Interactive Workflow Diagrams

Select a tool to view its interactive workflow diagram.

**Project Level**
- Bidding
- Budget

**Change Events**
- 1-Tier Change Orders
- 2-Tier Prime Contract Change Orders
- 3-Tier Prime Contract Change Orders

**Coordination Issues**

**Commitments**

**Daily Log**
- Daily Log Workflow
- Collaborator Daily Log Workflow

**Documents**

**Drawings**

**Forms**

**Incidents**

**Inspections**

**Invoicing**

**Meetings**
- Create a Meeting
- Create a Meeting Template

**Observations**

**Photos**

**Prime Contract**

**Punch List**

**Requisitions**

**Reports**

**RFIs**

**Schedule**

**Specifications**

**Submittals**

**Timesheets**

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Company Level
Prequalification Portal
Prequalifications

Project Level
Budget
Change Events
1-Tier Change Orders
2-Tier Prime Contract Change Orders
3-Tier Prime Contract Change Orders
Commitments
Daily Log

Daily Log Workflow

Collaborator Daily Log Workflow
Forms

START

Create...

Upload Form Template

Will you fill out the form on a...

MOBILE

COMPUTER

Fill Out Form... Fill Out Form... Fill Out Form...

View...

END

LEGEND

- Procore Admin
- Responsible Party
- Outside Forms tool

*This task is done out...
Inspections
Meetings

Create a Meeting

Do you want to create a new meeting using a template?

Yes

Create a Meeting from a Template

CUSTOMIZE THE AGENDA

No

Create a Meeting

CREATE THE AGENDA

Customize the Meeting's Agenda & Items

Define the Meeting's Agenda & Items

Add a Meeting Category

Add a Meeting Item

Distribute Meeting Agenda

Add Meeting to your Personal Calendar

Live Meeting

Convert Meeting from Agenda to Minutes Mode

Distribute Meeting Minutes

Record the Meeting Attendance

Add Meeting Minutes

Copy Meeting Minutes from Previous Meeting

Create a Meeting Category

Add a Meeting Item

Record Meeting Categories and Items

Create a Follow-up Meeting

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Create a Meeting Template

Has your company configured any meeting templates?

- Yes
  - Create a Meeting Template
- No
  - Do you want to create a new meeting based on a template?
    - Yes
      - Create a Meeting from a Template
    - No
      - Create a Meeting

Observations

Configure Advanced Settings: Observations

- Add Custom Observation Types
- Create & Assign Observation
- Review & Respond to Observation
  - PASS
    - Approve & Close Observation
    - CLOSED
  - FAIL
    - Reject Observation

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Prime Contract

Configure Settings: Prime Contracts

Create Prime Contracts
Create a Prime Contract with DocuSign

Edit the Advanced Settings Tab for a Prime Contract

Update the Schedule of Values (SOV) on a Prime Contract

Add Line Items to the Prime Contract SOV
Create the Prime Contract SOV from the Project Budget
Import a Prime Contract SOV from a CSV File

Email a Prime Contract

Approve a Prime Contract

Create an Owner Invoice

Email an Owner Invoice

Create a Payment Received

Legend:
- General Contractor
- Owner/CM
- Subcontractor
- Optional Step
Requisitions

START

Start a New Billing Period

How will invoices be created?

BY MY COMPANY

Create an Invoice on B... 

Review Invoices as a '...

END

BY MY SUBCONTRACTOR

Send Invoice Emails

Submit an Invoice as a...

Review Invoices as a S...

Have invoice contacts be...

Create Invoice Contact...

Legend
- General Contractor
- Subcontractor
- Optional Step

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Reports

Do you want to clone an existing custom report?

YES
- Clone a Custom Project Report
- Distribute a Snapshot of a Custom Project Report
- Create a Dashboard
- Share a Dashboard

NO
- Create a Custom Project Report
- Add a Visual to a Custom Project Report
- Share a Custom Project Report
- Create a Calculated Column in a Custom Report
- Aggregate Data in a Custom Report
Submittals
Prequalification Portal

START

View a Prequalification...

Edit a...

Submit a Prequalification...

Did you receive a "Change..."

Respond to a Change Requ...

No further...

END

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