone asks which room it shows. Someone else copies the explanation into a report. By the time the office has a usable record, several people have handled the same information.

That is a useful place to begin with AI.

This guide gives you five small workflows for turning information you already collect into drafts people can check and use. You can start with a folder, a spreadsheet, and an AI tool approved by your company. You do not need to replace your project-management system.

The goal is less retyping, clearer ownership, and fewer searches for the source. Whether it saves time depends on your inputs, review process, and team. Measure that before expanding.

The examples and templates here are original, illustrative operating suggestions. Your contract, company procedures, records requirements, and professional responsibilities still apply. This guide does not provide engineering, safety, inspection, legal, or compliance certification. Never use an AI draft to authorize construction or determine whether work is safe.

The rule that makes all five workflows usable

Every useful draft needs three things:

1. **A source:** Where did the fact come from?
2. **A reviewer:** Who can check it?
3. **A destination:** Where does the reviewed version belong?

Generative AI can produce confident false statements. NIST identifies this risk in its Generative AI Profile.[1] A well-written paragraph therefore needs the same factual review as a rough one.

Keep original notes, photographs, correspondence, and approved documents. Label AI output as a draft until the responsible person reviews it. Use “not recorded” when information is missing. Do not let a blank field turn into a guess.

Before uploading project material, confirm that the tool and account are approved for that information. Check client restrictions, access, retention, and the vendor's handling of inputs. A simple pilot can use fictional or sanitized examples while those questions are resolved.

1. Turn field notes into a daily-report draft

The problem

The superintendent has the facts, but turning shorthand into readable prose takes time. An office coordinator may receive fragments without knowing which observation belongs to which date or area.

Capture a small, repeatable packet

At your normal reporting point, collect:

- Project and report date
- Observer and observation time
- Specific location or work area
- Work observed and the source for any quantity
- Relevant people, equipment, or deliveries
- Constraints and unresolved questions
- Photo or document references

Use your existing required fields first. Caltrans' daily-report guidance is one public example of a structured record that captures work, discussions, conditions, and relevant facts. Its requirements apply to its own context, rather than every construction project.[2]

Ask for a draft with gaps visible

Reusable prompt

> "Create a daily-report draft using only the notes below. Use our headings: work observed, deliveries, constraints, conversations, and open questions. Preserve dates, quantities, units, names, and locations exactly. Reference the supplied source ID beside each factual item. Mark missing information 'not recorded.' Do not infer completion, cause, responsibility, safety, or approval. List contradictions separately. Return a draft for human review."

See the difference

Illustrative input: "Tuesday, east corridor. Delivery receipt DR-18 shows 24 cartons. Photo P-22. Note says 'started install'; installed quantity not written."

Useful draft: "In the east corridor, installation was reported as started. Installed quantity was not recorded. Delivery receipt DR-18 records 24 cartons received. Related photograph: P-22."

Draft to reject: "The crew completed installation of 24 cartons on Tuesday."

The second version invents completion and treats received material as installed material.

Review and file

The person responsible for the report checks dates, quantities, names, and source references. They resolve or retain the gaps, then file the reviewed report in the official location. Record the reviewer's name and review date. Keep the draft out of any automatic distribution list.

First measurement: Total minutes from collecting notes to filing the reviewed report, including correction time.

2. Create an RFI first draft that asks one clear question

The problem

A question reaches the office as “these don't match.” The project manager has to reconstruct the location, relevant documents, and actual decision needed before routing it.

Build the question packet

Collect the exact drawing or specification references and their revisions, the location, the observed discrepancy, any relevant photograph, and the requested response timing. Have the responsible person verify that the packet uses the applicable document versions.

Separate observations from proposed solutions. “Two references show different labels” is an observation. “Use this assembly instead” is a proposal requiring the appropriate review.

Give AI a narrow job

Reusable prompt

> “Prepare an RFI draft from these supplied references. Include the location, the specific ambiguity, documents reviewed, and one answerable question. Use only the references provided. Do not interpret the design, propose an engineering solution, invent a document reference, or state that additional cost or time is approved. Put missing information in a checklist for the project manager. Label the output DRAFT.”

Illustrative question: “The room designation on the supplied plan excerpt differs from the designation on the supplied schedule excerpt. Please confirm the applicable designation for the highlighted location.”

A reviewer should be able to point to the two references immediately. If the output mentions a revision that was never provided, reject and correct it.

Keep the authorization step separate

The project manager checks the technical question, routing, and timing before it enters the formal RFI process. Any cost, time, or scope consequence goes through the project's applicable change process. AIA's G701 instructions describe a separate change-order document for agreed changes to scope, contract sum, and time.[3]

An AI summary, informal reply, or convenient status label should never become your basis for assuming authorization.

First measurement: How many drafts require another round because a reference, location, or question is missing?

3. Assemble change evidence without inventing approval

The problem

A possible change generates photographs, texts, delivery records, and conversations. When someone needs a clear history, the evidence sits in several places.

Open an evidence record early

Give the issue an internal tracking ID. Record:

- What was observed and when
- Who recorded it
- Original scope reference, if identified
- Related photos, messages, receipts, and daily reports
- Requested decision and responsible reviewer
- Current authorization status, with the actual source

Use factual labels such as “evidence collected,” “under review,” and “approval not located.” Match official status terminology to your project's procedures. Do not overwrite the original record when a later explanation arrives.

Use AI to organize the chronology

Reusable prompt

> “Create a chronological evidence index using only these records. For each item, give the date, source ID, factual description, and unresolved question. Separate an observed condition from a request, proposal, instruction, or documented approval. Do not decide entitlement, assign blame, calculate a claim, or infer authorization from silence. Flag any conflicting dates or descriptions.”

Review the packet before the decision

Imagine a text says, “Please price the additional area.” The AI must preserve that as a request for pricing. It must not rewrite it as “Additional area approved.”

The person authorized under the contract determines the required notice, review, approval, and documentation steps. If timing or contractual rights may be affected, use the project's established escalation route promptly. A neat evidence packet cannot correct a missed requirement or replace professional advice.

First measurement: Time required to locate the supporting record for a randomly selected factual statement.

4. Prepare estimate follow-ups people have agreed to receive

The problem

An estimate goes out, then the follow-up depends on someone's memory. A generic automation may send the wrong scope, refer to an expired price, or continue after the prospect asks it to stop.

Keep a small follow-up register

Record the recipient, estimate identifier and version, date sent, approved scope summary, next agreed contact, preferred channel, and any stop request. Confirm the recipient and channel before drafting.

Start with people who requested an estimate and have agreed to the relevant follow-up. That is a conservative operating choice, not a complete statement of marketing law. Rules differ by jurisdiction and channel. For U.S. commercial email, the FTC's CAN-SPAM guide explains requirements including accurate sender information, truthful subjects, and an opt-out process.[4] Have the responsible person review your actual practice.

Draft a useful next step

Reusable prompt

> “Draft a short follow-up for the recipient and estimate listed below. Use only the verified estimate version, scope summary, and agreed follow-up date. Ask whether they need a clarification or want to discuss a next step. Do not invent availability, discounts, urgency, deadlines, price validity, or approval. Do not send the message. Flag missing permission or stop-request information.”

Illustrative draft: “I'm following up on estimate E-104 for the scope we discussed. Is there anything you would like clarified before deciding on the next step?”

Before sending, a person checks that the estimate is still applicable and the message complies with company policy and relevant rules. Record the actual response. An unanswered email does not establish acceptance.

First measurement: Follow-ups completed when agreed, with stop requests honored and wrong-version messages counted.

5. Make the next handoff easier to pick up

The problem

A handoff says, “Everything is in the folder.” The next person then has to discover what matters, which version is current, and what still needs attention.

Use a one-page handoff

Prepare five sections:

1. Work or area covered
2. Current verified status and its source
3. Open items, each with one owner
4. Next required decisions and their timing
5. Links or references to the authoritative records

Include items awaiting verification. A recipient needs to see uncertainty before it turns into a confident assumption.

Ask AI to expose loose ends

Reusable prompt

> “Build a handoff draft from the supplied records. For each open item, identify the owner and due date only when recorded. Otherwise mark them ‘unassigned’ or ‘not set.’ Include the source for every status. Preserve conflicting information in an exceptions section. Do not mark work complete because it was scheduled or because no one raised an objection.”

Close the loop with a person

The sender reviews the packet. The recipient confirms they can open the references and understands the outstanding items. Name the next owner explicitly. Receiving a handoff does not mean approving its technical content or accepting completed work.

First measurement: Questions the recipient must ask before they can take the next administrative step.

A one-week start

Choose one workflow, one project, and one reviewer. Use the team's normal process as your comparison.

Before the first draft: Agree on allowed inputs, required fields, the official filing location, and who can distribute the reviewed result.

During the week: Save a few original inputs, draft outputs, corrections, and final records. Record total handling time. Notice which corrections repeat. Missing information usually calls for a better capture form before it calls for a longer prompt.

At the review: Ask whether the workflow made the next person's work easier. Check for unsupported facts, misplaced approvals, privacy problems, and extra steps. Stop or narrow the pilot if the review burden outweighs the benefit.

You are looking for a dependable improvement people will actually use. One well-run workflow provides a better foundation than five unreviewed automations.

Your next step

Write down the document your team rewrites most often. Then answer: Who captures the facts? Who checks the draft? Where does the approved record live?

If those answers are unclear, start there.

For more on practical AI and physical operations, visit **Reality Systems: https://realitysystems.ai/**. When you reach out, describe the paperwork bottleneck and the roles involved. Leave confidential project material out of the initial message.

For a general inquiry, call (425) 375-7793. Leave a message. I'll call you personally. Keep private records out of the initial inquiry.

Sources and scope

Sources checked October 13, 2026. The workflow designs, prompts, and fictional examples are original. These sources support the narrow factual points noted in the text; they do not endorse this guide or establish that a particular AI workflow is compliant or effective.

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