 | Project Setup Guide

|  |
| --- |
| As you begin to implement Procore, your internal implementation/training team should get together to discuss how you're going to successfully rollout Procore.  Use this guide to document your company-specific procedures in order to encourage consistent usage of Procore by all key stakeholders. |

**Contents**

[**INTRODUCTION & ABOUT PROCORE** 4](#_Toc110262286)

[**LOGGING INTO PROCORE** 4](#_Toc110262287)

[**ADMINISTRATION, SUPPORT & TRAINING** 4](#_Toc110262288)

[**COMPANY TOOLS: SETTING UP YOUR ACCOUNT** 5](#_Toc110262289)

[**SUMMARY OF THE PROJECT CREATION PROCESS** 5](#_Toc110262290)

[**PROJECT TOOLS** 5](#_Toc110262291)

[**A picture containing text, clipart

Description automatically generated** 6](#_Toc110262292)

[**Admin** 6](#_Toc110262293)

[**Documents** 7](#_Toc110262294)

[**Directory** 7](#_Toc110262295)

[**Reports** 8](#_Toc110262296)

[**Tasks** 8](#_Toc110262297)

[**Text

Description automatically generated with medium confidence** 9](#_Toc110262298)

[**Drawings** 9](#_Toc110262299)

[**Specifications** 9](#_Toc110262300)

[**RFIs** 10](#_Toc110262301)

[**Programme** 10](#_Toc110262302)

[**Submittals** 11](#_Toc110262303)

[**Correspondence** 11](#_Toc110262304)

[**Instructions** 12](#_Toc110262305)

[**Snag List** 12](#_Toc110262306)

[**Site Diary** 13](#_Toc110262307)

[**Photos** 13](#_Toc110262308)

[**Meetings** 13](#_Toc110262309)

[**Logo

Description automatically generated** 14](#_Toc110262310)

[**Inspections** 14](#_Toc110262311)

[**Observations** 14](#_Toc110262312)

[**Incidents** 15](#_Toc110262313)

[**Forms** 15](#_Toc110262314)

[**Action Plans** 16](#_Toc110262315)

[Text

Description automatically generated 16](#_Toc110262316)

[**Budget** 16](#_Toc110262317)

[**Main Contract** 17](#_Toc110262318)

[**Commitments** 17](#_Toc110262319)

[**Direct Costs** 18](#_Toc110262320)

[**Change Events/Variations** 18](#_Toc110262321)

[Logo

Description automatically generated with medium confidence 20](#_Toc110262322)

[**Timesheets & Crews** 20](#_Toc110262323)

[**Daywork Sheets** 20](#_Toc110262324)

[**COMPLETING A PROJECT** 21](#_Toc110262325)

# **INTRODUCTION & ABOUT PROCORE**

This document establishes the framework for managing information on [COMPANY] projects. Its intent is to ensure that all project-related data is managed in a manner that is controlled, accurate, efficient, comprehensive, reliable, and systematic.

Procore provides everything you need to manage projects and share information with everyone connected to [COMPANY] projects.

The software maintains key site processes including site diaries, progress reports, drawings, RFIs, programmes, specifications, submittals, and timecards. It also supports integrations with quality and safety software and provides field productivity management tools and construction financials. [delete/amend as appropriate]

Procore increases project efficiency and accountability by streamlining and mobilising project

communications and documentation. With real time data and accessibility minimises costly risks and delays.

# **LOGGING INTO PROCORE**

For all users:

1. Go to <https://login.procore.com/> and add your email address and password
2. If you have forgotten your password or would like to reset your password, click on “Forgot Password” or “Reset Password”. An email will be sent to you to reset your password.
3. If your email address is in another Procore Client’s Directory, you will be prompted to select a company. Select your own company to go into your Procore account.

Ensure that you also download the **Procore Mobile App** – available on [iOS](https://en-gb.support.procore.com/faq/how-do-i-download-the-procore-ios-mobile-application) and [Android](https://en-gb.support.procore.com/faq/how-do-i-download-the-procore-android-mobile-application)

You will login into both the webpage and mobile app with the same login information.

# **ADMINISTRATION, SUPPORT & TRAINING**

The nominated internal project administrator for [COMPANY] is [CONTACT].

Additional support and configuration can be carried out by the Procore Customer Support Team. Further system support is available as follows:

* [Support Centre](https://en-gb.support.procore.com) – containing tutorials, videos, FAQs and guides
* [Live Chat & Contact Support](https://en-gb.support.procore.com/references/contact-support)
* [Quick How-to-training videos](https://en-gb.support.procore.com/references/videos/training-videos)
* [Live Webinars](https://www.procore.com/en-gb/webinars)
* [Procore Certifications](https://learn.procore.com/page/procore-certification)

# **COMPANY TOOLS: SETTING UP YOUR ACCOUNT**

*For Company-Admin Users*

*\*\* REQUIRED TRAINING\*\* –* [*Procore Administrator Certification*](https://learn.procore.com/procore-certification-procore-administrator-en-gb)

These trainings can also be accessed by logging into Procore, clicking the “?” and then selecting Procore Certification, or log into your account directly through [learn.procore.com](https://learn.procore.com/)

It is imperative to start with these videos as they will give you detailed instructions on how to setup the foundation of your success with Procore.

# **SUMMARY OF THE PROJECT CREATION PROCESS**

1. Create Project
   1. Follow this support article on [how to create a project](https://en-gb.support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project)
      1. [Follow these instructions](https://en-gb.support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/configure-a-project-template#Items_That_Will_Carry_Over_to_Your_New_Project) to create a project from a template.
2. Add in general Project information (address, stage, etc.)  *list anything that is mandatory for your team fill in (for reporting purposes)*
3. Begin adding people to the project as necessary:
   1. Use “Bulk Add from Company Directory” first, to see if the person already exists at the company level. If not, [add a person to Project Directory](https://en-gb.support.procore.com/products/online/user-guide/project-level/directory/tutorials/add-user-account-to-project-directory).
   2. If a lot of new users need to be added, the Import Template can be used: [Download a User Directory import](https://en-gb.support.procore.com/products/online/user-guide/company-level/directory/tutorials/download-the-company-or-user-import-template)
   3. Consider [creating Project Distribution Groups](https://en-gb.support.procore.com/products/online/user-guide/project-level/directory/tutorials/add-a-distribution-group-to-the-project-directory) for example: [Subcontractors, Design team, Internal Team]. These groups can be used when forwarding information or setting permissions in the Documents tool.

# **PROJECT TOOLS**

This section is to provide you with an overview of how to manage and use the tools in a project. The order of the instructions below will be based on what you would commonly use to streamline a project from Tendering Stage to Post-Construction (or the close of a project). While this order is the recommended best practice, please feel free to skip ahead to the tools you wish to start with.

To access your project tools, click on a project from your Portfolio once you’ve logged into Procore.

*Best Practices for any project tool*

* If you have Admin level-permission for your project tools, please be sure to review the configuration settings of each tool by clicking on the orange “gear icon” to the left of the title of the tool.
* Each tool settings page has a tab to the right called “Permissions table” that gives you an overview of who has permissions to access – and to what level – that particular tool in that particular project. The list is generated from the Project Directory.
* Download [Procore Drive](https://marketplace.procore.com/apps/procore-drive) to easily manage the following tools: Documents, Photos, Programme and Emails.
* Download [Procore Imports](https://en-gb.support.procore.com/products/procore-imports/setup-guide) to bulk upload items into the following tools: Admin (Locations, Work Breakdown Structure), Directory, Submittals, Snag List, Programme).

# **A picture containing text, clipart Description automatically generated**

*For Project-Admin Users*

*\*\* REQUIRED TRAINING\*\* -* [*Procore Core Tools Certification*](https://learn.procore.com/procore-certification-project-manager-core-tools)

## **Admin**

[*Admin Support Page*](https://en-gb.support.procore.com/products/procore-imports/user-guide/project-admin)

This is the tool for the project settings. Typically, this information will be added once you’ve created your project, but there are a few tabs in this tool you want to review before getting started with your project.

[ROLE] is responsible for reviewing and amending active tools: You can deactivate any tools you think you won’t need. Remember, if the tool has already been used, you won’t be able to deactivate it.

[ROLE] is responsible for establishing project work breakdown structure if default list not utilised: You can edit your cost codes and cost types if the Standard list isn’t typical for this project.

[ROLE] is responsible for updating working days: Check only the business days so that reminders don’t get sent during your off days

[ROLE] is responsible for establishing project specific location list: Make sure you import (or add) your locations within project site. This will really help in specifying where certain items come from. Locations means drawing areas; for example, First Floor, Conference Room, Lobby, Bathroom, Parking Lot, Second Floor, etc. If you have Revit, you can import directly from our Revit Plugin. Otherwise, you can use Procore Imports and our Excel template to bulk import your locations.

[ROLE] is responsible for establishing project specific equipment list: This is especially useful for daily logs. Please add any equipment that you would need for this project that needs inspection, maintenance, rentals, etc.

## **Documents**

[*Documents Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/documents)

Procore's Documents tool is the central repository for your organisation's mission-critical documents. Offering virtually unlimited storage space and a variety of markup and revision management features, you can ensure that your staff always has access to the most current document versions made available.

All documents uploaded into the Documents tool must follow the numbering convention system and an appropriate title – example: XXXX-XXX-XX-XXX-XXXX – Example Doc 1

[ROLE] is responsible for ensuring the document folder structure meets the team’s needs.

[ROLE] is responsible for ensuring internal documents are made private.

[ROLE] is responsible for subscribing/tracking internal/external team to appropriate folders.

In the settings section, there’s an option to download and install for free [Procore Drive](https://marketplace.procore.com/apps/procore-drive).

NOTE: Procore Drive is a drop box like app that allows for a smoother way to manage your folder structure and documents. It allows for drag and drop and has the same functionalities you see on Procore’s Documents tool.

NOTE 2: Procore Drive is only compatible with Windows (not Mac). If you have a Mac, we recommend you download Procore Drive onto a Windows Server (if possible), so that you can then have access to Procore Drive on your Mac.

Documents can also be saved directly from Outlook with [Procore for Outlook](https://support.procore.com/integrations/procore-outlook-addin).

The Documents tool integrates with [Docusign](https://marketplace.procore.com/apps/docusign) to digitally approve and sign key project documentation.

## **Directory**

[*Directory Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/directory)

Store all contact data for project team members and vendors. Invite project collaborators and control which tools they can access as well as their tool-specific permissions.

Only [ROLE] can add people to and remove people from the project directory.

[ROLE] is responsible for establishing default project distribution groups for [Design Team, Internal Team, Subcontractors]

## **Reports**

[*Reports Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/reports/tutorials/share-a-custom-project-report)

Procore's Project level Reports tool allows you to generate canned or standard reports that pulls specific data from the project. For a global report, go back to the Company Level and select “Reports” from Company Tools.

[ROLE] is responsible for building out company wide reports.

[ROLE] is responsible for building out project wide reports

[ROLE] is responsible for assigning report templates.

[ROLE] is responsible for building out project reports.

[Automated Distribution of Reports](https://en-gb.support.procore.com/products/online/user-guide/project-level/reports/tutorials/distribute-a-snapshot-of-a-custom-project-report):

* Be sure to first apply the filter (show last 7 days or last 30 days, etc.) to control how much you want to distribute
* Once you’ve created your custom report Click on Distribute Snapshot and scroll down to set up an automatic distribution at the frequency, day and time of your choice.
* Once you set up automatic distribution, the report will automatically generate live data and distribute to the users selected

[Sharing Custom Reports](https://en-gb.support.procore.com/products/online/user-guide/project-level/reports/tutorials/share-a-custom-project-report):

* Custom reports can only be viewed (on Procore) by the creator. You must share the report to give another user access to view.
* Once you’ve shared the report with at least one user, all Admin users will now have access to the report. Users will not be able to **edit** your original report, but they will be able to clone or distribute the original report.

## **Tasks**

[*Tasks Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/tasks)

The purpose of this tool is to assign category-specific tasks to internal members of your team. This tool is not meant to send tasks out to external users; only internal staff that are part of the project.

[ROLE], [ROLE] and [ROLE] are responsible for entering tasks.

[ROLE] is responsible for creating Task Categories.

Tasks can also be created directly from Outlook with [Procore for Outlook](https://support.procore.com/integrations/procore-outlook-addin)

# **Text Description automatically generated with medium confidence**

*For Project-Admin Users*

*\*\* REQUIRED TRAINING\*\* -* [*Procore Project Management Tools Certification*](https://learn.procore.com/procore-certification-project-manager-project-management)

*This Standard Operating Procedure will outline detailed instructions for Admin Users. Some tools and tool settings may not apply to Standard users*.

## **Drawings**

[*Drawings Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/drawings)

View, manage and archive all project drawings and revisions in Procore to ensure that team members always have access to the most current drawing set.

[ROLE] is responsible for activating drawings by area if needed. Examples: Drawing areas by floor or structure.

[ROLE] is responsible for uploading drawings and revisions.

* PDF format only
* You can upload multiple PDF documents at once or just a single PDF with all your drawings. You can also upload one PDF at a time if you don’t have all the drawings available

[ROLE] is responsible for reviewing and publishing drawing sheets.

* Review refers to reviewing the Optical Character Recognition (OCR) scan is correct and that number, title and discipline have been captured.
* ‘Publish and Distribute’ will distribute drawings to only those who are subscribe to the set. ‘Publish Only’ will not notify any user.

[ROLE] is responsible for marking up drawings with [ROLE].

[ROLE] is responsible for subscribing [ROLE], [ROLE], [ROLE] to drawings log.

## **Specifications**

[*Specifications Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/specifications)

Manage and archive all specs and revisions to ensure that the project team members always work off the current specs with real-time access. Access the current set of specifications from your mobile device on the site or back office computer.

[ROLE] is responsible for uploading specifications and revisions.

[ROLE] is responsible for subscribing [ROLE], [ROLE], [ROLE] to specifications log.

## **RFIs**

[*RFIs Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/rfi)

Procore's RFIs tool allows you to have timely RFI management, which is the key to good programme management and overall project success.

When creating an RFI its important to fill in all requested information from Procore including any attachments you consider relevant. The subject of the RFI needs to be clear and relevant. RFI’s will be rejected if the appropriate information is not filled in.

[ROLE] to establish default RFI Manager(s) to the project:

If you have a default RFI Manager setup, then Standard Users will create draft RFIs that will automatically get assigned to the RFI Manager who will then be notified by email and can decide what next steps to take; for example, adding an assignee, opening the RFI, contacting the creator of the RFI, closing the RFI, etc.

[ROLE] to Create DRAFT RFI (receives question outside of Procore) and assigns RFI to RFI Manager(s).

RFI Manager: [ROLE] to assign [ROLE], [ROLE] should be on distribution list.

When response received, [ROLE] marks official response and closes.

Draft RFIs can also be created directly from Outlook with [Procore for Outlook](https://support.procore.com/integrations/procore-outlook-addin)

RFIs can be responded to via email without the Outlook integration and the responses will be logged in Procore.

## **Programme**

[*Programme Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/schedule)

Create, edit and share programmes. Integrate your Primavera P6, Asta Powerproject or Microsoft Project programmes.

[ROLE] is responsible for downloading Procore Drive, and uploading the programme via Procore Drive, then updating as needed.

[ROLE] to set up automated weekly project programme emails to project team. (Optional)

In the settings section, there’s an option to download and install for free [Procore Drive](https://marketplace.procore.com/apps/procore-drive).

NOTE: Procore Drive will allow you to integrate your current programme software ensuring that all changes to the programme will be recorded and updated in Procore.

NOTE 2: Procore Drive is only compatible with Windows (not Mac). If you have a Mac, we recommend you download Procore Drive onto a Windows Server (if possible), so that you can then have access to Procore Drive on your Mac.

NOTE 3: The integration only allows for one programme per project.

## **Submittals**

[*Submittals Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/submittals)

A submittal refers to the written and/or physical information provided by a responsible contractor (i.e. contractors and subs). Submittals can be presented in various formats, such as drawings, technical submissions, QA check etc.

[ROLE] fills out submittal import template to create registry (optional).

[ROLE] creates (or edits existing) submittal; to add submittal. Creates the workflow which includes [ROLE] as Submitter, [ROLE] as internal approver and [ROLE] as ultimate approver.

[ROLE] takes response and distributes item; closes item. If needed, creates revision.

[DETAIL COMPANY SPECIFIC APPROVAL WORKFLOWS TO BE USED]

Example workflow:

|  |  |  |
| --- | --- | --- |
| Shop Drawings Example | | |
| Step 1 | **Subcontractor** – Asked to submit shop drawings | Submitter |
| Step 2 | **General Contractor** – Reviews received shop drawings before they are sent to client | Approver |
| Step 3 | **Design Team/Client** – Gets the final review | Approver |
| **Submittal Manager is notified – Close and Distribute** | | |

## **Correspondence**

[*Correspondence Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/correspondence)

The Correspondence tool enables you to send custom correspondences to collaborators, such as subcontractors, contractors and clients.

Admin users – view the setup guide [here](https://en-gb.support.procore.com/products/online/user-guide/project-level/correspondence/tutorials/getting-started-correspondence).

Correspondence Types to be used on Project include: [List Correspondence Types]

[ROLE] will create Correspondence [TYPE] as needed.

[ROLE] should be on distribution list.

When response received, [ROLE] closes.

Correspondence items can also be created directly from Outlook with [Procore for Outlook](https://support.procore.com/integrations/procore-outlook-addin).

The Correspondence tool integrates with [Docusign](https://marketplace.procore.com/apps/docusign) to digitally approve and sign key project documentation.

## **Instructions**

[*Instructions Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/instructions)

This tool provides team members on a construction project with the ability to capture and record all types of instructions (i.e., architect instructions, client instructions and site instructions for contractors).

[ROLE] will create Site Instruction Types as needed.

[ROLE] will assign Tasks to [ROLE]

[ROLE] should be included in the Distribution List

Instructions can be created directly from an RFI – see details [here](https://en-gb.support.procore.com/products/online/user-guide/project-level/instructions/tutorials/create-an-instruction-from-an-rfi)

If Procore Financials tools are active, a Change Event can be created directly from an Instruction – see details [here](https://en-gb.support.procore.com/products/online/user-guide/project-level/instructions/tutorials/create-a-change-event-from-an-instruction).

## **Snag List**

[*Snag List Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/punch-list)

With Procore's Snag List tool, keep a clear list of snag items, assign responsibility, select a due date and track current statuses directly from the site and even offline.

[ROLE] will establish [ROLE] to default Snag List Manager.

[ROLE] will establish [ROLE] to default Final Approver.

[ROLE] will create Snag List items as needed.

[ROLE] will review, revise and add to default Snag List templates (Company Admin).

Snag List items can also be bulk imported using [Procore Imports](https://en-gb.support.procore.com/products/procore-imports/setup-guide).

NOTE: Procore Imports is only compatible with Windows (not Mac). If you have a Mac, we recommend you download Procore Imports onto a Windows Server (if possible), so that you can then have access to Procore Imports on your Mac.

## **Site Diary**

[*Site Diary Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/daily-log)

Procore's Site Diary tool is much more than just site notes—it offers a more powerful construction software solution for project managers who need to keep track of every detail including, but not limited to, labour, communication, equipment, materials and jobsite events.

Required modules: [Weather Observations, Manpower log, Notes, Timecards, Equipment, Visitors, Phone Calls, Inspections, Deliveries, Safety Violations, Accidents, Quantities, Productivity, Skip, Waste, Scheduled Work, Photos, Delays] – DELETE/AMEND AS APPROPRIATE

Photos taken within the Site Diary will automatically populate the Photos tool.

## **Photos**

[*Photos Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/photos)

Easily capture, store and share your project photos in a secure online archive. Use your smartphone or tablet to quickly take a progress photo, add markups and instantly share it with other team members.

[ROLE] pre-creates albums based on (timeframe focus?)

-OR- Albums created as needed as the PM or Superintendents see fit.

[ROLE] is responsible for subscribing [ROLE], [ROLE], [ROLE] to Photos tool.

Additional tools can automatically populate the photos tool by default – this is amended in [Photo settings](https://en-gb.support.procore.com/products/online/user-guide/project-level/photos/tutorials/configure-advanced-settings-photos).

## **Meetings**

[*Meetings Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/meetings)

Manage all aspects of your project meetings from agenda distribution to post-meeting approval of minutes. Use customisable meeting templates and categories to streamline the entire process.

[ROLE] creates and maintains company level meeting templates.

[ROLE] creates meetings and agendas within Meetings tool.

[ROLE] adds and distributes meeting minutes.

If Procore Financials tools are active, a Change Event can be created directly from a Meeting – see details [here](https://en-gb.support.procore.com/products/online/user-guide/project-level/meetings/tutorials/create-a-change-event-from-a-meeting).

# **Logo Description automatically generated**

*For Project-Admin Users*

*\*\* REQUIRED TRAINING\*\* -* [*Procore Quality & Safety Tools Certification*](https://learn.procore.com/procore-certification-project-manager-quality-and-safety)

*This Standard Operating Procedure will outline detailed instructions for Admin Users. Some tools and tool settings may not apply to Standard users*.

## **Inspections**

[*Inspections Support Page – Company Level*](https://en-gb.support.procore.com/products/online/user-guide/company-level/inspections)

[*Inspections Support Page – Project Level*](https://en-gb.support.procore.com/products/online/user-guide/project-level/inspections)

Create comprehensive checklists to capture all of the requirements associated with the different type of inspections that occur during the lifecycle of a construction project.

The company-level Inspection tool is where inspection templates are created. These templates must be added to the Project Inspection (settings). Please add them to your existing projects and project templates.

[ROLE] will create Inspection Templates as needed.

[ROLE] will add Inspection Templates to a new project.

[ROLE] should be included in the Distribution List

When completing an Inspection, by default a user can add a comment, attachment or an observation to each question.

[DETAIL IF YOU INTEND ON FORCING USERS TO CREATE OBSERVATIONS ON FAILED ITEMS]

## **Observations**

[*Observation Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/observations)

Project managers can use the Observations tool to assign tasks to other project team members. These observations can encompass scopes of work including quality, safety, commissioning, warranty and work to complete. Unlike the Snag List tool, Observations is designed to be used at any phase in the project lifecycle.

[ROLE] will create observations as needed.

[ROLE] should be included in the Distribution List

[ROLE] will be responsible for establishing Observation templates (Company Admin)

[ROLE] will be responsible to establishing Observation Types (Company Admin)

Observations can also be created directly from Outlook with [Procore for Outlook](https://support.procore.com/integrations/procore-outlook-addin)

## **Incidents**

[*Incidents Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/incidents)

Digitally capture and manage incidents easily and accurately. Manage risk, identify trends and harness valuable data to better understand how to prevent unfortunate incidents in the future.

[ROLE] Creates Incidents

-What events warrant a creation of an Incident for your Company?

-(Fields Required) to include for Company Level Reporting

[ROLE] Manages all incidents across all project for company

Observations can be created and linked to Incidents as part of any corrective or preventative actions required – see details [here](https://en-gb.support.procore.com/products/online/user-guide/project-level/incidents/tutorials/add-an-action-to-an-incident).

Ensure to configure alerts for Incidents at company level - Any user can be added to an 'Alert Recipient' list to receive alert push notifications and emails for the projects they are added to, but they need 'Read Only' level permissions or higher on a project's Incidents tool in order to view the record associated with the alert.

## **Forms**

[*Forms Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/forms)

With Procore's Forms tool, capture the valuable data needed to keep you safe and help you build to quality standards. You can upload, access and fill out fillable PDFs that you and your project collaborators can immediately access directly from a mobile device.

[ROLE] will pre-create all the fillable forms for use and upload into Procore

[Name of Forms] to be used by [ROLE]

NOTE: Procore DOES NOT create fillable pdfs for you. Procore is a host that will allow you the space to store and use your fillable pdfs.

You can also use this space to add read-only documents such as Health and Safety manuals, if they are PDF.

## **Action Plans**

[*Action Plans Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/action-plans)

The Action Plans tool allows users to create plans outlining critical milestones that represent the standards of quality for their defined scopes of work. Action plans can also help users maintain a high degree of accountability by preserving records of work completed and documenting the approval from responsible parties for that completed work.

[DETAIL COMPANY SPECIFIC PROCESSES THAT WILL RUN THROUGH PROCORE – E.G. ITPs / PROJECT SETUP PLANS – INCLUDING RELEVANT HOLD POINTS]

[ROLE] will create the Action Plan templates (Company Level).

[ROLE] will create and publish the Action Plan within the project - also adding in all Reference, Due Dates and Assignees.

Action Plan References link to Procore’s Specifications and Drawings tools.

Action Plan Records link to Procore’s Inspections, Correspondence and Photos tools

# Text Description automatically generated

*For Project-Admin Users*

*\*\* REQUIRED TRAINING\*\* -* [*Procore Financial Management Certification*](https://learn.procore.com/procore-certification-project-manager-financial-management)

Also review the [Financial Management user Guide](https://en-gb.support.procore.com/products/online/financial-management-user-guides)

Procore’s financial tools are NOT MEANT TO replace your accounting system; rather it is meant to provide project managers and key stakeholders visibility on the financial health of a project.

Procore’s best practice is to always start tracking your project finances in the following order & your company’s Work Breakdown Structure (cost codes and types) must be added into the project Admin tool before using the financials tools:

## **Budget**

[*Budget Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/budget)

The Budget is the main hub for your financial management in Procore. It is where you can get a snapshot of where your budget is for the project but it is also feeds in from the other tools eliminating the need for double-entry of contract modifications and variation values into complex spreadsheets.

[ROLE] Is responsible for importing/creating budget: [Import a budget](https://en-gb.support.procore.com/products/online/user-guide/project-level/budget/tutorials/import-a-budget)

[ROLE] is responsible for taking [Snapshots](https://en-gb.support.procore.com/products/online/user-guide/project-level/budget/tutorials/create-a-budget-snapshot) and/or running the following reports:

[Report]

[Report]

[Report]

Budget views are configurable – see details on [reading the budget](https://en-gb.support.procore.com/products/online/user-guide/project-level/budget/tutorials/read-a-budget) and [setting up a new budget view](https://en-gb.support.procore.com/products/online/user-guide/company-level/admin/tutorials/set-up-a-new-budget-view).

## **Main Contract**

[*Main Contract Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/prime-contracts)

With Procore's Main Contracts tool, easily create and manage contracts with your clients and keep track of all variations and related items.

[ROLE] is responsible for creating Main Contract and Bill of Quantities (BOQ). [Copy BOQ from Budget](https://en-gb.support.procore.com/products/online/user-guide/project-level/prime-contracts/tutorials/create-a-prime-contract-sov-from-the-project-budget) or [import via CSV](https://en-gb.support.procore.com/products/online/user-guide/project-level/prime-contracts/tutorials/import-a-prime-contract-sov-from-a-csv-file)

[ROLE] is responsible for creating Owner Payment Applications.

This tool can be turned off if you do not have any upstream contracts for a project.

The Main Contract tool integrates with [Docusign](https://marketplace.procore.com/apps/docusign) to digitally approve and sign key project documentation.

You will still need to add a placeholder for the main contract even if you do not decide to execute the contract through Procore – this will be required for tracking Variations.

Main Contract pdf exports are customisable. Reach out to your Procore point of contact if you wish to make any changes – see details [here](https://en-gb.support.procore.com/products/online/custom-solutions/forms/get-started-with-custom-forms).

## **Commitments**

[*Commitments Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/commitments)

The Commitments tool in Procore allows your teams to see the status and current value of all downstream contracts and purchase orders. Easily pinpoint which contracts have been approved or determine the status of payment applications and payments.

[ROLE] is responsible for creating Commitments and Bill of Quantities (BOQ).

Remember to add Sub as a **payment application contact** to their contract. It is required for them to submit Requisitions and/or RFQ Pricing.

[ROLE] is responsible for approving commitments.

[ROLE] is responsible for sending commitments to Sub/Vendor. Change Status when issued and when signatures received.

[ROLE] is responsible for creating Billing Periods and requesting Subcontractor Payment Applications from Subs/Vendors

The Commitments tool integrates with [Docusign](https://marketplace.procore.com/apps/docusign) to digitally approve and sign key project documentation.

NOTE: If you are collaborating with subcontractors on Procore and would like them to review their respective contracts, request for quotes or change orders, please remember to add them to the Privacy list. Commitments are private by default and can only be viewed by Admin Users (unless you give specific permission to the contractor in question).

Subcontract & Purchase Order pdf exports are customisable. Reach out to your Procore point of contact if you wish to make any changes – see details [here](https://en-gb.support.procore.com/products/online/custom-solutions/forms/get-started-with-custom-forms).

## **Direct Costs**

[*Direct Costs Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/direct-costs)

Track all direct costs incurred (expenses and payment applications) that are NOT associated with commitments, such as general conditions and self-performed work.

[ROLE] is responsible for importing Direct Costs into Procore [weekly/bi-weekly/monthly]

[ROLE] is responsible for adding any one off Direct Costs directly into Procore

## **Change Events/Variations**

[*Change Events Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/change-events)

Change Events are where you will track anything that may incur a cost or scope increase on a project. One Change Event can contain multiple variations. The tool allows you to capture risk from site, send and receive RFQ responses and approve variations.

Before creating Change Events & Variations, go to the Configuration settings in the Main Contract tool and select the number of tiers you require for your Variations. Below is a description and chart that explains what each change order tier means. Please be sure to change that in your Standard Project Template if it is a standard workflow. Consult with your Procore Point of Contact if you are not sure which setting to select for your project.

* **1-Tier**. Single tier variations consist solely of a Main Contract Variation which can be sent for approval.
* **2-Tier**. This is the default configuration setting for the Main Contract tool. With this configuration, your users first create Potential Variations (PVs). The variations can then be grouped into a main contract variation (MCV) which can then be sent to the appropriate person (e.g., the owner, the main contractor, the main contractor, etc.) for final approval.
* **3-Tier**. With this configuration, your users create Potential Variations (PVs). These PVs can then be added individually or grouped into a variation request (VR). Next, the VRs can be submitted for approval. Upon approval, you can then group these VRs into a single main contract variation (MCV) . Diagram

  Description automatically generated

[ROLE(s)] is responsible for creating Change Events.

Include/Exclude ROM.

[ROLE] is responsible for sending RFQs.

[ROLE] is responsible for drafting Potential Variations and sending to Owner.

[ROLE] is responsible for drafting Commitment Variation and sending to Contractor.

Use [Report] for [Meeting Name]

The Change Events tool integrates with [Docusign](https://marketplace.procore.com/apps/docusign) to digitally approve and sign key project documentation.

Change Events can also be created and linked from Procore’s Emails, Instructions, Meetings, Observations, RFIs and Daywork Sheets.

Change Event and Variation pdf exports are customisable. Reach out to your Procore point of contact if you wish to make any changes – see details [here](https://en-gb.support.procore.com/products/online/custom-solutions/forms/get-started-with-custom-forms).

# Logo Description automatically generated with medium confidence

*For Project-Admin Users*

*\*\* REQUIRED TRAINING\*\* -* [*Procore Field Productivity Certification*](https://learn.procore.com/procore-certification-project-manager-resource-management)

## **Timesheets & Crews**

[*Timesheets Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/timesheets)

[*Crews Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/crews)

Procore's Project level Timesheets tool gives you the ability to enter current-week timecard data for employees who have been added as contacts in the Company level Directory tool and workers who have been added in the Crews tool.

[ROLE] is responsible for updating Directory to Include Employees of Company? Checkbox

[ROLE] is responsible for setting up Crews

[ROLE] is responsible for reviewing Timesheets [report]

[ROLE] will create/setup and send [Field Production Report](https://en-gb.support.procore.com/products/online/user-guide/project-level/timesheets/tutorials/set-up-a-field-production-report) & [Labour Budget to Actual Report](https://en-gb.support.procore.com/products/online/user-guide/project-level/timesheets/tutorials/view-a-labor-budget-to-actual-report)

Will track time cards Individually/In Bulk

## **Daywork Sheets**

[*Daywork Sheets Support Page*](https://en-gb.support.procore.com/products/online/user-guide/project-level/tm-tickets)

With the Daywork Sheets tool, workers no longer have to worry about misplacing carbon copy tickets or waiting until they get back to the office to scan, manually enter, or email out-of-scope work requests. Instead, requests and digital signatures are captured in the field on mobile—while also notifying project managers and accountants at the office.

[ROLE] will create Daywork Sheets

[ROLE] will add Equipment list to project’s Admin tool

[ROLE] will receive notifications when Daywork Sheets are created or verified on-site

[ROLE] will sign off/approve Daywork Sheets

[ROLE] will create Dayworks Sheet Report and distribute snapshot

[Best practices for configuring Daywork Sheets](https://en-gb.support.procore.com/products/online/user-guide/project-level/tm-tickets/tutorials/best-practices-for-configuring-tm-tickets)

# **COMPLETING A PROJECT**

Project Stages

As your project progresses, it’s important to ensure you are consistently updating the stage of your project. Project stages can be edited at the Company Level Admin Tool.

Once you’ve got a list of stages determined (feel free to use the standard stages in Procore), you can edit a Project Stage by selecting the project, clicking on the Admin tool of the Project, and editing the Project Stage.

Once a project is completed, the best practice is to change the project stage to “Closed” or “Complete,” or what you would define as a completed project (for example, “Warranty”). Before clicking on the “Update” button, be sure to also deactivate the project at the top of the page.

Why Deactivate a Project?

This will allow you to create more projects as your project cap with Procore is the number of ACTIVE projects you are permitted at any given time.

Will I have access to my inactive projects?

Yes. Simply filter in the Portfolio for Inactive projects to view them.

Procore Extracts

[Procore Extracts](https://en-gb.support.procore.com/products/procore-extracts) is a desktop application for Windows computers that allows 'Admin' users to download (i.e. extract) information from Procore projects.

KEY FEATURES:

* Easily download items in bulk from Procore directly to your computer.
* Select which tools you want to download items from (e.g. submittals, RFIs, observations, photos) and whether you want attachments to be included.
* View files from Procore on your computer organised by project and tool.

NOTE: Procore Extracts is only compatible with Windows (not Mac). If you have a Mac, we recommend you download Procore Imports onto a Windows Server (if possible), so that you can then have access to Procore Imports on your Mac.