SiteGuard Contract And Operations Handout

Plain-language client brief for contract, insurance, procurement, public works, and operations stakeholders.

Contract tracking	Insurance alerts	Excel/PDF reports

Track	Contracts, insurance, owners, sites, dates, risk, and notes
Review	Expired, missing, expiring soon, and compliant records
Adapt	Categories, lifecycle stages, panels, and reports
Export	Excel, PDF, CSV, summary, and audit-ready packets

Client takeaway A practical replacement for spreadsheet-driven contract and insurance tracking.	**Review posture** Ready for end-user workflow testing with sample or approved data.

Purpose

SiteGuard is a desktop prototype designed to help teams manage contractor compliance before, during, and after work is performed. It gives contract, risk, procurement, public works, city management, and operations staff one structured workspace for tracking whether contracts and insurance are current, missing, expired, or nearing expiration.

The goal is to reduce spreadsheet confusion, make risk visible earlier, and create reports that can be used for management review, audit records, and follow-up.

The Problem It Solves

Contractor compliance often breaks down in the space between departments. One team may track the contract, another may handle insurance, another may manage site access, and another may need the report.

SiteGuard brings those pieces into one local project file so the team can see:

- Which contractors need attention.
- Which contracts or insurance certificates are expired.
- Which items are missing key information.
- Which records are coming up for renewal.
- Which department section or owner is responsible.
- Which records are ready for management review or closeout.

What Each Record Can Track

Each contractor or vendor record can include:

- Contractor or vendor name.
- Contract number, agreement type, procurement method, and contract value.
- Work order, site or facility, arrival or access window, and city section.
- Contract start date, contract expiration date, and insurance expiration date.
- COI limit, risk level, performance status, and closeout status.
- Owner or analyst, last review date, document request status, and notes.

The application uses this information to show whether the record is expired, missing, expiring soon, or compliant.

Contract Lifecycle

SiteGuard is designed to manage the record from start to finish. A contract can move through stages such as intake, scope, procurement, legal review, insurance review, execution, site access, performance, renewal, and closeout.

This gives the team a practical view of where each record stands. It also helps separate a date issue from a process issue. A contractor may have current insurance but still be waiting for legal review, site access, or closeout documentation.

Alerts And Expiration Tracking

The user can set an alert window so the dashboard flags records before they become urgent. For example, the team can choose to flag items expiring within 30 days, 60 days, or another policy window.

The planned status language is intentionally simple:

- Expired: the contract or insurance date has passed.
- Missing: required document or expiration information is not on file.
- Expiring soon: the date falls inside the selected alert window.
- Compliant: the contract and insurance are current beyond the alert window.

Flexible Workspace Setup

The Master Setup panel allows the organization to change category names and process names. This matters because different teams organize work differently.

A city management analyst may want categories for reporting, council packet support, or budget review. A corporation yard team may want categories for facilities, fleet, safety, and field work. Procurement, risk, finance, and records staff may each need a different view of the same compliance record.

SiteGuard is meant to fit the operating process instead of forcing every department into one rigid template.

Dashboard And Panels

The dashboard uses panels such as Lifecycle, Categories, Policy, Register, Details, and Master Setup. Panels can be moved, opened, closed, docked, undocked, resized, reset, and arranged with quick layouts.

This makes the workspace practical for different working styles. A data-entry user may want the details form larger. A manager may want status summaries and the register first. A reviewer may want the overdue records and policy window visible.

Saving, Sharing, And Protection

Projects are saved as local .siteguardproj workspace files. A workspace can be saved, copied, backed up, moved, or shared according to local policy.

The app includes Save and Save As behavior. Save writes back to the current file. Save As creates a new copy. If password protection is enabled, the project database is encrypted and requires the password to reopen.

For early testing, stakeholders should use sample data or approved test data until the prototype has gone through security and larger development review.

Reports

SiteGuard can export report packages for people who need the information but may not use the app directly.

The export package can include:

- Excel workbook with tables, charts, status summaries, overdues, notes, and setup information.
- PDF packet for management review, meetings, records, and audit use.
- CSV backup files for spreadsheet import or future migration.
- README and summary files describing what was generated.

Prototype Status

SiteGuard is a working prototype. It is designed to be tested by potential end users, improved based on their feedback, and then reviewed by security and a larger development team before production use.

The current purpose is not to claim final enterprise readiness. The current purpose is to prove whether the workflow, fields, alerts, reports, and workspace flexibility solve the real contract management problem.

Stakeholder Feedback Questions

- Does the record contain the fields your team needs to manage contractor compliance?
- Are the lifecycle stages accurate for the way your work moves from intake to closeout?
- Are the status labels clear enough for daily use?
- Would the Excel and PDF outputs support your management or audit process?
- What category names or process names would you change in Master Setup?
- What would prevent your team from replacing the current spreadsheet process with this workflow?

Recommended Next Step

Run a controlled pilot with sample or approved records. Ask testers to create records, update dates, change workflow stages, adjust categories, save workspaces, and export reports. Use that feedback to refine the prototype before broader testing and security review.