Inspections & Observations

Instructor Setup

1. Create the projects needed for the exercises (see instructions here).

2. Assign students to project(s) (see instructions here). For instructions on creating a student permission template to assign them the correct permissions for the exercises, see instructions under "Adding Students to Procore" section here (make sure that students have "Admin" permissions for the Inspections and Observations tools).

3. Add inspection template(s) at the company level so that students have access to the template for any projects they are working on. Here are instructions for doing this.

4. If using mobile devices to do the exercises, download the Procore app on the Apple App Store (iOS) or Google Play Store (Android).

Things To Consider

- These exercises can be completed in Procore on the web (desktop or laptop) or on a mobile device. Using a 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.

- Scenarios 2 & 3 can be collaborative; ask students to assign the observations to one another.

- Times listed are estimates and can vary depending on student groups.

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 under the Inspections Tool. Begin the site walk using any of the templates as your guide. Add a photo 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. Navigate to the Observations tool and create an Observation for each failed inspection item. Add as much relevant information as possible, including pictures with markups for reference.

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? Go to the Observations tool and respond with comments explaining the solution of each problem.