Best Practices for Using Procore During COVID-19

In addition to Procore’s many ongoing efforts to help clients during this time, the Procore team wanted to highlight some tool features that can help your company navigate this situation on your jobsites and in your office.

Procore Products & Tool Features

- Project Management
  - Project Stages
  - Directory
  - Emails
  - Documents
  - Meetings
  - Announcements
  - Daily Log
  - Tasks
  - Schedule
  - Submittals
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- Resource Management


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Project Management

Project Stages

- A [Project Stage can be created](#) to tag projects that are on hold due to COVID-19.
- [Project Stages can be updated](#) in the project's Admin tool.

Directory

The Directory tool can store all contact data for project team members and vendors. Through the Company level Directory tool, you can invite project collaborators, control which tools they can access, and set their tool-specific permissions.

- [Distribution Groups](#) can be created for Announcements and other tool notifications related to the field and office teams.

Emails

The Emails tool allows you to control your communications and manage all project-related emails using one centralized client regardless of the device or software you use to manage your email.

- COVID-19 specific [email tags can be created](#) and [applied to pertinent emails for easy filtering](#).
- [Download the Microsoft Outlook plug-in](#) for an intuitive way to save and tag emails.

Documents

The Documents tool allows you to manage and archive all of your mission-critical project documentation such as drawings, specifications, bid packages, emails, safety checklists, warranty information, and more.
• **Create COVID-19 specific document tags** to tag pertinent documents for search.

• **Create a new folder(s) within the Documents tool** to share COVID-19 related documentation and notices with the extended teams.

• **Set up a tracking list** to be auto-distributed when uploaded.  
  *Note:* Users who are on a tracking list will receive an automated digest email approximately one (1) hour after a file is added, updated, or deleted.

• **Route documents through DocuSign** to collect signatures quickly and easily.  
  *Note:* To do this, the **DocuSign integration must be enabled** for your project.

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**Meetings**

Manage all aspects of your project meetings from agenda distribution to post-meeting approval of minutes in the Meetings tool. Customizable meeting templates and categories allow you to streamline the entire process.

• Connect virtual meeting software to the Meetings tool for remote meetings.  
  ◦ **Zoom**  
  ◦ **Microsoft Teams**  
  ◦ **GoToMeeting**

• Leverage the Conference column when **recording attendance** for virtual meetings, which may be utilized for future contact tracing efforts.

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**Announcements (Android & iOS Devices)**

Streamline communication between teams on a project in the Announcements tool on your iOS or Android device. When you create announcements, you can choose which distribution groups to send them to. These announcements will then be displayed in push notifications on your mobile device and within the Procore mobile application.

• **Create announcements** that will display on users’ Android or iOS mobile devices and can be viewed in the app at any time. An alert badge will also appear on the Procore mobile app for any announcement received.  
  *Note:* Users may need to adjust their notification settings on their **Android** or **iOS device** to receive push notifications when an announcement is created.

• You can **create specific distribution groups** to make sending updates even easier. For example, your team could have distribution groups for the office staff and field workers so they only receive announcements that are relevant to them.

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**Daily Log**

The Daily Log tool is designed to provide project team members with a central location for viewing, tracking, and emailing updates about daily project activities such as labor, communication, equipment, materials, and more.

• You can **create custom delay types** in the **Delay Log** for COVID-19 to track cumulative time delays across a defined duration.  
  ◦ **Directory tool Admins** can **set additional notifications** for a user when a Delay Log is submitted from the Daily Log tool.
• The Manpower Log supports the creation of custom fields, which allows company admins to add relevant fields for capturing virus-related information. This is especially useful for tracking both GC and specialty contractor workers and hours.

• The Visitor Log allows you to track and report on anyone who walks onto the job site. It also provides a comment field for teams to enter additional information.

### Tasks

The Tasks tool allows you to track and manage action items throughout the lifespan of the project.

• You can create a custom COVID-19 category to capture any related task.

### Schedule

Keep your team up-to-date with a real-time view of the current project schedule. You can create, edit, and share schedules, and integrate your Primavera P6 or MS Project schedules.

• The Schedule Change Request feature can be leveraged to capture and review any requested COVID-19 related changes to the schedule.
  
  ◦ Update the Schedule Notification settings in the project's Directory tool to receive schedule change request emails and notify your team of schedule changes.

• Use Weekly Project & Resource Schedule Emails to keep specialty contractors informed by sending them look-ahead schedules every week at the same time with the most up-to-date data.

### Submittals

The Submittals tool allows you to organize your submittal log by division, add shop drawings, or even add pages from product catalogs. You can add attachments directly from your computer or from the project's Documents tool.

• Submittal Packages and Custom Submittal Types can be used to group, tag, and capture COVID-19 related paperwork collected from your trades or subtrades.

• Custom Submittal Log Statuses can be used to capture submittals on hold due to COVID-19. 
  
  *Note:* Custom submittal types and statuses can be created at the company level by company admins.

### RFIs

The RFIs tool can help you with the timely management of your RFIs to keep your project running smoothly and on schedule.

• Leverage Custom Solutions to add a custom drop-down selector that can be used to capture COVID-19 related RFIs or cost/schedule impacts.
Quality & Safety

Inspections

The Inspections tool allows you to create comprehensive checklists to capture all of the requirements associated with different types of inspections that occur during the lifecycle of a project. You can create a unique template for each inspection or modify, add to, or edit a company template on a project-by-project basis in the Company level Inspections tool.

The Inspections Tool can be used to track the completion of the following:

Procore has added new inspection templates, which have been automatically added to the Company level Inspections tool for all companies with the Inspections tool enabled.

- Project shutdown checklist tasks for preparing the job site to close
- Project startup checklist tasks to be completed once a project opens back up
  
  *Note:* This can include any administrative tasks. Each item can be assigned to a different individual through the Observations tool.
- Daily Audit/Jobsite Cleanliness checklist
- COVID-related checklists
  - An [Inspetction Type](https://support.procore.com/customer-success/best-practices-for-using-procore-during-covid-19) for COVID-19 can be created at the company level for more streamlined reporting.
  - You can create templates at the company level for use across multiple projects and apply the template to affected projects.
  - You can now access multiple industry-sourced checklists that were added to all existing accounts that will assist in the preparation and maintenance of a cleaner job site. The following checklists are available:
    - [NextWave Safety Solutions] Concrete Pre-Pour
    - [NextWave Safety Solutions] Ladder Safety - Simple Checklist
    - [OAC Management Inc.] Pre-Backfill Checklist
    - [OAC Management Inc.] Pre-Drywall Checklist
    - [OAC Management Inc.] Pre-Roofing Checklist
    - [OSHA] Daily Inspection of Trenches and Excavations
    - [OSHA] Lockout/Tagout Procedures
    - [OSHA] Materials Handling
    - [Procore] Equipment Pre-Operation Checklist
    - [Procore] Jobsite Cleanliness and Preparedness Checklist
    - [Procore] SWPPP - Construction Site Stormwater Checklist

Observations

Project managers can use the Observations tool to assign tasks to project team members at any phase in the project lifecycle. Observations can encompass scopes of work including quality, safety, commissioning, warranty, and work to
Observations can be used with Inspections to document, assign, and track any items from the template that need to be addressed. The “Enforce Observation upon item failure” setting can be enabled to automate this process.

- Custom Observation Fields and Fieldsets can be created for affected projects to make documentation easier and ensure all necessary information is captured.
- Custom Observation Types for COVID-19 can be created from the Company level Admin tool.
- Observation templates can be created on the Company or Project level if tasks are repetitive across trades and assignees.
- A Change Event can be created from an observation if there is a potential cost impact associated with the Observation.

Incidents

Digitally capture and manage incidents easily and accurately with the Incidents tool. Be proactive on the jobsite and keep track of potential safety-related issues or document unfortunate accidents. Manage risk, identify trends, and harness valuable data to better understand how to prevent unfortunate incidents in the future.

- Cases of infectious disease discovered on the jobsite can be captured with the Incidents tool.
  - Select "Contagious Disease" as the Injury/Illness type when filling out an Incident report.
  - If you want to add a COVID-19 as a specific option in the Injury/Illness type.
  - Custom Field Options can be used to add an additional COVID-19 specific option on the Injury/Illness Record.
- An incident can be classified as "Medically Treated" or "Lost Time," the number of days absent can be documented for record keeping, and the incident can be reported as a “Recordable/Notifiable” event per regulatory instructions.
- Severity levels can be set up to notify appropriate internal parties.

Forms

With the Forms tool, you can upload, access, and complete fillable PDFs. You and your project collaborators can then access these forms from their mobile devices. All form templates and completed forms are stored in Procore.

- In the Forms tool, you can complete and file new reference materials and/or pandemic-related forms.
  - Create a fillable PDF to create fillable forms.
  - Create Company Form Templates.
  - See instructions on filling out a form.

Design Coordination

Procore Design Coordination customers can connect the entire project team in one platform to improve communication and reduce project risk.
Coordination Issues

- Monitor issues progress and keep work on track using the interactive web-based dashboard to increase accountability with remote teams.
- The entire project team can instantly communicate and collaborate with commenting and @ mention functionality in one central location.
- Project teams can mitigate risk by moving coordination issues to observations and assigning them to foreman as work to complete in the field.
- Manage 2D coordination with the Coordination Issues pins on Drawings.

BIM

Having remote access to critical information is more important than ever. Procore BIM customers can give project site teams a way to view coordinated models without having to install complex modeling software. Team members can conveniently access the BIM web viewer from the Models tool within the Procore web application or on mobile iOS devices to visualize what needs to be built in the field, eliminating onsite surprises and improving project predictability.

Models

- Share coordinated models with the entire project team utilizing Procore’s mobile and web viewer.
- Create Coordination Issues straight from the model to easily communicate issues from the Field to the Office.
- Leverage field-to-field communication by creating observations from the mobile model viewer.

Project Financials

Budget

Build and manage a comprehensive budget throughout a project's lifecycle. By eliminating the need for double-entry of contract modifications and change order values into complex spreadsheets, you'll have greater insight into how seen and unforeseen changes impact the bottom line. Take control over complicated project factors when evaluating and forecasting your project's completion costs.

- You can create a new cost code/division to group COVID-19 related cost impacts.
- Enable sub jobs and add a sub job to your project.

Change Events

Track potential costs on a project by coordinating the entire change management process.
• Leverage Change Events to identify potential COVID-19 related cost and schedule impacts.
• Create a Change Event Type, Reason, and Status for COVID-19 related items.

Bid Management

Bidding

Solicit bids for projects while providing a central location for managing and viewing the status of all bids. Contractors can download bid packages from Procore and submit bids directly back into the system.

• Set the due date for a Bid Package as "To be determined" to allow more flexibility.
• Early communication best practices during preconstruction is critical to your project outcome. Send bulk correspondence to your bidders to make sure expectations are defined and clear as local jurisdiction standards for construction-related activity are established around COVID-19.

Prequalification

Procore's Company level prequalifications tool gives users the ability to extensively evaluate their companies. This helps to make sure that users best interests are protected and financial risks are minimized.

Prequalification Forms

• Coming Soon Procore is preparing a feature that allows you to create your own custom prequalification form questions to add to the list of preset questions that you can enable or disable. A custom prequalification question is a great way to verify what companies have established COVID-19 preventative measures such as Exposure Prevention, Preparedness, and Response Plan.
• Edit your Prequalification form to mark critical fields as required. If you are updating your current company Prequalification form, any edits will create a new version of the Prequalification form and will update any existing forms sent to users.

Resource Management

Timesheets

Procore's Project level Timesheets tool gives you the ability to enter current-week timecard data for employees who have been added as contacts in the Company level Directory tool and workers who have been added in the Crews tool.
• Connect Procore’s native time tracking tools to the Smartbarrel system to have better tracking of your workforce, PPE, and weather conditions. Smartbarrel can provide RFID key fobs to create time tracking that does not require physical contact with devices and uses a camera to capture a photo of the individual clocking in/out.

• Employees can use the My Time tool in the Procore mobile application for Android and iOS devices to clock-in/out, submit time entries, and sign off on time entries without using another user’s device.

• Connect Procore’s native time tracking tools with TIKS VMS to get temperature screening on your jobsite. TIKS VMS has thermal cameras that can detect human skin temperature and log it as well as escalate to a site supervisor when temperatures indicate a potential fever risk.

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Portfolio Financials

Track asset performance, measure project costs, compare bids, and aggregate performance insights across your entire portfolio. Gain an at-a-glance view of each asset in addition to individual cost items.

Approval Workflows

• Set up and adjust approval workflows for financial items, such as revised budgets or vendor invoices, to keep projects moving forward efficiently.

Project Cost Report

• Configure your project cost report to keep you up to date on critical project financial status.

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Capital Planning

Update capital plans faster and more often with access to accurate information. Capital plans are updated in real-time as costs data from individual projects are entered.

Cash Flow Forecast

• Update project cash flow forecasts and push them to the capital plan to help inform any potential long-term planning adjustments.

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Services & Support


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Training Centers

A Training Center is a service that allows companies to build custom documentation and materials for their team. This content is kept in a private section on Procore's Support site and is only accessible to users who have been granted access, making it the most efficient way to keep your internal team and external collaborators trained and up-to-date with your company's best practices. If your company uses a Training Center, you can create COVID-19 specific documentation to serve as a single source of truth of best practices and company-specific procedures. You can then manage and update your own content as needed.

Resources

Procore Community:

- Check out this COVID-19 Resources Page within the Procore Community! It's FULL of helpful content.
- Tool Webinars and Industry RoundTable discussions
- Procore Jobsite: COVID-19 Articles
- Procore Certification Training Portal
- Leveraging Procore's data-driven insights to provide clarity in uncertain times
- Procore Safety Qualified: Free online courses to help you stay safe on the job.
- Procore's Coloring & Activity Book: No matter what we're up against, one of the best stress relievers is seeing our kids be creative and happy. Download our coloring and activity book and share what your little artists come up with using the hashtag #ProcoreMasterpieces.
- Procore Community: COVID- 19 Discussion Board: This is the time to lean on each other. Join our COVID-19 Community group to be part of the discussion, learn from different approaches, and find comfort in discovering that you don't have to face this on your own.

Partner Integrations

- Check out this helpful resource on the 8 partner integrations to support remote work during COVID-19
- Procore App Marketplace
- Procore Integrations Knowledge Base

*Please note that the below is a list of potential ways that Procore can be leveraged in helping to document COVID-19 related impact across multiple tools. This list was sourced from some client best practices and input from internal Procore resources. Please defer to Local, State and National Governance with respect to requirements.

The use of features outlined in this document does not guarantee compliance with any applicable laws and regulations, nor does it guarantee avoidance of any specific incident. Please contact your attorney to obtain advice with respect to any particular issue.