

Quick Reference Tool Guide

Which tool, when. Ideas are sparks, decisions are rallies, making is sandboxes, problems are flags, questions-for-the-record are RFIs, information is notes, action is tasks, approvals are submittals, the plan is a schedule, the record of a conversation is a meeting, the record of a day is a log.

	Spark Company board / Studio <i>An idea worth keeping, before anyone commits to it.</i>
USE IT	Something occurred to you or the team that deserves to survive the week: capture it, gather thoughts and reactions, let it wait until a project wants it.
NOT FOR	Working an active problem or making a decision on a deadline. When an idea needs a verdict, take it to a rally; when a project commits to it, move it into a sandbox.
	Rally Workshop <i>The team gathered around one question, to decide something.</i>
USE IT	You need many heads on one thing fast: finish options, a layout call, a vendor choice, how to fix what a flag raised. Contributions come in, a direction emerges, action items capture what happens next.
NOT FOR	Producing the work itself, or a question an outside party must answer on the record (that is an RFI). A rally is a conversation with an end, not a workspace.
	Sandbox Studio <i>A workspace where creative work is developed until it is published.</i>
USE IT	Assets need making: concept work, drawings, documents, models. Versions accumulate, reviews render verdicts, and approved work publishes onto elements and into the Library.
NOT FOR	A quick group decision (rally) or storing finished reference files (Library). A sandbox has a lifespan; if nothing is being developed, it is the wrong container.
	Flag Project tool <i>Something is wrong, and now it has an owner.</i>
USE IT	A problem threatens the work: damage, a conflict, a blocker, a safety issue. Raise it, own it, and shepherd it to resolution. If the fix needs group thinking, start a rally from the flag.
NOT FOR	Questions (RFI), to-dos (task), or FYIs (note). A flag that is really a question sits unresolved because nobody can 'fix' it.
	RFI Project tool <i>A formal question that needs an official answer on the record.</i>
USE IT	The answer matters and must be citable: a spec clarification, a jurisdiction question, a client decision. Reply as an Answer when you are answering the question; reply as a Comment to discuss without touching the official record.
NOT FOR	Open-ended discussion (rally) or internal problems (flag). If nobody outside the room needs the answer in writing, it is probably not an RFI.
	Note Project tool <i>Information the project should keep, or someone should receive.</i>
USE IT	Decisions, instructions, site conditions, records: write it once, type it with your company's note types, and send it TO people when they need to see it.
NOT FOR	Action. A note asks nothing of anyone; if someone must do something, make it a task.
	Task Project tool <i>A to-do with a name on it.</i>
USE IT	Someone needs to do a specific thing, ideally by a date. Assign it and it lands in their My Tasks until it is done.
NOT FOR	Recording information (note) or tracking a problem (flag). A task with no clear 'done' is one of those in disguise.
	Submittal Project tool <i>Something needs formal approval before it is used or built.</i>
USE IT	Material samples, shop drawings, product data: route it through review to an approval that stands as a record, then save approved files to the Library.
NOT FOR	Design feedback while work is still forming; that is a Studio review on the asset.

	Schedule Project tool <i>The plan over time.</i> USE IT Work that unfolds across weeks needs dates, owners, dependencies, and progress. Give a schedule an owner and they run it, with a daily heads-up while unassigned items sit overdue. NOT FOR A handful of one-off to-dos; plain tasks carry those fine.
	Meeting Project tool <i>An agenda, a room, minutes, and action items.</i> USE IT A scheduled conversation that needs a record: build the agenda, send it ahead, run roll call and per-topic notes, capture decisions, issue the minutes. NOT FOR Decisions that do not need a meeting. A rally gathers the same input asynchronously, without finding a slot on six calendars.
	Log Project tool <i>What actually happened today.</i> USE IT The daily record from the site or the shop: entries by type, photos under each entry, follow-up flags for anything that needs an owner. NOT FOR Anything that needs a response. A log states; it never asks.
	Scout Everywhere (Cmd+K) <i>A question about what is already in Ceruleo.</i> USE IT "Did we get a reply from the township?" "What is overdue on Riverside?" Scout reads everything your permissions allow, across all your projects, and links its sources. NOT FOR Asking people things. Scout only reads what is recorded; new questions for humans are RFIs, rallies, or discussions.

The common mix-ups

Rally or sandbox?

Rally to decide, sandbox to make. A rally is a conversation with an end; a sandbox is a workspace with a lifespan. Decide the direction in a rally, then develop the work in a sandbox.

Flag or RFI?

A flag says "something is wrong and it is ours to fix." An RFI says "we need an answer from someone, in writing." If resolving it means someone answers a question, it is an RFI.

When is a flag appropriate?

When a problem threatens the work and needs an owner now. Not for questions, not for to-dos, not for FYIs. If you cannot say what 'resolved' looks like, it is not a flag.

Note or task?

Information is a note; action is a task. "The paint arrived damaged" is a note (or a flag, if someone must deal with it); "reorder the paint" is a task.

RFI Answer or Comment?

Answer when you are answering the question; it goes on the official record and clears the review. Comment to discuss, ask for clarification, or think out loud; the record stays clean.

Meeting or rally?

If it needs a time slot, roll call, and issued minutes, it is a meeting. If the same input can arrive over a day or two while everyone stays where they are, it is a rally.

Spark or rally?

A spark keeps an idea alive for later; a rally works a question now. Sparks have no deadline and no verdict. When a spark is ready to be decided on or built, move it along.