## **Standard Operating Procedure – Specialty Contractors**

## **Important Company Settings and Configuration Setup**

## The below are to be configured and managed by your companies \*[Procore Administrator](https://support.procore.com/procore-learning-paths/general-contractor/procore-administrator) (aka Company Admins) are key in facilitating Procore tools with users in their company.

## **Company Admin Tool:** Procore's [Company Level Admin](https://support.procore.com/products/online/user-guide/company-level/admin) tool is designed to be used by the limited number of individuals within your enterprise who are responsible for managing the Procore application for your organization. With this tool, your company's designated Procore Administrators can configure a variety of preferences and settings to tailor Procore's construction management environment to suit your organization's business-specific needs, processes, and workflows.

## **Permissions Tool:** Procore's Company level [Permissions Tool](https://support.procore.com/products/online/user-guide/company-level/permissions) gives your organization the ability to efficiently manage user access to Project level tools using permission templates.

## **Company Level Directory:** Create, import, and store an unlimited number of contacts in Procore. Users who have been assigned 'Admin' permissions to this tool can add contacts for your employees, team members, subcontractors, suppliers, and vendors. In addition, [Directory Tool](https://support.procore.com/products/online/user-guide/company-level/directory) Admins can invite contacts to join Procore as end users, as well as set access permissions to different Procore tools.

## **Company Level Reports:** Procore's [Company Level Reports Tool](https://support.procore.com/products/online/user-guide/company-level/reports) provides your company with access to a variety of canned reports detailing your company's Procore datasets--everything from high-level project overviews to company-wide timecard information. The tool also lets users with 'Admin' level permissions build detailed custom reports, as well as to narrow down on more precise detail using the project rollup reporting feature.

## **Company Level Inspections:** Procore's [Company Level Inspections](https://support.procore.com/products/online/user-guide/company-level/inspections) tool provides your organization with easy way to create a comprehensive set of boilerplate inspection checklists that can be reused and customized on individual construction projects.

## **Prequalifications:** Procore's Company level [Prequalifications](https://support.procore.com/products/online/user-guide/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.

\*Procore Certification: [Procore Administrator](https://learn.procore.com/series/procore-certification-subcontractor-client/procore-certification-procore-administrator)

# **Common Customer Success Terms**

## **Integrations**

* [GoToMeeting](https://support.procore.com/integrations/go-to-meeting)
* [Microsoft Office 365](https://support.procore.com/integrations/microsoft-365)
* [Procore Gmail](https://support.procore.com/integrations/gmail-addon)
* [Procore Outlook](https://support.procore.com/integrations/procore-outlook-addin)
* [Zoom](https://support.procore.com/integrations/go-to-meeting)

## **Project Settings**

Project Stages, Project Types, and Departments are what we refer to as “Company Level Filters” and can be established prior to creating a project. These filters can help report project types, client portfolio, and otherwise categorize projects in useful manner for internal reporting and use. These filters are selected at the time of project creation but may be modified as the project moves through its lifecycle or evolves in terms of scope of work.

* [Project Stages:](https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/add-a-custom-project-stage) See samples below for additional stages that may be useful:
  + Design
  + Sales Cycle/Quoting (similar to Bidding)
  + Order
  + Delivery
  + Installation (similar to Course of Construction)
  + Punch List
  + Ongoing/Service
* [Project Types:](https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/add-a-custom-project-type) Helpful in delineating the nature of the project/industry segment that the project serves. Note that only a single type may be selected.
  + Installation
  + Commercial Office / Corporate
  + Education
  + Hospitality
* [Region:](https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/add-a-custom-project-region) For clients that serve multiple regions, this field may be helpful to associate the project with that particular region.
* [Project Roles](https://support.procore.com/faq/how-do-i-prepare-my-data-for-import-into-procore/what-are-custom-project-roles)
  + Background: Project Roles are generic roles that can be customized at the Company Level and then associated with specific team members on a per project basis. Once specific team members are selected their name, phone and email are listed on the Project homepage making it easy to see who the primary contacts are on each job. Examples of Project Roles include:
    - Sales Manager/Coordinator
    - Project Manager
    - Freman/Superintendent
    - Designer
    - Client (recommend using the ‘company’ type for client which will list the client company only, instead of a specific contact)
    - Lead Installer
  + Note: The “Group” field found in this configurations area does not impact any functionality or reporting or appear in any other area of Procore.
  + Note: Project Roles are **unrelated** to the permissions defined above. Project roles are only informational and do not impact a user's access to a project.
* [**Cost Codes**](https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/add-and-edit-company-cost-codes)
  + Cost codes refer to the alpha and/or numerical system used to map cost line items. These are used in the financial tools for items like Purchase Orders, Subcontracts, and Change Orders, and may also be used in time tracking, Punch list items and other non-financial instances. **Cost Codes must be in place before any financial items are created in Procore**.
  + To Start: Download [Procore Imports](https://support.procore.com/products/procore-imports/setup-guide#Install_Procore_Imports_App) or contact your Implementation Resources.

## **Standard Project Template**

* Standard Project Template(s) are the basis of tools, settings and preferences that carry over from the template to each new project created.
* You may create additional templates.
* Some Subcontractors have chosen to create separate templates for their different divisions (if applicable), i.e. Structural Steel, Concrete, etc.

To Start: Review the [Configure a Project Template](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/configure-a-project-template) and [What Items Carry Over from the Standard Project Template](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/configure-a-project-template#Items_That_Will_Carry_Over_to_Your_New_Project) support articles, and visit each tool configuration as you work through the Standard Operating Procedures & Roles/Responsibilities section of this document. Make sure to loop in your Procore Point of Contact.

**Suggested Configurations Review:**

* [Folder Structure:](https://support.procore.com/products/online/user-guide/project-level/documents/tutorials/create-a-standard-folder-structure)
  + Create your folder structure in the default project template so you can carry this structure over to other projects.
  + It is most efficient to use [Procore Drive](https://support.procore.com/products/procore-drive) to establish this (see Documents section below for more information).
* Configure Settings: Each tool in Procore has a specific set of configurations. These lists of settings can be accessed by clicking on the orange gear icon at the top left of every Procore tool. Settings include: default due dates, email notification preferences, etc.

**Fill in Highlighted areas with your company’s specific roles/responsibilities**

*\*All notes below tools are just examples, and should be customized based on company needs\**

*\*If your GC’s have the same project in their personal Procore account, this may affect operating procedures\**

## **Project Creation**

[ROLE] is responsible for creating Projects [add a new project](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/add-a-new-project).

* Will need Procore Administrator permissions to create new projects

[ROLE] is responsible for setting up the project directory

[ROLE] is responsible if more people need to be added throughout the course of the project

## \*Core Tools

**Home**

[Home](https://support.procore.com/products/online/user-guide/project-level/home): Project dashboard that provides users with a high-level overview. Basic information about the job and open items can be found here.

[ROLE] will set the project team.

## **Admin**

[Admin](https://support.procore.com/products/online/user-guide/project-level/admin): The Project level Admin tool is designed specifically for use by a select number of individuals at your enterprise who will be responsible for managing individual projects. With this tool, a project Admin can configure a variety of preferences and settings to tailor Procore's project environment to suit your specific project management needs.

* Functions/Information available in this tab include:
  + Activation/Deactivation of Projects
  + General Project Information such as name, number, address, stage, type, departments, etc.
  + Turning project tools on and off.
  + Cost code copying/access.
  + [Locations](https://support.procore.com/products/online/user-guide/project-level/admin/tutorials/add-multi-tiered-locations-to-a-project) list (see below Section for more information).
  + [Equipment](https://support.procore.com/products/online/user-guide/project-level/admin/tutorials/add-equipment) List for Daily Log
  + Unit Quantity Based Budget
* Note that the Project Home and Project Admin Configurations pages provide editable access to much of the same information. The Project Admin Tool also ties to other tool configurations pages. However, this page may not include all other tools. **It is best practice to access the configurations for each tool within the tool itself.**

[ROLE] will configure jobsite locations.

[ROLE] will configure jobsite equipment.

Only [ROLE] can inactivate a job, turn tools on/off, and manage the project cost code list.

**Custom Reports**

[Reports](https://support.procore.com/products/online/user-guide/project-level/reports): This tool will help your team to compile and analyze project data. Note that reports can be created within a job or at the company level (where you can report on information across different projects).

[ROLE] is responsible for creating and distributing custom reports

[ROLE] is responsible for taking Snapshots and/or running the following reports:

**Documents**

[Documents](https://support.procore.com/products/online/user-guide/project-level/documents): Tool used to manage all mission critical documentation that is not already handled using a pre-existing Procore Tool! (For example: No need to store drawings here when they are already stored in the ‘Drawings’ tool.

## [ROLE] is responsible for ensuring the document folder structure meets the team’s needs.

## This should be prepared in your [Standard Project Template](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/configure-a-project-template).

## [ROLE] is responsible for ensuring internal documents and folders are made private.

## Do you want to grant certain users special access to locked folders? [Manage Folder Permissions](https://support.procore.com/products/online/user-guide/project-level/documents/tutorials/manage-permissions-for-files-and-folders).

## Do you want certain users to receive notifications when a file is updated? [Manage Folder Tracking](https://support.procore.com/products/online/user-guide/project-level/documents/tutorials/manage-file-and-folder-tracking-in-the-project-documents-tool).

## Considering that the Documents tool is designed to be used for all document tracking that is not covered by your available tools, what sort of documents will you store here?

## (ex: Permits, Safety Waivers, etc.)

**Directory**

[Directory](https://support.procore.com/products/online/user-guide/company-level/directory): Location where all contacts are stored. This should include internal team members as well as external companies like material vendors, sub-tier workers, consultants, etc.

[ROLE] will be setting up our user import template.

## Adding: Vendors? GC Point of Contact?

Only [ROLE] can add people to a project directory.

## **Tasks** *(internal action items)*

[Tasks:](https://support.procore.com/products/online/user-guide/project-level/tasks) This tool will be used to manage and track action items that you assign to your internal team members.

[ROLE] will create and assign tasks as needed.

[ROLE] will review these items and close them out if handled properly.

\*Procore Certification: [Core Tools](https://learn.procore.com/series/procore-certification-subcontractor-client/procore-certification-project-manager-at-specialty-contractor-core-tools)

## \*Project Management

## **Drawings & Specifications**

[Drawings](https://support.procore.com/products/online/user-guide/project-level/drawings) & [Specifications](https://support.procore.com/products/online/user-guide/project-level/specifications): Manage and archive project drawing and spec revisions to ensure that team members always have access to the most current drawing set.

[ROLE] is responsible for uploading drawings and specifications and revisions.

* Do you receive your plans from the GC? How are they sending them to you? Should they upload them directly into Procore instead? (see [granular permissions](https://support.procore.com/products/online/user-guide/company-level/directory/tutorials/grant-custom-permissions-in-a-permission-template)).

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

* What items should they be creating? (ex: RFIs, Progress Photos, Punch List items, etc.)

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

**RFIs**

[RFIs:](https://support.procore.com/products/online/user-guide/project-level/rfi) Request for Information. A central storage space for all questions, and responses pertaining to a jobsite. Use this tool in a collaborative manner or as an internal tracking tool.

[ROLE] to Create RFI out in the Field

* Should this user escalate the RFI to an internal user? Or directly to GC?

Assigns RFI to [ROLE].

[ROLE] should be on distribution list.

* Will receive notifications that coincide with your RFI email preferences in [RFI Configure Settings](https://support.procore.com/products/online/user-guide/project-level/rfi/tutorials/configure-advanced-settings-rfis).

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

* Will GC POC enter RFI response directly through Procore? Will he/she post response via email?
* Has the RFI been distributed out to all affected parties?

**Submittals**

[Submittals:](https://support.procore.com/products/online/user-guide/project-level/submittals)  S[hop drawings](https://en.wikipedia.org/wiki/Shop_drawing), material data, samples, and product data. The submittal log will be a great place for your team to review and approve sub-tier submittals. It is also a great place to track submittals that your team is submitting to the General Contractor.

[ROLE] create submittal registry in Procore.

* Will GC’s be review/approving your submittals through Procore? Or will we simply use the submittal tool to track and log approved submittals?

[ROLE] will review sub-tiered submittals

* Are we subbing any work out? Does the GC have to review these submittals?

[ROLE] takes response and distributes and closes item. If needed, creates revision.

* Who on your team is impacted by a submittal approval/rejection? Have they been notified?

## **Photos**

[Photos](https://support.procore.com/products/online/user-guide/project-level/photos): Central archive for all of the project photos that you take over the course of the job.

[ROLE] creates the photo albums. How to [Create a Photo Album](https://support.procore.com/products/online/user-guide/project-level/photos/tutorials/create-a-photo-album).

[ROLE] responsible for organizing photos into the proper albums. How to [Bulk Edit Photos](https://support.procore.com/products/online/user-guide/project-level/photos/tutorials/bulk-edit-photos).

[ROLE] responsible for taking progress photos on the jobsite through [Drawing Markups](https://support.procore.com/products/procore-mobile-ios/user-guide/drawings-ios/tutorials/add-photos-to-a-drawing-ios).

## **Punch List** *(closeout action items)*

[Punch List](https://support.procore.com/products/online/user-guide/project-level/punch-list): Use this tool to track internal Punch List items, or items received from the GC.

[ROLE] will create Punch List items as needed.

* Do you receive a Punch List from your GC? Is it in an Excel format? Consider [Importing Punch List Items into Procore](https://support.procore.com/products/online/user-guide/project-level/punch-list/tutorials/import-punch-list-items)

[ROLE] is responsible for configuring Punch List Types.

* Punch List Types refer to a field within the Punch Form by which you can later filter your list.
  + Some Subcontractor defaults include:
    - Defect - Reorder Needed
    - Commissioning
    - Change Order
    - Incomplete Work

## **Daily Log**

* Do you need to provide Daily Logs to your GC? Who will send this?
* Popular Subcontractor Logs:
  + Weather Observations
  + Notes
  + Equipment
  + Delivery

## **Meetings**

[Meetings](https://support.procore.com/products/online/user-guide/project-level/meetings): Track and store meeting agendas and subsequent minutes.

[ROLE] will standardize meetings across jobs by creating meeting templates in the Company Level Admin tool.

[ROLE] will create a project meeting and build out scheduled attendee list.

[ROLE] will Convert the Agenda and log the meeting minutes.

**Emails**

[Emails](https://support.procore.com/products/online/user-guide/project-level/emails): Store and track project-related email correspondences in this tool. You can also use it for internal bulletins and project updates.

[ROLE] will log external email correspondences in this tool

* Do you use Outlook? Consider [Dragging and Dropping Emails using Procore Drive](https://support.procore.com/products/procore-drive/user-guide/emails).
* If not, [CC the Inbound Procore Email Address](https://support.procore.com/products/online/user-guide/project-level/emails/tutorials/send-an-inbound-email-to-the-projects-emails-tool) to automatically log the correspondence.

Only [ROLE] can send email bulletins to internal staff members from this tool

\*Procore Certification: [Project Management Tools](https://learn.procore.com/series/procore-certification-subcontractor-client/procore-certification-project-manager-at-specialty-contractor-project-management)

## \*Quality & Safety

**Inspections**

[Inspections](https://support.procore.com/products/online/user-guide/project-level/inspections): Use this tool to standardized checklists for field members to perform. Note that this is to be used for internal inspection checklists, NOT 3rd party inspections.

[ROLE] creates inspection templates at the Company Level.

[ROLE] adds inspection templates to the job

([Add Company Level Inspection Template to a Project](https://support.procore.com/products/online/user-guide/project-level/inspections/tutorials/add-company-level-inspection-templates-to-your-project)).

[ROLE] performs inspection in the field.

* Will observation items be created when an inspection items ‘fails’ or is ‘at risks’? Should this be required? ([Configure Inspection Settings](https://support.procore.com/products/online/user-guide/project-level/inspections/tutorials/configure-advanced-settings-project-level-inspections#Inspection_Settings)).

**Incidents**

[Incidents](https://support.procore.com/products/online/user-guide/project-level/incidents): Use this tool to capture and manage incidents that occur onsite. Manage risk and identify trends to prevent future incidents!

[ROLE] will create the incident in Procore

* Has the accident already in added to the [Daily Log’s Accident Log](https://support.procore.com/products/online/user-guide/project-level/daily-log/tutorials/create-accident-log-entries)? Copy this information over to Incidents tool

[ROLE] will organize an Incident Report using the Reports tool (Project or Company level tool)

## **Observations** *(action items during course of project)*

## [ROLE] will create observations as needed. Then send items out to the assignees

## Will you be assigning items to external contacts?

## Will you be creating these items on the web or mobile interface?

## If from Mobile, do you plan on creating the observations directly from your Drawings? Check out [Linking Items to a Drawing](https://support.procore.com/products/procore-mobile-ios/user-guide/drawings-ios/tutorials/link-items-to-a-drawing-ios).

**Forms**

* [ROLE] is responsible for uploading fillable PDFs into Procore. ([Create a Company Level Form Template](https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/create-a-company-level-form-template)).
* [ROLE]

\*Procore Certification: [Quality and Safety Tools](https://learn.procore.com/series/procore-certification-subcontractor-client/procore-certification-project-manager-at-specialty-contractor-quality-safety)

## \*Financial Management

**Budget**

[ROLE] Is responsible for importing/creating budget

* Will your budget match the contract SOV exactly? Will you budget for profit/overhead/insurance?
* How many line items do you typically have on a budget?
  + Generally, the less line items you have, the easier it is to create in-app

[ROLE] is responsible for taking Snapshots and/or running the following reports : [Report]

\*Does the Procore budget contain all of the columns you want? If not, [Set Up New Budget Views](https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/set-up-a-new-budget-view).

**Prime Contract**

[Prime Contract](https://support.procore.com/products/online/user-guide/project-level/prime-contract): Your General Contractor Agreement. This will also be used to Bill the GC.

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

* [Create SOV from Budget Lines](https://support.procore.com/products/online/user-guide/project-level/prime-contract/tutorials/create-schedule-of-values-from-the-budget) - All line items or divisional summaries.
  + Do you hide your contingency lines? (profit, overhead, etc.) If so Edit the Schedule of Values or use the divisional summary option

[ROLE] is responsible for creating Payment Applications.

[ROLE] is responsible for reviewing the Pay App and [Sending it to the GC](https://support.procore.com/products/online/user-guide/project-level/prime-contract/tutorials/email-a-payment-application).

**Commitments**

Commitments: Your Purchase Orders and Subcontracts. Vendors and Sub-tiers will also use this to bill you.

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

* Do you have Sub-Tiers? Vendor?

[ROLE] is responsible for approving commitments

[ROLE] is responsible for sending commitments to Sub-Tier/Vendor. Change Status when issued and when signatures received.

[ROLE] is responsible for requesting Requisitions from Sub-Tier/Vendors

**Direct Costs**

[ROLE] is responsible for inputting team invoices, expenses, and payroll information.

[ROLE] is responsible for review and approving Direct Costs

* Is your account integrated with an ERP accounting Solution - Costs will flow automatically from

**Change Events/Change Orders**

[ROLE] is responsible for creating Change Events.

[ROLE] is responsible for requesting RFQ from sub-tiers or vendors

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

\*Procore Certification: [Financial Management Tools](https://learn.procore.com/series/procore-certification-subcontractor-client/procore-certification-project-manager-at-specialty-contractor-financial-management)

\*Resource Management

**Import Budgeted Production Quantities**

[ROLE] is responsible for uploading the [Budgeted Production Quantities](https://support.procore.com/products/online/user-guide/project-level/timesheets/tutorials/import-budgeted-production-quantities) to the Project Admin Tool

**Timesheets**

[ROLE] is responsible for entering their time via Timesheets

[ROLE] is responsible for Managing project Timesheets

**Crews**

[ROLE] is responsible for establishing crews.

* Will crews be built out based off the job sites they are working on? The different trades they perform?

\*Procore Certification: [Resource Management Tools](https://learn.procore.com/series/procore-certification-subcontractor-client/procore-certification-project-manager-at-specialty-contractor-resource-management)

## Pre-Construction

**Bidding**

[Bidding](https://support.procore.com/products/online/user-guide/project-level/bidding): Use this tool to invite sub-tiers and vendors to bid on a job. Additionally, use the bidding tool to collect and qualify proposals before ironing out your contracts.

[ROLE] will create the bid package.

[ROLE] will ‘[Search for Bidders](https://support.procore.com/products/online/user-guide/project-level/bidding/tutorials/search-for-and-invite-bidders)’ and build out a bid list. [ROLE] will then send out invitations.

[ROLE] is responsible for sending correspondences to bidders when bid documents are updated.

[ROLE] will qualify the returned bids.

* Do you have the Construction Financials Product Line? If so, [Convert Qualified Bids to Purchase Orders](https://support.procore.com/products/online/user-guide/project-level/bidding/tutorials/award-a-winning-bid-and-convert-it-into-a-purchase-order).

**Prequalification**

Procore's Company level [Prequalifications](https://support.procore.com/products/online/user-guide/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.

[ROLE] will be responsible for managing the qualifications for all vendors and subcontractors.

## \*VDC

**Models**

With Procore's [Models](https://support.procore.com/products/online/user-guide/project-level/models) tool and plugin, you can publish federated Navisworks® model files directly to your Procore project and view them on the web. This will allow field teams to quickly reference coordinated models in the field on iOS mobile devices, reducing installation errors and increasing productivity.

[ROLE] is responsible for exporting locations from Revit into Procore.

[ROLE] is responsible for exporting models from Navisworks into Procore.

[ROLE] Will have access to the Models From the web and iOS devices.

**Coordination Issues**

Identify and resolve coordination issues prior to construction using the Procore [Coordination Issues](https://support.procore.com/products/online/user-guide/project-level/coordination-issues) tool and plugins. This tool will allow coordination issues to be connected to other items, such as RFIs and change events, so that an issue can be tracked and referenced from initiation to resolution in your Procore project.

[ROLE] will be responsible for creating Coordination Issues on a iOS Device

[ROLE] will be responsible for creating and managing Coordination Issues from Navisworks and the Coordination Tool on the web

[ROLE] will be responsible for Elevate a Coordination Issue to an RFI or Observation.

\*Procore Certification: [Coordination Issues Tool](https://learn.procore.com/series/advanced-training/coordination-issues-overview)