Start with a consistent record

Use these forms to organize your own site information and keep observations, photographs, actions and documents connected. The kit is reusable for your business projects.

1 Create a project copy

Copy this workbook and the CSV registers into a project folder. Keep an unfilled original. Set a project ID, visit ID and author.

2 Record facts and limitations

Enter the purpose, areas covered and access or information limits. Describe what was observed. Distinguish observations from interpretations and missing information.

3 Link the evidence

Assign observation IDs such as OBS-001 and photo IDs such as P-001. Use the same IDs in captions, file names and follow-up actions.

4 Carry actions forward

Name an owner, status and agreed due date for each action. Completion should reference evidence, not just a checked box.

5 Review and hand over

Check file versions, unresolved items and recipients before sharing. Keep the editable source and a dated issued copy together.

Included: this 8-page fillable PDF, five editable CSV registers, a Markdown guide and a fictional worked example. The sample and full kit use the same page design.

Scope: documentation only. This is not an inspection procedure, certification, code analysis, diagnosis or repair specification. Technical conclusions require the responsible professional.

Visit record

Complete one record per visit or information review. Leave unknown information clearly identified.

PROJECT NAME / ID

VISIT ID / DATE

PROPERTY / AREA / LOCATION

RECORD AUTHOR

INFORMATION SOURCE

PURPOSE AND AREAS COVERED

ACCESS OR INFORMATION LIMITATIONS

RELATED PHOTOS / OBSERVATIONS / DOCUMENT IDS

Photo register

Use a stable photo ID and connect each image to a location and observation. Record what the image shows; keep interpretations separate.

PHOTO ID	LOCATION	CAPTION / FILE NAME	OBSERVATION ID

Suggested file name: project_visit_photo-id_short-description.jpg

Keep the original image. Record the source and date separately if they are uncertain. Add rows in the accompanying CSV file when needed.

Observation record

Duplicate this page for each observation. Preserve uncertainty and identify the source of information.

OBSERVATION ID / VISIT ID

AREA / LOCATION

OBSERVED FACTS OR INFORMATION PROVIDED

EVIDENCE REFERENCES AND SOURCE

UNKNOWN ITEMS / LIMITATIONS

FOLLOW-UP REQUIRED / ACTION ID

Action register

Use one line per action. Carry open items forward. Record a completion reference when the action closes.

ID / OBS.	ACTION REQUIRED	OWNER / DUE	STATUS / EVIDENCE

Suggested statuses: open, awaiting information, in progress, complete, cancelled. A status describes the task; it does not certify roof condition.

Document register

List the files that support the project record. Keep revisions explicit and identify missing items.

DOCUMENT ID	FILE / DESCRIPTION	SOURCE / REVISION	DATE / STATUS

Record corrections as a new revision. Keep an issued copy separate from working drafts. Avoid placing confidential project material in public download folders.

Worked example

This example demonstrates recordkeeping only. The project and observations are fictional; they are not a roof assessment.

Visit record

VIS-001 | Sample building | Roof A | 2026-11-02 | Author: Sample inspector

Scope and limitation

Record visible items in the photographs supplied for this example. No physical visit, testing, roof access or condition determination took place.

Observation OBS-001

Photo P-001 shows an object beside a drain. The object is not identifiable from this image. Water depth, roof slope, drainage performance and membrane condition are not determined.

Photo register

P-001 | Roof A / drain zone | overview | linked to OBS-001

P-002 | requested close-up | not yet supplied | linked to OBS-001

Action ACT-001

Request a clearer photograph and location confirmation from the person who supplied P-001. Owner: project coordinator. Status: awaiting information. Due date: to be agreed.

Document register

DOC-001 | P-001.jpg | source: sample training file | revision: 1

DOC-002 | Visit record | author: sample inspector | revision: 1

Handover note

OBS-001 remains unresolved. P-002 is missing. Do not mark ACT-001 complete until the requested information is received and reviewed by the responsible person.

Review before handover

The record author or responsible reviewer should complete this check before issuing a project package.

- [ ] Project, visit, location and author are identified.
- [ ] The scope and information or access limitations are explicit.
- [ ] Observations describe supported facts without invented measurements.
- [ ] Photo IDs match captions, file names and observation references.
- [ ] Outstanding actions have an owner and an explicit status.
- [ ] Missing information and unresolved items are visible.
- [ ] File versions and issue date match the document register.
- [ ] Recipients and confidential information have been checked.
- [ ] The final PDF and files open correctly and contain the intended content.
- [ ] An editable source and dated issued copy are retained.

REVIEWER / REVIEW DATE

OPEN ITEMS OR ISSUE NOTES