

# Procore for Superintendents

**Problem:** New superintendents (project site managers) at Weekes Construction must quickly learn to use Procore, the project management software into which all project data is recorded. However, they are given no introduction to the software and are generally expected to fumble through it and learn to use it on their own.

**Project Description:** This eLearning module will introduce superintendents to using Procore to record project data, including uploading project site photos and viewing blueprints.

## Learners:

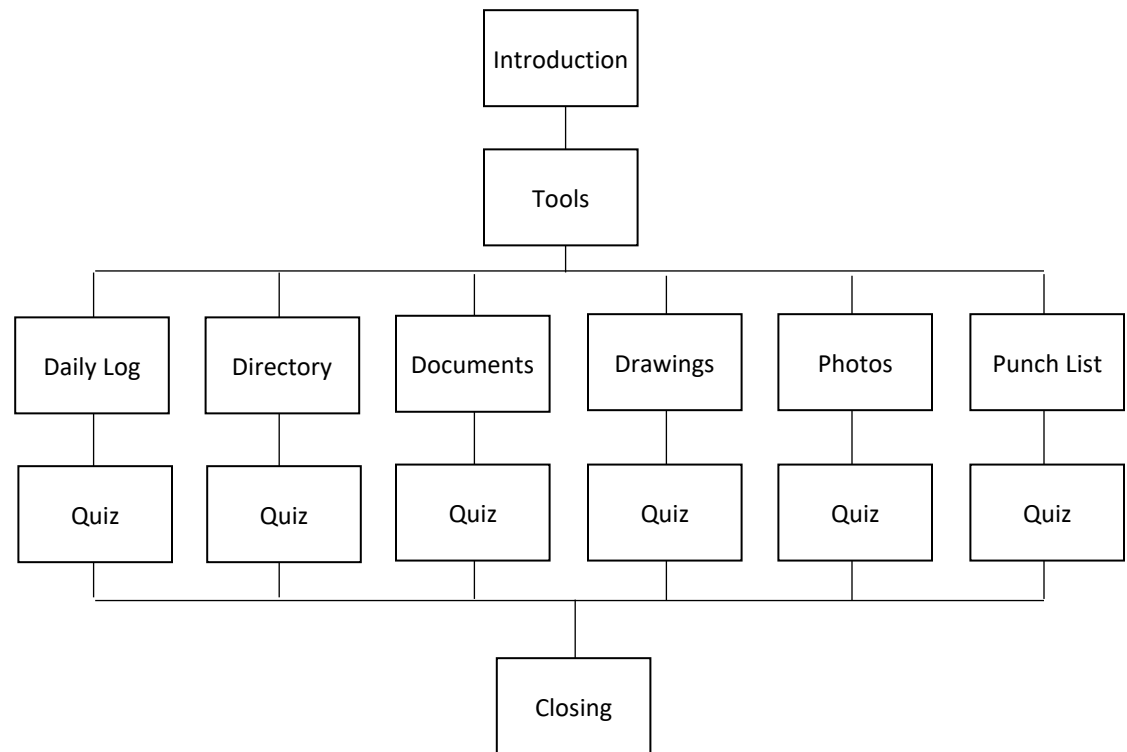
- Male
- Early 40's to mid-50's, on average
- Not computer savvy
- Little or no experience with project management software
- Busy on job sites managing a project, but must also record data daily to document progress

## Deliverables:

- 15-minute long interactive, on-demand eLearning module.
- 8 sections of 2-minutes each introducing Procore, providing an overview of tools, and offering 6 “how-to” teaching components.
- 6 screen recording videos showing the tools interface and teaching the “how-to” components.
- Voice over recording for all sections to provide information and teach the “how-to” components.
- Closed captioning options for video accessibility.
- Interactive quiz questions throughout.

## Content Outline:

Introduction to Procore (1 min.)  
Overview of Procore tools (2 min.)  
How to record activity in the daily log (1 min.)  
How to use the directory to contact someone (1 min.)  
How to upload or access project documents (1 min.)  
How to view plans (blueprints) (1.5 min.)  
How to upload site photos (1.5 min.)  
How to create or close punch list items (1 min.)



## Slide Title: Introduction to Procore (Screen 1)

### Media



### Narration

Procore is project management software specifically for the construction industry. As a superintendent, you'll use Procore to manage your jobs.

Procore is convenient and easy to use. It is mobile project management that improves efficiency by connecting field and office in real time. Your project manager can immediately see the record of a call you make or the photos you uploaded. All your project site data is managed in one place.

Procore's mobile app is built for the field, making it easy for everyone to have a clear understanding of what needs to get done every day to stay on schedule and prevent rework. Procore provides access to everyone so no one is left out of the loop.

### Interactions

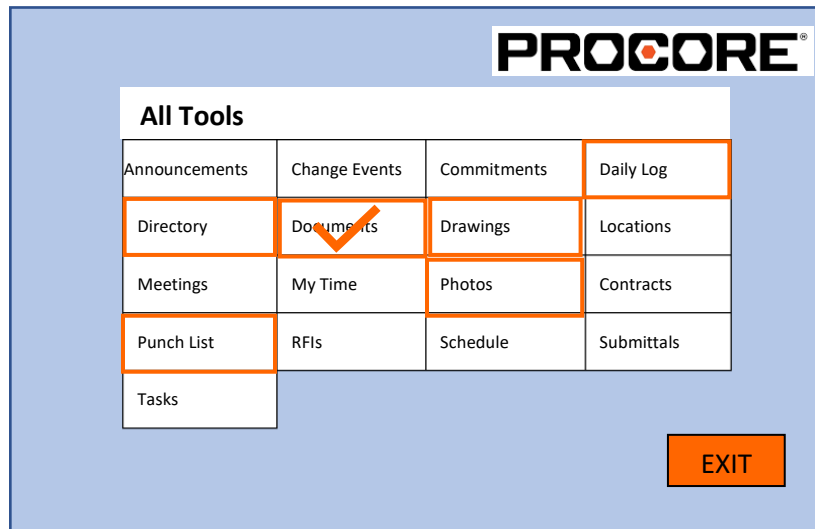
User clicks START to begin narration. START button fades.

[Need images to play during narration.]

Although Procore can be used on a computer [computer screen], you're most likely to use the Procore app [app image] on your phone or tablet.

## Slide Title: Overview of Procore tools (Screen 2 - MENU)

### Media



### Narration

When you access the Tools screen, make sure that the correct job is selected from the menu at the top. [drop down list of jobs]

You won't use all the tools displayed because Procore is meant for project management at all levels, so some tools may only be used by project managers and some may not be used at all.

The daily log is used to record progress on the job site each day, including what trades were there and what work they completed.

In the directory, you will find a list of all your subcontractors and key points of contact including site foremen for different trades.

Documents contains any information you might need about the job that isn't a drawing.

Drawings are your plans or blueprints for the job.

Photos holds your images that record daily progress or document conditions that you might need help resolving.

The punch list is used at the end of the project to let subcontractors know when they have items that need to be fixed or re-worked.

From any screen, you can always return to the Tools menu by clicking Tool on the black bar across the bottom of your screen. [zoom to Tools]

Click a highlighted tool to continue training.

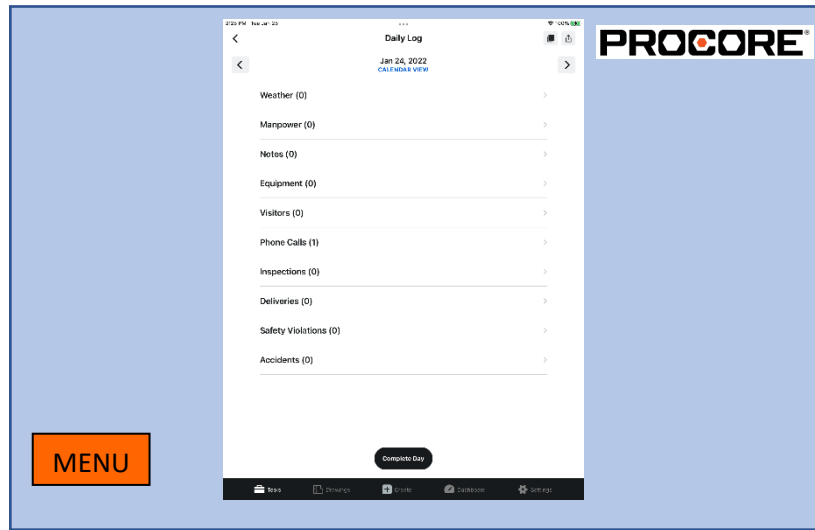
### Interactions

Those tools used by superintendents will each be highlighted with an orange outline.

After learning about a tool, use can return to the MENU screen or exit.

## Slide Title: Daily Log (Screen 3)

### Media



### Narration

[2 min. narrated screen recording]

The daily log is a record of activity completed each day. Project managers use the daily log to review progress and ensure that a job is on schedule.

The daily log is where you will record your daily manpower. Click the orange plus at top right to record a new entry. Enter the company name, number of workers, number of hours, and a summary in the comments section of what work that company completed that day.

Phone calls made using the directory will be recorded in the phone calls section of the daily log.

### Interactions

User can click MENU and return to menu to select next tool.

Deliveries is used to record deliveries from vendors and suppliers. After entering the delivery information, you can add a photo by clicking "Add Attachment" and "Take Photo".

### KNOWLEDGE CHECK (quiz)

The daily log is used to

- Review progress
- Ensure that a job is on schedule
- Both of the above

Phone calls are recorded in the daily log

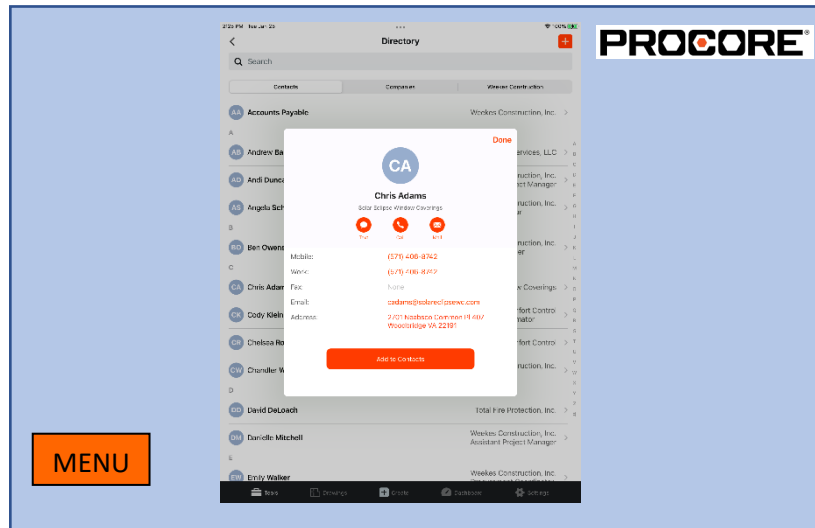
- Each time you make a phone call
- When you access your contacts
- Only if made using the directory

To record a new entry in the daily log

- Click the red X at top left
- Click the orange plus at top right
- Click Submit at the bottom of the screen

## Slide Title: Directory (Screen 4)

### Media



### Narration

[2 min. narrated screen recording]

You can text, call, or email a contact using the directory. If you make a phone call, that interaction is recorded in the daily log.

Clicking “Add to Contacts” will add that person to your device contacts list.

You can sort your contacts by company to see only the contacts for the selected project.

Click on “Weekes Construction” to see all contacts internal and external to Weekes.

Click the orange plus at top right to add a new contact or company to the project.

### Interactions

User can click MENU and return to menu to select next tool.

### KNOWLEDGE CHECK (quiz)

The directory is used to

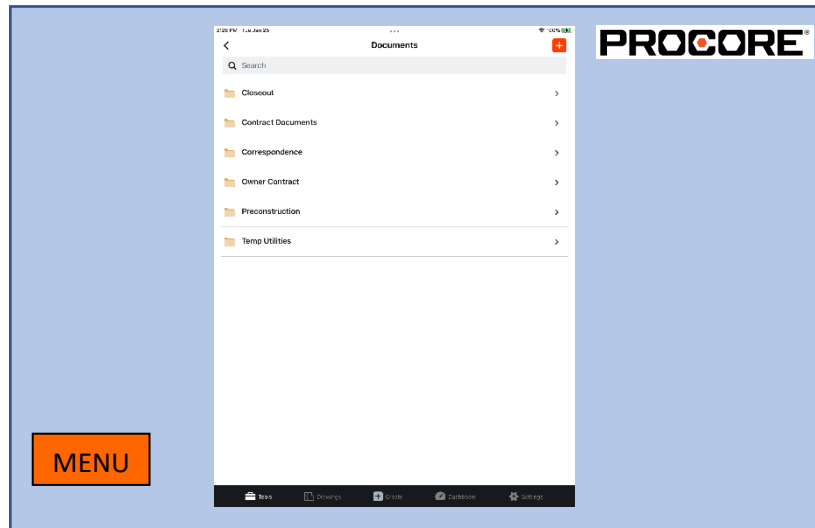
- Record daily progress
- Call, text, or email a contact
- Upload photos

Why would you click “Add to Contacts” when that person is already a contact?

- To add that person to the device Contacts list
- To make sure that person is in Contacts
- To remove a person from Contacts

## Slide Title: Documents (Screen 5)

### Media



### Narration

[2 min. narrated screen recording]

Documents is like a folder on your hard drive. You can upload any files that don't belong in your photos.

If your project manager needs to give you a large file, he will upload it to your documents rather than trying to email it.

Click the orange plus at top right to upload a file. You can upload a file to the existing folders by opening that folder before you click the plus, or you can create a new folder for your file.

### Interactions

User can click MENU and return to menu to select next tool.

### KNOWLEDGE CHECK (quiz)

Documents is used like

- A second Photos folder
- A place to store plans
- A folder on your hard drive

Your project manager might do what with Documents?

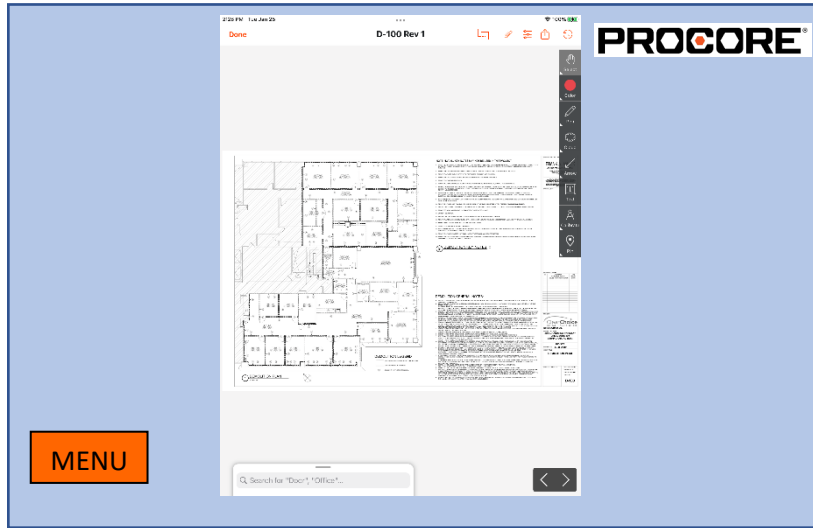
- Upload a large file
- Upload a drawing or plan
- Upload project photos

If you have a file that doesn't fit one of the shown folders, you should

- Select a shown folder anyway
- Upload it outside the folders
- Create a new folder

## Slide Title: Drawings (Screen 6)

### Media



### Narration

[2 min. narrated screen recording]

Drawings are your project plans or blueprints. These are uploaded by your project manager.

The most recent set of drawings, including any changes or revisions, will be stored in this section.

To access a plan, click the category, and then click on the image. You can zoom in on a plan by dragging with your fingers. Tap anywhere on the screen to see your tools and options.

You can use the markup tools on the right side to highlight an area with the cloud or write on the plan with the text tool.

### Interactions

User can click MENU and return to menu to select next tool.

Drawings are to scale, so you can use the calibrate tool to calculate a missing dimension.

### KNOWLEDGE CHECK (quiz)

Drawings are also called

- Project plans
- Blue prints
- Both of the above

To calculate a missing dimension, use what tool?

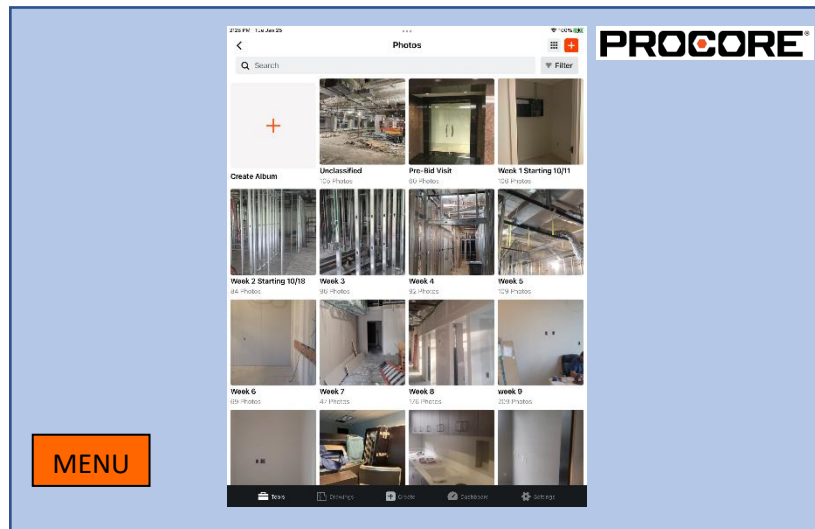
- Calculate
- Measuring tape
- Calibrate

To zoom in on a plan

- Drag it with your fingers
- Double-click it
- Click the Zoom button

## Slide Title: Photos (Screen 7)

### Media



### Narration

[2 min. narrated screen recording]

In this section, you'll upload photo proof of job progress. Superintendents usually create weekly or daily albums to hold photos. Some projects require a daily report, so you would create a daily album. For most projects, you'll create albums weekly for reports to show progress to the project owner.

Click on an album to see existing photos. Then click the back arrow to return to the photos screen.

To create a new album, click the plus above "Create Album." Give the album a name, and click Save. Open the album by clicking on it, and click the camera icon at top right to take a new photo straight into the folder, or click "Choose from Library" to upload existing photos.

Be sure to open a folder before you take a photo, or your image will go into the "Unclassified" folder.

### Interactions

User can click MENU and return to menu to select next tool.

### KNOWLEDGE CHECK (quiz)

For most projects, you will create albums

- Daily
- Weekly
- Monthly

Click the camera icon to

- Take a new photo
- Upload existing photos
- Both of the above

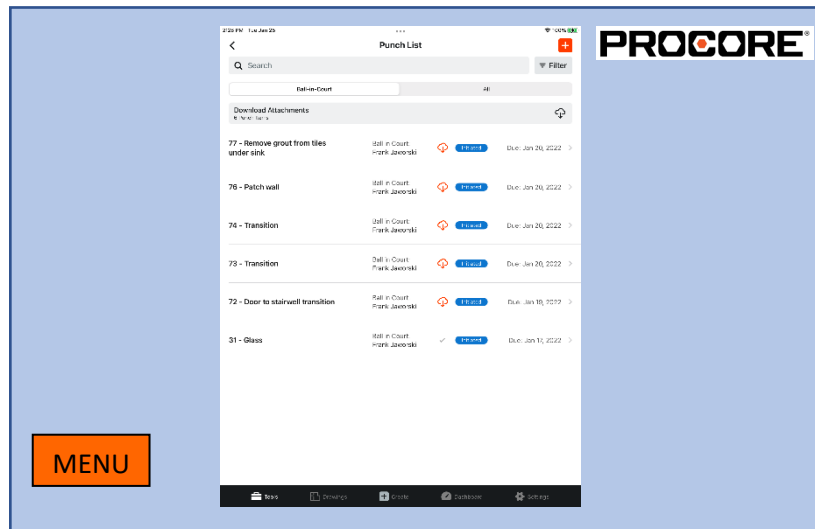
To create a new album

- Click the plus above "Create Album"
- Click the camera icon
- Type "New Album"



## Slide Title: Punch List (Screen 8)

### Media



### Narration

[2 min. narrated screen recording]

The punch list is most used at the end of a project to identify problems that need to be fixed. Punch list items are initiated by the superintendent, but assigned to whatever trade is responsible for fixing the problem.

To create a new punch list item, click the orange plus at top right and click "Create Punch Without a Template". Enter a title that identifies the problem. Then click the camera and take a photo of the condition of the problem. Specify the punch item manager and final approver. Click "Assignees" and select from the directory the person responsible for fixing the problem. Enter a due date and select the priority of the item. Then click Save at top right.

Your project manager will show you how to close punch list items.

### Interactions

User can click MENU and return to menu to select next tool.

### KNOWLEDGE CHECK (quiz)

The punch list is most used at

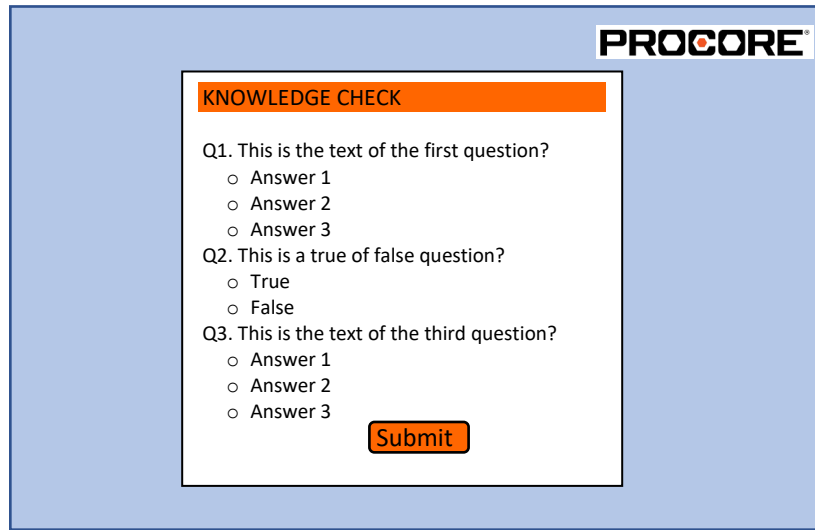
- The beginning of a project
- The middle of a project
- The end of a project

To create a new punch list item, select

- Create a Punch Without a Template
- Create a New Punch
- Create a Punch With a Template

## Slide Title: Quiz at end of tool instructions (Screens 9-14)

### Media



The screenshot shows a quiz interface with a light blue background. In the top right corner, the PROCORE logo is displayed. A white box in the center contains the quiz content. At the top of this box is an orange header with the text "KNOWLEDGE CHECK". Below the header are three questions, each with three radio button options. At the bottom of the white box is an orange "Submit" button.

**PROCORE**

**KNOWLEDGE CHECK**

Q1. This is the text of the first question?

- Answer 1
- Answer 2
- Answer 3

Q2. This is a true of false question?

- True
- False

Q3. This is the text of the third question?

- Answer 1
- Answer 2
- Answer 3

**Submit**

### Narration

### Interactions

Each “how-to” tool section will conclude with a 1-3 question quiz. Feedback will be given for each question. Points will not be tallied.