

Section 01 30 10 – Administrative Requirements

COLLABORATION SOFTWARE

1. SUMMARY

- a. Contractor shall utilize web-based construction project management collaboration software commonly known as Procore (www.procore.com) to submit, track, distribute and fully collaborate on project documentation and action items. Wherein this specification references Procore it shall mean the California Military Department (CMD) Procore account.
- b. The intent of utilizing a web-based construction management application is to reduce cost and schedule risk, improve quality and safety, and maintain a healthy team dynamic by improving information flow, reducing non-productive activities, reducing rework and decreasing turnaround times.

2. SOFTWARE USAGE (including but not limited to)

- a. Daily Log
 - i. Using the Daily log tool within Procore, Contractor shall provide a separate daily log entry for the Superintendent, Site Safety and Health Officer and Quality Control team (as defined elsewhere in this contract). Should contractor already have an established process for documenting Daily work activities, Safety and QCM, the CMD may, at its sole discretion, permit the use of some or all of the contractors' reports provided they are uploaded daily into Procore Daily log tool as directed by the Department.
 - ii. Contractor shall upload pictures daily when work is performed. A reasonable number of pictures shall be taken to illustrate the work of the project but in any event no less than 10 photos daily, if work is interior and exterior there shall be 10 of each area of work. Photos shall be made available to the entire project team, loaded directly into the Procore platform, using the "Photos" tool and provided relevant naming convention to permit search features at a later date. These uploads shall be in addition to those required in the Section 01 30 00 (if addressed) and elsewhere in the contract.
- b. Directory
 - i. Contractor shall input and update (as required) the Procore project directory to include all key project team members. As directed by the CMD, subcontractors may not be required to participate within the Procore project. Should CMD require participation of subcontractors withing Procore, participation will be at no additional cost or expense.
- c. Deficiency Tracking
 - i. Contractor shall respond promptly to deficiencies and observations identified in PROCORE and do so in accordance with the terms and conditions of this contract.
- d. Documents
 - i. Contractor will, as directed by the Department, utilize the Procore "Documents" storage location for miscellaneous project documents. Contractor shall not upload documents unless directed by the Department. Documents loaded shall have a naming convention of title/subject to permit search functions of the Procore system.
 - ii. Contractor shall use proper version control and check out files, without compromising access to all previous revisions.

e. Drawings

- i. Project Drawings will be located in the Drawings tool of Procore. Any drawing revisions will be made in Procore and it shall be contractors' sole responsibility to stay abreast of any changes including contract modifications. Contractor shall, as directed by the Department, maintain the contractually required "as built" drawings in the Procore.

f. Invoicing

- i. If requested by the Department, the Contractor shall utilize Procore Invoicing tool for invoice submission. Invoicing shall be submitted as further defined in this contract using AIA forms uploaded as attachments to each submission.

g. Inspections

- i. Contractor shall utilize the Procore platform as directed by CMD for all project inspection requests. Inspection process shall be as defined elsewhere in the contract documents.

h. Meetings

- i. Contractor shall utilize Procore Meetings tool to create, edit and post meeting minutes. Prior Meeting minutes shall remain accessible through the duration of the project. At the sole discretion of the department, the contractor may be permitted to utilize existing meeting practices if they meet the intent of the government, in which case contractor shall ensure a record copy of any such meeting is posted in Procore as directed by the department.
- ii. Contractor will record and distribute meeting minutes and action items via the Meetings tool within the Procore software.

i. Mobile Accessibility

- i. Contractor shall provide at least one mobile (Apple or Android) tablet or computer (phone is not acceptable) with the Procore App installed for the use of Contractor's team for the duration of the project. Contractor is responsible for ensuring a reliable internet connection for the device.

j. Photos

- i. Contractor shall utilize Procore Photos tool or other tools as directed to upload and view photos from web and mobile.
- ii. Contractor shall utilize Procore to markup or comment on photos to clarify the intent of RFI's etc.

k. Punchlist

- i. All punch list items will be managed through the Procore software.
- ii. Contractor shall utilize Procore to create and manage punch list items utilizing mobile products and link them to specific locations on the drawings.
- iii. Punchlist items will be created by the Contractor while walking with the CMD and applicable consultants.
- iv. Contractor shall utilize Procore to distribute punch list items and to mark them as resolved with photographic proof of resolution as required.
- v. Unless otherwise agreed in writing, Punchlist Items may not be closed while a representative from the CMD or applicable consultant acting on behalf of CMD is not present.

I. Requests for Information (RFIs)

- i. Contractor shall utilize the RFI tool within Procore to create and process RFIs with assignees, due dates and attachments.
- ii. Contractor shall fully complete the RFI tool request form, posting the RFI to the drawing(s) and link all relevant specifications, photos, etc. in the Procore RFI tool whenever submitting RFI's to the CMD. Failure to do so will result in rejection of the review and be deemed a review by the CMD as defined elsewhere in the contract documents.
- iii. If project includes design, drawings will be provided to the CMD in accordance with the following requirements:

<https://support.procore.com/faq/how-can-i-improve-the-accuracy-of-ocr-on-my-drawings>

m. Schedule

- i. Contractor shall provide native files as required by Procore and as defined elsewhere in the contract documents. Procore accepts typical scheduling software such as Microsoft Project, Primavera P3, or Primavera P6.

n. Specifications

- i. Project Specifications will be uploaded into Procore. Any project revisions will be made in Procore and it shall be the contractors' sole responsibility to stay abreast of any changes including contract modifications.

o. Submittals

- i. Contractor shall maintain the submittal register in Procore of all submittals as directed by the CMD.
- ii. Contractor shall submit all submittals through the Procore "Submittals" tool utilizing the multi-step approval workflows predefined by the CMD and in accordance with the terms provided elsewhere in the contract documents.
- iii. Contractor shall fill out the submittals completely. A failure to do so will result in automatic rejections and be deemed a "review" as provided elsewhere in the contract.

3. TECHNOLOGY

- a. Contractor shall have PDF and the Microsoft suite software as they are a requirement of Procore. Attachments to RFIs, Submittals, Meetings, etc. should be uploaded in PDF as required by Procore.

4. TRAINING AND SUPPORT

- a. Contractor shall designate a minimum of one primary and one backup staff person to administer the contractors' Procore responsibilities of this project. Those personnel will be trained as defined below and shall not rely on the CMD staff for training.
- b. The Contractor shall ensure adequate training of all staff utilizing the Procore software. Selected staff must complete all required training necessary to fully function in the system and on this project. Training is offered in the form of self-paced learning videos as well as interactive webinars. Training is free and can be found at:

<https://education.procore.com/page/procore-certification-general-contractor-client>

- c. The contractor shall host a kickoff meeting with the CMD and applicable team members at the beginning of the project to discuss how the software will be used, routing & naming protocols, etc. Project Subcontractors should not be part of the Procore platform unless otherwise directed by the Department.

5. PROCEDURES

a. RFIs and Submittals

- i. The Contractor will be responsible for submitting all RFIs and Submittals through the Procore software tools and assigning them to the appropriate parties using predetermined workflows. All data fields shall be filled out completely and routed as defined in the project kickoff/Job Start meeting.
- ii. All project team members including Architects / Engineers / Consultants etc. are responsible for posting all responses to these items via the Procore software, including uploading all relevant attachments.
- iii. The Contractor will, as directed by CMD, distribute responses to all affected subcontractors and confirm agreement with the response by "close and distribute" action on the item.

b. Construction Documentation

- i. The Contractor will construct pursuant to Drawings, Specifications and Documents in the software and ensure that the current version of all applicable construction documentation is available to the entire team within Procore software.
- ii. The Contractor will ensure that all RFIs which modify the current drawings are posted/linked to the drawings and available in the Procore software immediately upon response from the department.

6. COST

- a. The Contractor's bid proposal shall be inclusive of full utilization of the Procore software costs. The program is hosted by the CMD and no adjustment to the contract will be made for utilization.