## QUESTIONS TO ANSWER

**Who is responsible for creating Projects?**

**What is the workflow for getting Projects Set-up?** (ex**:** Procore Company Level Admin creates projects and adds the key Project Manager (PM). PM then adds users and begins the project.)

**Who is responsible if more people need to be added throughout the course of the project?**

## SUMMARY OF THE PROJECT CREATION PROCESs

1. Create Project
   1. Follow this support article on [how to create a project](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/add-a-new-project)
   2. **If your company has enabled the ERP Integrations tool, r**eview the following articles before adding a new project:
      1. Dexter + Chaney Spectrum: [Add a Procore Project to Spectrum](https://support.procore.com/integrations/dexter-chaney-spectrum/tutorials/add-a-procore-project-to-spectrum)
      2. QuickBooks: [Add a Procore Project to QuickBooks](https://support.procore.com/integrations/quickbooks/tutorials/add-a-procore-project-to-quickbooks)
      3. Sage 300 CRE: [Add a Procore Project to Sage 300 CRE](https://support.procore.com/integrations/sage-300-cre-sto/tutorials/add-a-procore-project-to-sage-300-cre)
2. Add in general Project information (address, stage, etc.)  *list anything that is mandatory that your team fill in (for reporting purposes)*
3. Begin adding people to the project as necessary
   1. Use “Bulk Add from Company Directory” first, to see if the person already exists at the company level. If not, [add a person to Project Directory](https://support.procore.com/products/online/user-guide/project-level/directory/tutorials/add-person-to-project-directory).
   2. If a lot of new users need to be added, the Import Template can be used: [request a User Directory import](https://support.procore.com/products/online/user-guide/project-level/directory/tutorials/request-a-user-directory-import)
4. Go into the configuration settings of tools like RFIs and Submittals, and add default distribution lists:
   1. [Configure Advanced Settings RFIs](https://support.procore.com/products/online/user-guide/project-level/rfi/tutorials/configure-advanced-settings-rfis)
   2. [Configure Admin Settings Submittals Tool](https://support.procore.com/products/online/user-guide/project-level/submittals/tutorials/configure-admin-settings-submittals-tool)

## Questions to Answer (for each tool)

**Is usage of the tool mandatory or optional?**

**Who (role wise) is required to use it?**

**Are there any specific company-related processes to be followed for that tool?**

**Are there any mandatory fields to be filled in when creating an item within the tool?**

*\*All notes below tools are just examples, and should be customized based on company needs\**

## Directory

Only [ROLE] can add people to project directory.

## Drawings & SPECIFICATIONS

[ROLE] is responsible for uploading drawings and specifications and revisions.

[ROLE] is responsible for marking up drawings with [ROLE].

[ROLE] is responsible for subscribing [ROLE], [ROLE], [ROLE] to drawings log.

## Documents

[ROLE] is responsible for ensuring the document folder structure meets the team’s needs.

[ROLE] is responsible for ensuring internal documents are made private.

[ROLE] is responsible for subscribing/tracking internal/external team to appropriate folders.

## RFIs

[ROLE] to Create DRAFT RFI (receives question outside of Procore)

Assigns RFI to [ROLE].

[ROLE] should be on distribution list.

When response received [ROLE] marks official response and closes.

## Submittals

[ROLE] fills out submittal import template to create registry (optional).

[ROLE] creates (or edits existing) submittal; to add submittal. Creates the workflow which includes [ROLE] as Submitter, [ROLE] as internal approver and [ROLE] as ultimate approver.

[ROLE] takes response and distributes item; closes item. If needed, creates revision.

## Observations

[ROLE] will create observations as needed.

## Punch List

[ROLE] will create Punch List items as needed.

## Schedule

[ROLE] is responsible for downloading Procore Drive, and uploading the schedule via Procore Drive, then updating as needed.

## Daily Log

Required logs: [Weather Observations, Manpower log, Notes]

## Photos

[ROLE] pre-creates albums based on (timeframe focus?)

-OR- Albums created as needed as the PM or Superintendents see fit.

## Budget

[ROLE] Is responsible for importing/creating budget

[ROLE] is responsible for taking Snapshots and/or running the following reports: [Report]

## Prime Contract

[ROLE] is responsible for creating Prime Contract and Schedule of Values (SOV). Copy SOV from Budget.

[ROLE] is responsible for creating Pay Applications.

## Commitments

[ROLE] is responsible for creating Commitments and Schedule of Values (SOV).

Remember to add Sub to privacy drop down of their contracts. Required for them to submit Requisitions and/or RFQ Pricing.

[ROLE] is responsible for approving commitments

[ROLE] is responsible for sending commitments to Sub/Vendor. Change Status when issued and when signatures received.

[ROLE] is responsible for requesting Requisitions from Subs/Vendors

## Change Events

[ROLE] is responsible for creating Change Events.

Include/Exclude ROM

[ROLE] is responsible for sending RFQ

[ROLE] is responsible for drafting PCO and sending to Owner.

Use [Report] for OAC Meetings