

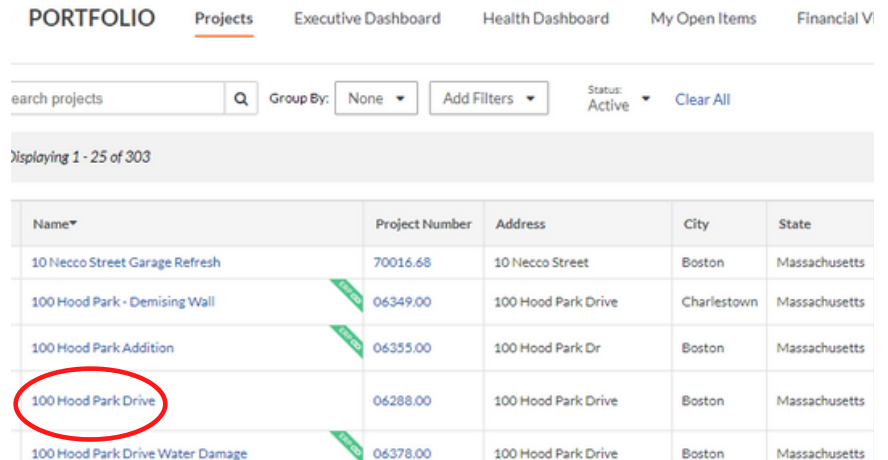
Module 8

Manage Directory/ Permissions

1

- Log into Procore

- Click on the name of the project on the homescreen

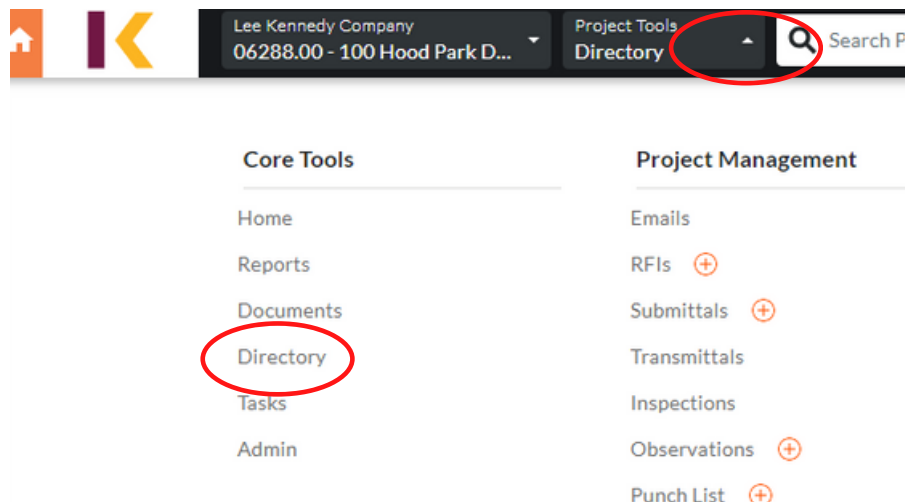


The screenshot shows the Procore 'PORTFOLIO' page with the 'Projects' tab selected. At the top, there are navigation links for 'Executive Dashboard', 'Health Dashboard', 'My Open Items', and 'Financial V'. Below these is a search bar for 'Search projects' and a 'Group By' dropdown set to 'None'. A table displays a list of projects, with the row '100 Hood Park Drive' circled in red. The table has columns for Name, Project Number, Address, City, and State.

Name	Project Number	Address	City	State
10 Necco Street Garage Refresh	70016.68	10 Necco Street	Boston	Massachusetts
100 Hood Park - Demising Wall	06349.00	100 Hood Park Drive	Charlestown	Massachusetts
100 Hood Park Addition	06355.00	100 Hood Park Dr	Boston	Massachusetts
100 Hood Park Drive	06288.00	100 Hood Park Drive	Boston	Massachusetts
100 Hood Park Drive Water Damage	06378.00	100 Hood Park Drive	Boston	Massachusetts

2

- Click on “Project Tools”
- Under “Core Tools”, click on “Directory”



The screenshot shows the Procore interface for a specific project. The top navigation bar includes the company name 'Lee Kennedy Company' and the project name '06288.00 - 100 Hood Park D...'. The 'Project Tools' menu is open, showing a list of options. The 'Directory' option under the 'Core Tools' section is circled in red. Other options include 'Home', 'Reports', 'Documents', 'Tasks', 'Admin', 'Emails', 'RFIs', 'Submittals', 'Transmittals', 'Inspections', 'Observations', and 'Punch List'.

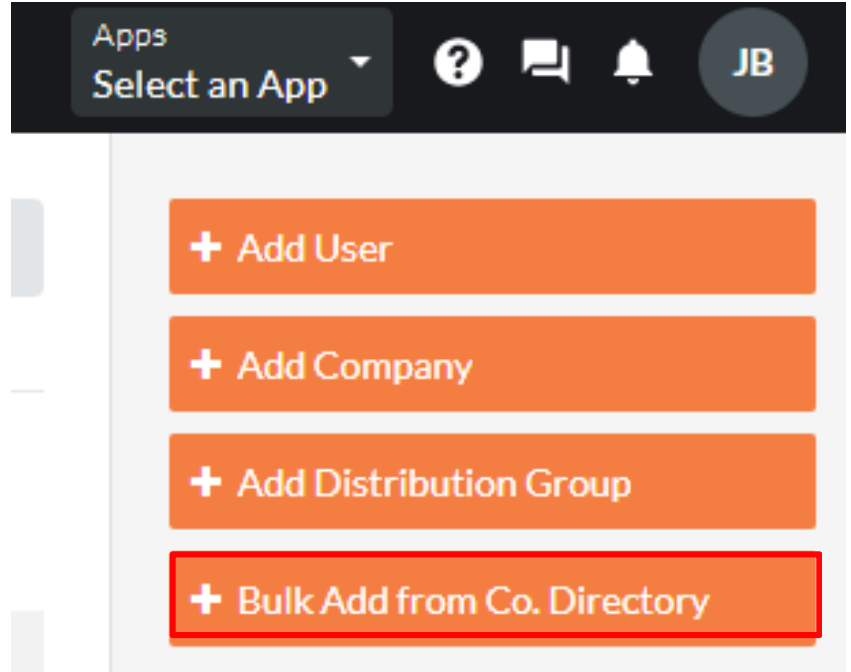
Core Tools	Project Management
Home	Emails
Reports	RFIs (+)
Documents	Submittals (+)
Directory	Transmittals
Tasks	Inspections
Admin	Observations (+)
	Punch List (+)

Module 8

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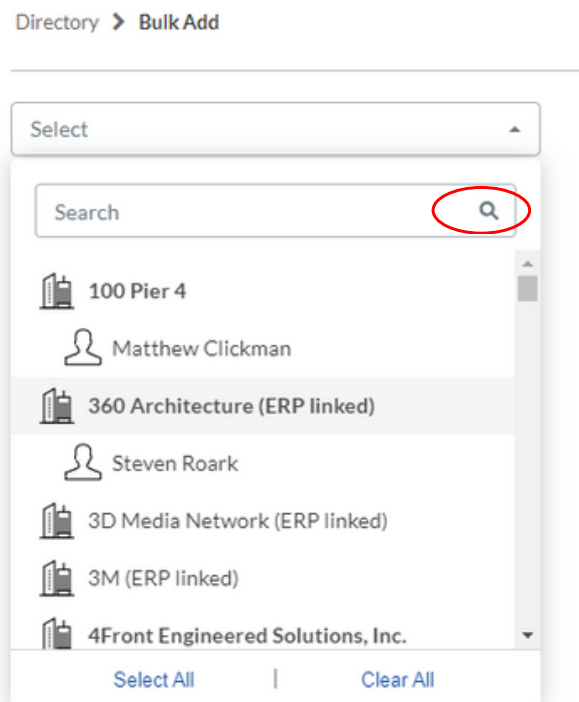
3- Adding LKCo Team Members

- Click on “+ Bulk Add from the Co. Directory” on the right-hand side of the screen



4- Adding LKCo Team Members

- Use the search box to search for the team member's name

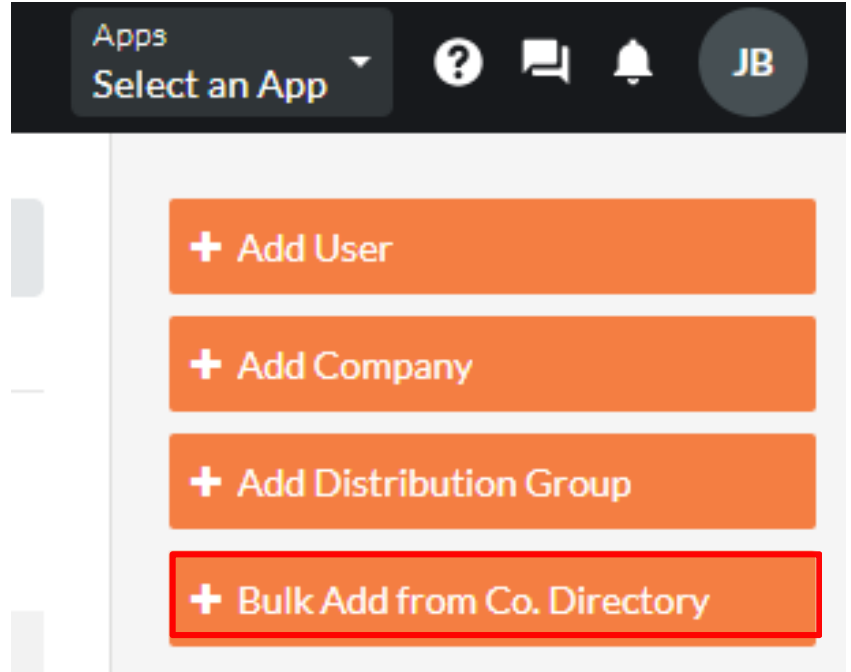


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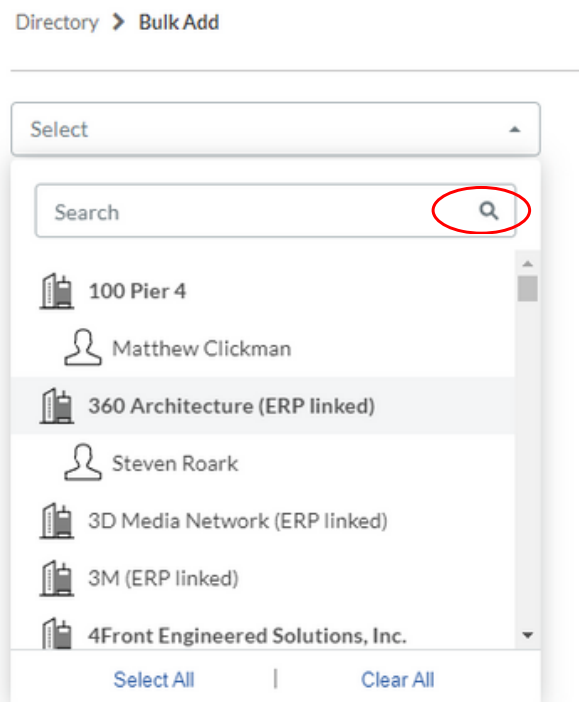
3- Adding LKCo Team Members

- Click on “+ Bulk Add from the Co. Directory” on the right-hand side of the screen



4- Adding LKCo Team Members

- Use the search box to search for the team member's name



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5- Adding Owners/ Design Team Members

- Click on “+ User” on the right-hand side of the screen

The screenshot shows a dark top navigation bar with the text 'Apps Select an App' and a dropdown arrow, followed by icons for help, chat, and notifications, and a circular user profile icon labeled 'JB'. Below this is a light gray sidebar containing four orange buttons with white text: '+ Add User', '+ Add Company', '+ Add Distribution Group', and '+ Bulk Add from Co. Directory'. The '+ Add User' button is highlighted with a red border.

6- Adding Owners/ Design Team Members

- Input:
 - First Name
 - Last Name
 - Email Address
 - Permission Template

The screenshot shows a form titled 'Add User To 100 Hood Park Drive' with a close button. It contains several input fields: 'First Name', 'Last Name', 'Email Address', 'Permission Template' (with a dropdown menu showing 'Apply Permission Template List'), and 'Is Employee Of Lee Kennedy Company?' (with a dropdown menu showing 'No'). Below these fields is an 'Advanced' section with a text input field and a note: 'To locate an existing user by their company name, start typing the company name here, and then select the user:'. At the bottom, there is a 'Privacy Policy' link, a '* required field' note, and 'Clear' and 'Add' buttons.