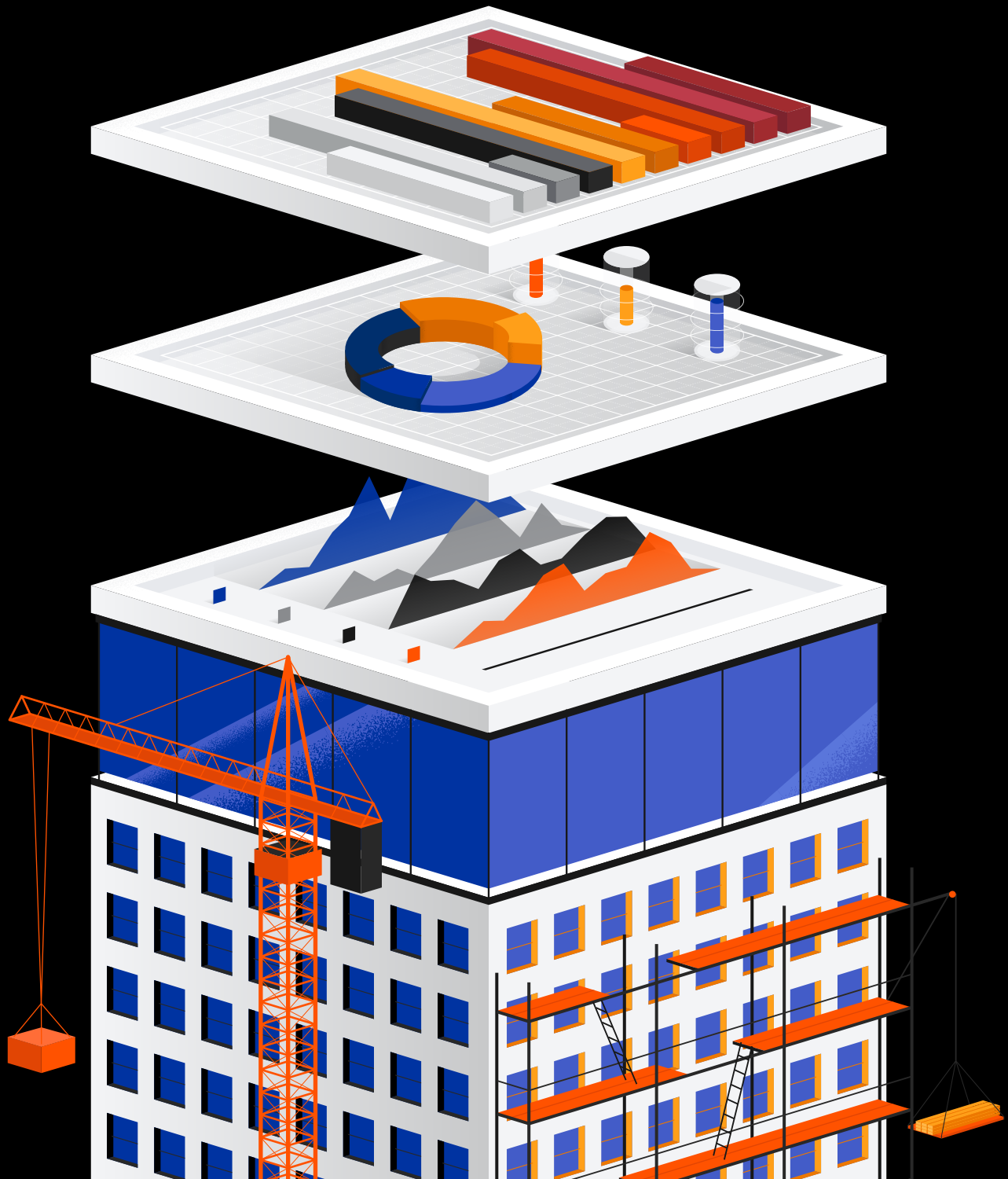


PROCORE®

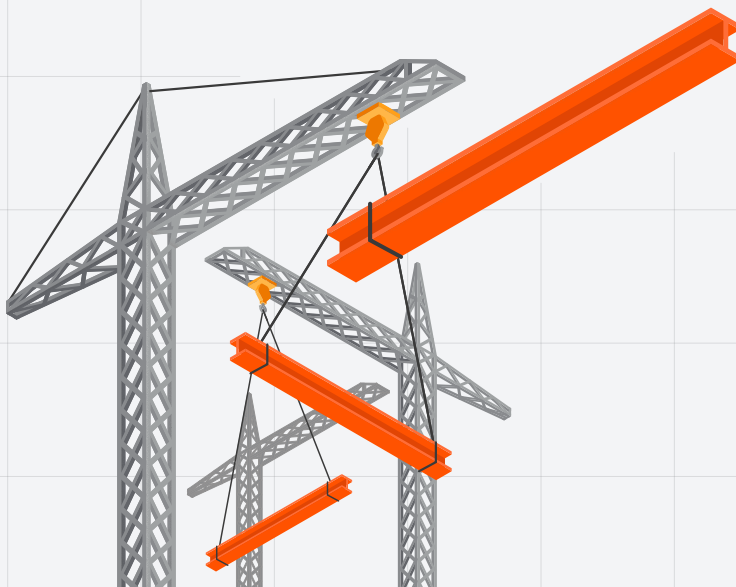
# Getting Started with Procore

Your First 30 Days



# Contents

- 03 Introduction
- 04 Your First 30 Days:  
Top Tool Overview
- 08 Your First 30 Days:  
Checklists & Benefits



# 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 Daily Log Items

## Quality & Safety

- + Creating Company-Level Inspections
- + Creating Inspection Schedules
- + Creating Incidents
- + Creating & Viewing Observations

## Financial Management

- + Importing Budgets
- + Defining Work Breakdown Structure (WBS)
- + Creating & 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 are uploaded, reviewed, and published, Procore automatically recognizes, 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 centralized 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 submittal tool, [import existing submittals](#), or utilize 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.

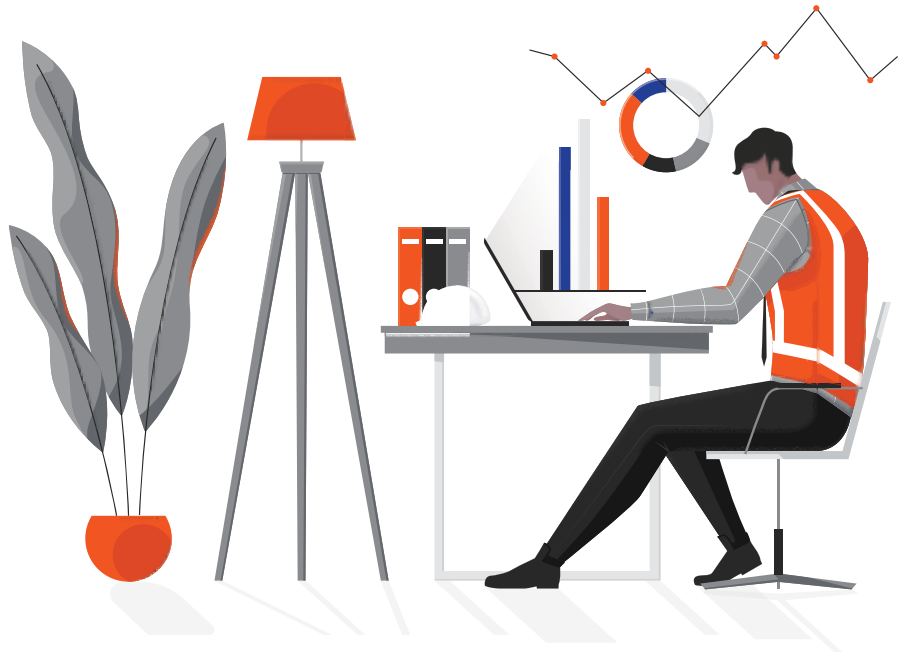
[View a short How-To](#)



### Creating Daily Log Items

Procore's Daily Log Tool can help your team—from [field workers](#) to [subcontractors](#) and other collaborators—track and share everything happening on every job site with written notes or audio recordings through the web or mobile app. To make entries more accessible, they're organized into easy-to-search categories, from weather conditions to equipment status to labor 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 optimize 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 Schedules

Procore's Inspection Scheduler enables your team to efficiently manage their recurring and single-instance scheduling 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 Incident Tool. Each incident can be easily logged 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 log and have the access needed to review it.

[View a short How-To](#)



#### Creating & 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 Observation 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 upon 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 & 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: Prime Contracts & 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 Prime Contract](#)

[View a short How-To on Creating a Change Event](#)

# Your First 30 Days: Checklists & Benefits

Procore's broad capabilities give you the tools to connect your team, standardize 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 Schedules  
Setup 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 field team data fueling faster, smarter decisions

### Drawings: Checklist for Field

Download Drawings to your mobile device and [view](#)  
Create and link markups such as RFIs, Photos, Correspondents, etc.  
Enable push notifications for Drawings  
Download Mobile App

### Drawings: Benefits for Field

- + 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, Correspondents, etc)
- + Provide easy web and mobile experience



## — YOUR FIRST 30 DAYS: CHECKLISTS & 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

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

### RFIs: Checklist for Field

Create and Link RFIs to Drawings  
Create RFIs on your Procore Mobile App  
Add photos from your phone gallery

### RFIs: Benefits for Field

- + Create RFIs in the field
- + Ensure all collaborators have visibility into RFI answers
- + Have a single source of truth



## — YOUR FIRST 30 DAYS: CHECKLISTS & 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 are approved

### 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 log

### Submittals: Checklist for Field

Link Submittals to Drawings  
Access [Submittals](#) from your Procore Mobile App  
Filter Submittals by status

### Submittals: Benefits for Field

- + Reduce rework by installing only approved submittals
- + Have a single source of truth for your Submittal log
- + Obtain easy access to submittals from the field

## — YOUR FIRST 30 DAYS: CHECKLISTS & BENEFITS

### Daily Logs: Checklist for PMs

Ensure the desired Daily Logs are enabled for your projects  
 Ensure the appropriate users have the correct permissions  
[Create Daily Log entries](#) on Mobile  
 Set up your distribution list

### Daily Logs: Benefits for PMs

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

### Daily Logs: Checklist for Field

Encourage [Field Teams](#) to create Daily Logs via collaborative entry  
 Create and approve Daily Log entries  
 Close and distribute Daily Logs

### Daily Logs: Benefits for Field

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



## — YOUR FIRST 30 DAYS: CHECKLISTS & BENEFITS

### QUALITY & SAFETY

#### Company-Level Inspection Templates: Checklist for Field, Quality & Safety

Create your Inspection templates  
(Company Level)  
Create Observation templates at the  
Company level then populate specifics  
on the Project level  
Set-up Locations

#### Company-Level Inspection Templates: Benefits for Field, Quality & Safety

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

#### Inspection Schedules: Checklist for Field, Quality & Safety

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

#### Inspection Schedules: Benefits for Field, Quality & 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 & BENEFITS

### Incidents: Checklist for Field, Quality & Safety

If something happens on the project, create an [Incident](#)  
 Create at least one record, also create a Witness Statement  
 Create Action item, and if applicable, tie that Action to an Observation

### Incidents: Benefits for Field, Quality & 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 Field, Quality & Safety

Create a standalone [Observation](#)  
 Create an Observation from a template in the field  
 Create an Observation from [Quick Capture](#) on your mobile device

### Observations: Benefits for Field, Quality & 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 & BENEFITS

### FINANCIAL MANAGEMENT

#### Budgets: Checklist

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

#### Budgets: Benefits

- + Obtain a baseline to establish financial health of projects
- + Keep track of project changes, costs, forecasts, and risks
- + Keep your data synchronized 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

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



## — YOUR FIRST 30 DAYS: CHECKLISTS & BENEFITS

### Workflows: Checklist

Create [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 invoice or contract) in Procore
- + Facilitate the approval process for time spent on a project

### Contracts: Checklist For Prime Contracts

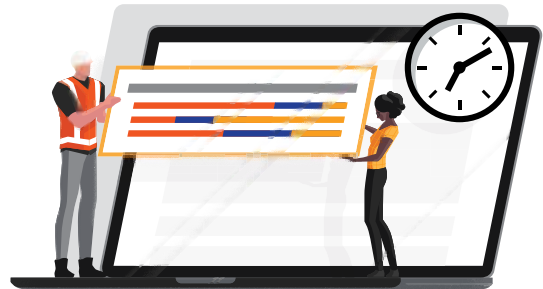
Check and/or create [Prime Contract](#) using Prime Contracts Tool  
 Add Schedule of Values  
 Add financial markups for Change Orders  
 Make sure Prime Contract is approved

### Contracts: Benefits

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

### Contracts: Checklist For Sub Contracts

Check and/or create sub contract or purchase order using [Commitments Tool](#)  
 Add Schedule of Values  
 Follow your business practice to review/execute sub contract



### Managing Change Events & Orders: Checklist

Check if there is any activity in Change Events, tracking activity  
 If not, check to see if Prime Contracts/Commitments are created and approved

### Managing Change Events & Orders: Benefits

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