



Crux uses GoFormz to better communicate job-specific procedures and streamline the collection of field data from remote areas.

INDUSTRY

Field Service,
Construction

CUSTOMER SINCE

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FORMS

- Equipment Inspections
- Daily Job Briefings
- Job Safety Analysis Forms
- Incident Reports
- Permits

At-A-Glance

Challenge

Needed a digital document solution to increase job site visibility, better access to operational insights, monitor field team progress and simplify company-wide procedural document sharing.

Solution

Digitized their daily forms, inspections and static documentation to better communicate job-specific procedures and streamline the collection of field data from remote areas.

Results

- Increases in job site transparency
- Documentation and sharing of job-specific procedures now streamlined
- Images and Sketches now directly embedded in forms
- Ability to work offline in remote areas
- 50% time savings in paperwork, delivery and processing

Why GoFormz

"GoFormz was the easiest way to build the templates using our original forms, without having to rebuild an entire form system. Anybody can build a form, you don't need any programming knowledge."

– Gary Ramsey, Specialty Asset Manager, Crux Subsurface Inc.

About Crux Subsurface, INC



Crux Subsurface Inc. is a “geotechnical exploration and construction firm”, which provides contract engineering and drilling services to some of the most challenging exploration and construction projects in North America. Crux Subsurface Inc. has taken on many landmark projects, including the Hoover Dam Bypass, and offers services like helicopter support and customized drilling.

The Full Story

Crux Subsurface Inc., a North American geotechnical exploration and construction firm, specializes in completing challenging engineering and drilling services. These projects entail the use of critical equipment and transportation (e.g. helicopters) on job sites, which necessitates that various safety and procedural documentation be completed daily. Gary Ramsey, a Specialty Asset Manager at Crux, was tasked with digitizing the operation's onsite documentation, in an effort to increase job site visibility and better manage project documentation.

Needing to identify a solution that would host Crux's variety of forms (from Job Site Briefings to Equipment Inspections) Gary began researching mobile form options that would not only be easy to use, but also easy to implement. After exploring several options, Gary and his team found their solution. "GoFormz was the easiest way to build the templates using our original forms, without having to rebuild an entire form system," Gary explained. "Anybody can build a form, you don't need any programming knowledge. It's quite easy to do."

Signed, Sealed, Delivered

After successfully testing their newly digital forms in the field, Gary's team knew right away that they wanted to move forward with GoFormz on a large scale. Crux's GoFormz user base quickly grew from three to fifty, allowing their entire team to learn and benefit from their new digital platform features. For example, when completing Daily Job Briefings, the entirety of the onsite crew must sign the document to confirm that they had received the briefing. With GoFormz, these signatures can be expediently captured through Digital Signature boxes. Once the briefing document is completed, an Automated Workflow then delivers the completed document to that job's project manager. Similarly, teams will complete daily Drill Reports, which are then automatically routed to a project manager upon the completion of their project. "As soon as that is completed he has a record of what they did and he knows that that site is completed."

Among the other useful features used frequently by the Crux team are Image and Sketch fields. Crux employees leverage these visual assets when completing onsite inspections and

Vehicle Incident Reports. Before GoFormz, a separate photo would need to be delivered along with submitted paperwork. Now, with mobile versions of their incident forms, users can directly capture and include images within their forms and annotate them to highlight key areas of interest.

Many Crux projects are carried out in remote areas with no wireless signal, so the ability to capture field data without wireless connectivity is important for them. "The fact that we can use the forms offline is a big plus," Gary remarked. With GoFormz, they can fill out a mobile form offline, and it will automatically sync with the system when the device is back online.

Safety First

A key element when completing work in the field is safety, especially when operating specialty machinery. For this reason, Crux personnel complete job-specific Job Safety Analysis and review project procedures prior to beginning a task. These project procedures are static documents used company-wide for job-specific procedural guidance, and are regularly updated to ensure compliance and keep field teams safe.

To ensure each team member has access to the most recent, up-to-date version of each project procedure, Crux uses GoFormz to upload approved procedures, making them instantly available throughout the operation. Before GoFormz, updated procedural documents would need to be emailed to each crew member, which left opportunities for human error and negligence. "Now, if they need to make a change, the document can be uploaded automatically... rather than relying on teams to actually read their emails," Gary explained. "The next time they log in, they have the current information."

Savings

By eliminating their paper forms and removing the dependency on physical printing and storage resources, the Crux team has witnessed fantastic savings.

"The guys can fill out the electronic forms in a reduced time frame, and no longer have to fill out and physically mail or ship them to the main office."

Gary estimates a time savings of approximately 50%. Another noteworthy benefit is the increase of collected data and speed at which it

becomes available. "The other benefit is we're seeing data sooner, we're not waiting for users to fill in a full book rather than an individual form," Gary detailed. "I can see when equipment needs repair, or if there is a problem with equipment, within 24 hours — whereas before it might be three weeks later that you find out there's a problem."

What's Next?

With 90% of their forms already digitized, Gary and the Crux team plan to digitize as many of their remaining forms as possible.