## QUESTIONS TO ANSWER

**Who is responsible for creating Projects?**

**What is the workflow for getting Projects Set-up?**

* Procore Company Level Admin creates projects and adds the key Project Manager (PM). PM then adds users and begins the project.
* Office Level Admin is responsible for creating projects and adding the PM.
* PM is responsible for creating projects.

**Who sets up the project directory?**

**Who is responsible if more people need to be added throughout the course of the project?**

## SUMMARY OF THE PROJECT CREATION PROCESs

1. Create Project
   1. Follow this support article on [how to create a project](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/add-a-new-project)
   2. If you have the Sage integration:
      1. If creating in Procore first, [add a Procore Project to Sage](https://support.procore.com/integrations/sage-300-cre-sto/tutorials/add-a-procore-project-to-sage)
      2. If creating in Sage and pulling into Procore, [add a Sage Job to Procore](https://support.procore.com/integrations/sage-300-cre-sto/tutorials/add-a-sage-job-to-procore)
2. Add in general Project information (address, stage, etc.)  *Highlight anything that is mandatory that your team fill in (for reporting purposes)*
3. Begin adding people to the project as necessary
   1. Use “Bulk Add from Company Directory” first, to see if the person already exists at the company level. If not, [add a person to Project Directory](https://support.procore.com/products/online/user-guide/project-level/directory/tutorials/add-person-to-project-directory).
   2. If a lot of new users need to be added, the Import Template can be used: [request a User Directory import](https://support.procore.com/products/online/user-guide/project-level/directory/tutorials/request-a-user-directory-import)
4. Go into the configuration settings of tools like RFIs and Submittals, and add default distribution lists:
   1. [Configure Advanced Settings RFIs](https://support.procore.com/products/online/user-guide/project-level/rfi/tutorials/configure-advanced-settings-rfis)
   2. [Configure Admin Settings Submittals Tool](https://support.procore.com/products/online/user-guide/project-level/submittals/tutorials/configure-admin-settings-submittals-tool)

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| **If this is the first time these users will have seen Procore, please follow the “*Training a New Project Team*” guidelines on the next page.** |

## Questions to Answer

**Who adds users to the project?**

The Project Creator, or does the Project Creator add key Project Manager (PM), and the PM is then responsible for adding users?

**What training do you want new users to go through?**

Procore Certification, Procore Training Webinars, will your super users/Procore admins run a specific training when new jobs start, or do you want to run training for each office instead?

**Recommended:** Add new internal users to the Sandbox Test Project, have all new users complete Procore Certification, attend Training Webinars per your companies requirements, and host internal training sessions lead by your Procore Admins.

## Training Process/Timing (project-based)

Two weeks prior to project start date:

1. Add users to the project directory and invite them to Procore.
2. At the same time, separately send them this email, editing the content to take into account the training that you require of them.

Hello [ROLE],

I am excited to announce that our organization recently engaged Procore software as a tool to enhance and streamline our project management efforts. This decision is a culmination of months of research by select project team members to identify the best project management solution on the market.

The next step is to get all of our project teams to use the system. To begin this process, you'll receive an invitation email with the subject line "Welcome to Procore" which will allow you to setup your user ROLE and password to access our Procore account. Once received, please complete the training requirements outlined in the [Getting Started with Procore: Internal Users Guide](https://support.procore.com/getting-started-with-procore-internal-users)article.

We will be having a training meeting to go over all of the features and responsibilities on [insert date]. Prior to that meeting, please complete the following:

* Procore Certification
* Training Webinars [dictate which ones you require]

Thank you in advance for embracing this tool and for all your efforts as we continue to strive for excellence in all that we do.

Approximately 1 week or less before new users are required to start using Procore, hold a training session with the team members where your Procore Admin runs through the key tools and how to perform each action.

## Questions to Answer (for each tool)

**Is usage of the tool mandatory or optional?**

**Who (role wise) is required to use it?**

**Are there any specific company-related processes that need to be followed for that tool?**

**Are there any mandatory fields that need to be filled in when creating an item within the tool?**

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

## Emails

Upload emails that need to be tracked through Procore Drive.

Add the project email address as a contact in Outlook, and CC that address when sending a project related email, so it is tracked in Procore. NOTE: emails are private by default.

## RFIs

[ROLE] to Create RFI (receives question outside of Procore)

Assigns RFI to [ROLE].

[ROLE] should be on distribution list.

[ROLE] responds via email or within Procore.

[ROLE] responds if needed.

[ROLE] marks official response and closes.

## Submittals

NOTE: Sequential vs. parallel approval must be decided at start of project. (**Parallel**: Can go to many people at once; anyone can approve at any time. **Sequential**: Many people can be added to the workflow, but it has to go through the sequence.)

[ROLE] fills out submittal import template to create registry (optional).

[ROLE] creates (or edits existing) submittal; to add submittal. Creates the workflow which includes [ROLE].

[ROLE] responds, or forwards for review to consultant.

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

## Inspections

[ROLE] will create needed templates at the company level for use within Projects.

[ROLE] will be responsible for running [NUMBER] inspections on Projects.

## Observations

[ROLE] will create observations as needed.

## Meetings

[ROLE] will be responsible for adding the agenda for [ROLE] meeting in Procore and recording meeting minutes.

## Punch List

[ROLE] will create Punch List items as needed.

## Schedule

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

## Daily Log

Required logs: [Weather Observations, Manpower log, Notes]

## Photos

[ROLE] pre-creates albums based on (time frame, focus?)

-OR- Albums are created as needed as the PM or Superintendents see fit.

## Drawings

[ROLE] is responsible for uploading drawings and revisions.

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

## Specifications

[ROLE] responsible for uploading.

## Documents

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

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

[ROLE] to dictate what GC/Architect should be saving.

## Directory

Only [ROLE] can add people to directory.