

BRICK BY BRICK

# PROJECT MANAGER HANDBOOK

PROCORE®



ConstructionFinancials



WELCOME TO

# BRICK BY BRICK

THE GAME THAT GIVES YOU A RUN FOR YOUR MONEY!

As skilled members of a general contractor's construction team, your goal is to complete your project on time and under budget.

With Procure at your fingertips, you'll have all the tools to successfully keep track of your project's financial health, but setbacks happen when you least expect them, and the clock is ticking!

**CAN YOU BUILD IT?**

**PROCORE**<sup>®</sup>



Construction**Financials**



## PROCORE LOGIN CREDENTIALS

Visit: [app.procore.com](https://app.procore.com)

Username: **procorebrickbybrick+pm@gmail.com**

Password: **Procore#1**

As the **Project Manager**, your goal is to keep the budget up to date and ensure the project runs smoothly.

# VOCAB TO KNOW

## **DIRECT COST**

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The field costs directly attributed to the construction of a project, including labor, material, equipment, subcontracts and their associated costs.

## **CONTINGENCY**

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An amount of money reserved by the owner and/or the GC to pay for unforeseen changes in the work or increases in cost. May be “hidden” by GC so that it can be used internally, or may be a transparent cost that is tracked by the GC and openly shared with the owner.

## BUDGET MODIFICATION

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As changes arise, you can create modifications that transfer funds between budget line items. Ex: If a contractor needed to hire additional personnel in order to make a project deadline, he/she might create a budget modification to move money out of contingency in order to allocate more money towards staffing.

## COST CODE

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In Procore, a cost code is used to group individual project costs by their nature of function. The “Company” and “Project-Level Admin” tools include a 16 Division Cost Code Structure that aligns with the CSI MasterFormat. You can add, edit, or delete the codes on this list.

# DAILY BUDGET REQUIREMENTS

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## **YOUR TOTAL PROJECT BUDGET IS \$7,250.**

You must update the budget daily to reflect the day's direct costs.

Daily direct costs include payroll for the following:

**-PROJECT MANAGER: \$300/DAY**

**-SUPERINTENDENT: \$250/DAY**

**-LABORER: \$200/DAY**

+ Direct costs must have a status of "approved" to be properly included in the budget.

## **OVERTIME PAY:**

Your team may decide to continue building at night. The Laborer who works during the 2-minute night will be paid 1.5x their normal daily pay rate. Other roles do not earn overtime pay.

**LABORER COST PER DAY: \$200**

**LABORER OVERTIME COST PER NIGHT: \$300**

# PRE-CONSTRUCTION

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You have  
8 minutes to prepare  
for construction.



Log in to Procore and familiarize  
yourself with the Budget and  
Direct Costs tools.



Confused about how to create  
a direct cost in Procore? Looking  
to create a budget modification  
but don't know how? Find all the  
answers to your Procore questions  
in the back of your booklet.

**CONSTRUCTION  
BEGINS**



## DAY ONE

1

You have 8 minutes.  
When the day starts, draw a “Project Management” card from the deck. Read the card aloud and follow all instructions.

2

Next, the Superintendent will draw a “Field Event” card and read it aloud. Any action-items must be completed before building can begin for the day.

3

Once the actions are completed, begin the process of updating your daily budget.  
Today is January 1, 2017.



## NIGHT ONE

You have 2 minutes. Decide as a team whether or not you would like your Laborer to work overtime. If you decide they should work overtime, you have to pay the Laborer \$300 on top of their normal daily pay rate (see “Daily Budget Requirements” for more information). If you decide they do not need to work overtime, complete your tasks as planned.



## DAY TWO

1

You have 8 minutes. When the timer starts, draw a “Project Management” card from the deck. Read the card aloud and follow all instructions.

2

Next, the Superintendent will draw a “Field Event” card and read it aloud. Any action-items must be completed before building can begin for the day.

3

Once the actions are completed, begin the process of updating your daily budget.

Today is January 2, 2017.

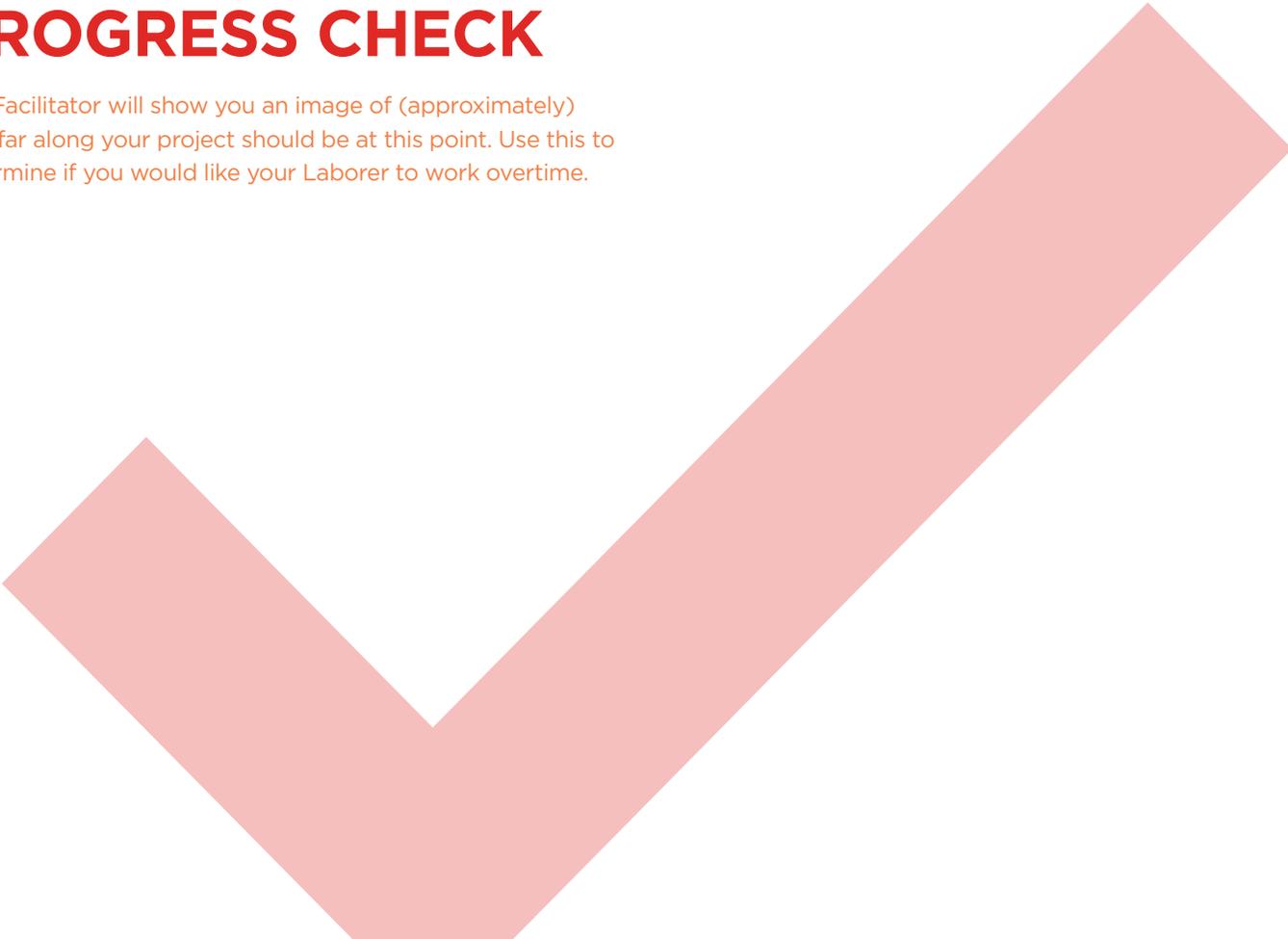


## NIGHT TWO

You have 2 minutes. Decide as a team whether or not you would like your Laborer to work overtime. If you decide they should work overtime, you have to pay the Laborer \$300 on top of their normal daily pay rate (see “Daily Budget Requirements” for more information). If you decide they do not need to work overtime, complete your tasks as planned.

# PROGRESS CHECK

The Facilitator will show you an image of (approximately) how far along your project should be at this point. Use this to determine if you would like your Laborer to work overtime.





## DAY THREE

1

You have 8 minutes. When the timer starts, draw a “Project Management” card from the deck. Read the card aloud and follow all instructions.

2

Next, the Superintendent will draw a “Field Event” card and read it aloud. Any action-items must be completed before building can begin for the day.

3

Once the actions are completed, begin the process of updating your daily budget.  
Today is January 3, 2017.



## NIGHT THREE

You have 2 minutes. Decide as a team whether or not you would like your Laborer to work overtime. If you decide they should work overtime, you have to pay the Laborer \$300 on top of their normal daily pay rate (see “Daily Budget Requirements” for more information). If you decide they do not need to work overtime, complete your tasks as planned.



## DAY FOUR

1

You have 8 minutes. When the timer starts, draw a “Project Management” card from the deck. Read the card aloud and follow all instructions.

2

Next, the Superintendent will draw a “Field Event” card and read it aloud. Any action-items must be completed before building can begin for the day.

3

Once the actions are completed, begin the process of updating your daily budget.  
Today is January 4, 2017.

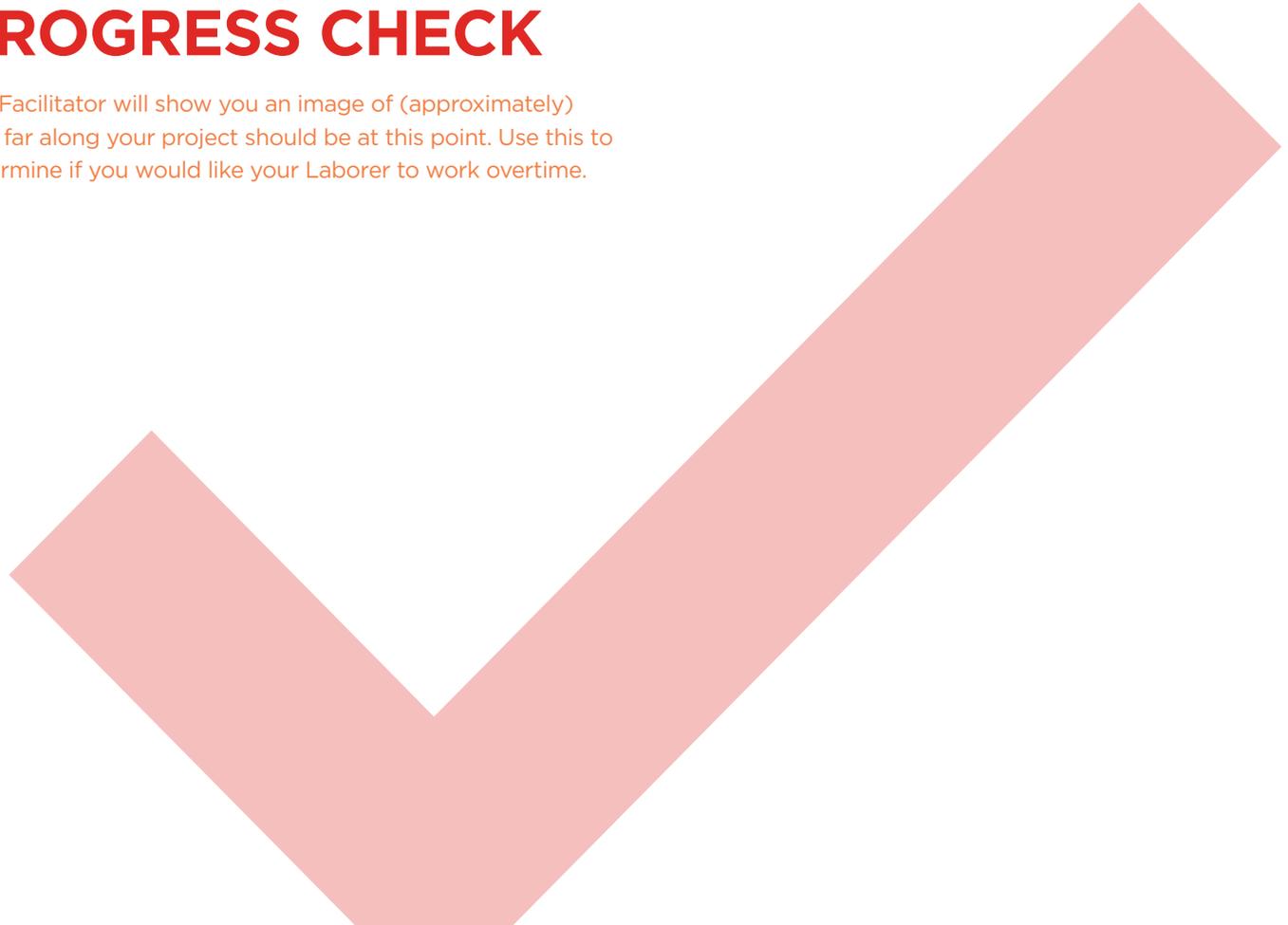


## NIGHT FOUR

You have 2 minutes. Decide as a team whether or not you would like your Laborer to work overtime. If you decide they should work overtime, you have to pay the Laborer \$300 on top of their normal daily pay rate (see “Daily Budget Requirements” for more information). If you decide they do not need to work overtime, complete your tasks as planned.

# PROGRESS CHECK

The Facilitator will show you an image of (approximately) how far along your project should be at this point. Use this to determine if you would like your Laborer to work overtime.





## DAY FIVE

1

You have 8 minutes. When the timer starts, draw a “Project Management” card from the deck. Read the card aloud and follow all instructions.

2

Next, the Superintendent will draw a “Field Event” card and read it aloud. Any action-items must be completed before building can begin for the day.

3

Once the actions are completed, begin the process of updating your daily budget.

Today is January 5, 2017.



## NIGHT FIVE

You have 2 minutes. Decide as a team whether or not you would like your Laborer to work overtime. If you decide they should work overtime, you have to pay the Laborer \$300 on top of their normal daily pay rate (see “Daily Budget Requirements” for more information). If you decide they do not need to work overtime, complete your tasks as planned.



## DAY SIX

1

You have 8 minutes. When the timer starts, draw a “Project Management” card from the deck. Read the card aloud and follow all instructions.

2

Next, the Superintendent will draw a “Field Event” card and read it aloud. Any action-items must be completed before building can begin for the day.

3

Once the actions are completed, begin the process of updating your daily budget.  
Today is January 6, 2017.

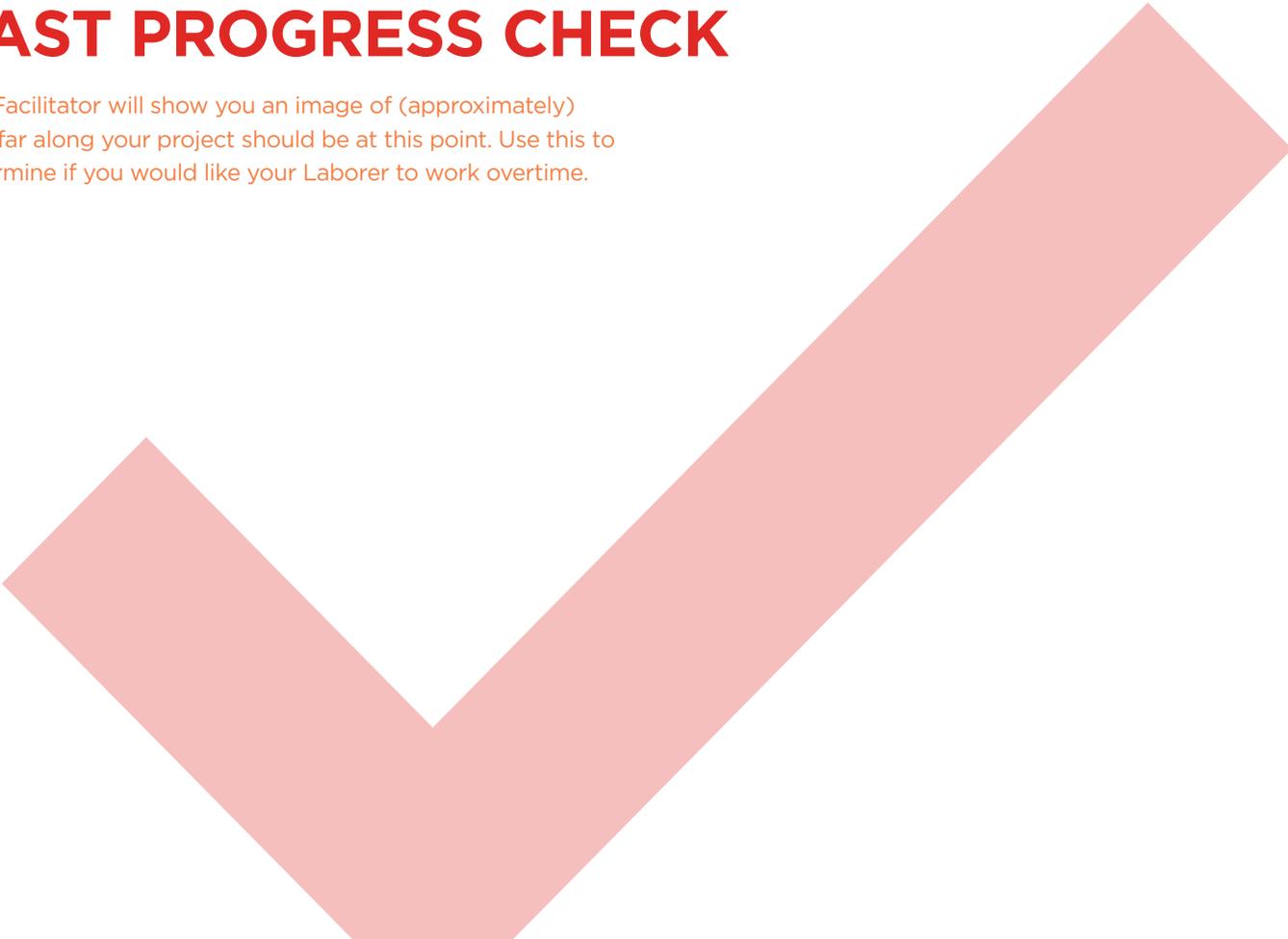


## NIGHT SIX

You have 2 minutes. Decide as a team whether or not you would like your Laborer to work overtime. If you decide they should work overtime, you have to pay the Laborer \$300 on top of their normal daily pay rate (see “Daily Budget Requirements” for more information). If you decide they do not need to work overtime, complete your tasks as planned.

# LAST PROGRESS CHECK

The Facilitator will show you an image of (approximately) how far along your project should be at this point. Use this to determine if you would like your Laborer to work overtime.





## DAY SEVEN (THE LAST DAY!)

1

You have 8 minutes. When the timer starts, draw a “Project Management” card from the deck. Read the card aloud and follow all instructions.

2

Next, the Superintendent will draw a “Field Event” card and read it aloud. Any action-items must be completed before building can begin for the day.

3

Once the actions are completed, begin the process of updating your daily budget.  
Today is January 7, 2017.



## NIGHT SEVEN

You have 2 minutes. Decide as a team whether or not you would like your Laborer to work overtime. If you decide they should work overtime, you have to pay the Laborer \$300 on top of their normal daily pay rate (see “Daily Budget Requirements” for more information). If you decide they do not need to work overtime, complete your tasks as planned.

# POST- CONSTRUCTION WRAP-UP

When you have completed construction on your building, **let the Facilitator know** so they can track the results of the game.



# SCHEDULE

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If you are playing against other teams and you completed construction on or before schedule:

1

The first team to finish will earn a credit to their contingency budget of \$1,000.

2

The second team to finish will earn a credit to their contingency budget of \$500.

3

The third team to finish will earn a credit to their contingency budget of \$250.

**IF A TEAM DOES NOT COMPLETE CONSTRUCTION BEFORE THE END OF THE SEVENTH NIGHT, THEY WILL BE CHARGED A PENALTY FEE OF \$500.**

# BUDGET

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Any team that completes construction under the allotted budget will earn a \$500 credit to their contingency budget.

# DETERMINING THE WINNER

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1

You and your team will complete a quality inspection of the building. If it is determined that the project was built incorrectly (does not match the drawings), you will be penalized \$500.

2

Referencing your budget, report the amount in your “Projected Over/Under” budget column along with any bonuses or penalties to the Game Facilitator.

3

In the end, the team with the highest amount in their “Projected Over/Under” column in the Budget is the winner. Every team who has a positive over/under is still in business (so, they’re essentially winners too).



**CONGRATULATIONS  
TO ALL THE  
BUSINESSES  
WHO  
SURVIVED!**



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# BRICK BY BRICK



# **SUPPORT DOCUMENTATION**

# CREATE A DIRECT COST

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## 1. Navigate to the project's Direct Costs tool.

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## 2. Click the + Add New Direct Cost button.

+ Add New Direct Cost

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## 3. Fill out the following fields:

**Type:** Select Payroll, Invoice, or Expense from the drop-down menu.

- + Expense = Material or job site items
- + Payroll = Daily labor costs
- + Invoice = Jobsite item

**Date:** Select a date from the calendar picker.

- + Make sure the date you select matches the Daily Log date

**Status:** Select Approved. If the status is set to anything other than “Draft,” the value of the cost will be visible in the “Direct Cost” column on the Budget.

**Vendor:** From the drop-down, select the vendor from which the direct cost was received (if applicable).

**Employee:** If applicable

**Terms:** N/A for game play, leave blank

**Description:** Enter in a more detailed description of the direct cost.

**Received Date:** N/A for game play, leave blank

**Paid Date:** N/A for game play, leave blank

**Attachments:** N/A for game play, leave blank

### New Direct Cost

Type:	Invoice	Invoice #:	8
Date:	08/17/16	Status:	Draft
Vendor:	Vega's Concrete	Employee:	G, Agness
Terms:	Net 30	Description:	
Received Date:	08/22/16	Paid Date:	08/30/16
Attachments: <a href="#">Attach Files</a>			

#### 4. Add a line item to the direct cost by selecting one of the following:

**Cost Code:** Select the appropriate cost code for the item.

- ▶ **Daily Labor Costs:** select specific role
- ▶ **Expense:** Select appropriate Cost Code (Contingency or Profit)

**Type:** Select the appropriate item type from the drop-down menu.

- ▶ **Daily Labor Costs:** select Labor
- ▶ **Expense:** Select Other

**Quantity:** Enter in the quantity of units.

**Units:** Enter in the number of units of the item.

**Unit Cost:** Enter in each unit cost.

**Subtotal:** The subtotal will be calculated automatically.

ADD LINE ITEM							
Sub Item	Cost Code	Type	Description	Qty	Units	Unit Cost	Subtotal
N/A	00-00- Ball Concrete Materials and L	Labor		10	EA	\$100.0000	\$1,000.00
						Amount:	\$1,000.00

Click **+Add**.

Click **Create** to create the direct cost.



6. Changes are highlighted under the “Budget Modifications” column. Related sub-totals will also reflect the changes accordingly. Subtracted amounts are enclosed in parentheses. (e.g. (\$2,000)) Results from Example 1 are shown below.

▼ Description	Cost Code	Category	Original Budget	Budget Modification	Approved Cds	Revised Budget	Available Budget	Proposed Budget	Committed Cds	Direct Costs	Available Cost	Proposed Cost	Percent To Complete
▼ 01 - General Requirements													
01-001 - Project Manager Labor	01-000 - Project Mgmt.	Labor	\$60,000.00	\$2,000.00	\$0.00	\$62,000.00	\$0.00	\$62,000.00	\$0.00	\$0.00	\$0.00	\$0.00	96.000000
01-002 - Project Engineer Labor	01-000 - Project Mgmt.	Labor	\$40,000.00	\$0.00	\$0.00	\$40,000.00	\$0.00	\$40,000.00	\$0.00	\$0.00	\$0.00	\$0.00	96.000000
01-003 - Superintendent Labor	01-000 - Superint.	Labor	\$75,000.00	\$3,000.00	\$0.00	\$78,000.00	\$0.00	\$78,000.00	\$0.00	\$45,000.00	\$0.00	\$45,000.00	100.000000
01-004 - Project Geotechnical Labor	01-000 - Project Geotech.	Labor	\$40,000.00	\$0.00	\$0.00	\$40,000.00	\$0.00	\$40,000.00	\$0.00	\$0.00	\$0.00	\$0.00	96.000000
01-004 - Project Geotechnical Labor	01-004 - Project Geotech.	Labor	\$94,000.00	\$0.00	\$0.00	\$94,000.00	\$0.00	\$94,000.00	\$0.00	\$0.00	\$0.00	\$0.00	96.000000
01-005 - Temporary Office Overhead	01-000 - Temporary	Other	\$50,000.00	\$0.00	\$0.00	\$50,000.00	\$0.00	\$50,000.00	\$0.00	\$0.00	\$0.00	\$0.00	96.000000

7. Remember, you can view the “Budget Modifications” report to view a detailed record of all changes, including the name of the person who made the change, as well as a timestamp. (A link to the report can be found in the right pane under the Budget tab.)

Date	From	To	Amount	User	Notes
09/22/17 at 02:12 pm	01-000-L	01-002-L	\$2,000.00	Pat Project Manager	
10/15/17 at 11:04 am	01-000-S	01-000-S	\$3,000.00	Pat Project Manager	Correct Superint. category
02/15/17 at 11:14 am	00-900-L	00-700-L	\$11,000.00	Pat Project Manager	Revised and further separability from the project

# CREATE A CHANGE EVENT

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## 1. Navigate to the Project level Change Events tool.

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## 2. In the right pane, click the + Create Change Event button.



+ Create Change Event

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## 3. Fill out the following fields:

- + Change Event #: This field will automatically populate with the next number in your change event sequence. However, you can also manually change the number, as well as create a custom alphanumeric number (e.g. A200). Once a custom number has been added, the next change event created will automatically be given the next sequential number.
- + Title: Provide a descriptive title for the change event. The change event's subject is displayed as the title in the list view.
- + Status: Select Open, Closed, or Void to indicate the status of the change event.
- + Open: This is the default status when you first create a change event. This indicates that the change event is active, and users can manage items within the event (RFQs, Budget Modifications, Commitment PCOs, and Prime PCOs).
- + Closed: Set the change event to this status once all necessary change orders and RFQs have been created and the event is considered complete.
- + Void: Set the change event to this status if no change came from the event. Setting the change event as "void" is an alternative to deleting the change event since a record will be kept on the log page for future reference.
- + Note: If you mark a change event as "void," that change event will be hidden on the Change Events Log page.

To view voided events, select 'Void' or 'All (Include Void)' from the Status list under Filters on the Change Events log page.

- + Pending: Set the change event to Pending if the change event requires approval before it can be closed out.

**4. Scope:** Select “In Scope” if the cost is covered in the original contract. Select “Out of Scope” if the cost was not covered in the contract, signifying that the change order will likely be submitted to the client as an additional cost.

**5. Type:** Select “TBD,” “Allowance,” “Contingency,” “Owner Change,” or “Transfer” to indicate the type of cost you are preparing for. To learn how to configure change types, see Set Default Change Order Configurations.

**6. Change Reason:** Select a change reason from the drop-down menu. To learn how to configure change reasons, see Set Default Change Order Configuration.

**7. Description:** Describe the event that may result in a change in costs.

## 8. Attachments: Attach any relevant files.

### New Change Event

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**GENERAL INFORMATION**

Origin:

Change Event #:

Title:

Status:  Scope:

Type:  Change Reason:

Description:

Attachments:

**9. Once the General Information has been filled out, you can start creating scope estimates by selecting which cost codes are impacted by doing the following:**

- + Click + Add New Line.
- + If applicable, select a subjob from the drop-down menu.

- + Select the impacted cost code from the drop-down menu. You will see budgeted cost codes and non-budgeted cost codes in this list. Note: You will only be able to select a category that is already scoped on the budget.
- + Select a Line Item Type.
- + Enter a description.
- + Enter a ROM (Rough Order of Magnitude). A ROM is the numeric estimation of what the cost could be and has no financial impact on any of the other tools in Procore.

Note: The ROM shows up as its own column in the Prime Contract PCO list when creating a Prime PCO.

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**10. Click “Create” to create the change event. See “Next Steps” below. RFQs (Requests for Quotes) for subcontractor pricing and/or change orders need to be created. See “Next Steps below.)**

**SCOPE ESTIMATE (Optional)**

Subjobs	Cost Code	Type	Description	ROM
Base Project ▾	01-013 - Projec ▾	Labor ▾	Wood veneer wa	3000.00 <span style="color: red;">⊘</span>
+ Add New Line			Total	\$3000.00

Cancel
Create



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For any questions or game feedback contact: [brickbybrick@procore.com](mailto:brickbybrick@procore.com)