

# Procore's Exhaustive User Permission Matrix – Company Level

COMPANY LEVEL					
<i>(Last Updated on 9/19/14)</i>		User Permission			
Tool (Tab)	Task	Read	Standard	Admin	Superuser
Programs	N/A				
Portfolio	Add New Project	x	x	x	
	View Project (they have access to)	x	x	x	
	View ALL projects			x	
	Configure View Access			x	
	Configure Filter Options			x	
	Create Custom Portfolio Reports			x	
	Edit Custom Reports			x	
	View Custom Reports	x	x	x	
	<i>Configure Advanced Settings</i>				x
Planroom	Submit Bid	x	x	x	
	View Planroom tab	x	x	x	
	View all Bid Pkgs			x	
	View Bid Pkg		x	x	
	<i>Configure Advanced Settings</i>			x	
Timecard	View their own timecard entries	x	x		
	Create their own Timecard entries		x		
	Edit Timecard entries			x	
	Create TC entries for all users			x	
	<i>Configure Advanced Settings</i>			x	
Schedule	View all scheduled tasks	x	x	x	
	View all scheduled tasks - ALL projects			x	
	Create Calendar Items		x	x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	<i>Configure Advanced Settings</i>			x	
Directory	View all Contacts, Companies, Dist. Grps	x	x	x	
	Export Contact Info (pdf/csv)	x	x	x	
	Add Person			x	
	Add Company			x	
	Inactivate Person			x	
	Add Distribution Group			x	
	Import People from csv				x
	Import Companies from csv				x
	Merge Contacts				x
	Merge Vendors				x
	Allow user to create new projects			x	
	<i>Configure Advanced Settings</i>			x	
Reports	Create New Report (view and print)*	x	x	x	
	Create User Sessions Report			x	
	View "Account Health" Report				x
	<i>Configure Advanced Settings</i>			x	
Documents	Download Documents (view and print)	x	x	x	
	Email Document		x	x	
	Add/Edit File Description			x	
	Create Sub Folder		x	x	
	Delete Document			x	
	Upload Files into Folder		x	x	
	Manage Folder Permissions			x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Manage File Permissions			x	
	Check In/Out File		x	x	
	Upload a New Version		x	x	
	Download Previous Version	x	x	x	
	Track a File	x	x	x	
	Lock/Unlock File			x	
	<i>Configure Advanced Settings</i>			x	
Workflow	Create Workflow				x
	Edit Workflow				x
	Create State				x
	Creat User Role				x
Admin					
Company Settings	Edit Company Name			x	
	Set Time Zone				
	Add Employer Identification Number			x	
	Display Project Number in Change Project Drop-Down List			x	
	Enable/Disable Surveys in Procore			x	
	Enable Avatars			x	
	Upload Company Logo			x	
	Add Office			x	
	Add Project Stage			x	
	Add Project Type			x	
	Add Department			x	
	Add Program			x	
	Enable Terms and Conditions			x	

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Vendor Insurance Notifications			x	
(Superuser Settings)	Turn on Custom Fields				x
	Enable Daily Construction Report Log				x
	Enable Manual Project Latitude/Longitude Override				x
	Enable Submittal log Custom Reports				x
	Enable Company Portfolio Custom Reports				x
	Enable CSRF Protection				x
	Stream Bid Documents				x
	Enable Box Integration				x
	Enable Quick Add of New Contacts				x
	Enable Permission Upgrade for Existing Contacts				x
	Enable Permission Upgrade for Existing Contacts				x
	Enable Chat				x
	Dictionary				x
	Account Active				x
	Demo Company				x
	Salesforce Account Id				x
	Disallow Project Creation				x
	Maximum # Active Projects				x
	Currency Symbol				x
	Use 24 Hour Clock				x
	Use International Date Format				x
	Public Company Site Enabled				x
	Public Committed Costs Enabled				x
	Allow users to copy contracts across projects on project creation				x
	Allow Inbound Emails To Any Procore Object				x

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Enable Caching of My Open Items				x
	Enable My Open Items on Company Home				x
	Zendesk Organization Id				x
	Enable Checkin / Checkout Of Docs				x
	Enable Outdated Browser Warnings				x
	Enable Proest Import				x
	Use Strict File Uploading				x
	Enable Timberline Vendor ID				x
	Enable Timberline Integration				x
	Enable Parent Job				x
	Enable Company Level Open Submittals Report				x
	Enable Strict Passwords				x
	Enable BCC				x
	Enable Mechanical Turk For All New Projects				x
	Enable Mechanical Turk For All Existing Projects				x
	Enable Sequential Approvers For All New Projects				x
	Enable Sequential Approvers For All Existing Projects				x
	Enable Submittals Division Filter				x
	Alternate Name For Cost Codes				x
	Logout Redirect				x
	Enabled Tabs				x
	New Custom Tab				x
(Outbound Email Settings)	Change Default Email Settings				x
(Enable Project Templates)	Enable Project Templates				x

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
Project Settings	Select Available Project Tools				x
	Add New Custom Project Tab				x
	Configure Default Project Settings			x	
Project Roles	Add New Project Role			x	
Project Dates	Add New Project Date			x	
Cost Codes	Add Company-specific Cost Code			x	
	Add Company-specific Division			x	
	Edit Cost Codes and Descriptions			x	
Contract Configuration	Add New Cost Code Category and Abbreviation			x	
	Enable 3rd party contract integration via SFTP server				x
	Disable Auto-Numbering For Commitment Contracts				x
Bidding Configuration	Create Custom Bid Email			x	
Submittals Configuration	Create Custom Submittal Type			x	
	Create a Custom Submittal Log Status			x	
Trade Configuration	Create New Trade Configuration			x	
PDF Templates	Create New PDF Template				x
<i>CUSTOM Tab</i>					
Adv Settings	Display workflow columns on list page				x

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Tool (Tab)	Task	Read	Standard	Admin	Superuser
	Plural Tab Name				x
	Enabled on Mobile?				x