

Change Management | Level 1

Instructor Setup

1. Create the projects needed for the scenarios.
2. Assign student(s) to project(s).
3. Create a Prime Contract and at least one Commitment within your project(s). This step can be completed by the instructor or a student. Contracts should be in an “Approved” status.
4. *Optional:* Upload a Budget to your project(s). This step can be completed by the instructor or a student.
5. Encourage students to complete the survey once they have completed the required scenarios. *(QR code to survey included on last page)*

Recommended Student Permissions

Change Events: Standard or Admin.

If incorporating another tool in the process, user must also have Standard or higher on that tool, and/or permission to view private contracts.

Must have Admin to create an RFQ from a Change Event.

Things to Consider

- This exercise can be completed in Procore on the web or on a mobile device.
 - Change Events can be initiated from mobile, but RFQs cannot be created on mobile.
- If students are working in groups, consider having one student play a Superintendent who creates a Change Event on the mobile app, and another student play a project manager reviewing that Change Event on the web.
- Times listed are estimates and can vary depending on student groups.

Roles Involved- Optional

General Contractor - Project Manager

General Contractor - Superintendent

Scenario 1 | Unexpected Discovery (~30 min)

Your project is underway and you receive word that the superintendent was approached in the field by the earthwork foreman, who located unexpected dinosaur bones and fossils when they over-excavated for the building pad. This unexpected discovery must be recorded in Procore. Collect all necessary quotes and approvals to move forward.

Reference support.procore.com if you get stuck to find support articles that will help walk you through this process.

Scenario 2 | Missing Pieces (~30 min)

During an onsite specialty contractor coordination meeting, your specialty contractor caught a discrepancy in the drawings and expects there will be added costs for additional time and materials. Decide how to best record this information in Procore. Collect all necessary quotes and approvals to move forward.

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Scenario 3 | When One Door Opens... (~30 min)

During your weekly meeting with the owner and architect, a discussion broke out about doors and hardware. Your owner has determined that they do not like the doors specified and would like to change to a higher-end style. Decide how to best record this change in Procore. Collect all necessary quotes and approvals to move forward.

Reference support.procore.com if you get stuck to find support articles that will help walk you through this process.

Let the Procore.org team know what you thought of this activity. Use a smartphone or tablet to scan the QR Code below. Complete the survey and be entered to win Procore swag!

