

Procore's Exhaustive User Permission Matrix – Project Level

PROJECT LEVEL					
<i>(Last Updated on 9/19/14)</i>		User Permission			
Tool (Tab)	Task	Read	Standard	Admin	Superuser
Home	Initiate Screen Share				x
	View tab	x	x	x	
	View "your" items in Overview and Recently Changed Item	x	x	x	
	Access Home Configuration Screen			x	
	Change project address			x	
	Add/Modify Persistent Project Message	.		x	
	<i>Configure Advanced Settings</i>			x	
Email	View (Public) Email	x	x	x	
	View (Private) Email	x	x	x	
	View all public and private emails			x	
	Create Email		x	x	
	Reply to an Email that Originated in the Emails Tool...	x	x	x	
	Create Email Correspondence to any user...	.	x	x	
	Reply to or Forward an Email in the Emails Tool		x	x	
	Receive an Email	x	x	x	
	Delete Email			x	
	Mark email as private			x	
	Create Tag			x	
	Archive/Unarchive Email			x	
	View/Retrieve Emails from Recycle Bin			x	
	Apply Tag		x	x	
	Delete Tag			x	
	<i>Configure Advanced Settings</i>			x	
Bidding	Create Bid Package			x	
	Edit Bid Package			x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Submitting a Bid			x	
	Search for Bidders			x	
	Delete a Bid			x	
	Invite and Reinvite Users to Bid			x	
	Convert Bid to Draft Subcontract			x	
	<i>Configure Advanced Settings</i>			x	
Prime Contract	View Prime Contract	x	x	x	
	Create Prime Contract			x	
	Edit Prime Contract			x	
	Create Potential CO		x	x	
	Create CO Request			x	
	Create Prime Contract CO			x	
	Create Pay App			x	
	Create Payment			x	
	Email Contract		x	x	
	Delete Prime Contract			x	
	View Change History			x	
	Enable Earned Value				x
	<i>Configure Advanced Settings</i>			x	
Commitments	Create Purchase Order			x	
	Create Subcontract			x	
	View all Subcontracts and Purchase Orders			x	
	View Subcontract	x	x	x	
	View Purchase Order	x	x	x	
	Create a Draw Request		x	x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Add Line Item to SOV			x	
	Add Related Item			x	
	Email Subcontract		x	x	
	PDF Subcontract	x	x	x	
	Advanced Config Settings			x	
	Be designated as an approver of a CCO	x	x	x	
	Email Forward a Commitment		x	x	
	Edit a Commitment		x	x	
	Delete a Commitment			x	
	Create and Edit CCO			x	
	Add Payments Issued			x	
	Customize PDF				x
	<i>Configure Advanced Settings</i>			x	
Budget	Lock/Unlock Budget			x	
	Create New Budget Line Item		x	x	
	Delete New Budget Line Item		x	x	
	Change Budget Values		x	x	
	Import Budget (csv)		x	x	
	View Buyout Summary Report			x	
	<i>Configure Advanced Settings</i>			x	
Change Orders	View Change Orders		x	x	
	Create and Print PDF of CO	x	x	x	
	Be designated as an approver of a CO	x	x	x	
	Email Forward CO		x	x	
	Edit and Delete Change Orders			x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Allow new Change Orders without a contract				x
	<i>Configure Advanced Settings</i>			x	
RFIs	Create RFI		x	x	
	Edit RFI			x	
	Close RFI			x	
	Reopen RFI			x	
	Delete RFI			x	
	Respond to an RFI		x	x	
	Email/Forward RFI		x	x	
	View (Public) RFI	x	x	x	
	View (Private) RFI	x	x	x	
	Export RFI Log to PDF/CSV	x	x	x	
	Export Individual RFIs to PDF/CSV	x	x	x	
	Be assigned an RFI		x	x	
	Assign RFI to Standard Users			x	
	Move RFI to Recycle Bin			x	
	Retrieve RFI from Recycle Bin			x	
	Allow Multiple Questions in RFIs				x
	Customize PDF				x
	<i>Configure Advanced Settings</i>			x	
Submittals	Create Submittal		x	x	
	Edit Submittal			x	
	Create Package			x	
	Respond to a Submittal		x	x	
	Be assigned a Submittal (i.e. Approver)		x	x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	View (Public) Submittal	x	x	x	
	View (Private) Submittal	x	x	x	
	Create Revision		x	x	
	Edit Package			x	
	Bulk Edit of Package			x	
	Submit Submittal Package for Review		x	x	
	Delete a Submittal			x	
	Delete a Package			x	
	Email/Forward Submittal		x	x	
	Export Submittal Log to PDF/CSV	x	x	x	
	Export Individual Submittals to PDF/CSV	x	x	x	
	Distribute Submittal			x	
	Edit a Response to a Submittal			x	
	Create/Edit/View a Custom Submittal Report			x	
	Delete a Custom Submittal Report			x	
	Download All Attachments of a Submittal	x	x	x	
	Generate QR Code	x	x	x	
	Import Submittal Template				x
	Enable Sequential Approval Workflow:				x
	Enable Sequential Approval Reassignment				x
	Enable Distributing Submittal Responses				x
	Enable Submittal Bulk Editing				x
	Use Spec Section On List Screen? (Will Hide Cost Code)				x
	Enable QR Codes on PDF (requires custom template)				x
	Enable Submittal Schedule Calculations				x
	Enable Mass Review of Submittals in a Package				x

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	<i>Configure Advanced Settings</i>			x	
Transmittals	Create Transmittal		x	x	
	Edit Transmittal			x	
	- Add Item			x	
	- Make Private			x	
	Email Transmittal		x	x	
	Delete Transmittal			x	
	Customize PDF				x
	<i>Configure Advanced Settings</i>			x	
Punch List	Create Punch List Item		x	x	
	Email Punch List Item(s)		x	x	
	View all Punch List Items	x	x	x	
	Export Punch List Log (pdf/csv)	x	x	x	
	Export Single Punch List Item (pdf only)	x	x	x	
	Create a Punch List Item		x	x	
	Close Punch List Item		x	x	
	Delete Punch List Item			x	
	View Change History (tab) of Single Punch List Item			x	
	Edit Punch List Item		x	x	
	Change Status of PL Item		x	x	
	Add a Response to a PL Item		x	x	
	Edit Response of PL Assignees			x	
	Add Attachments to a PL Item		x	x	
	Retrieve a Deleted PL Item			x	
	Upload Punch List Items				x

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	<i>Configure Advanced Settings</i>			x	
Meetings	Create a Meeting			x	
	View a Meeting	x	x	x	
	Edit a Meeting			x	
	Add/Edit Scheduled Attendees			x	
	Add Attachment			x	
	Add Uncategorized Item			x	
	Create Category			x	
	Email Meeting			x	
	Distribute Agenda			x	
	Convert to Minutes			x	
	Export Meeting as a PDF	x	x	x	
	Follow-up Meeting			x	
	Customize PDF				x
	Delete a Meeting			x	
	<i>Configure Advanced Settings</i>			x	
Schedule	Create a Calendar Item		x	x	
	Request Schedule Change		x	x	
	Email Scheduled Task		x	x	
	Edit Schedule Task		x	x	
	Delete Calendar Item			x	
	Enable Scheduling Integration For Calendar Admins				x
	<i>Configure Advanced Settings</i>			x	
Daily Log	Email Daily Log		x	x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Copy Daily Log			X	
	Add Item		X	X	
	Enable Related To			X	
	<i>Configure Advanced Settings</i>			X	
Reports					
	Add Custom Report				X
	<i>Configure Advanced Settings</i>			X	
Project Reports	View Assignment Report			X	
	View Cost Code Report			X	
	View User Sessions	X	X	X	
	View RFI Delays	X	X	X	
	View Submittal Approvers' Response Time	X	X	X	
	View Punch List Delays	X	X	X	
	View Vendor Insurance	X	X	X	
	View Watch Folders	X	X	X	
	View Timecard Reports	X	X	X	
Contract and Change Mgmt Reports	View Committed Cost Report	X	X	X	
	View Change Order Reconciliation Report	X	X	X	
	View Overdue Prime Contract Change Orders	X	X	X	
	View Overdue Commitment Change Orders	X	X	X	
	View Unexpected Prime Contract Change Orders	X	X	X	
Schedule Reports	View ALL	X	X	X	
Daily Log Reports	View ALL	X	X	X	
Photos	Create Album		X	X	
	Resize thumbnails of albums	X	X	X	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Change Order of Albums (Drag and Drop)			x	
	Download Photo	x	x	x	
	Upload Photos		x	x	
	Export Photo as PDF	x	x	x	
	Email Photo (Outbound)		x	x	
	Email Photo (Intbound)			x	
	Set (Photo) as Project Photo			x	
	Set (Photo) as Album Cover			x	
	Rotate Photo			x	
	Print Photo		x	x	
	Play Slideshow	x	x	x	
	Create an Album		x	x	
	Change an Album			x	
	Delete an Album			x	
	Make a Photo Private			x	
	Add Description to Photo			x	
	Post a Comment on a Photo		x	x	
	Delete a Comment on a Photo			x	
	Favorite Photo (Star)			x	
	<i>Configure Advanced Settings</i>			x	
Drawings	Upload Drawings		x	x	
	Download Drawings	x	x	x	
	Download with Markup	x	x	x	
	Email Drawings		x	x	
	Add Drawing Markups	x	x	x	
	Publish Markups		x	x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Delete Markups (Published Layer)			x	
	Delete Markups (Personal Layer)	x	x	x	
	Add a Drawing Link	x	x	x	
	Email Drawings		x	x	
	Edit a Drawing			x	
	Enable/Disable Markup				x
	<i>Configure Advanced Settings</i>			x	
Documents	Download Documents (view and print)	x	x	x	
	Add/Edit File Description			x	
	Import Options		x	x	
	Create Sub Folder		x	x	
	Delete Document			x	
	Upload Files into Folder		x		
	Manage Folder Permissions			x	
	Manage File Permissions			x	
	Check In/Out File		x	x	
	Reset Checkout			x	
	Upload a New Version		x	x	
	Download Previous Version		x	x	
	Add Related Item			x	
	Track Folder		x	x	
	Track a File		x	x	
	Lock/Unlock File			x	
	Email File/Folders		x	x	
	Transfer File			x	
	Review Transferred File			x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Enable Inbound Faxing				x
	Change/Set Directory for Received Faxes				x
	<i>Configure Advanced Settings</i>			x	
Directory	Add Person			x	
	Add Company			x	
	Add Distribution Group			x	
	Reactivate a User			x	
	Inactivate a Company			x	
	Reactivate a Company			x	
	Invite User			x	
	Re-invite User			x	
	Remove a User from a Project			x	
	Download vCard			x	
	Import People from csv				x
	Import Companies from csv				x
	<i>Configure Advanced Settings</i>			x	
Admin					
Project Settings >					
General	Deactivate (Delete) Project			x	
	Upload Project Logo			x	
	Remove Project Logo				x
Active Tabs	Set Active Tabs			x	
Cost Codes	Add New Cost Code			x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Delete Cost Code			x	
	Delete All Cost Codes			x	
	Change Cost Code Description at Project Level			x	
	Copy Cost Codes			x	
	Copy from Another Project			x	
	Add Division			x	
Cost Code Category Assignments	Assign Cost Code Category Assignments				x
Spec Sections	Add Specification			x	
Locations	Add Location			x	
Equipment	Add Equipment			x	
Tab Configuration					
Schedule	Enable Scheduling Integration For Calendar Admins				x
CUSTOM Tab					
Adv Settings	Form Editor				x
	List View Editor				x
	Customize PDF				x