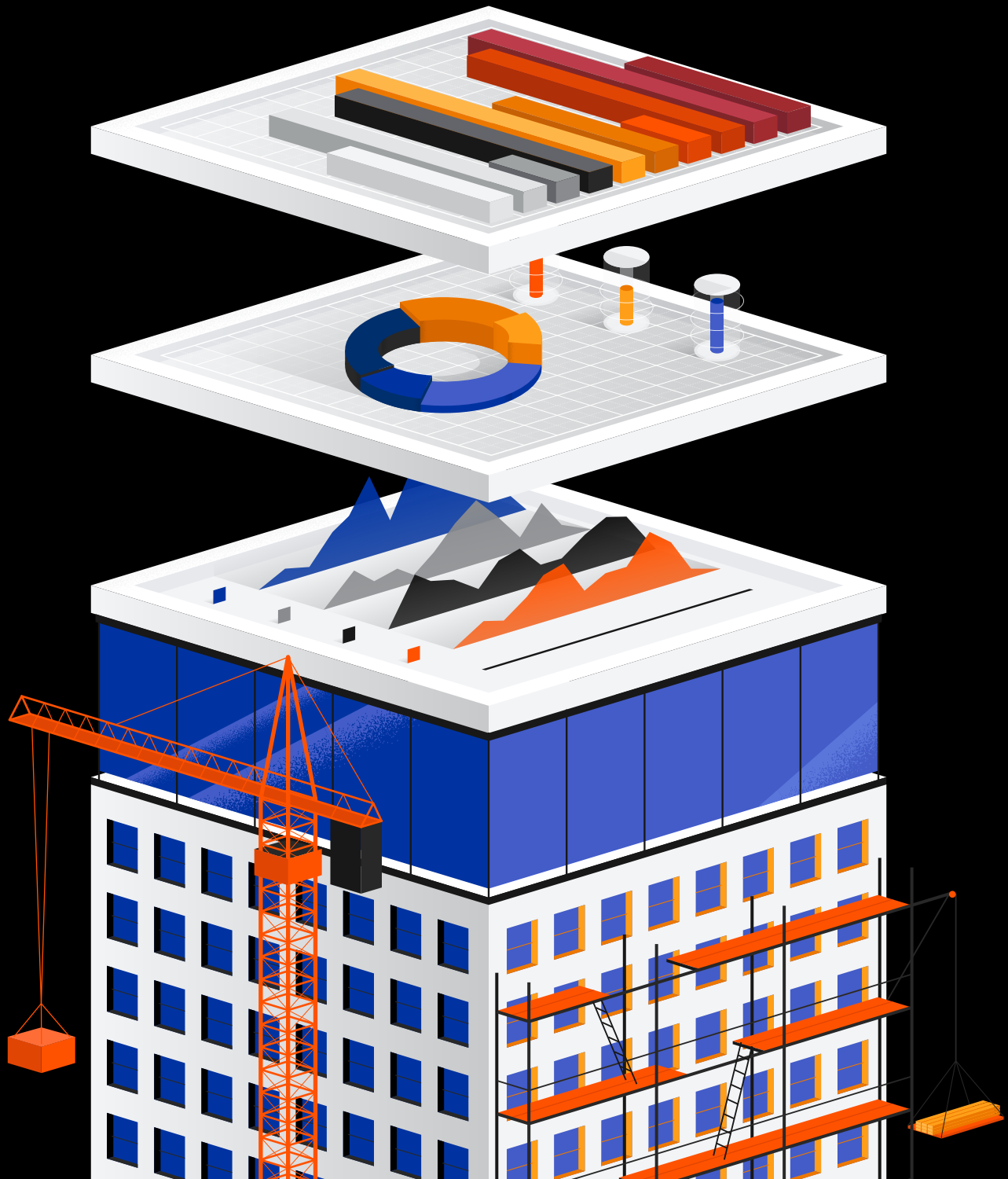


PROCORE®

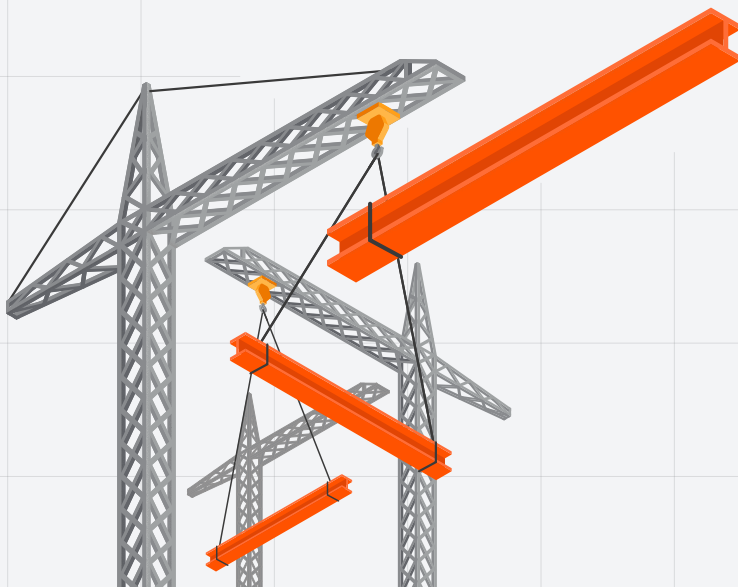
Getting started with Procore

Your first 30 days



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Introduction

This guide is designed to help you get your whole team up to speed with Procore. From Project Management to Quality & Safety to Financial Management, we'll introduce you to the top tools to focus on during your first 30 days:

Project Management

- + Uploading drawings
- + Uploading specifications
- + Creating RFIs
- + Managing submittals
- + Creating site diary items

Quality & Safety

- + Creating Company level inspections
- + Creating inspection programs
- + Creating incidents
- + Creating and viewing observations

Financial Management

- + Importing budgets
- + Defining work breakdown structure (WBS)
- + Creating and configuring workflows
- + Managing contracts

Our overviews will walk you through these key tools, and our checklists will give you actionable resources to ensure you're taking the right steps to drive ROI ASAP.

Your first 30 days: Top tool overview

PROJECT MANAGEMENT

Your Procore journey starts with Project Management – the key to connecting all your teams and all your project data to empower your business to make better decisions, faster.



Uploading drawings

Procore's Drawings tool enables you to upload, review and publish your drawings quickly and easily. As you upload a drawing, the tool uses optical character recognition technology to identify the drawing's number, discipline and title. From there, the drawing is split into individual sheets, where document details can be reviewed, edited, confirmed and published through an intuitive interface.

[View a short how-to](#)



Uploading specifications

Uploading specification revisions is easy with Procore's step-by-step process. Once the revisions have been uploaded, reviewed and published, Procore automatically recognises, inserts and marks the revisions in your spec book. The Specification Viewer then provides a streamlined experience with intelligent search capabilities and quick-link chapter navigation.

[View a short how-to](#)



Creating RFIs

Procore makes creating RFIs fast and effective with a simple, field-by-field utility that allows teams to work together on an RFI while assigning a single RFI manager for oversight. All information and attachments are consolidated in our centralised cloud storage, and simple automation is leveraged to ensure assignees know when a response is expected – and reminds them when that response is overdue.

[View a short how-to](#)

– YOUR FIRST 30 DAYS: TOP TOOL OVERVIEW



Managing submittals

When it comes to managing submittals, Procore's intuitive, flexible workflow saves time and energy. You can create submittals directly in the Submittals tool, [import existing submittals](#) or utilise the Submittal Builder to generate submittals from specifications in your Specifications tool. From there, you can take the [next steps](#), distributing the submittal to responsible parties, revising and eventually closing the submittal.

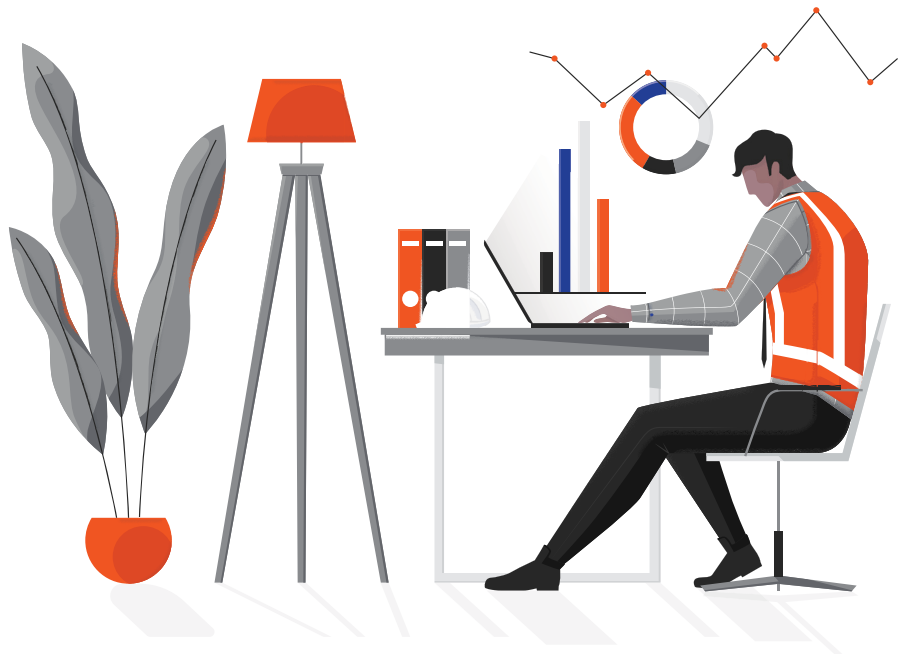
[View a short how-to](#)



Creating site diary items

Procore's Site Diary tool can help your team – from [site workers](#) to [subcontractors](#) and other collaborators – track and share everything happening on every worksite with written notes or audio recordings through the web or mobile app. To make entries more accessible, they're organised into easy-to-search categories, from weather conditions to equipment status to labour details.

[View a short how-to](#)



– YOUR FIRST 30 DAYS: TOP TOOL OVERVIEW

QUALITY & SAFETY

Inspections are a crucial part of maintaining quality and safety standards, and Procore is built to optimise the process.



Creating Company level inspections

Reliable inspections begin with a consistent Company level inspection template. With Procore, creating that template takes just minutes. Find out what needs to be included in every inspection with a click-by-click guide. Then give inspectors a digital tool that walks them through the requirements on every site and enables them to file all their notes and reference documents in a central location.

[View a short how-to](#)



Creating inspection programs

Procore's Inspection Scheduler enables your team to efficiently manage their recurring and single-instance program needs. Configure inspection types, times, locations and more – and control who sees a given event, all with just a few clicks.

[View a short how-to](#)



Creating incidents

If an accident or near miss occurs, it's important that the incident is quickly and accurately recorded. Adding an incident is simple in Procore's Incidents tool. Each incident can be easily registered with all location, date and time info, as well as any relevant photos. A distribution list and custom permissions make sure the right people are aware of the register and have the access needed to review it.

[View a short how-to](#)



Creating and viewing observations

Throughout the course of a job, your team needs to document and track deficiencies, warranty requests, safety items and more. Then they need to assign associated action items to responsible parties. They can streamline this process with automation and optional templates provided by the Observations tool – enabling team members to search, filter and [view observations](#) as needed.

[View a short how-to](#)

– YOUR FIRST 30 DAYS: TOP TOOL OVERVIEW

FINANCIAL MANAGEMENT

Procore is built to help your team improve quality and safety, reduce project delays and cost overruns. Real-time visibility and data-driven insights are the foundation on which all financial decisions are made. These insights enable faster and more informed decision-making.



Defining work breakdown structure (WBS)

Procore's work breakdown structure (WBS) enables your team to create custom financial segments, beyond sub job, cost code and cost type. This flexibility delivers the financial granularity needed in the construction industry.

[View a short how-to](#)



Importing budgets

Procore's flexible Budget Management tool allows your team to import or build budgets directly in the platform. Step-by-step guidance ensures consistent formatting to facilitate automation, and easy editing capabilities allow your team to make updates as needed.

[View a short how-to](#)



Creating and configuring workflows

Procore's self-service workflows allow your team to automate critical project processes – powering the journey to the finish line by triggering and tracking notifications, responses, approvals, etc. Users can easily define custom project maps that account for every step of a project and every responsible party.

[View a short how-to on creating a Company level workflow](#)

[View a short how-to on creating a Project level workflow](#)



Managing contracts: Head Contracts and Change Events

Establishing your contracts in Procore allows you to accurately and reliably define the value for a project – and [manage changes](#) that affect that value. A thorough pull-down menu-based process ensures consistent contract methodology, capturing all inclusions and exclusions and setting the project up for success.

[View a short how-to on creating a head contract](#)

[View a short how-to on creating a change event](#)

Your first 30 days: Checklists and benefits

Procore's broad capabilities give you the tools to connect your team, standardise your processes, save time and drive revenue. But that all starts with implementation and adoption. Here are some steps to start laying that foundation for your top tools:

PROJECT MANAGEMENT

Drawings: Checklist for PMs

- Invite the correct users and grant them the correct permissions
- Upload drawings, specifications and programs
- Set up locations for projects

Drawings: Benefits for PMs

- + Provide a single source of truth with a central hub for all project information and workflows
- + Make it [easy to invite users](#) and [set up project locations](#)
- + Provide visibility into site team data, fuelling faster, smarter decisions

Drawings: Checklist for the site

- Download drawings to your mobile device and [view](#)
- Create and link markups such as RFIs, photos, correspondences, etc.
- Enable push notifications for drawings
- Download the mobile app

Drawings: Benefits for the site

- + Ensure everyone is aware of updated drawings (subscriber list)
- + Ensure everyone is working off the most current version
- + Link markups to other Procore tools (RFIs, photos, correspondences, etc.)
- + Provide an easy web and mobile experience



– YOUR FIRST 30 DAYS: CHECKLISTS AND BENEFITS

RFIs: Checklist for PMs

Make sure users have correct permissions to create and view RFIs
 Link your RFIs to your drawings
 Set up your distribution list so that the correct parties are notified when RFIs are closed out

RFIs: Benefits for PMs

- + Standardise the process
- + Ensure all your users have visibility into RFI answers
- + Have a single source of truth for all teams

RFIs: Checklist for the site

Create and link RFIs to drawings
 Create RFIs on your Procore mobile app
 Add photos from your phone gallery

RFIs: Benefits for the site

- + Create RFIs on site
- + Ensure all collaborators have visibility into RFI answers
- + Have a single source of truth



– YOUR FIRST 30 DAYS: CHECKLISTS AND BENEFITS

Submittals: Checklist for PMs

Create a [submittal register](#) from your specifications with [Submittal Builder](#) or Submittal Import

Create workflow templates with a submitter role as the first step
[Set up your distribution list](#) so the correct parties are notified when submittals have been approved

Submittals: Checklist for the site

Link submittals to drawings
Access [submittals](#) from your Procore mobile app
Filter submittals by status

Submittals: Benefits for PMs

- + Enable your team to deliver higher-quality projects
- + Streamline your review process
- + Have a single source of truth for your submittal register

Submittals: Benefits for the site

- + Reduce rework by installing only approved submittals
- + Have a single source of truth for your submittal register
- + Obtain easy access to submittals on site

– YOUR FIRST 30 DAYS: CHECKLISTS AND BENEFITS

Site diaries: Checklist for PMs

Ensure the desired site diaries are enabled for your projects

Ensure the appropriate users have the correct permissions

[Create site diary entries](#) on the mobile app

Set up your distribution list

Site diaries: Benefits for PMs

- + Provide an official record of daily project activities
- + Reduce risk by documenting daily activities
- + Provide ease of communication from the site to the office

Site diaries: Checklist for the site

Encourage [site teams](#) to create site diaries via collaborative entry

Create and approve site diary entries

Close and distribute site diaries

Site diaries: Benefits for the site

- + Obtain an official record of daily project activities
- + Reduce risk by documenting daily activities
- + Provide ease of communication from the site to the office



– YOUR FIRST 30 DAYS: CHECKLISTS AND BENEFITS

QUALITY & SAFETY

Company level inspection templates: Checklist for the site, quality and safety

Create your inspection templates
(Company level)
Create observation templates at the
Company level, then populate specifics
at the Project level
Set up locations

Company level inspection templates: Benefits for the site, quality and safety

- + Standardise your process
- + Reduce missed items and
administrative burden

Inspection programs: Checklist for the site, quality and safety

Initiate an inspection or schedule a
recurring inspection for your project
Create an observation from the inspection
when deficiencies have been identified
Confirm all observations are closed
before signing off on the inspection

Inspection programs: Benefits for the site, quality and safety

- + Confirm that the installation meets the
specs and document it
- + Identify and correct deficiencies
or hazards
- + Gain a clear understanding of project risk



– YOUR FIRST 30 DAYS: CHECKLISTS AND BENEFITS

Incidents: Checklist for the site, quality and safety

If something happens on the project, create an [incident](#)
 Create at least one record, as well as a witness statement
 Create an action item and, if applicable, tie that action to an observation

Incidents: Benefits for the site, quality and safety

- + Capture incidents quickly and easily
- + Format your toolbox talks, onboarding, quarterly training and learning elements
- + Manage, document and distribute information efficiently

Observations: Checklist for the site, quality and safety

Create a standalone [observation](#)
 Create an observation from a template on site
 Create an observation from [Quick Capture](#) on your mobile device

Observations: Benefits for the site, quality and safety

- + Make closing out jobs easier by tracking observations as you go
- + Identify and track assignable action items to closure
- + Keep the project in compliance from a quality and/or safety perspective



– YOUR FIRST 30 DAYS: CHECKLISTS AND BENEFITS

FINANCIAL MANAGEMENT

Budgets: Checklist

Check and confirm to see if you have cost codes established at the Project level. If not, add them.
If you don't have a budget, [set up and import](#) one into Procore
Verify/confirm the data to ensure the budget is accurate

Budgets: Benefits

- + Obtain a baseline to establish the financial health of projects
- + Keep track of project changes, costs, forecasts and risks
- + Keep your data synchronised with the accounting team via an [ERP integration](#), and provide data-driven insights for better decision-making

Work breakdown structure: Checklist

Set up work breakdown structure in the Company level [Admin tool](#)
Go to the 'Work breakdown structure' tab in the right-hand menu in the company admin
Click into 'Cost code' to add your cost codes, and review your cost types to see if you need additional cost types

Work breakdown structure: Benefits

- + Itemise project costs so you can tag, track and report on them across the Procore platform



– YOUR FIRST 30 DAYS: CHECKLISTS AND BENEFITS

Workflows: Checklist

Create a [workflow](#) in the company's Workflow tool
 Assign workflows to projects
 Configure roles, responsibilities and notifications for your workflows

Workflows: Benefits

- + Create steps to 'Approve' an item (such as a subcontractor progress claim or contract) in Procore
- + Facilitate the approval process for time spent on a project

Contracts: Checklist for head contracts

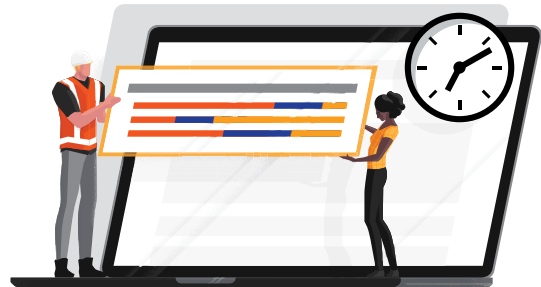
Check and/or create a [head contract](#) using the Head Contracts tool
 Add schedule of values
 Add financial markups for variations
 Make sure the head contract is approved

Contracts: Benefits

- + Easily capture the value of your contracts/commitments
- + Make it easier to monitor changes to contracts by linking back to the budget
- + Provide contract visibility for your collaborators

Contracts: Checklist for subcontracts

Check and/or create a subcontract or purchase order using the [Commitments tool](#)
 Add schedule of values
 Follow your business practice to review/execute a subcontract



Managing change events and variations: Checklist

Check if there has been any activity in Change Events
 If not, check to see if head contracts/commitments have been created and approved

Managing change events and variations: Benefits

- + Have an SOP for all worksite changes
- + Manage changes digitally
- + Streamline budget change management processes