LEE KENNEDY
Let's build on big thinking.

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PROTRAC

PLAYBOOK FOR PROJECT MANAGEMENT

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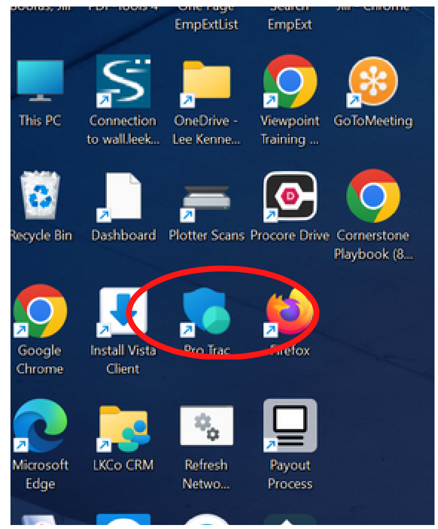
Accessing ProTrac

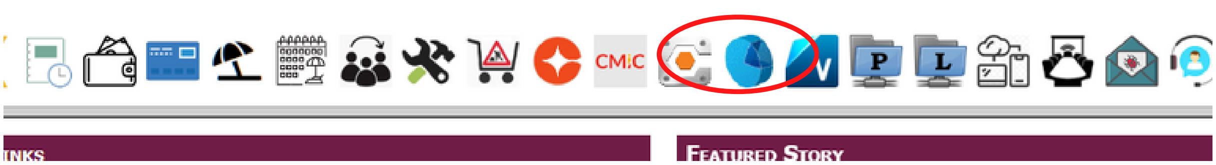
There are 3 ways to access ProTrac:

Click on the ProTrac icon on your home screen



OR

Click on the ProTrac icon on the LKCO dashboard



OR

via https://remote/leekennedy.com/

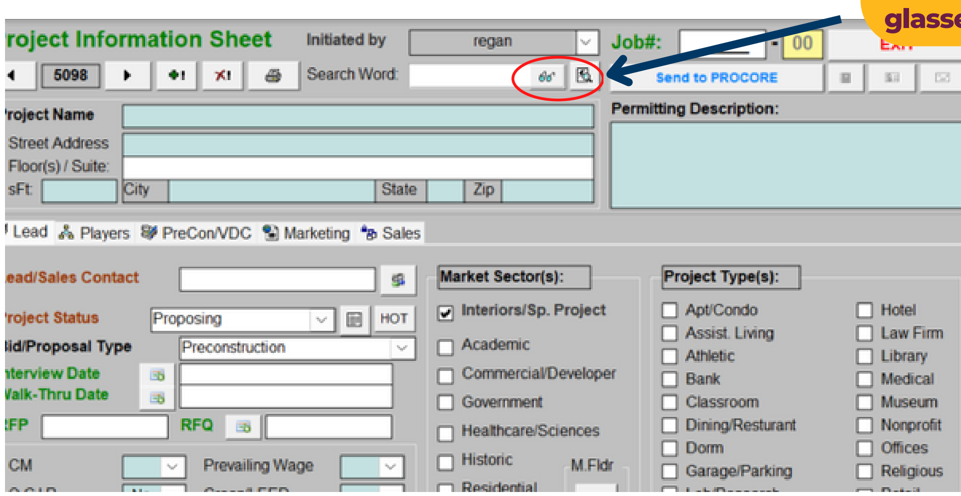
Job Numbers

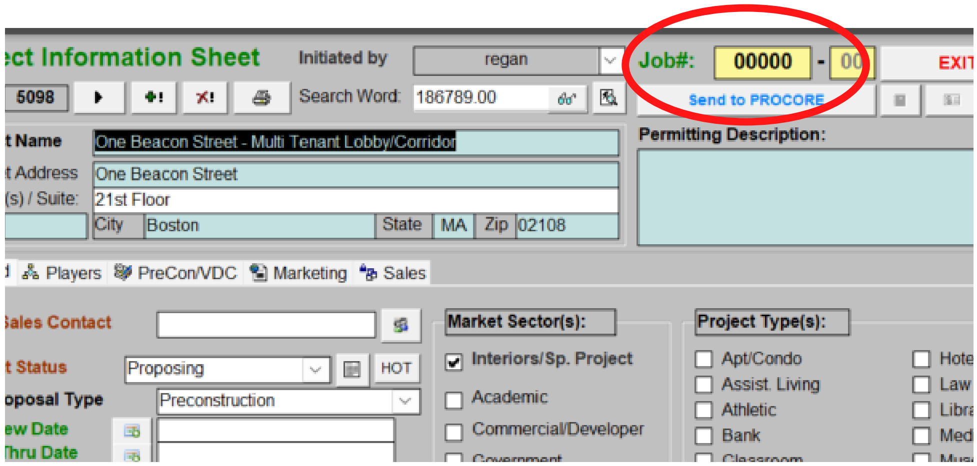
Use the "Search Word" field to find an existing job

*****Note: If there isn't a job number created yet, the job number will show up as "00000"**

To open a subsidiary number, double-click Job#: 0000 and it automatically creates a new number. You must complete all job details before this will be generated.

Click on the glasses to search

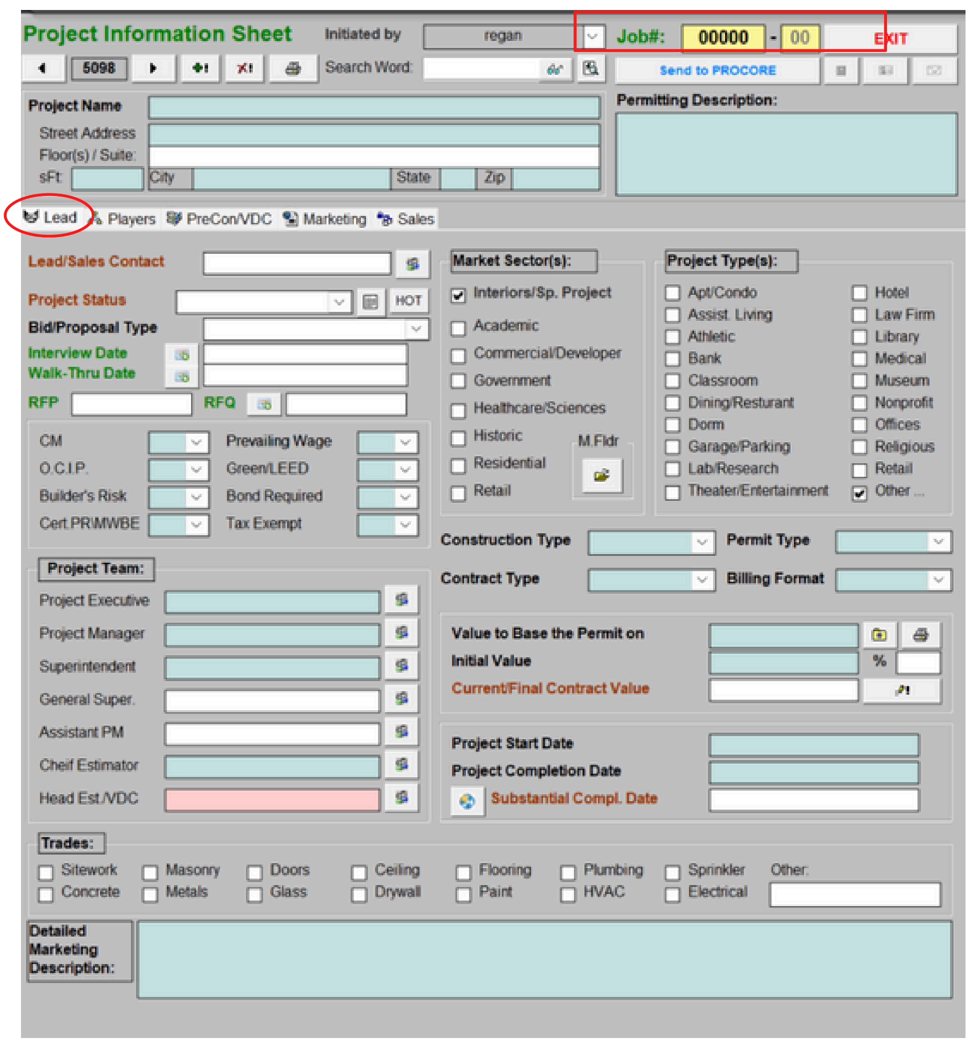




Filling in Required Information: Lead Tab

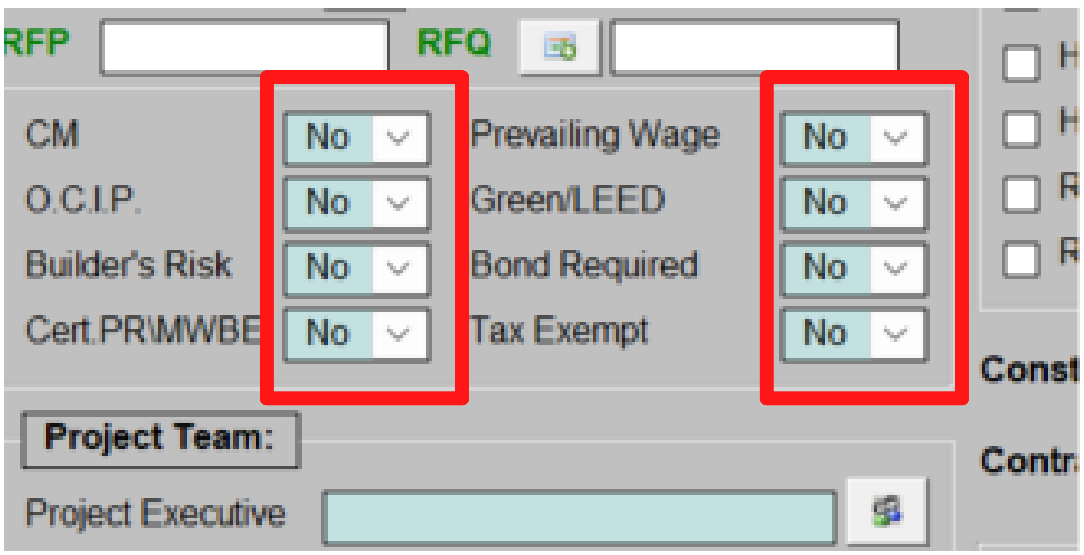
- **Complete all blue fields (see following pages for step-by-step instructions)**
  - *****NOTE: Square footage can be found on the bid sheet from the Preconstruction Department**
  - **"Permitting Description" should be brief**

It is important to update values and dates across tabs in ProTrac monthly.

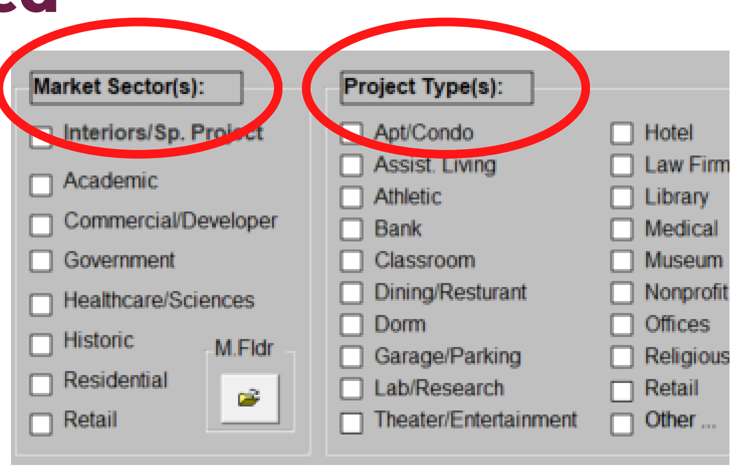


Filling in Required Information: Lead Tab (continued)

Step 1: Change Yes/No boxes as necessary
*****NOTE: Yes/No section will default to "No"**



Step 2: Make sure that the "Market Sector(s)" section is completed
*****Note: There is typically only one sector per job**

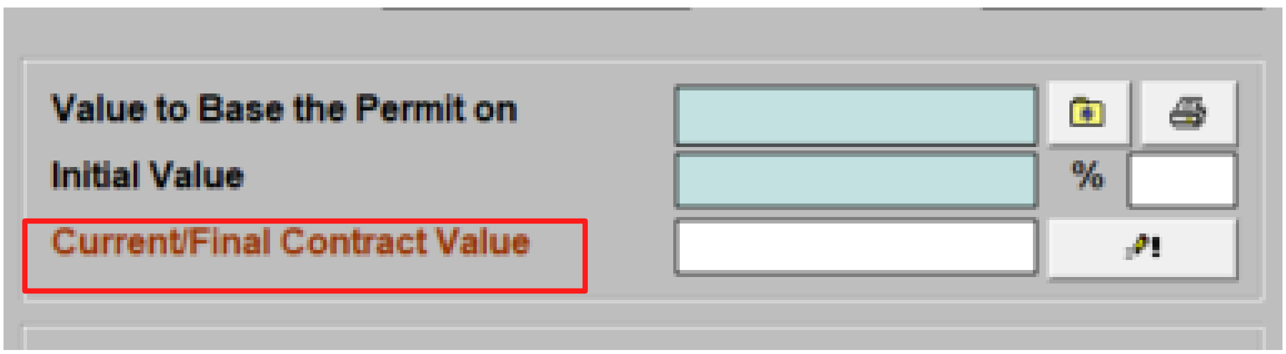


Step 3: Complete "Project Type(s)" section. Select all that apply.

Filling in Required Information: Lead Tab (continued)

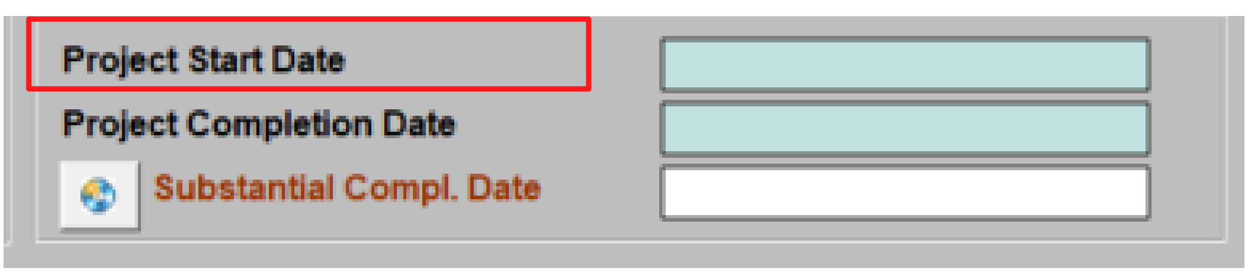
Step 4: Permit cost will not always match initial value. Permit costs are typically only direct costs.

*****Note: Current/final contract value should be updated monthly**



Step 5: Once your project starts, go in and update your start date

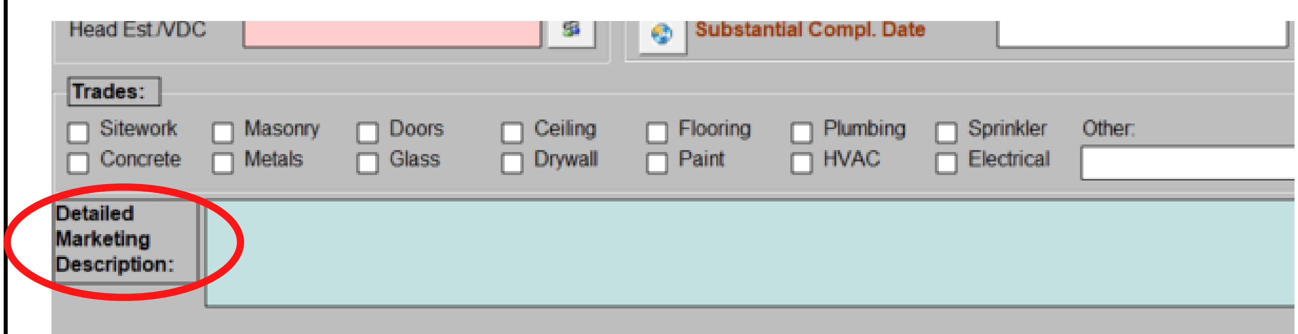
*****NOTE: Project completion date may need to be updated throughout the life of the project**



Filling in Required Information: Lead Tab (continued)

Step 6: Complete the "Detailed Marketing Description". This should be very detailed. It can include:

- **Anything that is unique about the job (i.e. finishes, design, building)**
- **Anything that is challenging about the job (i.e. site logistics)**
- **Types of spaces**
- **Unique aspects to highlight the project**
    - ***NOTE- This box is not limited on space. It will get bigger with more text. The more detail for marketing, the better.**

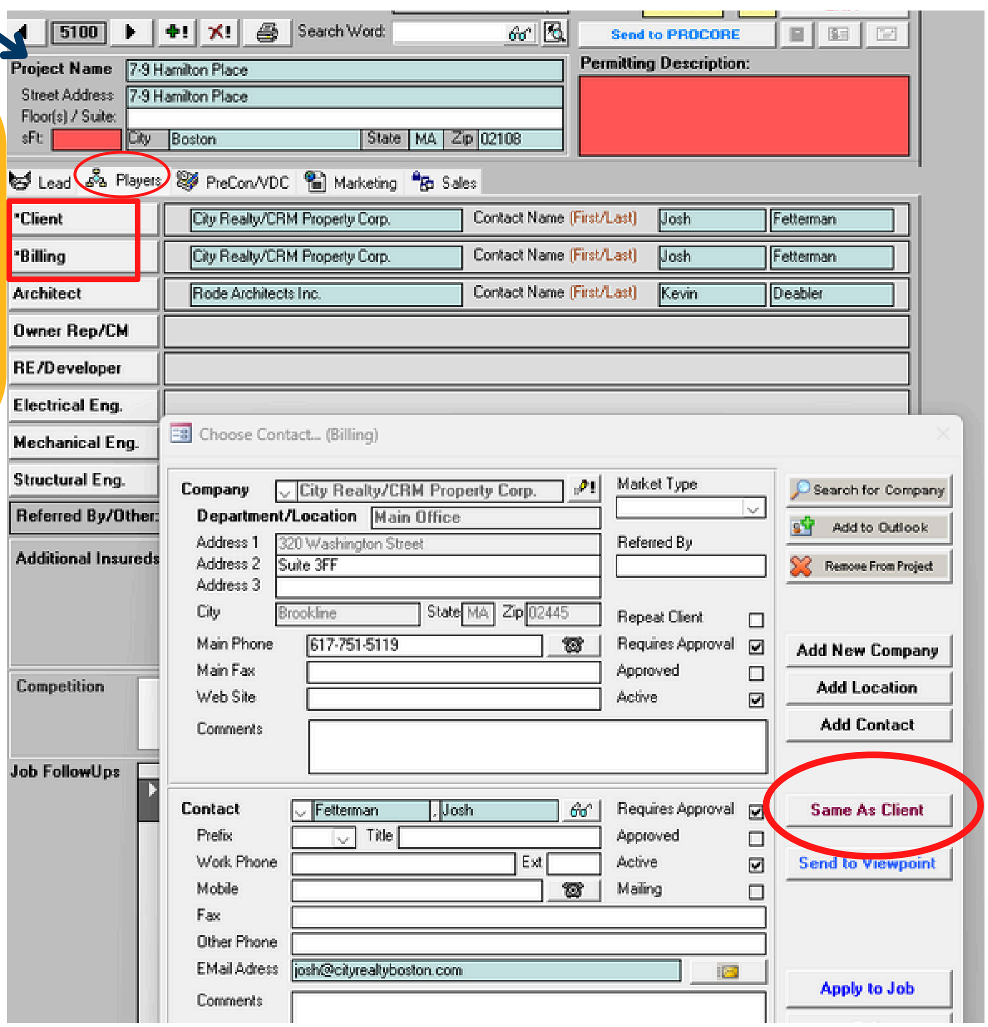


Filling in Required Information: Players Tab

- **Only sections/lines with asterisk (*) are required.**
    - **This section may need to be updated once the project is started**
    - **If the billing contact information is the same as the client, click on billing and then select "Same as Client"**

In order to fill these fields, click title to be able to input information

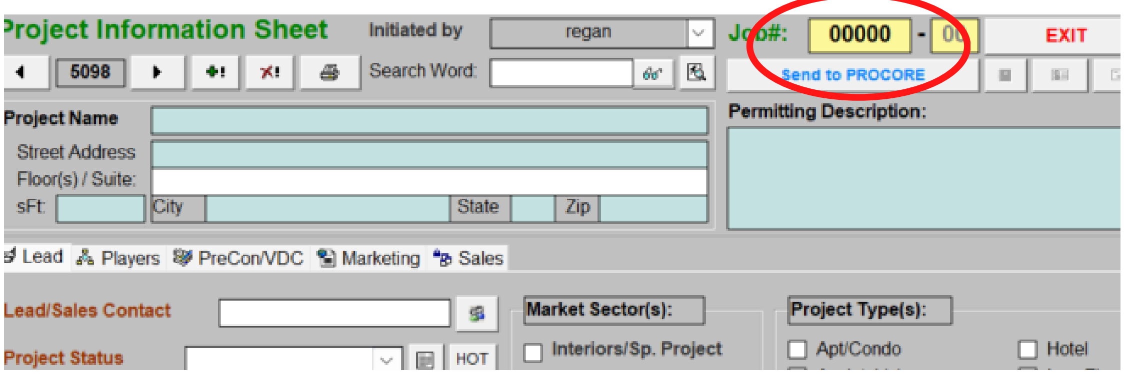
Although they are not required, we encourage you to fill in the remaining fields



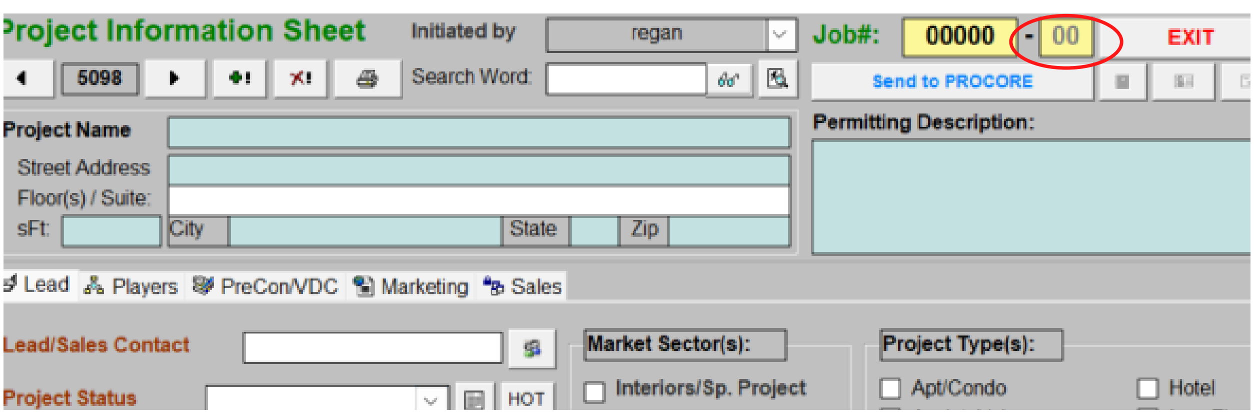
Final Steps

- **Once all information is complete, double-click on the job number (00000)**

- **Click through the prompts**
  - **Is this an interiors job?**
  - **Do you want to generate permit documentation?**
  - **Do you want to send it to Viewpoint?**
  - **Do you want to send it to Procore?**

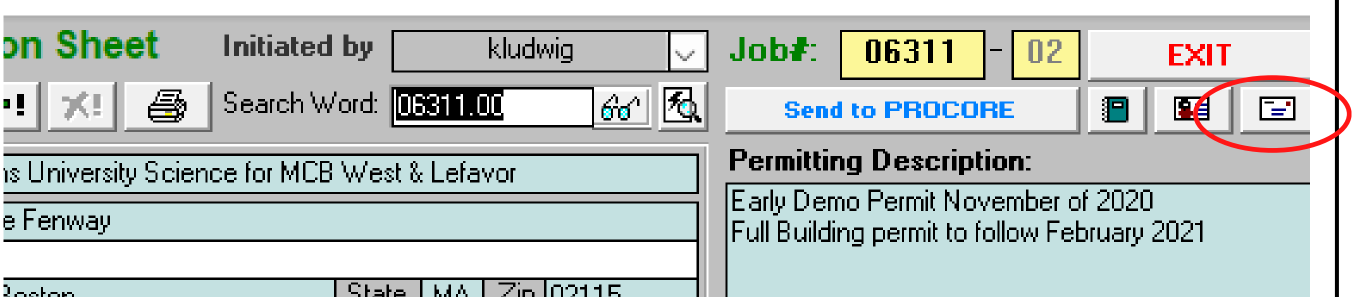


*****NOTE: To create a sub job, make sure that you are in the main job and click on the 00**



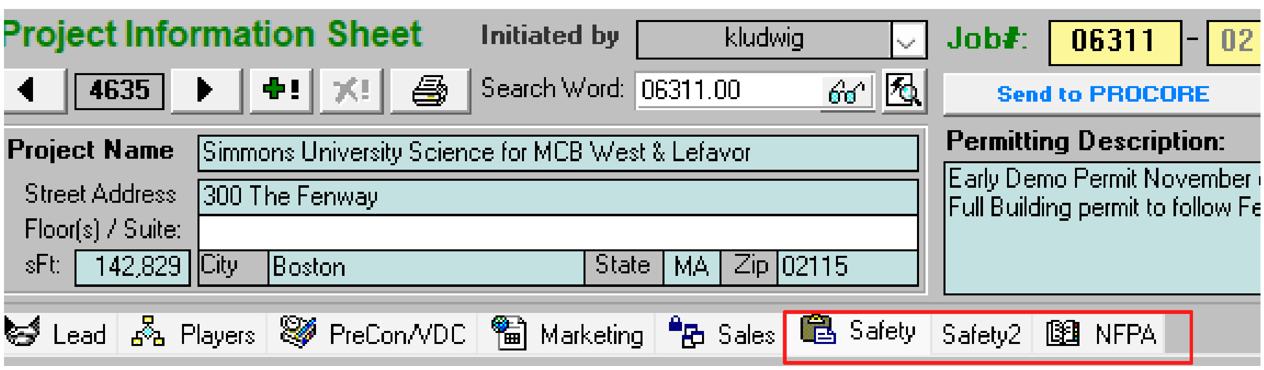
Email Notifications

Usually an email will automatically pop up to notify the team, but if you want to email people manually at another time, click on the email button to send a notification that the new project has been created



Optional: Safety Tab

- **Once you have created a job number, a Safety, Safety 2, and NFPA tab will appear**



- **You can complete, edit, and revise any information in the Safety and Safety 2 tabs**
    - **This information will allow you to generate the NFPA documentation in a Word Document**

*****NOTE: The NFPA document that is generated is used only on projects that we DO NOT hire Code Red. Code Red is hired for complex projects.**

ProTrac Checklist

It is important to update ProTrac throughout the lifecycle of the project. Both Preconstruction and Marketing use this historical data when benchmarking pricing on similar future projects.

- **Update current/ final value monthly**
- **Update start date**
- **Update project completion date**
- **Make sure that the detailed marketing description is, in fact, detailed**