



Resource Management Enterprise Implementation

Your dedicated Project Team partners with you to implement Procore tools that optimize workforce management, leverage smarter forecasting, and improve transparency in tracking.

SCOPE OF WORK

- Project Coordination Services:** Project Coordinator will manage execution, including project planning, resource management, deliverable approvals, and budget/schedule oversight.
- Account Configuration:** Foundational configuration of in-scope tools, including project templates, company settings, workflows, permissions, and template builds.
- Discovery:** Procore-led discovery to identify business outcomes, processes, and strategy.
- Process & Configuration Advisement:** Guidance on best practices, configuration settings, and permissions aligned to desired processes and outcomes.
- Configuration Training:** Overview of Procore’s configuration architecture to support long-term platform administration.
- Analytics Setup:** Activation of the default Procore Analytics Reports and Dashboard, and training on navigating the tool.

DELIVERABLES

- Implementation Project Plan:** A customized schedule that guides through the services engagement.
- Configuration Workbook:** Document outlining agreed-upon configuration changes to the Procore platform.
- Discovery Summary:** PDF summarizing key discovery insights, including current and future state, to inform prioritization.
- Validation Script:** Procore-provided testing script to support user validation of in-scope tools.
- Project Closeout Documentation:** Summary of project performance, lessons learned, and recommendations.

PROCORE IMPLEMENTATION: IN-SCOPE TOOLS	
✓	Core Platform
✓	Timesheets
✓	Crews
✓	Equipment
✓	T&M Tickets
✓	Workforce Planning
✓	Materials
✓	Reports (up to 3 reports)
✓	Analytics for Resource Management

A program of self-guided learning and Procore-led implementation accelerates your project teams’ Procore adoption.

ASSUMPTIONS

(1) The Customer will be responsible for loading all data into the Procore system via the Procore user interface or Procore Imports tool. (2) The Customer will be responsible for configuring the Procore account outside of the in-scope configurations. (3) The Customer will be responsible for creating and updating their Procore Standard Operating Procedures. (4) All Services will be delivered in English. (5) The Customer is an active participant in the implementation for the duration of the process in order to facilitate the delivery of the Professional Services described herein. (6) Customer personnel must be available as needed to complete tasks assigned to them. If Customer resources are not available as needed, or there are organizational changes, it will negatively impact the delivery of services included in this package. (7) The project is a joint effort between Procore and Customer. (8) The setup of the Procore Analytics tool will only be delivered if the customer has acquired and enabled access to Microsoft Power BI.

EXCLUSIONS

The following are considered out of scope for the Professional Services described herein, unless explicitly stated: (1) Integration with third-party applications, tools, or systems not specifically outlined; (2) Data Migration, including data cleaning and data mapping; (3) Onsite Services; (4) Change management activities, including organization transition; (5) User Acceptance Testing; (6) System Administration



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A successful implementation depends on engagement from your team participate in consultations, validate configurations, and complete self-guided training. Procore’s Project Team will guide you through key milestones and deliverables.

RESOURCE MANAGEMENT ENTERPRISE	
PROCORE IMPLEMENTATION: SAMPLE VALIDATION SCRIPT	
✓	Equipment
✓	General Settings
✓	Setup Equipment Tool
✓	Add Tools to a Project
✓	Create Equipment Record
✓	Timesheets
✓	General Settings
✓	Create Classifications
✓	Create a Crew
✓	Add a Worker
✓	Create a Timesheet
✓	Review a Timesheet
✓	Approve a Timesheet
✓	T&M Tickets
✓	General Settings
✓	Create a T&M Ticket
✓	Edit a T&M Ticket
✓	Request a Signature on a T&M Ticket
✓	Sign a T&M Ticket

RESOURCE MANAGEMENT ENTERPRISE	
PROCORE IMPLEMENTATION: SAMPLE CONFIGURATION WORKBOOK	
DEFAULT CONFIGURATION	UPDATED CONFIGURATION
Equipment	
Equipment Category & Type	
Make Configurations	–
Equipment Status: Available (Available) In-Use (Onsite) Unavailable (Inactive)	–
Custom Fields & Statuses	Add Custom Field: • Approval Completed?
Timesheets	
Employee Tracking on Projects: Disabled	Enable
Timecard Privacy: Disabled	–
Timecard Rounding: Disabled	–
Timesheet Settings: Limit Available Cost Codes by Cost Type	Reference updated table at link
Default Work Week: Monday-Sunday	Monday-Friday
Pay Period Frequency: None	Biweekly
Custom Message for Late Time Submission	<i>This pay period has been closed. By submitting time late your Payroll Administrator will be notified. Please reach out to your payroll team with any additional details on why this was entered after the pay period.</i>

10-WEEK SAMPLE TIMELINE

