PROCORE

FINAL NEW RELEASE WEBINAR w/ Q&A

February 22, 2018

Versions:

- iOS: 9.8
- Android: 7.10
- Windows: 2.14.0
- Procore Drive: 1.9.7

Recordings are posted 24 hours after broadcast.

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ConstructionOS

GENERAL

Locations: Print Location QR Codes To Avery 6460 Labels

- Users will now be able to export 30 location QR codes per page in a format that is compatible with Avery 6460 label sheets.
- Why? The Avery 6460 format fits perfectly in door jambs and is far more durable and lasting than loose sheets of printer paper taped haphazardly to a wall.
- Learn More: Support Article - Generate & Print QR Codes

MOBILE UPDATES

- (Android) Editable Tool Lists
  - Now customers can arrange their tools in a way that makes sense for the way they work
  - Why? Today in Procore, tool lists are becoming very long making searching for a tool unwieldy. When doing an audit on the he number of tool permissions Android user have; we learned that the average tool permissions per users is 19 tools - that is a lot of scrolling to find a tool.
  - Questions?
    - Q: Does the Editable Tool List get applied at the company level or per project?
      A: This is applied at the project level.
- (Android) Project Links feature allows you to view web links that exist outside Procore within the app.

DOCUMENTS

MOBILE UPDATES

- (Android) Upload files from other Apps
  - Now users can upload files from other apps into Procore on Android! This means that if you have a PDF document stored in Google Drive that needs to be in Procore you can do that from your tablet.
  - We currently support PDF files for docs and images in the Photos tool.
- (iOS) Now you can upload Documents through the Documents tool!
- (iOS) You can sync a Document to your device to use offline. To do this tap the download icon next to a document in the Documents tool.
- (Windows) Now you can access Documents through the Documents tool!

ProjectManagement

BIDDING

Added Ability To Copy Bid Lists From Inactive Projects

- Updated the Bidding tool's Search For Bidders page to allow users to copy Bid Lists from inactive projects.
- Why? Now users needing to access previous bid lists don't need to keep their projects open or edit the active status.

RFIs

Updated RFI PDF Export Filenames

- Updated the RFI tool to make the pdf export file names more uniform with the rest of the app.
  - Project name - RFI # - RFI Title - Date (truncated to a max of 100 characters)

MOBILE UPDATES

- (iOS) Now you can filter RFIs by Responsible Contractor.

SUBMITTALS

Show Custom Reports in Submittals tool Sidebar

- Reports created for submittals will now be in the submittal logs sidebar no matter what view. Reports can also be created from this sidebar.
- Questions?
  - Q: Does that report visibility apply to company wide templates? Or just custom reports at the project level?
    A: Currently just custom reports at the project level and/or cloned reports (project-level) from the template.

Added Inline Editing On Package View

- Updated the Submittals tool so now Sent Date and Return Date for a single approver on a submittal package page can be inline edited.

Added Required Responder option to Submittals

- Now, you can designate the users from whom a required response is needed. This lets you specify which user within a group must respond to a submittal before Ball In Court responsibility is shifted to the next submittal workflow group.
  - If you mark all Approvers/Submitters within a group as required, ALL users would need to respond to shift BIC to the next step

    - If you mark no Approvers/Submitters within a group as required, the first response made by ANY approver would shift the BIC
    - If you mark some Approvers/Submitters within a group as required, only once ALL REQUIRED users have responded will the BIC shift.
- Why? After the rollout of the new submittal workflow earlier this month Procore users wanted the ability to create parallel approval groups on a submittal workflow. However, they also wanted to designate final approval authority to only one or two key members of a group.
- Learn More: Set Required Responses for Submittal Workflow
- Questions?
    - Q: If we have 4 people, but just need any one of them to respond - then no checkbox?
      A: Absolutely correct.
    - Q: Are submittal workflow templates available?
      A: Not yet. Stay tuned ;)
    - Q: When "Notify Approver of Appover's Comments" configuration is checked, does the submitter get those notifications too?
      A: Great question! As of yesterday, the "Submitters" should no longer be receiving those emails with that configuration enabled.
    - Q: If a user is optional, will they get a reminder email after the due date?
      A: Yes. They have a due date that is shared with the rest of the group. You can remove the due date to "disable" the overdue emails for that step, but keep it mind it will disable the reminders for everyone in that group - Required or Optional.
    - Q: If submittal is forwarded for review and reviewer responds, does the Forwarder get a notification that ball is back in his court?
      A: This was a discovered bug. As I write this, the fix is currently in testing so I expect the fix to be release very soon.

Updated Button/Banner Behavior When Distributing Submittals

- We moved the button to the side panel to distribute/redistribute the submittal. This button will be active once one approver in the workflow has responded. While the submittal workflow is in progress, a BLUE 'Workflow in Progress banner appears when viewing the submittal. When the required submittal workflow is completed, a GREEN 'Workflow is Complete' banner displays along with either a 'Close and Distribute' or 'Close and Redistribute' button.
- Why? Improved the button and banner behavior in the Submittals tool to clarify the state of a submittal workflow.
- Learn More:
    - Release Note - Updated Distribution Banners
    - Support Article - Distribute a Submittal
- Questions?

- Q: Can the submitttal be distributed more than once with this change?
  A: Yes, you can re-distribute as many times as needed. However, keep in mind this will "refresh" the distributed date. I recommend using the "Email" button instead.
- Q: If GC responded with revise & resubmit, does it push it back to submitters ball in court?
  A: Not automatically. This still requires an Admin to distribute it back to the Submitter.

MOBILE UPDATES

+ (iOS) Now you can filter Submittals by Responsible Contractor.

DRAWINGS

Re-Designed Drawing Review Page

+ Updated the Drawings tool to introduce a re-designed Drawings Review Page to improve the UX and allow the users to more efficiently review all the drawings in a set.
+ Why? On the old page this was very time-consuming and frustrated users before they realized the value of the Drawings tool. Users had to confirm the Name, Number, Discipline, Revision, etc. of every drawing and we only showed 10 drawings at a time.
+ Learn More:
  - Support Article - Review Drawings
  - Drawings Review Page Upgrade

Added Multi-Select Markup On Drawings

+ Updated the Drawings fullscreen viewer to add the ability for users with publishing access to be able to use "Shift + Click" to bulk select and publish or delete markup. Users without publish access will now have the ability to "shift + click" their personal markup and have the option to bulk delete. Also, if a user tries to delete markup elements with attachments, there is now a confirm modal before deleting.
+ Why? Quickly remove or publish multiple markup
+ Questions?
  - Q: Is there a way to visually determine which markups are still unpublished?
    A: Best way is to turn off the filter for "Published" markups.
  - Q: With the multiselect, can you link a Document or RFI?
    A: Not yet, but you definitely see where we are going with this.

Added Option To Change Drawing Number On A Specific Revision

+ Added a new option to the Drawing Info page revision table to "Change Drawing Number" that allows the user to change the drawing number of a specific drawing revision (not just for the whole drawing). Also, the "Compare Revisions" link is in a new "more options" drop-down menu on the page.

- Why? Quickly change the revision numbering from a list view.
- Questions?
    - Q: Can you bulk edit revision number?
      A: Not currently.

MOBILE UPDATES

- (iOS) Drawing Push Notifications
    - If the user opts-in to Procore push notifications, we will alert them right when an admin Publishes drawings. Notifications are per user, per device. Important to note:
        - The user must be subscribed to the Drawing Log in order to receive push notifications.
        - Upon the first login, Procore will ask the user if they would like to receive push notifications.
        - Users can also opt-in to push notifications via the mobile Settings > Notifications > Change Push Notification Settings.
        - Users will only receive them if the Admin selects 'Publish & Distribute'
    - Learn More: Support Article - Enable Push Notifications for Drawings
- (iOS) New Drawing Sync Experience
    - Two options to sync, 'Current Drawings Only' or 'Manually Selected Only', with a brief explanation of the meaning of both options, eliminating lots of confusion. The new experience also provides you with an update of when the drawings were last synced, ensuring that teams are working from the most current information.
    - Why? Our old drawing sync didn't inform users how up to date their device was or which drawings they had.
    - Questions?
- (Android) Batch Drawing Comparison
    - Same functionality as last month's release, but now on Android. With Batch Compare we have added the ability to stay in Comparison mode while swiping left/right/up/down from one drawing to the next.
    - Swiping left/right to the next drawing will trigger a comparison of that drawing to its previous version, showing any changes between them
    - Swiping up/down let's you compare to an older/newer revision of the same drawing
- (Windows) Users can now export a drawing comparison as an image.
    - Questions?
        - Q: Does the drawing compare tool export PNG export to scale?
          A: Yes. Since the drawings have to be the same size in order to compare, the download will respect scale and download as the original size.

- (Windows) Users can now open a drawing in your favorite PDF editor by right-clicking on it from the drawings list.

SPECIFICATIONS

MOBILE UPDATES

- (Windows) Added a PDF viewer in specifications which allows searching within the specification.

PHOTOS

Redesigned Photos Tool Upload Modal

- Redesigned the Photos tool upload modal to allow the user to upload a photo, select a trade, choose the album to upload into, and attach a location all at once- streamlining the upload experience for users.

MEETINGS

Show & Select Previous Meeting Minutes

- Updated the Meetings tool so that users can now hover over a meeting item in the 'Previous Minutes' section and see a list of previous minutes. Users can star the minutes so they can selectively reference notes from previous meetings
- Why? Users want to be able to selectively reference notes from previous meetings.
- Learn More: Support Article - Select previous Minutes
- Questions?
    - Q: So when you are starring them, they will show up in the CURRENT minutes?
      A: No. They are still considered "previous minutes".
    - Q: Does the starring of previous meeting minutes override "show # of previous meeting minutes" setting? i.e. If it's set to 3, and I choose 2 or 4, will it still show 3?
      A: We do not override that setting, we will always show that number by default. You can select more by starring them
    - Q: Can you copy the previous meeting minutes into Official Meeting Minutes?
      A: You can star them to have them show as "Previous Minutes" or copy/paste to pull them into your current meeting minutes

SCHEDULE

Updated Schedule PDF Export Filenames

- Updated the Schedule tool to make the pdf export file names more uniform with the rest of the app.
    - For 'All' Export: "Schedule Items (All)_YYYY-MM-DD.pdf"
    - For 'Day' Export: "Schedule Items (Day)_YYYY-MM-DD.pdf"

- For 'Week' Export: "Schedule Week View (YYYY-MM-DD - YYYY-MM-DD).pdf"
- For 'Month' Export: Schedule Month View _YYYY-MM.pdf

Quality & Safety

DAILY LOG

Added 'Trade' configuration to Manpower Log

- Added a new 'Show the Trade Field on the Manpower Log' checkbox to the Daily Log > Configure Settings. When a user with 'Admin' level permission places a checkmark in this box, the trade system adds the 'Trade' field to the Manpower Log.

INSPECTIONS

Added Default Distribution List To Inspections Configuration

- Updated the Project level Inspections tool to add a new Default Distribution drop-down list on the Inspection Settings page.
- Why? This provides users with the ability to set a default distribution list for new inspections.
- Question?
  - Q: Can the distribution for inspections automatically occur if an item is marked as not passed?
    A: No, but we see users utilizing the default distribution on Observations instead.

Added Ability to Edit Inspection Number

- Updated the Inspections tool to provide end users with the ability to edit inspection numbers. If a user attempts to change an inspection number to a number that is already used, the system displays a message that gives the user to click 'Use Next Available Number' or 'Continue' (which assigns the selected inspection the duplicate number).
- Learn More: Release Announcement

New Response Set Feature

- Updated the Company and Project level Inspections tool to add a new 'Standard Response Phrasing' area which appears when a user creates a new Inspection Template. This lets the template author specify the response set (e.g., 'Pass' or 'Fail', 'Safe' or 'At Risk') to use in any inspections based on the template.
- Learn More: Support Article - Create a Company Level Inspection Template
- Question?
  - Q: How about a yes and no?
    A: We are looking to bring even more flexibility to Inspection responses including multiple choice options soon, perhaps this will work for you!

OBSERVATIONS

Added Hazard, Contributing Condition And Contributing Behavior Fields

- Added fields Hazard, Contributing Condition and Contributing Behavior to Observations and Observations created through Inspections.
- Available on iOS & Android. Windows to follow.
- Why? It is important for capturing information on lagging indicators in Incidents, it is also crucial to capture information on leading indicators in Observations. The ability to analyze trends in Hazards, Contributing Conditions, and Contributing Behaviors in Observations will help users implement corrective actions and prevent incidents from occurring.
- Learn More:
    - Add Root Cause Analysis Fields
    - Delete Root Cause Analysis Fields

PUNCH LIST

Added Granular Permissions for Punch List

- The new granular permission for Punch List allows users to view and/or respond to punch items that are assigned to their colleagues within the same company, for both private and non-private items.
- Why? In the past, a punch item could be assigned to multiple assignees, but could only be resolved by those specific assignees. We designed the feature in a way that still allows Punch Items to be assigned to individuals but now others in the same company will have visibility into punch issues and the ability to resolve the punch on the assignees' behalf!
- Learn More: Support Article - Grant Granular Permissions

FORMS

Forms Tools has been released!

- Procore's Project level Forms tool gives you the ability to upload any existing fillable PDFs your company sends to collaborators to complete during the project lifecycle. 'Admin' level users will be able to select and add pre-existing custom templates to a project. Team members can then fill out, save, and store these forms in Procore.
- Available on iOS and Android.
- Forms is only available to clients on the current Quality + Safety product line contract.
- Why? "Prior to the Forms tool, we stored various forms in the Documents tool. This was very inefficient because if any of these forms were updated we would have to rely on users to save the new form to their folders or update the file ourselves."
- Learn More: Support Article - Forms
- Webinar: Register here
- Questions?

- Q: Does it allow for signatures?
  A: Yes!
- Q: You stated that the forms tool is intended for mobile use, but CAN it be used over web?
  A: Yes, but you would download it and fill it out outside of Procore, then reupload. Again, it's easier on mobile.
- Q: Are forms available to people with standard permissions? Example subcontractor access forms and fills it out and sends it to us?
  A: Yes. But keep in mind if you have other internal Forms in that tool, you may want to make the Forms private by default (configuration) or use the "Private" checkbox in individual forms.

ConstructionFinancials

DIRECT COSTS

Filter 'Financial Line Item Details' Report By Direct Cost 'Type'

- Updated the Company and Project level Reports tools to expand the filtering capability of the 'Type' column in the 'Financial Line Item Details' custom report. Users can now select 'Type' from the Add Filter drop-down list and then mark the desired checkboxes (i.e., Direct Cost Expense, Direct Cost Invoice, Direct Cost Payroll, or Direct Cost Subcontract Invoice) to narrow data in the report to the selected filters.
- Learn More: Release Note - Expanded Direct Cost Filtering on Detail Report

PRIME CONTRACT & PAY APPLICATIONS

Added DocuSign Integration To Payment Applications

- We have successfully integrated with DocuSign so users can sign Payment Applications, anytime, anywhere and on any internet enabled device.
- Learn More: Support Article - Setup and Update Docusign on Pay Apps

Added Prime Contract 'Contract Dates' To Custom Reports

- Updated the Company and Project level Reports tools to add the following items to the 'Prime Contract-Available Columns' list when creating a custom report for the Commitments tool: Approval Letter Date, Contract Date, Issued On Date, Execution Date, Letter of Intent Date, Returned Date and Substantial Completion Date. Columns are only available when the field is enabled under 'Contract Dates' area on the Project Level Prime Contract tool's Configure Settings.

COMMITMENTS & REQUISITIONS

Added DocuSign Integration To Requisitions

- We have successfully integrated with DocuSign so users can sign Requisitions, anytime, anywhere and on any internet enabled device.
- Learn More: Support Article - Setup and Update Docusign on Requisitions

Added Commitment 'Contract Dates' To Custom Reports

- Updated the Company and Project level Reports tools to add the following fields to the 'Commitments-Available Columns' list when creating a custom report for the Commitments tool: Approval Letter Date, Contract Date, Issued On Date, Execution Date, Letter of Intent Date, and Returned Date. Columns are only available when the field is

enabled under 'Contract Dates' area on the Project Level Commitment tool's Configure Settings.
- Learn More: Release Announcement

CHANGE EVENTS & CHANGE MANAGEMENT

Export A Change Event to PDF

- Users can now export a single change event to PDF.
- Learn More: Support Article - Export a Change Event

Prime PCO Workflow

- Procore Workflow is available on Prime Potential Change Orders.

DOCUSIGN INTEGRATION

Updated Status To Approved When Change Order Is Completed In DocuSign

- The Change Order status is updated to Approved when signatures are completed in DocuSign. This applies to Prime Contract Change Orders, Prime Potential Change Orders, and Commitment Change Orders.

Updated Status To Approved When Contract Is Completed In DocuSign

- The contract status is updated to Approved when signatures are completed in DocuSign. This applies to Prime Contract and Commitments.

Added Confirmation Pop-up Message When Voiding/Withdrawing An Envelope From DocuSign

- Added a confirmation warning message when clicking the "Void" button on the DocuSign Pending Banner (Blue) or the "Withdraw" button on the DocuSign Complete Banner (Green). This applies to all tools that have DocuSign Integration including Prime Contract, Commitments, Change Orders, and Documents.

Invoice Contacts Populate On DocuSign Envelope For Requisitions

- Each 'Invoice Contact' on a Commitment will automatically populate on the DocuSign envelope as a 'Subcontractor' recipient for Requisitions.

WORKFLOW

Added a setting to Company Admin, Project Admin, or default Tool Admin. The selection for this setting will determine who can:

- Approve a financial item on behalf of another user/User Role
- Set/change the Workflow selection or User selection for User Roles

FieldProductivity

TIMESHEETS

Added Timesheets Configuration Settings

- Added the option for an Admin user to be able to enable/disable optional fields on timecard entries in the Timesheets Configuration Settings.
- Learn More: Support Article

appmarketplace

Learn about all our partnered integrations here:
https://marketplace.procore.com/

NEW INTEGRATIONS LIVE IN THE MARKETPLACE

Viewpoint Vista Connector - Learn More

- The Viewpoint Vista Connector is Procore's 4th accounting integration. Procore's Viewpoint Vista Connector eliminates costly errors from double entry and connects siloed teams with synchronized access to the latest financial information.
- Benefits of this integration:
    - Improve Team Communications and Make Decisions Confidently. Procore automatically syncs cost data from Accounting for commitments, actual costs, estimates, and more. Providing real time access to the latest financial information improves communication—from Accounting to the field. The risk of costly errors due to double entry is eliminated and project teams can make accurate, informed decisions.
    - Work Independent of Your Accounting Team. Manage the cost side of projects in Procore in real time without waiting on accounting reports or data requests.
    - Accounting Retains Control. Accounting maintains peace of mind with full control over financial data pushed to and from your accounting system.
    - Maintain Accurate and Secure Financial Data in Procore. Access project-related financial data securely in Procore without having to contact Accounting or wait for reports.