 | Project Setup Guide

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| As you begin to implement Procore, your internal implementation/training team should get together to discuss how you're going to successfully rollout Procore. Use this guide to document your company-specific procedures in order to encourage consistent usage of Procore by all key stakeholders. |

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| **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)
      1. [Follow these instructions](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/configure-a-project-template#Items_That_Will_Carry_Over_to_Your_New_Project) to create a project from a template.
   2. **If your company has enabled the ERP Integrations tool,** review 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)
      4. Viewpoint Vista: [Add a Procore Project to Viewpoint Vista](https://support.procore.com/integrations/vista-viewpoint/tutorials/add-a-procore-project-to-vista-viewpoint)
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: [Download a User Directory import](https://support.procore.com/products/online/user-guide/company-level/directory/tutorials/download-the-company-or-user-import-template)
   3. Consider [creating Project Distribution Groups](https://support.procore.com/faq/what-is-the-difference-between-a-distribution-group-and-a-distribution-list) for example: [Subcontractors, Design team, Internal Team]. These groups can be used when forwarding information or setting permissions to Document tool.

1. 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)

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**Directory**

Only [ROLE] can add people to project directory.

[ROLE] is responsible for establishing default project distribution groups for [Design Team, Internal Team, Subcontractors]

**Reports**

[ROLE] is responsible for building out company wide reports.

[ROLE] is responsible for assigning report templates.

[ROLE] is responsible for building out project reports.

**Tasks**

[ROLE], [ROLE] and [ROLE] are responsible for entering.

[ROLE] - Task Categories.

**Admin**

[ROLE] is responsible for establishing project cost code list if default list not utilized.

[ROLE] is responsible for establishing project specific location list.

[ROLE] is responsible for establishing project specific equipment list.

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**Drawings**

[ROLE] is responsible for activating drawings by area if needed. Examples: Drawing areas by floor or structure.

[ROLE] is responsible for uploading drawings and revisions.

[ROLE] is responsible for reviewing and publishing drawing sheets

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

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

**Specifications**

[ROLE] is responsible for uploading specifications and revisions.

[ROLE] to create submittal registry from specifications (optional).

[ROLE] is responsible for subscribing [ROLE], [ROLE], [ROLE] to specifications 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 establish default RFI Manager(s) to the project.

[ROLE] to Create DRAFT RFI (receives question outside of Procore) and assigns RFI to RFI Manager(s).

RFI Manager: [ROLE] to assign [ROLE]

[ROLE] should be on distribution list.

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

**Schedule**

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

[ROLE] to set up automated weekly project schedule emails to project team. (Optional)

**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.

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**Inspections**

[ROLE] will create Inspection Templates as needed.

**Observations**

[ROLE] will create observations as needed.

[ROLE] will be responsible for establishing Observation templates (Company Admin)

[ROLE] will be responsible to establishing Observation Types (Company Admin)

**Incidents**  
[ROLE] Creates Incidents

-What events warrant a creation of an Incident for your Company?

-(Fields Required) to include for Company Level Reporting

[ROLE] Manages all incidents across all project for company

**Punch List**

[ROLE] will establish [ROLE] to default Punch Manager

[ROLE] will create Punch List items as needed.

[ROLE] will review, revise and add to default Punch List templates (Company Admin)

**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.

[ROLE] is responsible for subscribing [ROLE], [ROLE], [ROLE] to Photos tool.

**Forms**

[ROLE] will pre-create all the fillable forms for use

[Name of Forms] to be used by [ROLE]



**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 Owner Invoices.

**Commitments**

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

Remember to add Sub as an **invoice contact** to their contract. It is 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 creating Billing Periods and requesting Subcontractor Invoices from Subs/Vendors

**Change Events**

[ROLE(s)] 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.

[ROLE] is responsible for drafting CCO and sending to Contractor.

[ROLE] is responsible for creating Budget Modification

Use [Report] for [Meeting Name]



**Time Sheets + Crews**

[ROLE] is responsible for updating Directory to Include Employees of Company? Checkbox

[ROLE] is responsible for setting up Crews

[ROLE] is responsible for reviewing Timesheets [report]

Will track time cards Individually/In Bulk