

Procore Integration Guide

Version 3.0



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Overview

Safe Site Check In data is integrated using Procore integration points. The initial integration setup requires a technical resource on your end who is familiar with your Procore implementation. Your Safe Site Support team will work with you as part of the initial setup and ongoing needs. They can be reached at: support@safesitecheckin.com

Once the initial integration is done, your business users can maintain the integration. You must have the following activated to make a connection into Procore.

1. Procore Tools - Daily Log
2. Procore tools - Directory
3. A Safe Site Check In License option that includes Procore Integration

Your Safe Site Support team will work with you as part of the initial setup and ongoing needs. They can be reached at: support@safesitecheckin.com

The following Procore integrations are available from the Safe Site Check In app:

1. **Daily Log - Manpower.** Aggregated data by Company from check ins
2. **Daily Log - Visitors.** Individual check in records

Setting Up The Integration

1. Go to the Procore Marketplace and find the Safe Site Check In app at <https://marketplace.procore.com/>
2. Select the app to install it.

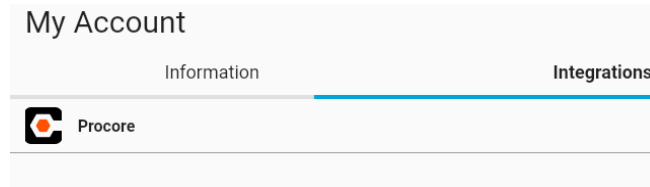
Note, the install will add the Safe Site Check In user to your account with the appropriate company and project permissions that you review during the install process. You should not alter the user because it may cause the integration to fail.

Setting Up Safe Site Check In

After installing the app from the marketplace, use the Safe Site Check In **Admin App** to enter the following information:

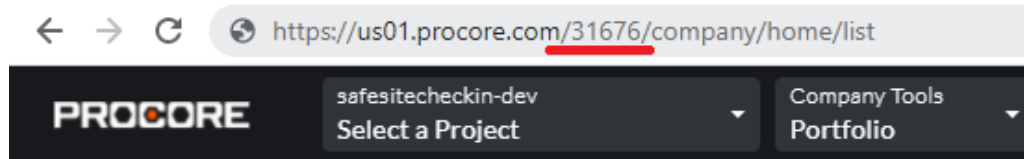
1. Your Procore Company Id:
 1. Select the **Account** item in the left panel.
 2. Select the **Integrations** Tab

You should see the following:



3. Select the **Procore** item
4. Enter your Procore **Company ID**

Note: your Procore Admin should be able to provide you with the Company ID. This can be found from the Procore web home page address in your browser (as underlined in red below) if you are signed into Procore.



5. Select the **Test Connection** button to verify that the connection works. Within seconds, you should see the following:

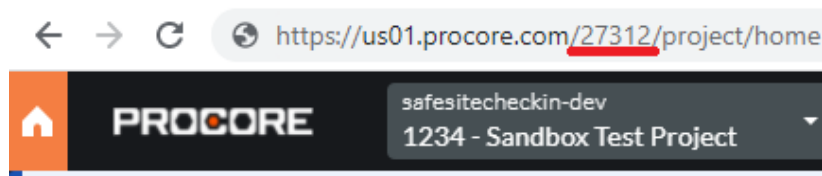


Please contact Safe Site Check In support if you see error messages.

2. A Procore **Project ID** that is associated with a Safe Site Check In **Site**. Depending on your application setup, you may have one or more Sites associated with Locations in a Procore Project. You must have completed step one above to continue:

1. Select the **Sites** item in the left Panel
2. Select the Site that will be integrated to Procore.
3. You will see a **Procore Project ID** field. Enter the ID number.

Note: your Project ID can be found if you are signed into the Procore app and looking at a Project web page address in your browser (as underlined in red below) if you are signed into Procore.



4. **Save** your changes. Note, if the Project ID is not valid, an error message will appear.
3. A list of Company names loaded into Safe Site Check In. This is not mandatory, but strongly recommended. When visitors check in, they need to provide their company name. They can either type in a name or pick from a list of companies that is loaded into the Safe Site Check In app..

If the visitor picks from a list that matches company names in Procore, then Safe Site Check In data is loaded into the corresponding company in Procore.

If the visitor types in a name, it may not match a corresponding company name in Procore. When this happens, the Safe Site Data is loaded, however, it is put into Procore Manpower logs with a value of *No Company*.

4. A list of Location names loaded into Safe Site Check In. This is not mandatory, but if you have locations within each job site that are defined for each Project in Procore, the Manpower logs with location data from check in data . When visitors check in, they need to provide their intended location within a site. They can either type in a name or pick from a list of locations that is loaded into the Safe Site Check In app..

If the visitor picks from a list that matches location names in Procore, then Safe Site Check In data is loaded into the corresponding company in Procore.

Note: If you used the Procore integration feature prior to May 21, 2021 then you must re-register each Site with its associated Procore Company Project ID. See the troubleshooting section of this guide for more information.

Automatic Company Name Matching

As of Safe Site Check In Version 8.1 (May 21, 2022), the company names that are recorded during the check in process can be linked directly to Procore.

1. From the admin.safesitecheckin.com app, select the Customize item from the left panel.
2. Select a check in flow, and the Contact Info tab

The screenshot shows the 'Contact Info' tab selected. It features an 'Add Field' button and three input fields:

- Flow Info
- Contact Info**
- Additional Info

Fields listed:


- == Your Name *
- == Phone number *
- == Company Name *

3. Select the **Company Name** field to edit how it works.

< Visitor Check In Experience

Edit Contact Info - Company

Make this field Required

Visitor Action
Pick a Procore Vendor 

Name
Company

English | Español

Helper text
Who do you work for?

English | Español

Visitor can enter their own item

Visitor can only search for an item

4. From the Visitor Action list, select the **Pick a Procore Vendor** item. We recommend that you check the box for **Visitor can only search for an item** option. This prevents visitors from seeing the full list of company names.
5. **Save** the setting, then test that the app works as expected by trying a check in.


Automatic Location Name Matching


As of Safe Site Check In Version 8.1 (May 21, 2022), the destination (location) names that are recorded during the check in process can be linked directly to Procore.

1. From the admin.safesitecheckin.com app, select the Customize item from the left panel.
2. Select a check in flow, and the Additional Info tab

Flow Info Contact Info **Additional Info**

Add Field

=  Destinations *

=  Activities

3. Enable the the **Destinations** field
4. Edit how it the field works.

Edit Additional Info - Destinations


Make this field Required

Name

 English | Español

Helper text

 English | Español

Visitor Action
 Pick a Procore Location 

Visitor can enter their own item

Visitor can only search for an item

- From the Visitor Action list, select the **Pick a Procore Location** item. We recommend that you **DO NOT** check the box for **Visitor can only search for an item** option. Since your visitors do not know the location names, they need to see all locations to pick the one that fits.
- Save** the setting, then test that the app works as expected by trying a check in.

Note: If you used the Procore integration feature prior to May 21, 2021 then you must re-register each Site with its associated Procore Company Project ID. See the troubleshooting section of this guide for more information.

Scheduled Daily Log Data Imports

The Safe Site Check In app has a built-in scheduler. This lets admins define what days and times that you want to load data into Procore. A separate schedule is created for updating Manpower logs and Visitor logs. The following limits apply:

- Procore only lets you load data for the current day.
- Data is loaded only for Projects that have a matching Site in Safe Site Check In. If you unexpectedly don't see Safe Site Check In data in a Procore Projects daily log, then you should verify that Site is defined in the app with a valid Procore Project ID.
- If you schedule more than one data load in a day for the same Project, you may end up with duplicate check in data being populated into Procore.
- The Safe Site Schedule also lets admin run a Schedule on demand, versus a specific date or time. This comes in handy for testing purposes or when a scheduled task fails.

Use the following steps to load Safe Site Data into Procore:

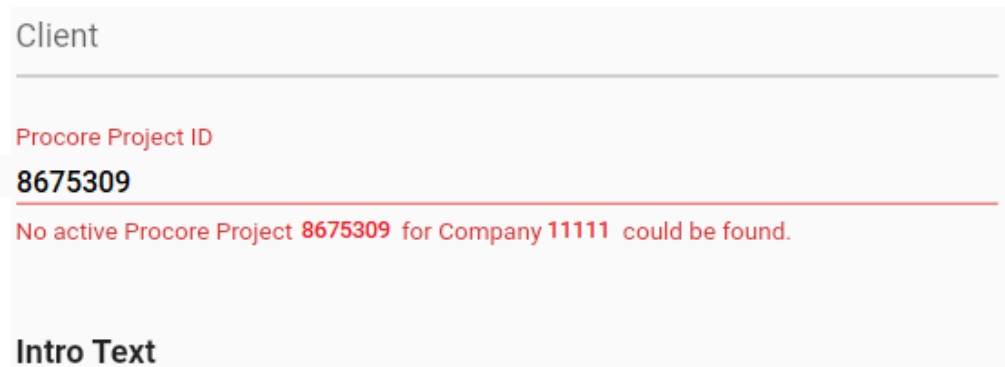
1. Select the **Schedule** item in the left panel
2. Enter a *Schedule Name* and *Description*.
3. Change the Schedule Type from *CheckinReport* to **Procore**
4. Select the *Integration Type*, either **Manpower Logs** or **Visitor Logs**
5. Select the Entry Status, this is typically set to **Granted** for **Manpower Logs**.
6. Set the *Default Worker Hours*. **Note**, if you have enabled the Safer Site Check Out feature, then Safe Site will calculate the number of hours worked for each visitor. If a visitor does not check out, then Safe Site uses the value entered in this field.
7. Select the days of the week and time of day that you want data to be sent to Procore.
8. Select either All Sites, or a select list of sites.
9. Select the **Save** button.

You need to Activate the schedule. Note, you can also run the scheduled item by selecting the menu, then selecting the **Run Now** item.

Troubleshooting

Procore Project ID connection

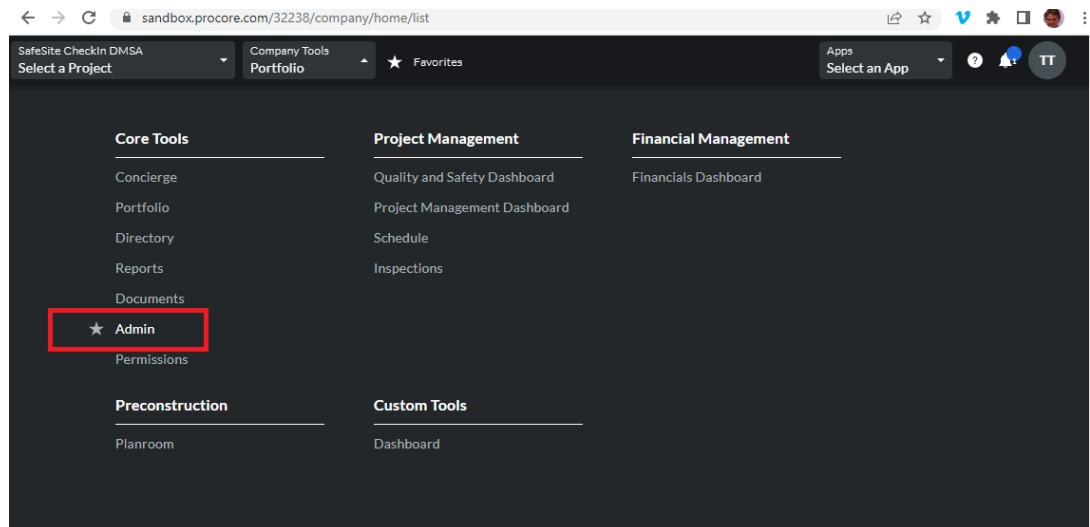
When adding a Project ID to a Site from the Safe Site Check In app, you may see the following error when editing a Site:



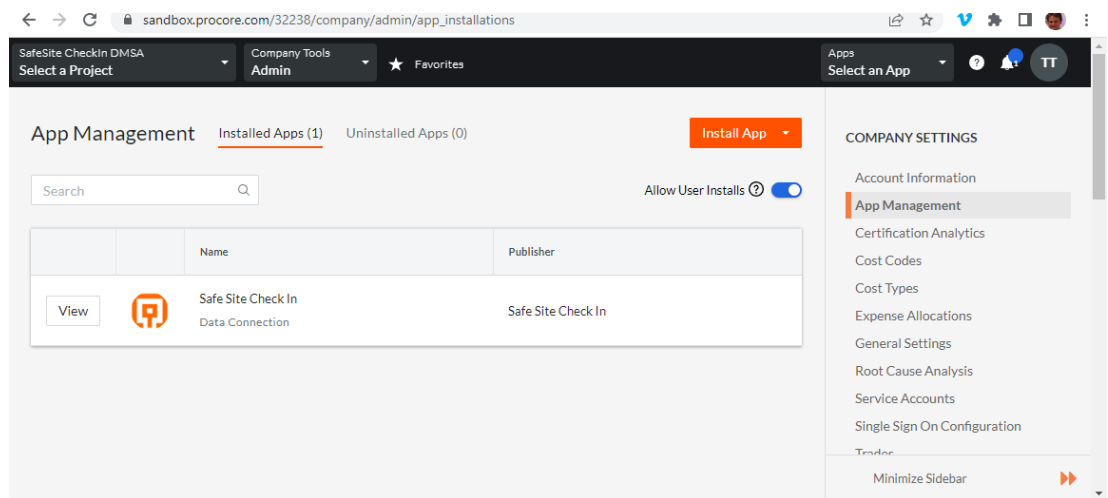
The screenshot shows a form field for 'Client' with a red border. Below the field, the text 'Procore Project ID' is displayed in red, followed by the value '8675309' in bold black. Below this, a red error message reads: 'No active Procore Project 8675309 for Company 11111 could be found.' Below the error message, the text 'Intro Text' is visible.

When this occurs:

- First, verify that you have entered the correct Project ID and that is an Active Project
- If the problem persists, then have a Procore Admin check Permissions in Procore for the Safe Site Check In app:
 - From the Procore Home Admin page select Company Tools and the **Admin** item:




- Select the **App Management** item in the left panel:



- Select the **Safe Site Check In** item's **View** button
- Select the **Permissions** tab item
- Select the **Project** item

SafeSite CheckIn DMSA Select a Project Company Tools Admin Favorites Apps Select an App

SafeSite CheckIn DMSA > App Management > Safe Site Check In

 Safe Site Check In Uninstall

App Info Usage Setup Instructions Permissions

Project
Company

Project Level Permissions

Tool	None	Read-Only	Standard	Admin
Daily Log			✓	
Directory		✓		

Permitted Projects

Add

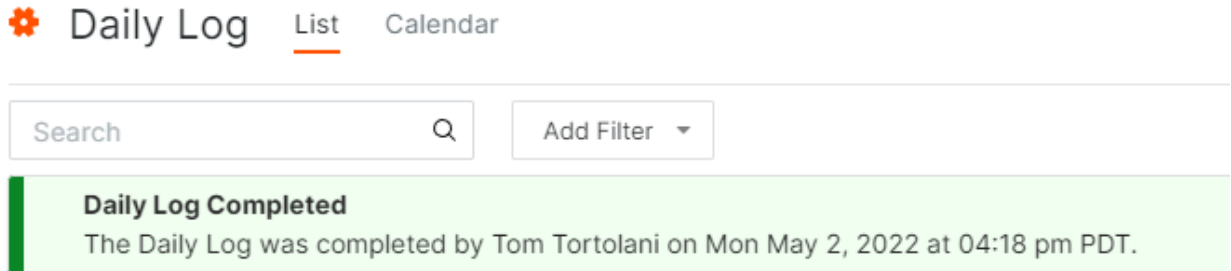
- Standard Project Template
- 1234 - Sandbox Test Project 🗑
- Test Project 2 🗑

- Review the items in the *Permitted Projects* list. You should either:
- Have a Project template defined. Procure Project templates let you set properties that can be applied to multiple projects.
- Assign the app to individual projects.

Note: as you add future sites, you need to ensure they either use the Project template that references the Safe Site Check In app, or add the new site to the permitted project list

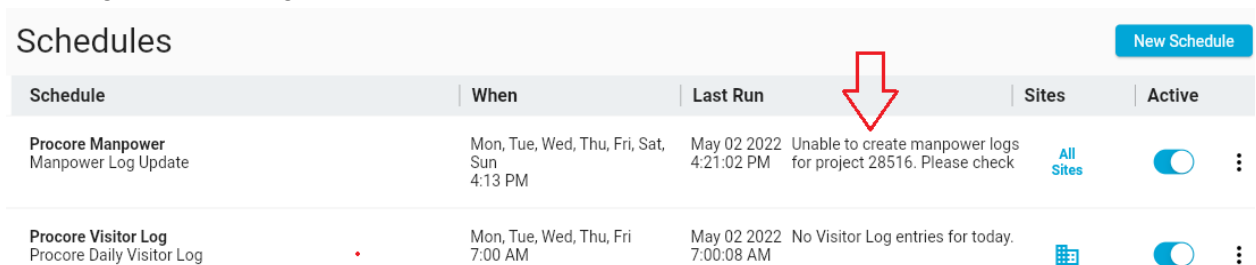
Scheduler Unable to Create Logs

A scheduled job to update a Project in Procore will not work if the Project's daily log in Procore is Completed. For example, if Project ID 28516 is already marked as completed in Procore:



The screenshot shows the 'Daily Log' section with tabs for 'List' and 'Calendar'. Below the tabs is a search bar and an 'Add Filter' dropdown. A green notification banner at the bottom states: 'Daily Log Completed. The Daily Log was completed by Tom Tortolani on Mon May 2, 2022 at 04:18 pm PDT.'

:
Then a Safe Site Check In schedule attempts to load data into the job, you will see the following error message in the Admin App:



The screenshot shows a table titled 'Schedules' with a 'New Schedule' button. The table has columns for Schedule, When, Last Run, Sites, and Active. A red arrow points to the error message in the 'Last Run' column for the 'Procore Manpower Log Update' schedule.

Schedule	When	Last Run	Sites	Active
Procore Manpower Manpower Log Update	Mon, Tue, Wed, Thu, Fri, Sat, Sun 4:13 PM	May 02 2022 4:21:02 PM Unable to create manpower logs for project 28516. Please check	All Sites	<input checked="" type="checkbox"/>
Procore Visitor Log Procore Daily Visitor Log	Mon, Tue, Wed, Thu, Fri 7:00 AM	May 02 2022 7:00:08 AM No Visitor Log entries for today.		<input checked="" type="checkbox"/>

Company Names and Locations Not Automatically Populated

Automatic population was introduced in Safe Site Check In Version 8.1 (May 21, 2022). If you used the Procore integration feature prior to this release, then you must re-register each Site with its associated Procore Company Project ID.

1. From the admin.safesitecheckin.com app, select a site.
2. Remove the Procore Project ID value, then **Save** the change.
3. Select the site again, then re-enter your Procore Project ID, then **Save** your change.