***Recommended Project Manual Language***

***Section 01 30 00 – Administrative Requirements***

**COLLABORATION SOFTWARE**

1. SUMMARY
   1. Utilize a web based construction project management collaboration software such as Procore ([www.procore.com](http://www.procore.com)) to submit, track, distribute and collaborate on project documentation and action items.
   2. The intent of utilizing a web based construction management application is to reduce cost and schedule risk, improve quality and safety, and maintain a healthy team dynamic by improving information flow, reducing non-productive activities, reducing rework and decreasing turnaround times.
2. SOFTWARE CAPABILITIES (including but not limited to)
   1. Daily Log
      1. Provide daily log entry from web and mobile with automatic capture of daily weather conditions.
      2. Provide ability to attach photographs to entries directly from mobile.
      3. Provide reporting capabilities to easily report on man-hours and activities for a certain time frame and contractor.
   2. Dashboards
      1. Provide a dashboard that shows the status of all currently assigned items with drill down capability to see the subject, assignee and due date of each item.
   3. Deficiency Tracking
      1. Provide a means for recording, assigning and confirming completion of any deficiency or observation noted during the course of construction. Must be accessible from web and mobile.
   4. Directory
      1. Provide a directory of all team member’s contact information that is accessible from web and mobile.
   5. Documents
      1. Provide a storage location for miscellaneous project documents with the ability to have a folder hierarchy and privacy settings on folders.
      2. There should not be a storage limit.
      3. Provide download tracking.
      4. Provide the ability to revision and check out files, with access to all previous revisions.
   6. Drawings
      1. Provide access to a system maintained current set of drawings on web and mobile, with access to all previous revisions as well.
      2. Provide automatic hyperlinking capability for detail callouts.
      3. Provide drawing markup capabilities on web and mobile.
      4. Provide ability to link RFIs, Submittals, Punchlist Items, Photos and Project Documents to the drawings.
      5. Drawing Markups should be carried forward when new revisions are uploaded.
      6. Markups and linked documentation should be able to be public or private.
   7. Financial Management
      1. Provide ability to manage contracts, payment applications and change orders through the software.
      2. Provide ability to view contracts and change orders from web and mobile.
   8. Inspections
      1. Provide ability to create inspections from web and mobile.
      2. Provide ability to create a deficiency item from an inspection that can be assigned and tracked to completion.
   9. Meetings
      1. Provide ability to create, edit and view meeting minutes from web and mobile.
      2. Provide ability to create action items with assignees and due dates from a meeting item.
   10. Mobile Accessibility
       1. Provide native mobile applications for iOS and Android phones at a minimum that provide access to relevant project documentation, including as-built versions of Drawings and Specifications, even when there is no internet access.
   11. Photos
       1. Provide ability to upload and view photos from web and mobile.
       2. Provide ability to markup photos from mobile to clarify anything important in the photo.
       3. Provide ability to link photos to specific locations on drawings.
   12. Punchlist
       1. Provide ability to create punchlist items from web and mobile and link them to specific locations on the drawings.
       2. Provide ability to distribute punchlist items to all contractors, for contractors to mark them as resolved with photographic proof of resolution via mobile, and for the items to be marked as complete via mobile or web. .
   13. Requests for Information (RFIs)
       1. Provide ability to create RFIs with assignees, due dates and attachments.
       2. Provide ability for assignees to respond to RFIs both via the software and by responding to the system generated email.
       3. Provide an auto-generated log of all RFIs.
   14. Schedule
       1. Provide ability to display schedules from typical scheduling software such as Microsoft Project, Primavera P3, Primavera P6 or Asta Powerproject.
   15. Specifications
       1. Provide ability to upload project specifications and manage them at the individual specification level.
       2. Provide ability to view and search specifications on web and mobile.
       3. Provide ability to upload revisions to individual specifications and maintain all revision history.
       4. Provide an auto-generated current specification log that provides access to the current version of each specification.
       5. Provide ability to link specifications to submittals and view the specification from the submittal.
   16. Submittals
       1. Provide ability to upload a submittal register of all expected submittals.
       2. Provide ability to create multi-step approval workflows for submittals, with reminder notifications for the current assignee.
       3. Provide the ability to upload any file type without size restrictions.
       4. Provide an auto-generated submittal log.
3. TECHNOLOGY
   1. Fully web based with mobile apps for Windows, iOS and Android phones.
   2. Accessible without logging in through a virtual private network (VPN).
   3. Works on the current version of Internet Explorer, Google Chrome, Mozilla firefox and Apple Safari browsers.
   4. Can generate emails automatically, and all attachments are included in the emails via download links to avoid emails not being delivered due to size.
   5. PDF output of forms such as RFIs, Submittals, Meetings, Change Orders, etc. should be available and customizable.
4. TRAINING AND SUPPORT
   1. The software selected must provide support to all parties via email, phone and live chat at no additional charge.
   2. The software selected must provide training in the form of self-paced learning videos as well as interactive webinars.
   3. The contractor shall hold a kickoff meeting with the Owner and applicable consultants at the beginning of the project to discuss how the software will be used, routing & naming protocols, etc.
5. PROCEDURES
   1. RFIs and Submittals
      1. The Contractor will be responsible for submitting all RFIs and Submittals through the software and assigning them to the appropriate parties.
      2. Architects / Engineers / Consultants etc. are responsible for posting all responses to these items via the software, including all relevant attachments.
      3. The Contractor will distribute responses to all affected subcontractors and confirm agreement with the response by closing the item.
   2. Construction Documentation
      1. The Contractor will manage Drawings, Specifications and Documents in the software to ensure that the current version of all applicable construction documentation is available to the entire team via web and mobile.
      2. The Contractor will ensure that all RFIs which modify the current drawings are posted to the drawings and available via web and mobile within 24 hours of the RFI being responded to.
   3. Contractor will record and distribute meeting minutes and action items via the software.
   4. Contractor will take daily site photos and make them publicly available.
   5. Punchlist
      1. All punchlist items will be managed through the software.
      2. Punchlist items will be created by the Contractor while walking with the Owner and applicable consultants.
      3. It will be at the Owner’s discretion whether or not Punchlist Items can be closed while a representative from the Owner or applicable consultant is not present.
   6. General
      1. It is intended that the contractor will utilize the software for at least all functions identified in “Section B – Software Capabilities.”
6. PRICING
   1. The Contractor’s proposal shall be inclusive of all software costs. [OR - The cost of Procore Technologies services has been paid in full by the Owner]
   2. The software must allow for unlimited users to ensure that all parties have access to the system.