Glossary of Terms

ABN
Short for *Australian Business Number*.

ACN
Short for *Australian Company Number*.

Addendum
A supplement to documents, issued prior to taking receipt of bids, for the purpose of clarifying, correcting, or otherwise changing bid documents previously issued.[1]

Additional Services
Services provided in addition to those specifically designated as basic services in the agreement between the *owner* and *CM*. Also known as *supplemental services*.[1]

Accounting Approver
An *accounting approver* is an individual with the authority to accept and reject Procore data for export to an *integrated ERP system*. An accounting approver also has the authority to unlink commitments and commitment change orders that have been synced with an integrated ERP system.

AEC
Short for *Architecture, Engineering, and Construction (AEC)*.

AFR
Short for *Architect Field Report*.
Agency
A legal relationship by which one party is empowered and obligated to act on behalf of another party.[1]

Agency Construction Management
Also known as CM as Agent. A form of CM performed in a defined relationship between the CM and owner. The agency form of Construction Management establishes a specific role of the CM acting as the owner's principal agent in connection with the project/program.[1]

Agenda Item
See Meeting Item.

Agreement
A document setting forth the relationships and obligations between two parties, as the CM and owner or contractor and owner. It may incorporate other documents by reference.[1]

AIA
Short for American Institute of Architects.

Allowed List
An allowed list (also sometimes referred to as a safe list) is a list of email addresses, domain names, IP addresses, or other entities that are explicitly granted access or allowed to run as part of an organization's security strategy. It is the opposite of a denied list.

Allowance
An allowance is an amount of money that has been set aside in a construction contract's original sum to cover the costs of paying for known items that were not specified in detail on the contract.

Alternatives Analysis
See Trade-Off Study.

American Institute of Architects
The American Institute of Architects (AIA) is the leading professional membership association for licensed architects, emerging professionals, and allied partners. Visit AIA.
Apparent Low Bidder

The bidder who has submitted the lowest bid for a division of work described in bid documents, a proposal form, or proposed contract.\[1\]

Approval Framework

In Procore, an approval framework defines the primary capabilities that are available when users create, manage, review, and respond to submittals. Currently, the submittal workflow framework is supported in Procore.

Approval Path

In Procore, an approval path refers to the steps that a submittal must go through before it reaches the final approval stage. The initial approval path for submittals is defined by the approval workflow. However, the path across a submittal's lifecycle can be altered by members of the submittal's workflow. For example, an approver might forward a submittal to another Procore user for review or the submittal might need to be rejected, and then revised and resubmitted to approvers.

Approval Process

In Procore, an approval process refers to a predefined sequence in which designated members of the submittal workflow are required to review a submittal before it can be closed and distributed to the assigned subcontractors. To learn more, see How do I add people to the submittal workflow?

Approval Workflow

In Procore, an approval workflow designates the list of individuals who respond to submittals (for example, approve, reject, and so on.) in accordance with the rules that have been determined by the approval framework and approval process being used.

Approved Bidders List

The list of contractors that have been pre-qualified for the purpose of submitting responsible, competitive bids.\[1\]

Approved Changes

Changes in the contract documents that have been subjected to an agreed upon change approval process and have been approved by the party empowered to approve such changes. See also Change Order.\[1\]

Approver

An approver is a person who is designated to approve a submittal before work can proceed. Typically, there are multiple
approvers on a submittal workflow and members of the design team (for example, architect, project engineer, structural engineer, and so on). However, your particular submittal workflow might include other approvers.

**Architect**

A person who designs and guides a plan, project, and so on.[3]

**Architect Field Report**

An Architect Field Report (AFR) is a required report where the architect visits a field site and produces a report to keep the owner apprised of construction progress and the quality of work being completed. It is a record of a project's progress, job site decisions, concerns and is typically issued by the architect after each field visit. The AIA developed a form (for example, G711™–1972, Architect Field Report) which defines the information that should generally be included in the report. However, most architecture firms include more information in a report than what is included on the G711.

**Architect's Supplemental Instructions**

An Architect's Supplemental Instructions (ASI) is a formal notice issued from an architect to address and resolve minor, non-contractual, issues that might arise during the construction process. It addresses how work should proceed and is used to resolve issues where the instructions do not change the contract terms. The AIA developed a form (for example, G710™–1992, Architect's Supplemental Instructions) which defines the information that should generally be included in the report.

ASI forms are added to the original contract data and legally modify the original contract details. These changes are usually minor and provide clarification and small changes, such as slightly altering dimensions or changing a color scheme, to be implemented by the architect. ASI should not change the cost quoted on the contract or alter the contract timeline.

**As-Built Drawings**

Drawings or plans that show the work, as actually installed. Also known as Record Drawings. A general contractor is required to maintain as-built drawings and submit them to the owner and architect at the end of the construction phase. GC's often require major subcontractors to submit “as-builts” for their scope of work.[1]

**ASI**

Short for Architect's Supplemental Instructions.

**Assignable Permission Template**

In Procore, an assignable permission template is a role-based permission template that is available for assignment to a user at the time that user is created or added to a Procore project. Assignable permission templates are always defined
within a permission template.

ATO

Short for Australian Tax Office.

Attic Stock

The term, Attic Stock, is used to describe excess/surplus construction material that are either left over from a job and taking up storage space. The term is also used to refer to materials that have been ordered intentionally, typically as part of a contractual obligation, to ensure that identical materials are available for future replacement and/or repairs on a project.

At-Risk Construction Management

A delivery method which entails a commitment by the Construction Manager (CM) to deliver the project within a Guaranteed Maximum Price (GMP). The CM acts as consultant to the owner in the development and design phases, but as the equivalent of a general contractor during the construction phase. When a construction manager is bound to a GMP, the most fundamental character of the relationship is changed. In addition to acting in the owner's interest, the construction manager also protects him/herself.[1]

Australian Business Number

An Australian Business Number (ABN) is a unique 11 digit number assigned by the Australian Business Register (ABR) to identify business entities operating in Australia.

Australian Company Number

An Australian Company Number (ACN) is a unique nine-digit number issued by the Australian Securities and Investments Commission (ASIC) to every company registered under the Commonwealth Corporations Act 2001.

Backcharge

A backcharge refers to an amount of money that a contractee holds back from a contractor as a consequence for performing incomplete or defective work.
Ball In Court

In Procore, being designated as the Ball In Court (BIC) person indicates that an action is required by the designee. For example, when you first send out a submittal for approval, the members of the first group in a submittal workflow are automatically assigned the 'Ball In Court' responsibility. When all required members of that group submit a response (for example, Approved, Approved as Noted, and so on.), the 'Ball In Court' designation proceeds to the next group of approvers in the submittal workflow's sequence. The designation changes in sequential order until all required submitter(s) and approver(s) have submitted their response.

Basic Services

Scope of service as defined in the original agreement between owner and CM as basic services.[1]

Beneficial Occupancy

The use of the constructed facility by the owner prior to final completion of the construction.[1]

BIC

Short for Ball in Court.

Bid

An offer to perform the work described in contract documents at a specified cost.[1]

Bid Bond

A pledge from a surety to pay the bond amount to the owner in the event the Bidder defaults on its commitment to enter into a contract to perform the Work described in the Bid Documents for the bid price.[1]

Bid Documents

The documents issued to the contractor(s) by the owner which describe the proposed Work and contract terms. Bid documents typically include: drawings, specifications, contract forms, general and supplementary general conditions, proposal or bid forms, and other information.[1]

Biddability

The degree to which a set of Bid Documents could be reasonably expected to permit a bidder to establish a competitive price to perform the Work as defined in the Bid Documents.[1]
Biddability Review

A formal review of the contract documents, addendum, and reference documents to be accomplished with respect to the local construction marketplace and the bid packaging strategy so as to eliminate ambiguities, errors, omissions, and contradictions, for the purpose of minimizing bid prices in the procurement phase and disputes during construction.[1]

Billing Period

A billing period defines the billing cycle used by your project's team and its subcontractors for invoicing. In addition to defining the frequency of the billing cycle (for example, monthly or weekly), a billing period also defines the cycle's start/end dates and an invoice's due date.

BIM

Short for Building Information Modeling.

Blacklist

See Denied List.

Block list

See Denied List.

Bond

A pledge from a surety guaranteeing the performance of the obligation defined in the bond, including the completion of work or payment of the bond amount to the obligee (owner or contractor) in the event of a default, or nonpayment by a principal (contractor or subcontractor), as with bid, performance and labor and material bonds.[1]

Bonus

Additional compensation paid or to be paid to a contractor by the owner as a reward for accomplishing predetermined objectives that are over and above the basic requirements of the contract between the owner and contractor.[1]

Budget

The dollar amount allocated by the owner for a project/program.[1]

Budget Code

In Procore, a budget code is applied to line items in Procore's financial management tools to give you the ability to
categorize line items. It identifies costs for budgetary reporting and consists of a cost code, cost type, and sub job combination (if the sub jobs are enabled on the project). It can also include a division to align with the CSI MasterFormat. For example, 01 General Requirements, 02 Site Construction, and so on.

Budget Estimate

An estimate of the cost of work based on preliminary information, with a qualified degree of accuracy.[1]

Budget Modification

In Procore, a budget modification is a transfer of money from one budget line item to another budget line item. Budget modifications are created in a project's Budget tool, instead of creating a Prime Contract Change Order (PCCO). To create a budget modification, the budget must be locked (see Lock a Budget).

Budget View

In Procore, a budget view is customized visual layout that defines the data columns that are available to your users who work with your budget data in the project's Budget tool. Budget views are configured by your Procore Administrator with the Company level Admin tool and can include standard, calculated, and source columns. Your administrator can also assign one or multiple budget views to the projects in your company's Procore account. After assignment, Budget tool users can switch between the assigned budget views to see the project's budget data from different perspectives.

Builders Risk Insurance

See Course of Construction Insurance.

Building Information Modeling

Building Information Modeling (BIM) is a term used in the construction management industry to describe the technologies used to generate and manage digital representations (such as, images) of facilities (such as, construction sites). BIM technologies provide design and construction teams with the opportunity to generate digital models that simulate the construction process, including actions and issues at the site with the overall goal of improving safety, correcting issues and problems, and analyzing potential impacts prior to the physical construction process.

Business Item

See Meeting Item.
CA
Short for *Contract Administration*.

CBE
Short for *Certified Business Enterprise*. For more information, visit [CBE Program History](https://support.procore.com/references/construction-management/glossary-of-terms) on the Department of Small and Local Business Development's web site.

CCAEA
Short for *California Counties Architects and Engineers Association*. Visit [CCAEA - California Counties Architects and Engineers](https://support.procore.com/references/construction-management/glossary-of-terms)

CCCO
Short for *Commitment Contract Change Order*.

CCD
Short for *Construction Change Directive*.

CCO
Short for *Commitment Change Order*.

CD
Short for *Construction Documents*.

CE
Short for *Continuing Education*.

Change Event
On a construction project, a *change event* is any change that affects the scope of work on a construction project. Examples include project changes that affect the scope of the work to be completed, project schedule, costs, and more. A change event is typically recorded in writing and precedes the creation of a *change order*, which allows your team members and stakeholders to prepare for a cost change, before it becomes an actual cost.
Change Order

A Change Order (CO) is a written record of a contract modification that details any amendment(s) to the original agreement's scope of work. Most construction contracts are executed with a clearly defined scope of work, so any work that is added, substituted, or deleted from the original contract's scope (such as changes to a project's designs, conditions, schedules, and/or costs) will typically require an approved change order.

Change Orders by Line Item

The Change Orders by Line Item (COBLI) feature allows users to choose what level of detail to show change orders on their invoices and financial markups. For example, this feature gives users the ability to bill at the PCO level, instead of the PCCO level on their owner invoice.

Changed Conditions

Conditions or circumstances, physical or otherwise, which alter the conditions or circumstances on which the contract documents were based.[1]

Claim

A formal demand for compensation, filed by a contractor or the owner with the other party, in accordance with provisions of the Contract Document (CD). Tends to lead to form legal action and may escalate to litigation.[1]

Client Request

A client request refers to a change in performance of work initiated by a request from the construction project's client.

Configurable Fieldset

A configurable fieldset is a group of data-entry fields that your company's Procore Administrator can configure as optional, required, or hidden for certain supported Procore tools. A configurable fieldset lets you turn data-entry fields ON and OFF and can also work with custom fields.

Connected App

In Procore, a Connected App refers to a third-party application built on the Procore OS platform by external developers. These applications are NOT owned, operated, or supported by Procore. When you connect a third-party application to your Procore account, you are authorizing that application to both access and use your Procore account on your behalf. Important! Authorized applications may be able to use your Procore account in various ways, which include (but are NOT limited to), accessing your Procore account, seeing your contact information, and performing a variety of actions in Procore on your behalf.

https://support.procore.com/references/construction-management/glossary-of-terms
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Contingency

A contingency is an amount of money that has been included in a construction contract’s original sum to cover the costs of paying for unknown items that may result in additional costs not specified in the construction contract.

Contract Warranty

A contract warranty is a legal or implied contract which warranties that any work defects found in the original construction will be repaired during the specified warranty period.

CM

Short for Construction Management.

CM as Agent

See Agency Construction Management.

CM Fee

A form of contractual payment for services, where the CM is paid a fee for services performed.[1]

CO

Short for Change Order.

COBLI

Short for Change Orders by Line Item.

Code of Accounts

The owner’s written description of the cost elements of the project, used for the owner’s accounting purposes.[1]

Commissioning

Building commissioning (Cx) is the process of verifying, in new construction, all (or some, depending on scope) of the subsystems for mechanical (HVAC), plumbing, electrical, fire/life safety, building envelopes, interior systems (example laboratory units), cogeneration, utility plants, sustainable systems, lighting, wastewater, controls, and building security to achieve the owner’s project requirements as intended by the building owner and as designed by the building architects and engineers. Recommissioning is the methodical process of testing and adjusting the aforementioned systems in existing buildings.
Commitment

In Procore, the term *commitment* refers to a subcontract or a purchase order. These commitments represent a legally enforceable financial agreement between two parties that must be fulfilled on a construction project.

Commitment Change Order

A *Commitment Change Order* (CCO) details a potential change in costs that will affect the contract. There are two (2) ways to create a CCO in Procore. See Create a Commitment Change Order (CCO) and Create a CCO from a Change Event.

Committed Cost

A *committed cost* is an investment or obligation that has already been made and cannot be recovered.

Company Administrator

A *company administrator* is an individual who is responsible for setting up your organization's new Procore account. The company administrator must be assigned 'Admin' level permissions on the company and project levels of the Procore application.

Company Permission Template

A *company permissions template* is a set of role-based permissions that can be assigned to one or more Procore users in a company. The permission settings in a company permissions template define what actions users can perform and what information they can view in each Procore Company level tool. Managing user access to Procore with permissions templates makes managing permissions simpler and more efficient than maintaining unique access permissions for each individual user.

Constructibility

The ease with which a project can be built, based upon the clarity, consistency, and completeness of the contract documents for bidding, administration, and interpretation to achieve overall project objectives.¹

Constructibility Reviews

The process of evaluating the construction documents for clarity, consistency, completeness, and ease of construction to achieve overall project objectives. General Contractors and key subcontractors may perform this review as part of the design process for the owner and/or architect.¹
Construction Budget

The sum established, normally during the planning or design phase, as available for construction of the project.[1]

Construction Contract Documents

The documents which provide the basis for the contract entered into between parties. They typically include the bid documents updated to reflect the agreement between the owner and the contractor(s) including but not limited to the drawings, specifications, project requirements, and other written documents.[1]

Construction Cost

All costs attributed to the construction of the project, including the cost of contracts with the contractor(s), construction support items, general condition items, all purchased labor, material, and fixed equipment.[1]

Construction Manager

A professional Construction Manager (CM) acts as an extension of staff to the owner and manages the entire project with pre-planning, design, construction, engineering and management expertise that can assure the best possible project outcome no matter what type of project delivery method used. A CM is NOT a general contractor. Few owners maintain the staff resources necessary to pay close, continuing attention to every detail—yet these details can “make or break” a project. CM is often used interchangeably with Project Manager (PM). CM’s may be firms independent from the Ownership entity.[1]

Construction Management Plan

A Construction Management Plan (CMP) is a written document prepared by the CM, which clearly identifies the roles, responsibilities and authority of the project team and the procedures to be followed during construction.[1]

Construction Schedule

A graphic, tabular or narrative representation or depiction of the time of construction of the project, showing activities and duration of activities in sequential order. Often in Gantt Chart format.[1]

Construction Specifications Canada

Construction Specifications Canada (CSC) is a national multi-disciplinary, non-profit association with chapters across Canada. CSC develops and delivers quality education programs, publications and services for the betterment of the construction community. Visit Construction Specifications Canada.
Construction Specifications Institute

Construction Specifications Institute (CSI) CSI is a national association of volunteers, including specifiers, architects, engineers, contractors, facility managers, product representatives, manufacturers, owners and others who are experts in building construction and dedicated to improving the communication of construction information. Visit Construction Specifications Institute (CSI).

Contingency

An amount of money reserved by the owner and/or the General Contractor (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.

Contract Administration

Construction Administration (CA) is the function of implementing the terms and conditions of a contract, based upon established systems, policies, and procedures.[1] Also referred to as CA or “C.A." and additionally used to refer to the role of the architect in the construction phase to attend meetings, go to site, and so on.

Contractor

The licensed organization or individual who undertakes responsibility for the performance of the work, in accordance with plans, specifications and contract documents, providing and controlling the labor, material and equipment to accomplish the work.[1]

CMP

Short for Construction Management Plan.

COR

Short for Change Order Request.

Cost Code

A cost code is a code that defines the specific type of work being completed on a construction project.

Cost Control

The function of limiting the cost of the construction project to the established budget based upon owner-approved procedures and authority.[1]
Cost of Construction

All costs attributed to the construction of the project, including the cost of contracts with the Contractor(s), construction support items, general condition items, all purchased labor, material and fixed equipment.\(^1\)

Cost Management

The act of managing all or partial costs of a planning, design, and construction process to remain within the budget.\(^1\)

Cost Plus

A *cost plus* is a contract type where the owner agrees to pay all construction costs plus an agreed upon markup percentage.

Cost Type

A *cost type* is a set of uniquely identified costs represented by an abbreviation and label. In Procore, several cost types are defined for use by default: \(L=\text{Labor, } E=\text{Equipment, } M=\text{Materials, } C=\text{Commitment, } OC=\text{Owner Cost, } SVC=\text{Professional Services, and } O=\text{Other.}\)

Course of Construction Insurance

*Builder’s Risk Insurance* (also known as “course of construction”) is a specialized form of insurance designed to insure buildings or projects against repair or replacement costs while they are under construction and, in some cases, for a specified period afterwards. This insurance will usually also cover build materials, fixtures and appliances all of which are intended to become an integral part of the structure under construction. The policy may be held by the Project Owner or by the Contractor depending on the requirements of the job.\(^2\)

CPM

Short for *Critical Path Method*.

Critical Date Schedule

A schedule representing important events along the path to project completion. All milestones may not be equally significant. The most significant are termed "major milestones" and usually represent the completion of a group of activities.\(^1\) See also *Milestone Schedule*.

Critical Path Method

*Critical Path Method* (CPM) is a scheduling technique used to plan and control a project. CPM combines all relevant information into a single plan defining the sequence and duration of operations, and depicting the interrelationship of the
work elements required to complete the project. The critical path is defined as the longest sequence of activities in a network which establishes the minimum length of time for accomplishment of the end event of the project.\(^1\) A variety of software tools are used to build and manage CPM schedules (for example, Microsoft Project and Oracle Primavera P6 are both commonly used in the industry).

**CRM**

Short for *Customer Relationship Management (CRM)*.

**CSC**

Short for *Construction Specifications Canada*.

**CSI**

Short for *Construction Specifications Institute*.

**CSRF**

Short for *Cross-Site Request Forgery*.

**Custom Field**

In Procore, a *custom field* is a term that has three distinct meanings. First, the term *custom field* is used to describe a custom field that was built your company as an add-on service by the Procore Custom Solutions Team. Second, the term *custom field* is used to describe the ability to customize a field label for a Procore tool (for example, there are two custom free-form text fields with customizable labels in the Configure Settings page of the project's RFIs tool). Third, the term *custom field* is used to refer to a feature that is supported in certain Procore tools where your company's Procore Administrator can create new custom fields, add those fields to a configurable fieldset, and then assign a configurable fieldset to a Procore project.

**Custom Permissions**

See *Granular Permissions*.

**Cx**

Short for building *commissioning*.

[back to top](#)
**DBB**

Short for *Design-Bid-Build*.

**DD**

Short for *Detailed Design or Design Development*. See *Design - Preliminary*.

**Default Permission Levels**

In Procore, *default permission levels* are comprised of a set of permissions that allow users to perform a collection of related tasks in a Procore tool. Currently, the default permission levels are *None*, *Read Only*, *Standard*, and *Admin*. See [User Permissions Matrix - Web](https://support.procore.com/references/construction-management/glossary-of-terms) and [User Permission Matrix - Mobile](https://support.procore.com/references/construction-management/glossary-of-terms) to learn more about the required user permissions for various Procore tasks.

**Denied List**

An *denied list* (also sometimes referred to as a *block list*) is a list of email addresses, domain names, IP addresses, or other entities that are explicitly blocked from having access or being allowed to run as part of an organization's security strategy. It is the opposite of an *allowed list*.

**Design-Build**

Design-Build is a project delivery method which combines architectural and engineering design services with construction performance under one contract agreement.[1]

**Design Development**

A *design development* refers to a change in the design that occurs during the construction phase of a project.

**Designer**

The individual or organization that performs the design and prepares plans and specifications for the work to be performed. The designer can be an *architect*, an engineer, or an organization which combines professional services.[1]

**Design - Schematic**

Traditionally the first stage of the designer's basic services. In the schematic stage, the designer ascertains the requirements of the project and prepares schematic design studies consisting of drawings and other documents illustrating the scale and relationships of the project.[1]
**Design - Preliminary**

The transition from the schematic phase to the completion of the design development. During this stage ancillary space is developed and dimensions are finalized. Outline specifications are developed into technical specifications; sections are delineated and elevations are defined. Also known as Design Development.[1]

**Design - Final**

The stage of the design process when drawings and specifications are completed for construction bid purposes. It is preceded by the preliminary design stage, and followed by the procurement phase. The designation used by designers for the last part of the design process prior to procurement.[1]

**Direct Costs**

The field costs directly attributed to the construction of a project, including labor, material, equipment, subcontracts and their associated costs.[1] In Procore, the term direct cost is used less broadly, and specifically refers to a cost on a construction project that is NOT associated with a purchase order or subcontract, such as temporary trailer costs, supervision payroll paid by GC, and so on.

**Distribution List**

A distribution list is a group of notification message recipients that can be added to items created in a variety of Procore tools. It is similar to the Cc (Carbon Copy) feature in an email program and is used as a mechanism for notifying select Procore end users about a specific event or change in status on an item. For example, when a project manager creates a new submittal, your company's process may require you to add a distribution group of 'Project Managers' to the distribution list for a particular submittal.

**Distribution Group**

A distribution group is a list of email recipients that must be created in the Company or Project Directory tool. It is similar in function to a Contacts Group in an email program and is NOT associated with any security settings. See Add a Distribution Group to the Company Directory and Add a Distribution Group to the Project Directory.

**Division**

In the construction industry, the term division refers to the divisions of construction that are defined by the CSI MasterFormat. A division is a widely-used grouping standard that helps to organize construction specifications, cost codes, and other documented information on a project. Examples of divisions include Division 01-General Requirements, Division 02-Site Construction, Division 03-Concrete, and so on.
Draw Request

In Procore, the term *draw request* has has been replaced by the term *subcontrator invoice*.

Drawings

The portion of the contract documents that gives a graphic representation and technical details of the work to be done in the construction of a project.[1]

E

Denotes an 'Equipment' line item type on a prime contract.

EIN

Short for *Employer Identification Number*.

End of Life

An *End of Life* (EOL) date defines the calendar date on which production of new releases, updates, and fixes for a software product, service, or feature ends.

End of Support

An *End of Support* (EOS) date defines the date that technical support for a software product, service, or feature ends.

EOL

Short for *End of Life*.

EOS

Short for *End of Support*.

ETL

Short for *Extract-Transform-Load*.
**Enterprise Resource Planning**

*Enterprise Resource Planning (ERP)* is a type of business-management software that can be used to collect, store, manage and data from many business activities, including construction and property management software and accounting systems (e.g., Integration by Procore: Viewpoint® Spectrum®, Integration by Ryvit: Viewpoint® Vista™, QuickBooks®, Sage 100 Contractor®, or Sage 300 CRE®).

**Employer Identification Number**

An *Employer Identification Number (EIN)* is a nine-digit number assigned by the Internal Revenue Service (IRS) to identify business entities operating in the United States.

**ERP**

Short for *Enterprise Resource Planning*.

**Estimated Cost to Complete**

The current estimate of the remaining costs to be incurred on a project at a specific point in time.[1]

**Estimated Final Cost**

The anticipated cost of a project or project element when it is complete. The sum of the cost to date and the estimated cost to complete.[1]

**Excusable Event**

An *excusable event* refers to an event detailed in a construction contract that either partially or wholly prevents or adversely affects a contractor’s performance of work.

**Existing Condition**

An *existing condition* refers to a change that occurs where design plans must be modified due to existing conditions at the job site.

**Fast Track**

The process of dividing the design of a project into phases in such a manner as to permit construction to start before the
entire design phase is complete. The overlapping of the construction phase with the design phase.\[1\]

**Federal Tax ID**

Short for *Federal Tax Identification Number*. See [Employer Identification Number](https://support.procore.com/references/construction-management/glossary-of-terms).\[1\]

**Field Order**

An order issued at the site by the owner or CM to clarify and/or require the contractor(s) to perform work not included in the contract documents. A field order normally represents a minor change not involving a change in contract price or time and may or may not be the basis of a change order.\[1\]

**Final Completion**

The date on which the terms of all construction contracts have been satisfied.\[1\]

**Financial Markup**

*Financial markup* is a fixed or percentage amount that is applied to the cost of a good or service to define a selling price that earns a profit.

**Float**

Contingency time that exists on a schedule of activities. It is measured by comparing the early and late dates on a start and finish basis.\[1\]

**Force Account**

Directed work accomplished by the contractor outside of the contract agreement.\[1\]

**FMI**

Short for *Factory Mutual International 3*.\[1\]

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**G**

**G702**

A *G702* (Officially known as the AIA G702™–1992, Application and Certificate for Payment) is an industry-standard, payment form developed by the [American Institute of Architects](https://support.procore.com/references/construction-management/glossary-of-terms) (AIA). The form is completed by a contractor
in application for payment. It requires the contractor to show the status of the contract sum to date, including the total dollar amount of the work completed and stored to date, the amount of retainage (if any), the total of previous payments, a summary of change orders, and the amount of current payment requested.

G703

A G703 (Officially known as the AIA G703™–1992, Continuation Sheet) is an industry-standard, payment form developed by the American Institute of Architects (AIA) that breaks the contract sum into portions of the work in accordance with a Schedule of Values (SOV) prepared by the contractor as required by the general conditions.

General Conditions

A section of general clauses in the Contract Specifications that establish how the project is to be administered. Included are obligations such as providing temporary work, insurance, field offices, and so on. Costs associated with General Conditions, often referred to as GC’s, is carried in its own division of the estimate/budget. Generally don't involve swinging a hammer or installing something permanently.¹

General Contractor

A general contractor is a contractor with primary contract responsibility for the construction, improvement, or renovation. The GC is the party who signs the Prime Contract for a construction project. This is the party that is responsible for completing and/or overseeing all facets of the construction, improvement, or renovation project. See also Prime Contractor.

Global Permission Template

In Procore, a global permission template can be assigned to any user on any project in your company’s Procore account. See also permission template and project specific permission template.

Granular Permissions

In the Procore web application, the term granular permissions refers to the ability to assign granular task privileges to new or existing permission templates. See Grant Granular Permissions in a Permission Template.

Guarantee

A legally enforceable assurance by a third party of satisfactory performance, quality or quantity of products or work during a specific period of time stated and included in the contract in the event the product or work fails to perform properly. Manufactured items often come with a manufacturer’s guarantee and works in conjunction with a warranty from the General Contractor or Subcontractors.¹ See also Warranty.
Guaranteed Maximum Price

A contractual form of agreement wherein a maximum price for the work is established based on an agreed-to scope. Cost-type contract (also known as an open-book contract) where the contractor is compensated for actual costs incurred plus a fixed fee subject to a ceiling price.\footnote{1} Abbreviated as \textit{GMax} or \textit{GMP}.

GC

Short for \textit{General Contractor}.

GMax

Short for \textit{Guaranteed Maximum Price}.

GMP

Short for \textit{Guaranteed Maximum Price}.

back to top

H

hh2

hh\textsuperscript{2} (www.hh2.com) is a third-party cloud service that works Procore’s ERP Integrations tool to synchronize data when the ERP Integrations tool in Procore is configured to work with the Sage 300 CRE® integration.

\textbf{hh2 Synchronization Client}

The \textit{hh\textsuperscript{2} synchronization client} is a third-party client application developed by hh\textsuperscript{2}. When the ERP Integrations tool is enabled on a company’s Procore account and the tool is configured to work with Sage 300 CRE® CRE, your Procore point of contact will work with your Procore Administrator to install and configure the hh\textsuperscript{2} synchronization client on your Sage 300 CRE® Server. This allows data to sync between your Sage 300 CRE® database server and Procore.

HTTPS

Short for \textit{HyperText Transfer Protocol Secure}.

HVAC

Short for \textit{Heating, Ventilation, and Air Conditioning}.
Hypertext Transfer Protocol Secure

A protocol that ensures secure communications over the Internet. Often abbreviated as HTTPS, it is a secure, encrypted connection for HyperText Transfer Protocol (HTTP) communication. This helps to ensure the privacy when data is exchanged.

IdP

Short for *Identity Provider*.

Identity Provider

An *Identity Provider* (IdP) provides the identifiers required for users to interact with a system. Procore's supported Single Sign-On (SSO) solutions can be configured to work with different identity providers. See [What is Single Sign-On?](https://support.procore.com/references/construction-management/glossary-of-terms)

IFB

Short for *Invitation For Bid*.

Insurance Manager

In Procore, an *insurance manager* is an internal employee (or multiple employees) at your company who will serve as your organization's primary point of contact(s) for ensuring that the insurance policies for your vendors (e.g., contractors, subcontractors, and other vendors) are in compliance with requirements and that their policy and certificate information is kept up-to-date in Procore. Insurance information for your vendors can be added and maintained in Procore's Company and Project level Directory tools. The responsibilities of an insurance manager include:

- Adding insurance policies to the vendor records in the Directory tool.
- Receiving automated email notifications from Procore about the expiration of vendor insurance policies.
- Updating insurance policy information as it changes.
- Removing insurance information from your vendor records when the information is no longer relevant.

Integrated ERP System

The term, *integrated ERP System*, is used to refer to the Enterprise Resource Planning (ERP) software that is configured to work with Procore's Company level ERP Integrations tool (e.g., Integration by Procore: Viewpoint® Spectrum®, Integration by Ryvit: Viewpoint® Vista™, QuickBooks®, Sage 100 Contractor®, or Sage 300 CRE®).
International System of Units (SI)

The International System of Units is a widely used metric system of measurement.

Invoice

An invoice is an itemized list of goods or services provided by a contractor that includes a statement of a sum due. In Procore, there are two types of invoices: an owner invoice and a subcontractor invoice.

Invoice Administrator

An invoice administrator is the person (or people) responsible for collecting, reviewing, and creating subcontractor invoices and owner invoices in Procore. An invoice administrator can be any person in your organization (for example, a project manager, an accountant, or a team of bookkeepers) who have been granted 'Admin' level permissions on the project's Commitments tool, the project's Prime Contracts tool, or both tools.

Invoice Contact

An invoice contact is a person who ensures that a subcontractor invoice is submitted to an upstream contractor for payment. In Procore, an invoice contact is always an employee of the designated 'Contract Company' on a purchase order or subcontract. The contract company is the party responsible for performing work and/or supplying materials for a project.

Invoice Manager

See Invoice Administrator.

iPaaS

Short for Integration Platform as a Service.

IPD

Short for Integrated Project Delivery. Similar to GMP except there is shared savings and shared risk for all major parties. Often touted as the way of the future, but very rarely used because people aren't willing to take on the extra risk.

J

JDE

Short for JD Edwards.
JTD
Short for *Job to Date*.

In the construction industry, a kickoff meeting refers to a group assembly that takes place at the start of a project to introduce members of the project team, review project objectives, as well as to review and discuss items related to site logistics, project phases, and scheduling. After your company purchases Procore, representatives from your company will be invited to attend a Kickoff Meeting with your Procore point of contact to get the implementation process started.

**K**

**L**
Denotes a 'Labor' line item type on a [prime contract](https://support.procore.com/references/construction-management/glossary-of-terms).

**Labor Costing**
In Procore, labor costing in real-time is the ability for labor data to be collected from the field and instantly applied to the budget as costs through the combined use of Field Productivity and Project Financials.

**LDs**
Short for *Liquidated Damages*.

**Lien**
A claim made against a property by a contractor or other professional who has supplied labor or materials for work on that property. Designed to protect professionals from the risk of not being paid for services rendered. Both general contractors and subcontractors are entitled to file liens on projects due to lack of payment.[1]

**Lien Waiver**
A *lien waiver* is a document from a contractor, subcontractor, materials man, equipment lessor or other party stating they have received the payment and waive any future lien rights to the property.
Life Cycle Cost

Life cycle costs include all costs incident to the planning, design, construction, operation, maintenance and demolition of a facility, or system, for a given life expectancy, all in terms of present value.\[^1\]

Liquidated Damages

An amount of money usually set on a per-day basis, which the contractor agrees to pay the owner for delay in completing the Work in accordance with the contract documents - If you are late to finish, you start paying a daily LD cost to compensate the owner. Abbreviated as LDs.\[^1\]

Long-Lead Items

The identification given to material and equipment having an extended delivery time and which may be considered for early procurement and purchase. Items which would be delivered too late for timely installation if their procurement or purchase were included as part of the procurement for the entire contract or project.\[^1\]

Long-Lead Time

The time interval between purchase and delivery of long-lead items.\[^1\]

Look-Ahead Schedule

See Short Term Construction Activity Plan.

Low Bidder

The bidder who has submitted the lowest bid, which is determined to be responsive and responsible for a division of work described in a bid document, proposal form or contract. Refers to both GC's and Subs.\[^1\]

Lump Sum

A fixed amount that includes the cost of overhead and profit paid, in addition to all other direct and indirect costs of performing work. Common type of contracting method.\[^1\]

Denotes a 'Materials' line item type on a prime contract.
MasterFormat

The MasterFormat is an organization standard that defines the master list of Divisions, Sections, and Section Titles for construction project specifications in the United States and Canada. It is authored by the Construction Standards Institute (CSI) and Construction Specifications Canada (CSC).

Master Schedule

An executive level summary schedule identifying the major components of a project, their sequence and durations. The schedule can be in the form of a network, Milestone Schedule, or bar chart. May include entitlements, design phase, construction, move-in, etc.[1]

Meeting Item

In Procore, a meeting item (also called an 'agenda item') is single, distinct topic on a meeting agenda. If you are facilitating a meeting using Procore's Meetings tool, you can add categorized or uncategorized meeting items to any meeting that you create.

MEP

Short for Mechanical, Electrical, and Plumbing.

Milestone Schedule

A schedule representing important events along the path to project completion. All milestones may not be equally significant. The most significant are termed "major milestones" and usually represent the completion of a group of activities.[1]

MOP

Short for Manual of Procedures.

MPP

Short for Microsoft Project file.

MSA

Short for Measurement System Analysis. It's a specifically designed experiment that seeks to identify the components of variation in the measurement.
MTD

Short for *Month to Date*.

Multiple Prime Contracts

Separate contractors contracting directly with the owner for specific and designated elements of the work.[1]

Non-Commitment Cost

In Procore, a *non-commitment cost* is a cost that is NOT included on the line items in a *commitment*. The cost is also an amount that is different from a cost submitted on a Prime Contract Potential Change Order (Prime PCO).

Non-Conforming Work

Work that does not meet the requirements of the contract documents.[1]

North American Numbering Plan

The North American Numbering Plan (NANP) is a telephone numbering plan comprised of 25 regions in 20 countries.

Notice of Award

A formal document informing an individual or organization of successfully securing a contract.[1]

Notice to Proceed

A formal document and/or point in the project’s life cycle authorizing an individual or organization to commence work under its contract. The issuance of the notice to proceed typically marks the end of a procurement phase.[1]

NTP

Short for *Notice to Proceed (with construction).*
Denotes an 'Other' line item type on a prime contract.

OAC

Short for Owner-Architect-Contract.

OAC Meeting

Short for Owner-Architect-Contract Meeting. A meeting between the project owner, the architect on the design team, and the general contractor.

OLTP

Short for Online Transaction Processing.

O&P

Short for Operations and Procedures.

Online Transaction Processing

*Online Transaction Processing (OTP)* is a data warehousing term used to describe transaction-oriented applications.

OC

Refers to the 'Owner Cost' line item on a prime contract.

Over/Under (also Projected Over/Under)

The net difference between what you expect to be the total cost of completion and the projected budget amount.

Owner Construction Management

A form of Construction Management that does not use an independent construction management organization as a team member. The owner performs all required Construction Management services with in-house staff.[1]
Owner Change

An owner change refers to an event initiated by a request from the construction project’s owner.

Owner Invoice

An owner invoice is a document that you produce for your client to show an itemized record of the amount you are owed for your work on a construction project. In Procore, an owner invoice is best understood as an accounts receivable invoice.

Owner’s Representative

The individual representing the owner on the project team. May work directly for the ownership or may be a consultant hired by the ownership.[1]

P4D

Short for Procore for Desktop. This is a legacy product that has since been replaced by Procore Drive.

Parallel Approval

Parallel Approval is a type of approval process that you can set up on a submittal workflow to provide assigned the 'Submitter' and 'Approver' role in the submittal workflow with the ability to submit their responses (for example, Approve, Reject, and so on.) concurrently. See How do I add people to the submittal workflow?

Parent Job

A parent job is job (a construction project) that has been designated as the 'parent' for one or more sub jobs. See What is the difference between a job, a parent job, and a sub job?

Pay App

Short for payment application. This term has been replaced by owner invoice. See What happened to 'requisitions' and 'payment applications’?

Payment Application

The term payment application has been replaced by owner invoice. See What happened to 'requisitions' and 'payment applications’?
PCCO
Short for *Prime Contract Change Order*.

PCO
Short for *Potential Change Order*.

Penalty
A punitive measure, usually associated with failure to fulfill a contractual obligation.[1]

Performance Bond
A pledge from a surety to pay the bond amount to the obligee (owner or contractor) in the event of a default in performance of contractual obligations.[1]

Permission Levels
See *Default Permission Levels*.

Permission Template

In Procore, a *permission template* is a set of role-based permissions that can be assigned to one or more Procore users. The permission settings in a template define what actions users can perform and what information they can view in each Procore tool. Managing user access to Procore with permission templates is a simpler alternative to managing unique access permissions for each individual user.

Phased Construction

An incremental approach to construction or design and construction. Each overlapping or sequential phase or element to have a defined work scope and to be considered as a separate project. Common for large projects with multiple buildings.[1]

Plans
See *Drawings*.

PM
Short for *Project Manager*.
PMO

Short for Project Management Office.

Post-Construction Phase

The period following substantial completion. May also be referred to as close out.[1]

Potential Change Order

A Potential Change Order (PCO) represents any potential change in cost that would affect the project's Prime Contract (i.e. the contract between the owner and general contractor). Potential Change Orders are typically created by the general contractor (GC) to receive a pricing estimate from subcontractors for changes on a project that affect a project's scope of work, construction schedule, which are expected to result in additional project costs. A PCO can contain one or more pricing items that may involve multiple subcontractors. Depending on whether or not the owner agrees to pay for some or all of the proposed changes, any PCO runs the risk of impacting the overall profitability of the project. Commitment Change Order (CCO) are generated from a PCO.

PP

For Procore users, PP is short for the Asta Powerproject file name extension. See Asta Powerproject.

Pre-Design Phase

The period before schematic design commences, during which the project is initiated and the program is developed; the planning and conceptual phase.[1]

Prime Contract

A prime contract is a legal agreement between the party financing a construction project (for example, a single project owner, commonly referred to as the contractee, client, or principal) and the party being paid to manage the project who has full responsibility for ensuring completion of work (for example, the general, primary, or main contractor). Using Procore, you can either create a single prime contract for a construction project or you can also divide the scope of work for a single project between multiple prime contracts.

Prime Contract Change Order

In Procore, a Prime Contract Change Order (PCCO) is a change order that affects the prime contract. In a two-tier change order setup, it typically consists of a bundle of Potential Change Orders (PCOs) that must be approved by the owner. In a three-tier change order setup, it typically consists of a bundle of Change Order Requests (CORs) that must be approved by the owner. See What are the different change order tiers?
Prime Contractor

A contractor, typically a General Contractor (GC), who has a contract with an owner.

Procore Administrator

A Procore Administrator (aka Company Admin) is the person, or people, at your company who are responsible for managing the Procore application in your environment. These individuals are granted 'Admin' level permission on both the Company and Project level tools in Procore. To learn about this person's roles and responsibilities, see Procore Administrator.

Professional Services

Services provided by a professional or by an organization that has specific competence in a field of endeavor that requires professional (and technical) knowledge and capabilities and that meets recognized standards of performance.[1]

Project Permission Template

A project permissions template is a set of role-based permissions that can be assigned to one or more Procore users in a project. The permission settings in a project permissions template define what actions users can perform and what information they can view in each Procore Project level tool. Managing user access to Procore with permissions templates makes managing permissions simpler and more efficient than maintaining unique access permissions for each individual user. There are two types of project permissions templates in Procore: project specific permissions templates and global permissions templates.

Project Specific Permission Template

In Procore, a project specific permission template can only be assigned to a user who has been added to the corresponding project's Directory tool. See also permission template and global permission template.

PRC

Short for Pending Revised Contract.

Program

A program is plan of action that typically also possesses the goal of accomplishing a clear business objective. In Procore, a company can add custom program names to organize their Procore projects so they are in alignment with an organization's unique program objective (see Add Programs). For example, a company may want to organize their projects by region (e.g., Northeast, Southwest, etc.), others may want to organize project by business sector (e.g., Federal Contracts, Commercial Projects, Residential Projects, etc.).
Program Management

The practice of professional construction management applied to a capital improvement program of one or more projects from inception to completion. Program Management provides additional benefits such as standardization, leveraged purchasing and economies of scale. See Also: Construction Management

Progress Meeting

A meeting dedicated to the subject of progress during any phase of project delivery. May also be referred to as an OAC meeting (Owner Architect Contractor).

Progress Payment

Partial payment of the contract amount periodically paid by the owner, upon approval by the CM and/or Architect, verifying that portions of the Work have been accomplished according to the progress reported in the payment request.

Project

The total effort required in all phases from conception through design and construction completion to accomplish the owner's objectives.

Project Budget

The sum or target figure established to cover all the owner's costs of the project. It includes the cost of construction and all other costs such as land, legal and professional fees, interest, and other project-related costs.

Project Cost

The actual cost of the entire project.

Project Management

The use of integrated systems and procedures by a team of professionals during project design and construction. As applied to a construction project, Project Management can be used synonymously with Construction Management.

Project Management Plan

A document prepared by the CM, and approved by the owner, which defines the owner's goals and expectations including scope, budget, schedule, and quality and the strategies to be used to fulfill the requirements of the project.
Project Procedures Manual

A detailed definition of the project team responsibilities and authority, project systems, and procedures.[1]

Project Team

Initially consists of the owner, design professional, and CM. Thereafter, as prime construction contractors are engaged they are added to the Team.[1]

Punch List

A list made near the completion of the construction work indicating items of work that remain unfinished, do not meet quality or quantity requirements as specified or are yet to be performed by the contractor prior to completing the terms of the contract. Referred to as a Snag List in European and Australian markets.[1] When enabled on a project in your company account, Procore provides a Punch List tool (see Punch List).

Purchase Order

In Procore, a Purchase Order (PO) is a documented financial commitment that details the types, quantities, and agreed-upon prices for products or services. As part of the procurement process, purchase orders are created by a ‘buyer’ (for example, a general contractor) and issued to a ‘seller’ (for example, a subcontractor) to cover the cost of a contract. Once accepted by the ‘seller,’ a purchase order represents an agreement between the two parties.

PX

Short for Project Executive.

QA

Short for Quality Assurance.

QC

Short for Quality Control.

Quality

The degree to which the project and its components meet the owner’s expectations, objectives, standards, and intended
purpose; determined by measuring conformity of the project to the plans, specifications, and applicable standards.[1]

**Quality Assurance**

The application of planned and systematic methods to verify that quality control procedures are being effectively implemented.[1] Abbreviated as QA.

**Quality Control**

The continuous review, certification, inspection, and testing of project components, including persons, systems, materials, documents, techniques, and workmanship to determine whether or not such components conform to the plans, specifications, and applicable standards.[1] Abbreviated as QC.

**Quality Management**

The process of planning, organization, implementation, monitoring and documenting of a system of policies and procedures that coordinate and direct relevant project resources and activities in a manner that will achieve quality. See also *Quality*.[1]

**Quick Response Code**

A two-dimensional, matrix-style barcode label that can be read by an optical reader and contains information about the item to which it is affixed. In Procore, you can generate and print QR codes for different uses in the Procore web application and then read the codes from your mobile device using the Procore for iOS app. See [Generate a QR Code for a Submittal](https://support.procore.com/references/construction-management/glossary-of-terms) and [Generate a QR Code for a Location](https://support.procore.com/references/construction-management/glossary-of-terms).

**QRC or QR Code**

Short for *Quick Response Code*.

**Record Drawings**

See [As-Built Drawings](https://support.procore.com/references/construction-management/glossary-of-terms).

**Related Items**

In Procore, a *related item* is a link between two Procore objects. It is an option that's available in many Procore tools, such as Commitments, Documents, RFIs, Submittals, and Transmittals. For example, if you are creating a submittal, you
might want to add a Procore drawing of the installation location or a photo of the item to be installed as a related item on the submittal. If you are adding a new punch item, you might want link a Potential Change Order (PCO) or a Commitment Change Order (CCO) as a related item, so the subcontractor can view the costs associated with the punch item.

**Retainage**

In Procore, the term *retainage* refers to the practice of withholding of a portion of a contract amount until the work is deemed satisfactorily complete. The withheld amount is specified in an agreement between the contracting party (the party paying for the work) and a contracted party (the person or company performing the work). A common practice is to withhold 5-10% of a contract's total value until a milestone is reached. Then, the withheld amount can be released as a progress payment. When work is substantially complete, the withheld amount can be released as a final payment.

**Retention**

In Procore, the term *retention* is used only when referring to the [sliding scale retention](https://support.procore.com/references/construction-management/glossary-of-terms) feature designed for Procore customers in Australia.

In this usage, *retention* refers the portion of a contract amount due that is withheld from a contracted party (the party doing the work) by the contracting party (the party paying for the work). The amounts withheld are based on a set of variable standards defined in the contract's scope of work. It is an industry-wide best practice and, in some regions, legally regulated to assure that contractors and subcontractors meet all of the job's contractual obligations.

**Requisition**

A *requisition* is a bill or invoice that is submitted to a customer or client. In Procore, the term *requisition* is no longer used. See [What happened to 'requisitions' and 'payment applications'?](https://support.procore.com/references/construction-management/glossary-of-terms)

**RFI**

Short for Request for Information.

**RFI Manager**

In Procore, an *RFI Manager* is the person responsible for overseeing an RFI throughout its lifecycle. This person is the gatekeeper between the RFI's Creator and the Design Team and is responsible for reviewing all Draft RFIs and either (1) providing a response to the RFIs and closing them out, or (2) opening the draft RFIs, assigning them a number, and then assigning them to the appropriate member of the design team, who then provides a response to the RFI's question.

**RFP**

Short for Request for Payment.
RFQ

Short for Request for Quotation.

Role-Based Permissions

Role-Based Permissions (RBP) define what actions users can perform and what information they can view in each Procore tool. In Procore, RBP is comprised of these concepts: (1) Roles and (2) Permission Templates. Roles are a set of access permissions which can be granted to a group of users by creating a permission template for a specific role or team (such as Accounting, Document Control, or Project Engineer) and then assigning users to the permission template.

Rolling Schedule

See Short Term Construction Activity Plan.

ROM

Short for Rough Order of Magnitude.

Rough Order of Magnitude (ROM)

Rough Order of Magnitude (ROM) is a rough numerical cost estimate that is used in the construction industry to gain a rough idea of the cost(s) to complete a project. ROM estimates are typically provided by a knowledgeable, high-level expert during the initiation/beginning phases of a project, when there is still a high level of uncertainty about the project. ROM estimates are understood to have a lower level of accuracy than a definitive/conclusive estimate.

RTAB

Short for Real Time As-Builts.

S

Denotes a 'Commitment' line item type for prime contracts.

SAML

SAML is short for Security Assertion Markup Language.
SAP

SAP is short for Systems, Applications & Products in Data Processing. SAP products are developed by SAP SE—a multinational corporation that offers a wide range of ERP applications.

Safe List

See Allowed List.

Schedule of Values

A schedule of values is a list of line items that details all of the agreed upon costs (for example, labor, materials, and so on) on a project. Abbreviated as SOV, it itemizes the contract amount into individual pay items to show how the entire contract sum is allocated to all of the project's work. An SOV is also based on the project's approved budget and commonly used to determine progress payments to contractor(s).

Scope

See Scope of Work.

Scope Changes

Changes that expand or reduce the requirements of the project during design or construction. May be related to change orders.[1]

Scope of Work

The division of work to be performed under a contract or subcontract in the completion of a project, typically broken out into specific tasks with deadlines.[1] Abbreviated as SOW.

SD

Short for Schematic Design.

Security Assertion Markup Language

The Security Assertion Markup Language (SAML) is an open-standard, XML-based data format technology that organization's commonly use to exchange user authentication and data authorization information between an identify provider an a web application or service provider. The Procore web application can be configured to work different SAML-based Single-sign on (SSO) integrations. See Okta SSO (SAML 2.0) and Azure Active Directory SSO.
Service Account

A service account is a dedicated user account that is created to manage a system's login access to a database or system. In Procore, one example of a tool that requires a dedicated service account is the hh2 synchronization client.

Sequential Approval

Sequential Approval routes a submittal to the people assigned the 'Approver' role in sequential order. In a submittal workflow, each 'Approver' must be set on a separate workflow step. See How do I add people to the submittal workflow?

Set Date (Drawing)

A set date refers to the date that a drawing was issue. This is different from the date that the drawing was first uploaded to Procore.

Shop Drawings

Drawings typically prepared by the contractor or sub, based upon the contract documents and provided in sufficient detail that indicate to the designer that the contractor intends to construct the referenced work in a manner that is consistent with the design intent and the contract documents. Many trades submit shop drawings, a few examples include: Structural Steel, Doors and Frames, and Concrete Reinforcing.[1]

Short Interval Schedule

See Short Term Construction Activity Plan.

Short Term Construction Activity Plan

The planning and scheduling of prime contractor(s) activities on site, for the short duration or "foreseeable future" usually developed on a week-by-week basis using milestones for planning intervals and coordinated by Construction Management personnel. Also known as Rolling Schedule, Look Ahead Schedule, and Short Interval Schedule.[1]

SI

Short for either International System of Units or Site Instruction.

Site Instruction

A site instruction is a formal instruction sent from the head contractor that contains directives for contractors working on a project.
**Sliding Scale Retention**

*Sliding scale retention* refers to the portion of a contract amount due that is withheld from a contracted party (the party doing the work) by the contracting party (the party paying for the work). The amounts withheld are based on a set of variable standards defined in the contract's scope of work. It is an industry-wide best practice in Australia, as well as legally regulated, to assure contractors and subcontractors meet all of the job's contractual obligations.

**Snag List**

See *Punch List*.

**SP**

Short for *Service Provider*.

**Special Conditions**

Refers to Special Conditions of the Contract for Construction. See *Supplementary General Conditions*.

**Special Consultants**

The designation for various professionals, including engineers, architects, designers and other experts, who provide expertise in specialized fields.[1]

**Specialty Contractor**

A *specialty contractor* is a contractor that specializes in a particular scope, or scopes, of work.

**Specifications**

The detailed written descriptions of materials, equipment, systems, and required workmanship and other qualitative information pertaining to the work. Provided by the *architect* and design team.[1]

**SOP**

Short for *Standard Operating Procedure*.

**SOV**

Short for *Schedule of Values*.
SOW
Short for Scope of Work.

SSOV
Short for Subcontractor Schedule of Values.

Start-Up
The period prior to occupancy when systems are activated and checked out, and the owner's operating and maintenance staff assumes the control and operation of the systems.\[1\]

STO
Short for Sage Timberline Office. This product is now called Sage 300 CRE®.

Subcontract
A subcontract is a legal agreement where a party on a prime contract engages a third-party (the subcontractor) to perform all or part of the work defined in the prime contract.

Subcontractor
A contractor who has a contract with a prime contractor to perform work.\[1\] A subcontractor is any contractor hired by another contractor (by this definition even a GC could be a subcontractor).

Subcontractor Invoice
A subcontract invoice is a request for payment from a subcontractor to the general contractor.

Subcontractor Schedule of Values
A Subcontractor Schedule of Values (SSOV) provides downstream contractors with a way to provide a detailed breakdown of specific work items on a subcontract or purchase order to an upstream contractor.

Sub Job
In Procore, a sub job allows you to compartmentalize job costs within a project. Once they are added to Procore (or imported via an integrated ERP system) you can monitor your project budgets and costs against them to help you better determine if you are making money on your project. For example, if your project is a multi-story commercial building, you might want to create a separate sub job for the build of each floor. Or, if your project is a multi-unit development, you might want to create a separate sub job for each individual structure.
Submittals

A submittal refers to the written and/or physical information provided by a responsible contractor (i.e., contractors and subs) to the general contractor. This information is submitted to the design team for approval of equipment, materials, etc. before they are fabricated and delivered to the project. Submittals can be presented in various formats, such as shop drawings, cut sheets on equipment, and material samples. Submittals are required primarily for the architect and engineer to verify that the correct products and quantities will be installed on the project in compliance with the design documents/contract documents. When enabled in your company's Procore account, Procore provides a Project level Submittals tool.

Submittal Manager

In Procore, a submittal manager is the person responsible for overseeing a submittal throughout its lifecycle. If you create a submittal and have 'Standard' or 'Admin' level permission to the Submittals tool, your name appears as the 'Submittal Manager' by default. However, users with 'Admin' level permission to the Submittals tool have the ability to assign the submittal manager role to any Procore user who has been granted 'Standard' or 'Admin' level permission to the Submittals tool (Note: Users with 'Standard' permission do not have permission to change the submittal manager). The 'Submittal Manager' field lets you change ownership of a submittal, when the person who created a submittal (or that submittal's current manager) is no longer a member of the project team.

Submittal Package

A submittal package is a container that stores one or more submittals. Typically, a general contractor creates submittal packages that list all of the individual submittals specific to a particular trade or subcontractor. For example, one might create a submittal package to contain all of the plumbing-related submittals in a commercial building project.

Submittal Schedule Calculations

Submittal Schedule Calculations is a back end configuration option where the estimated response due dates are automatically calculated with a predefined lead time (for example, five (5) days), which helps facilitate the timely responses from designated reviewers in the submittal's approval workflow. See Request to Enable Submittal Schedule Calculations.

Submittal Workflow

In Procore, a submittal workflow defines the group of individuals who are responsible for reviewing and approving an individual submittal. Each submittal created in Procore can have a different submittal workflow. In addition, designated members of a submittal workflow can consist of a submitter and one or more approvers.

Submittal Workflow Template

In Procore, a submittal workflow template provides users with 'Admin' level permission on the Submittals tool with the ability to define the submitter(s) and approver(s) for your project's submittal review process. You can create multiple
workflow templates to suit the specific needs of your review process.

**Submitter**

When using Procore to manage your project's submittals process, a *submitter* is the term that identifies the person who has provided the information contained within a submittal (for example, drawings, plans, documents, and so on.) to the general contractor so that the design team can review and approve the submittal. Typically, the person designated as being in the *submitter* role on a submittal is a contact that works for the responsible contractor (i.e., a subcontractor or a construction manager).

**Substantial Completion**

The date, certified by the design professional or CM or both, that a contractor has reached that stage of completion when the owner accepts use of the facility for its intended purposes, even though all work is not completed. [1]

**Supplemental Services**

See Additional Services.

**Supplementary General Conditions**

Additions and/or modifications to the General Conditions, which are part of the Bid Documents and/or contract documents. [1]

**Switch Overlay**

A mode a user can be in when using the Drawing Comparison functionality in the Drawings tool. When the user is comparing 2 different versions of a drawing, there is an option to view each version individually as an "overly." The user can click "Switch Overlay" to view the other version of the drawing.

**SWPPP**

Short for *Storm Water Pollution Prevention Plans*.

T&M Ticket

A *T&M Ticket* is a commonly used paper form that captures the details of an employer's request for a collaborator to perform out-of-scope work. Short for 'Time and Materials', it details a contractor's or subcontractor's expenses—such as,
use of materials and equipment, labor cost, and any markup for profit. In Procore, a *T&M Ticket* provides these collaborators with a digital method to document and track out-of-scope expenditures to ensure that they get paid.

**Tags/Keywords**

In Procore, a number of tools let you add tags/keywords to a record. When you have a large number of records, this makes it easier for users to use the tool's search feature to find the records marked with those tags/keywords.

**TBD**

*Short for to be determined.*

**Testing**

The application of specific procedures to determine if work has been completed in the prescribed manner and at the required levels of workmanship.[1]

**Trade Contractors**

Construction contractors who specialize in providing and/or installing specific elements of the overall construction requirements of a complete project.[1]

**Trade-Off Study**

The study to define the comparative values and risks of a substitution or exchange of a design component. The trade-off can identify both monetary and functional values. Also known as *Alternatives Analysis*.[1]

**Transfer**

*A transfer* refers to a change in ownership for performance of work.

**Transmittal**

In Procore, a *transmittal* is a record that acts much like a packing slip to record the documents, drawings, goods, materials, samples, supplies that are transferred between entities on a project.
UNC
Short for *Universal Naming Convention*.

Unit of Measure
In Procore, a *unit of measure* can be created to express these quantities for use with Procore's Financial Management tools: time, amount, length, area, volume, or mass. For example, hours, each, square foot.

UOM
Short for *Unit of Measure*.

Unique Identifier
A *unique identifier* is a string that identifies an entry in a system. The unique identifier for a Procore user account is the user's email address. This means that two users cannot have the same email address.

Value Engineering
Abbreviated as VE. A specialized cost control technique, which utilizes a systematic and creative analysis of the functions of a project or operation to determine how best to achieve the necessary function, performance, and reliability at the minimum life cycle cost. VE seeks improve the "value" of goods or products and services by using an examination of function. Typically VE is pursued in an attempt to lower overall project costs or costs of a particular building system i.e. HVAC.[1]

vCard
Short for *Virtual Business Card*.

VE
Short for *Value Engineering*.

https://support.procore.com/references/construction-management/glossary-of-terms
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Warranty

A warranty, sometimes called guarantee, defines and limits the responsibility of contractors for repairs of the construction project, both during and after completion of construction. Warranties are furnished by the subcontractors and general contractor to the owner of a project. Warranties establish the standards for determining defective work. Most construction warranties are express warranties and are required in the construction agreement, general conditions, plans or specifications, supplementary general conditions. Typical subjects of warranties are:

- A roofing contractor may warrant a roofing system against leakage for twenty years.
- An air conditioning contractor may warrant the ability of a system to achieve certain temperatures.
- A glass manufacturer may warrant the availability of colored glass used as an exterior curtain wall skin for a certain number of years.
- A general contractor may warrant the quality of the work performed by its forces and those of its subcontractors.[1]

See Also: Contract Warranty

Whitelist

See Allowed List.

Witness Statement

A witness statement is a statement taken as part of the incident investigation process and is used to better understand what happened, why it happened, and how similar incidents can be prevented in the future.

Work

All construction-incorporating labor, material and equipment required by the contract documents.[1]

Worker

In Procore, a worker is a member of a crew and does not have a Procore user account with login credentials for Procore. Workers can only be created and removed in the project's Crews tool. A worker's record consists of a First Name and Last Name. It can also optionally include an Employee ID and Classification. Any worker records created with the project's Crews tool can be viewed and/or edited in the 'Contacts' tab of the Company and Project level Directory tool.

Wet Signature

A wet signature refers to a physical signature on a paper document. It's a term that's often used to describe whether an authorized document was physically signed with a pen, as opposed to being authorized via an electronic/digital signature (i.e., e-signature).
**Wildcard Character**

In computing, a *wildcard character* is a character that can be typed in a string to represent one (1) or more characters. The most common wildcard character is the asterisk (*), which is frequently used as the end of a partial word to represent one or more characters in a search string. For example, in the Project level RFIs tool, typing `door*` in the Search field would return search results that might include `door, doors, doorframe, doorframes, and doorway`.

**X**

x-section

Short for *cross-sectional area*.

**Y**

Yard of Concrete

One (1) cubic yard of concrete equates to 27 cubic feet.

**Z**

Zoning

Zoning refers to governmental laws or regulations that limit how property is used in specific geographic areas.

**References**
