

Inspections & Observations

Instructor Setup

1. Create the projects needed for the scenarios
2. Assign student(s) to project(s).
3. Add inspection template(s) to the projects so that students have access. (*Hint! Use a project template to pull over automatically into new projects*)
4. If leveraging mobile devices, download the Procore app.
5. Encourage students to complete the survey once they have completed the required scenarios. (*QR code to survey included on last page*)

Things To Consider

- This exercise can be completed in Procore on the web or on a mobile device. Mobile will more accurately reflect how Procore is used in the field
- Scenarios can be completed independently or in small groups to allow students to play various construction roles.
- Scenario 2 & 3 can be collaborative; ask students to assign the observations to one another.
- Since permissions require “Admin” settings, students will be able to view all inspections and observations within the project. For increased privacy, consider creating one project per student or group of students.
- *Optional:* Have photos preloaded available in the photos tool so students do not need to upload their own.
- Times listed are estimates and can vary depending on student groups.

Recommended Student Permissions

Inspections: Admin

Observations: Admin

Roles Involved- Optional

General Contractor - Project Manager

General Contractor - Superintendent

Specialty Contractor - Foreman

Scenario 1 | Check, Check, Double-Check (~20 min)

Routine inspections are critical in each step of a construction project. They allow teams to keep a record of project progress and proof that the site is compliant with standards and regulations. You represent the General Contractor on a project and are about to start your daily site walk for today. The company's default checklists are in Procore. Begin the site walk using the inspection checklist as your guide. Add photos and make comments to provide more information as needed.

Reference support.procore.com if you get stuck to find support articles that will help walk you through processes in Procore.

Scenario 2 | Fixer-Upper (~20 min)

After completing an inspection as the General Contractor, you have reviewed the information and have observed 3 failed inspection items. It's important that the specialty contractor's team is aware of these failed items so they can fix them. Giving them notice inside of Procore means that your team has a historical record that the specialty contractor's team was notified and is an easy way to hold them accountable to resolving the issues. Determine the best way to do this in Procore and assign the items to the specialty contractor. Add as much relevant information as possible, including pictures with markups for reference.

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Scenario 3 | Full Circle (~10 min)

Put yourself into the shoes of the specialty contractor. You have an email from Procore, notifying you that there are 3 items in your court. You and your team have reviewed each item and taken the steps to resolve them. Now you need to let the General Contractor know. How can you do this in Procore?

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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!

