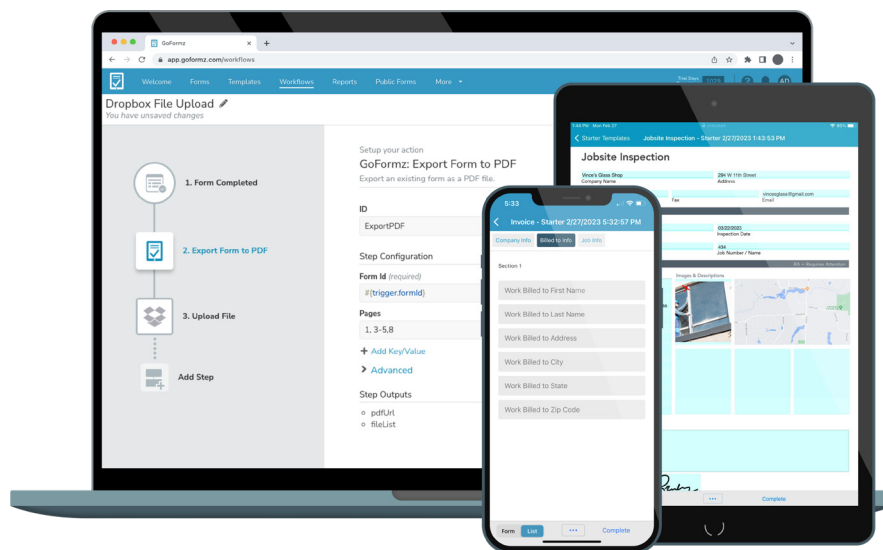




eBook

# 7 Common Use Cases for Construction Mobile Forms



[www.goformz.com](http://www.goformz.com)

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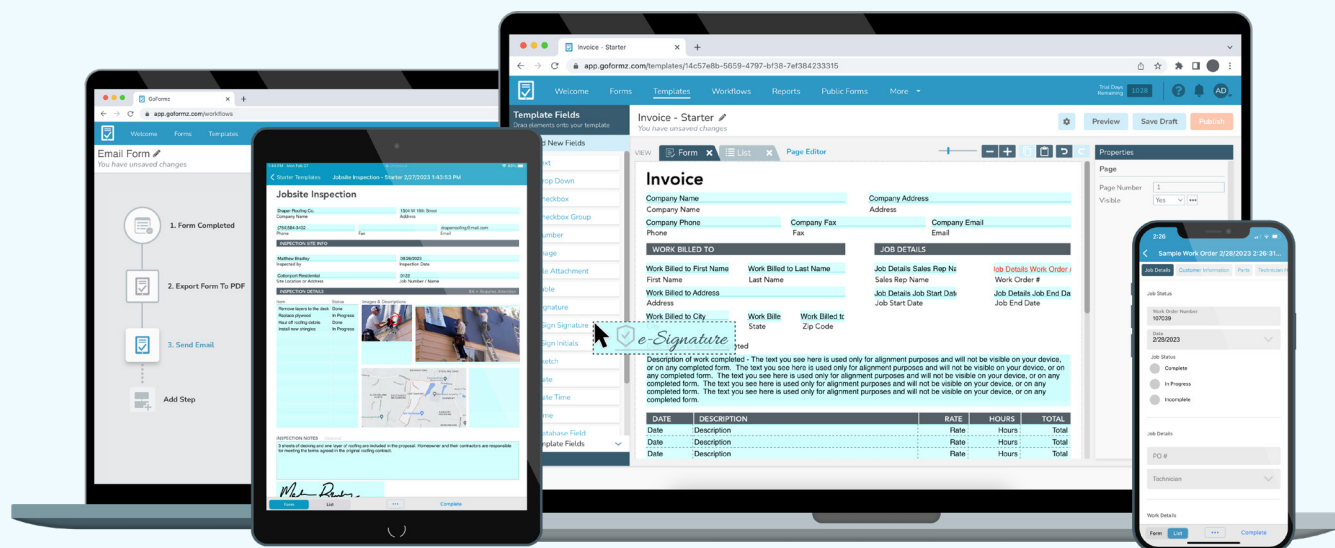
# Transforming Construction Job Sites with Mobile Forms

The workplace has evolved drastically, shifting to innovative, dynamic tools to help streamline work and bolster productivity. Unfortunately, despite these advancements, field teams are often left in the digital dust – burdened by archaic, manual tools that hinder efficiency and welcome human error. These outdated tools result in costly delays and mistakes and create a chasm between field and back-office teams.

One of the most common manual resources still used by construction teams is paper forms. Relying on paper forms to capture field data wastes time and money, resulting in outdated, incorrect, and isolated data.

Fortunately, elevating data capture and improving team efficiencies is as simple as digitizing existing forms for use on phones and tablets. With identical, digital versions of your existing construction forms, field teams and back-office personnel can effortlessly improve their job site visibility, collaboration, productivity, and data quality.

In this eBook, we'll dive into how mobile forms can transform your construction operations with minimal disruptions to your pre-existing workflows, explore seven, real customer use cases for mobile construction forms, and much more.



# 7 Use Case Examples

The image shows two devices displaying the goformz 'Hot Work Permit' form. The tablet on the left displays the full form, while the smartphone on the right displays a condensed version with tabs for 'Permit Info', 'Safety Precautions', and 'Requirements'.

**Tablet Form Details:**

- Header:** goformz logo
- Title:** Hot Work Permit
- Permit Valid from:** Date: [ ] Time: [ ]
- Location Description:** [ ]
- Type of Hot Work:**
  - ☐ Soldering ☐ Welding ☐ Cutting ☐ Grinding
- Safety Precautions:**
  - ☐ Fire hose and extinguishers accessible
  - ☐ Equipment is operable and in good repair
  - ☐ Smoke detectors temporarily disabled
  - ☐ Building occupants are protected
  - ☐ Pipes and tanks have been cleaned
- Requirements within 35 feet:**
  - ☐ Area has been properly swept to remove debris
  - ☐ Ignitable materials have been moved at least 3 feet
  - ☐ Cracks and holes have been covered and filled
- Footer:** Form List Complete

**Smartphone Form Details:**

- Header:** goformz logo
- Tabs:** Permit Info Safety Precautions Requirements
- Permit Information:**
  - Date [ ]
  - Time [ ]
  - Location Description [ ]
- Type of Hot Work:**
  - ☐ Soldering
  - ☐ Welding
  - ☐ Cutting
  - ☐ Grinding
  - ☐ Other
- Footer:** Form List Complete

- #1: Aldridge Electric
- #2: Oscar W. Larson Co.
- #3: Overland Pipeline
- #4: Oldcastle
- #5: ARC American
- #6: Robert Henry Corporation
- #7: Rhino Cable Services

# 1 Saves Time on Job Sites with the Procore-GoFormz Integration

## About

Aldridge Electric is widely recognized as one of the leading electrical technology contractors in the country, focusing on complex and challenging projects in the transportation, power, utility, and industrial sectors.



## Use Case Example

Having used multiple digital form solutions in the past, Aldridge Electric needed a mobile form solution that would easily integrate with Procore, keep accurate records of their safety forms, easy form creation, all within a mobile-friendly solution for their field employees.

With mobile forms, Aldridge Electric field employees are able to easily complete forms from their mobile devices using *List View* functionality. Integrating with Procore, captured data is secure and organized and can be automatically routed to project folders and site supervisors for review and processing in real-time.

## Results

- » Digital forms that previously took a day to build can be set up in two hours
- » Employees on phones and tablets can quickly fill out their forms on the go
- » Forms can now be routed for real-time review and approval
- » Electronic signatures rapidly confirm safety regulations are being followed

## Forms Used

- » Driver Vehicle Inspection Reports
- » Line Clearance Permit
- » Drill Logs
- » As-Builts

## Features Used

- » Procore Integration
- » List View (for mobile devices)
- » Digital Signatures
- » Automated Workflows

**"Document visibility is one of our top benefits with GoFormz. Paperwork isn't being lost, and it isn't difficult to get to."**

*– Nathan Skandera, Quality Manager at Aldridge Electric*

# 2 Increased Sales by \$10M and Saves \$300K Annually in Labor Costs With a Mobile Workforce

## About

For over 75 years, Oscar W. Larson Company has served the Midwest as the leader in full-service petroleum and fluid handling equipment contracting.



## Use Case Example

Oscar W. Larson regularly performs energy audits at customer sites, detailing the cost savings of alternative energy sources. With paper forms, reps would need to return to the office to complete calculations, generate a sales contract and print a proposal for signing – resulting in long delays and frequent errors. Adding to this burden were the 10,000+ paper timesheets that Oscar W. Larson personnel needed to rekey, throughout each year.

With mobile forms and *Automatic Calculations*, audits now end with a digitally signed contract instead of a trip back to the office. Leveraging *Automated Workflows*, submitted timesheets now automatically update HR systems each time an employee records their hours.

## Results

- » **An increase in sales by \$10M via faster bids and instant calculations**
- » **Streamlined and automated payroll results in savings of \$300,000 in annual labor costs**
- » **A savings of 20-25 tons of paper and counting using mobile forms**
- » Automated payroll and billing processes eliminate rekeying and save time
- » Simplified government collaboration via the preservation of original document formatting
- » Work order automations save time, accelerate back-office processes, and result in wider data availability

### Forms Used

- » Energy Audits
- » Timesheets
- » Inspections
- » Work Orders

### Features Used

- » Automated Calculations
- » Reporting Tool
- » Open API
- » Automated Workflows
- » DataSources

**"We couldn't live without GoFormz."**

– Aaron Slack, CTO,  
Oscar W. Larson Co.

# 3 Improves Data Accuracy and Streamlines Documentation With Digital Forms

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## **About**

Based out of Canonsburg, Pennsylvania, Overland Pipeline operates nationwide constructing pipelines for the oil and gas industry.



## **Use Case Example**

Overland Pipeline needed a way to digitize their paper-based process, which created numerous opportunities for human error. They relied heavily on field teams and multiple outside data sources to capture critical information.

Overland Pipeline used *List View* mobile forms equipped with *Data Sources* and *Automatic Calculations* to allow field crews to create forms on their mobile devices and use them as an accurate, single point of data entry. With highly accurate data instantaneously, Overland Pipeline reduces administrative demands, eliminates human error, and saves significant time.

## **Results**

- » **List View elevates data capture in the field**
- » **Saves a combined 3-4 hours a day of work using mobile forms**
- » *Data Sources* customize user experience when filling out forms
- » Digital data entry and automations reduce administrative demands and eliminate human error

## **Forms Used**

- » Daily Field Reports
- » JSAs
- » Timesheets

## **Features Used**

- » List View (for mobile devices)
- » Data Sources
- » Automated Calculations

**"[GoFormz] probably saves a combined 3-4 hours a day of work..."**

*– John Bates, Division Manager,  
Overland Pipeline*

# 4 Improves Quality Control with Real-Time Job Site Data

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## **About**

Oldcastle is North America's leading building materials company. They manufacture and distribute a diverse range of superior building materials, products, and solutions, which are used extensively in construction projects of all sizes.



## **Use Case Example**

Oldcastle needed a mobile forms platform that did not require IT support and could efficiently aggregate data so that management could better monitor quality control within their precision manufacturing and rigorous pre-delivery inspection process.

Oldcastle used mobile, customizable versions of their quality control forms to collect, process, and report on factory floor data, in real-time. With instantaneous access to factory floor data, management could better pinpoint and address workflow inefficiencies faster.

## **Results**

- » **Saved \$500k in production costs after identifying factory floor inefficiencies**
- » Improved quality control documentation speed and accuracy
- » Achieved greater insight into the production process

## **Forms Used**

- » Quality Control
- » Damage Control

## **Features Used**

- » Box Integration
- » Image Fields
- » Digital Signatures
- » Reporting Tool



**"Quality control is only as good as the participants, and GoFormz empowers our factory floor to give us insight that saves costs."**

*– Parimal Shukla, Manufacturing Engineer, Oldcastle*



# 5 Automatically Routes Form Data to Smartsheet to Simplify Project Management

## **About**

ARC American Inc. is an electrical utility contractor that “specializes in the installation, maintenance, and restoration efforts of all facets” of electrical facilities.



## **Use Case Example**

ARC American initially needed a digital solution to replace their lengthy and unorganized ‘Unit Sheet’ documentation process, centralize their documentation, and streamline their payroll processing.

Leveraging the GoFormz and Smartsheet integration, ARC American digitized their form collection for use on phones and tablets. Data is passed from ARC American’s Smartsheet sheets to their GoFormz mobile forms, expediting form completion and improving accuracy. Once a form is completed, a PDF copy can be attached to a corresponding Smartsheet row, which simplifies project management and centralizes documentation.

## **Results**

- » **Can now process billing in a day which previously took a week**
- » Central, digital record-keeping and project management
- » Increased accountability and operational visibility
- » Improved data entry accuracy and efficiency via pre-populated fields
- » More legible and complete forms
- » Project information readily available in forms, saving significant amounts of time

### **Forms Used**

- » Unit Sheets
- » Timesheets
- » Work Orders
- » Time & Equipment
- » Payroll Forms
- » Safety Forms
- » Human Resource Forms

### **Features Used**

- » Smartsheet Integration
- » Conditional Logic
- » DataSources
- » Drop Down Menus
- » Reporting Tool

**“Documents aren’t lost anymore. Any documents pertaining to a specific job can be automatically associated with the job row in Smartsheet.”**

*– Terri Bryan, Accounts Manager, ARC American*

# 6 Streamlines Processing and Simplifies Job Site Image Capture

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## **About**

Founded in 1974, the Robert Henry Corporation provides commercial and industrial construction services, including directional drilling, high voltage electrical work, and facility builds and repairs.



## **Use Case Example**

The Robert Henry Corporation needed a means of digitally capturing daily timesheet and field data, to more efficiently combat obstacles to productivity – like frustrating manual image collection, rekeying form data into ERPs, and incomplete reports.

With GoFormz, form data can be instantly reported on, completed forms are automatically stored, images can be easily input into mobile forms using the device's native camera, and documents are more thoroughly completed.

## **Results**

- » **Savings of approximately 40 hours a week**
- » Increased timesheet data reporting efficiency
- » Eliminated manual data rekeying and delivery
- » Simplified job site *Image* capture
- » Improved form data quality and completeness
- » Streamlined billing and incident reporting

## **Forms Used**

- » Timesheets
- » Incident Reports
- » Daily Job Briefings
- » Invoices
- » Time & Material Sheets
- » Training Forms
- » Safety Documentation

## **Features Used**

- » Automated Calculations
- » Reporting Tool
- » Image Field

**"We're saving 30-40 hours a week, at fifty bucks an hour, using GoFormz."**

*– Van Nussbaum, Controller, Robert Henry Corporation*

# 7 Utilizes Images to Show Proof of Work

## About

Rhino Cable Services provide services including, aerial and underground cable installation, inside plant/MDU, splicing, project management, and emergency response to outages.



## Use Case Example

Rhino Cable Services needed to replace their pen and paper methods with a digital solution that minimized change to their pre-existing processes, streamlined approvals, enhanced internal communication, and improved client-facing documentation.

With mobile forms and automated email routing, the Rhino Cable Services team improved their data collection in the field, streamlined approval processes, and expedited internal processes. Using the *Image* field, field team members are able to show proof of work along with annotations to provide customers with more thorough documentation upfront, enhancing client-documentation professionalism.

## Results

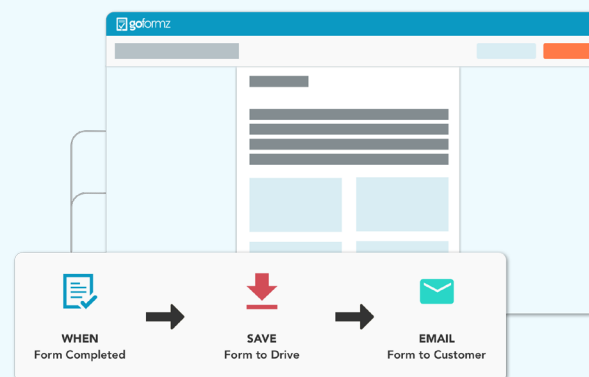
- » **Completes more work with fewer people with improved productivity**
- » Streamlines approvals through automatic email routing
- » Enhances client-facing documentation using the *Image* field to illustrate proof of work

## Forms Used

- » Daily Form
- » Job Estimates

## Features Used

- » Automated Workflows
- » Image Fields
- » Table Fields
- » Data Sources



**"There were a couple of people that were anti-technology in any form and GoFormz really hindered their ability to argue about it. We said it's the same thing, you're just using your finger instead of a pen."**

*– Jesse Ordonio, Operations Director, Rhino Cable Services*

# Automate Construction Data Capture

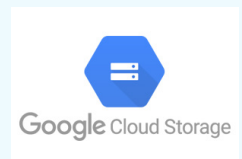
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Digitizing your construction forms introduces a wealth of opportunities for automation to eliminate manual, tedious tasks, administrative burdens, and ultimately save time. Automating even the simplest tasks, like emailing forms, can significantly accelerate your daily processes and grant your business more control over data.

Leveraging *Automated Workflows*, teams can automate tasks like uploading completed forms to Procore or Acumatica and emailing copies of completed forms to colleagues, clients, and more – streamlining construction operations from end to end. These automated tasks save your construction teams considerable amounts of time and reduce opportunities for delays, human error, and miscommunication.

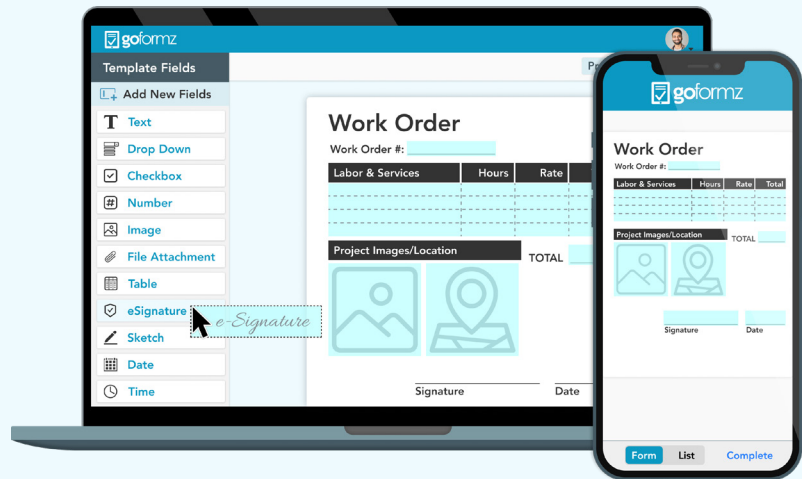
Here are a few of the automations you can use to streamline your construction data capture, form sharing, record-keeping, and more:

- » Dispatch mobile forms pre-populated with data from connected systems (like Procore, Acumatica, Smartsheet)
- » Instantly share completed forms to teammates, customers, key stakeholders, and more
- » Automatically route completed forms to Cloud storage (Box, OneDrive, BIM360)
- » Auto-Tagging of completed forms (customer names, user names, etc.) for optimized record-keeping and rapid form recall



# Getting Started with GoFormz Mobile Forms

GoFormz's no-code, drag-and-drop platform presents users with an easy-to-use platform for digitizing existing construction forms. Users can simply upload a JPG or PDF of their existing documents (or create a form entirely from scratch) that can be equipped with a variety of new data types like *File Attachments*, *eSignatures*, *Images*, *Sketches*, *Barcodes*, and even form *Logic*.



And the possibilities don't stop there: digital forms offer an array of form fields and features to help bolster construction operations from end to end. Once a form has been completed, they are automatically stored in the GoFormz Cloud and can also be instantly routed to collaborating co-workers, patients, integrated platforms, and much more!

Getting started is incredibly easy

1. Upload a PDF or JPG of your existing form
2. Make your form interactive and add Logic in the GoFormz Template Editor  
*Add digital fields, simple Logic, Automated Workflows, and much more!*
3. Fill out digital forms on phones, tablets, and computers
4. Store, review, and report on data in real-time, route data to your existing systems, and so much more

# Additional Resources

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If you found this eBook helpful but are looking for additional information to kickstart your digital transformation journey, [contact our team](#) or check out the helpful resources listed below:

## *Ready to Use Free Templates*

- » [Hot Work Permit Template](#)
- » [Lockout Tagout \(LOTO\) Form Template](#)
- » [Project Proposal Form Template](#)
- » [Jobsite Inspection Form Template](#)
- » [Timesheet Form Template](#)
- » [Pre-Delivery Inspection Checklist Form Template](#)
- » [Work Order Form Template](#)

## *Helpful Guides and Resources*

### Helpful Guides

- » [Digital, Mobile, Dynamic Construction Forms](#)
- » [Enhance Construction Site Safety with GoFormz](#)

### Customer Success Stories

- » [Construction Customer Success Stories](#)

### Blog Posts

- » [Construction Customer Success Stories](#)
- » [How GoFormz Can Help You Build a Safety Culture](#)
- » [Don't Settle for a PDF When You Need a Digital Form](#)
- » [How Much Can GoFormz Save You in Printing Costs?](#)