



# Construction Project Documentation & Technology Risk Checklist

A practical review tool for project records, access, RFIs, submittals, photos, Microsoft 365, backup, cybersecurity and dispute readiness.

## Use this during:

- Leadership technology reviews
- Provider reviews or transitions
- Project closeout planning
- Cyber insurance or risk discussions

**Operational technology checklist. Not legal or construction advice.**

## Scorecard

**0** Not reviewed

**1** Partially handled

**2** Documented and owned

### Total score range

0-8 High risk

9-16 Needs improvement

17-24 Strong foundation

## Nevada IT Support

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**Schedule a Technology Gap Review: <https://itsupportnv.com/technology-gap-review/>**

## Checklist Sections

### 01. Project document control

**WHY IT MATTERS**

Clear ownership reduces version confusion and makes project records easier to retrieve during closeout, leadership review or a dispute.

- Official record locations are documented.
- Folder, Teams, SharePoint and vendor portal ownership is assigned.
- Access rules match project roles and record sensitivity.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

Score:  0 Not reviewed  1 Partially handled  2 Documented and owned

### 02. Field documentation and jobsite photos

**WHY IT MATTERS**

Photos and daily field records lose value when they are scattered across phones, texts, apps and unmanaged personal storage.

- Approved photo and field-note locations are defined.
- Mobile upload process is practical for field teams.
- Retention expectations are documented for closeout.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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### 03. RFIs, submittals and change records

**WHY IT MATTERS**

RFIs, submittals and change records need consistent access and retention so project history can be reviewed without guesswork.

- RFI and submittal systems are named and owned.
- Change records are tied to the correct project folders.
- Export and archive process is understood.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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### 04. Inspection and QA/QC records

**WHY IT MATTERS**

Inspection and QA/QC documentation should be retrievable with supporting context, not dependent on one person's inbox or device.

- Inspection records have an approved storage location.
- Responsible owner is assigned for record completeness.
- Backup and export expectations are documented.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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### 05. Vendor and subcontractor documentation

**WHY IT MATTERS**

External documentation can become difficult to access when vendor portals, shared links and subcontractor files are unmanaged.

- Vendor portal access is reviewed regularly.
- Subcontractor file exchange method is documented.
- Key external records are copied to owned storage.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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### 06. Microsoft 365 and email retention

**WHY IT MATTERS**

Microsoft 365 settings affect email, Teams, SharePoint and OneDrive availability when staff change or records must be recovered.

- Retention and mailbox handling settings are reviewed.
- Shared mailboxes and project groups have owners.
- Former employee data handling is documented.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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### 07. Backup and recovery

**WHY IT MATTERS**

Backups only reduce operational risk when coverage, restore ownership and recovery timing are documented and tested.

- Critical project systems are included in backup scope.
- Recent restore tests are documented.
- Recovery contacts and escalation path are known.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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### 08. Field devices and access management

**WHY IT MATTERS**

Laptops, tablets and phones used in the field can expose project data if access, ownership and offboarding are loose.

- Field devices are inventoried and assigned.
- Screen lock, MFA and lost-device process are enforced.
- Offboarding removes access from apps and storage.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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### 09. Jobsite connectivity and communication

**WHY IT MATTERS**

Connectivity gaps can disrupt documentation, inspections, photos, email approvals and field-office coordination.

- Jobsite connectivity needs are planned early.
- Backup communication paths are known.
- Field support escalation is documented.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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### 10. Former employee and closeout data

**WHY IT MATTERS**

Project records should remain accessible after employee transitions without leaving unnecessary account access active.

- Former employee project data is retained appropriately.
- Mailbox, OneDrive and device transfer steps are documented.
- Closeout archive ownership is assigned.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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### 11. Cybersecurity and project risk

**WHY IT MATTERS**

Project records, payment workflows and external file sharing can become security risks when controls are unclear.

- MFA and external sharing settings are reviewed.
- Payment-change and vendor email risk is documented.
- Incident contacts and notification steps are known.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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### 12. Dispute readiness

**WHY IT MATTERS**

Dispute readiness depends on retrievable records, clear system ownership and documented technology support responsibilities.

- Record retrieval process is tested or documented.
- Owners can identify where key project evidence lives.
- Technology support role in retrieval is clear.

Owner: \_\_\_\_\_ Next Action: \_\_\_\_\_ Priority:  H  M  L

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## Review Summary and Next Steps

Use this page to summarize the score, ownership gaps and next technology review actions.

### Scorecard

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### Priority Actions

Total score: \_\_\_\_\_ Top owner: \_\_\_\_\_ Target date: \_\_\_\_\_

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Ready to turn the checklist into a Technology Gap Review?

Nevada IT Support can help review documentation workflows, Microsoft 365, access, backup and project technology risk.

CALL  
702-410-7537

VISIT  
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