



Project Execution Essentials for Owners Implementation

Your dedicated Project Team partners with you to implement Procore tools that help minimize delays, strengthen project management, and reduce rework.

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.

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 |
| ✓ | Drawings |
| ✓ | Observations |
| ✓ | Correspondence (up to 2 templates w/o workflow or 1 template w/ workflow) |
| ✓ | Punch List |
| ✓ | Inspections (up to 5 templates) |

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.

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.

| PROJECT EXECUTION ESSENTIALS | |
|---|--|
| PROCORE IMPLEMENTATION: SAMPLE VALIDATION SCRIPT | |
| ✓ | Drawings |
| ✓ | General Settings |
| ✓ | Upload, Review, & Publish Drawings |
| ✓ | Markup a Drawing & Link an Item |
| ✓ | Upload & Compare Drawing Revisions |
| ✓ | Correspondence |
| ✓ | General Settings |
| ✓ | Create a Correspondence Item |
| ✓ | Respond to a Correspondence Item |
| ✓ | Punch List |
| ✓ | General Settings |
| ✓ | Create Punch List Template |
| ✓ | Create Punch List Item |
| ✓ | Notify Assignees of Open Punch List Item |
| ✓ | Respond to a Punch List Item |
| ✓ | Observations |
| ✓ | General Settings |
| ✓ | Create Observation Template |
| ✓ | Create an Observation |

| PROJECT EXECUTION ESSENTIALS | |
|--|--|
| PROCORE IMPLEMENTATION: SAMPLE CONFIGURATION WORKBOOK | |
| DEFAULT CONFIGURATION | UPDATED CONFIGURATION |
| Drawings | |
| Default Fieldset | Add Custom Field: <ul style="list-style-type: none"> Approval Completed? |
| Standard Level Users Delete Published Markup? No | - |
| Enable Drawings by Area? | Yes: By Building (set up per project) |
| Disciplines & Abbreviations | - |
| Drawing Log Subscribers | SOP decision for new projects |
| Observations | |
| Set new Observations to Private by default | - |
| Working Days to Complete | 7 days |
| Default Templates: Commissioning, Environmental, Quality, Safety, Warranty, Work to Complete | Disable: Commissioning, Environmental, Warranty |
| Custom Templates Created | Enable |
| Default Distribution | SOP decision for new projects |
| Default Fieldset | Removed Fields: <ul style="list-style-type: none"> Field 1 Field 2 |

8-WEEK SAMPLE TIMELINE

