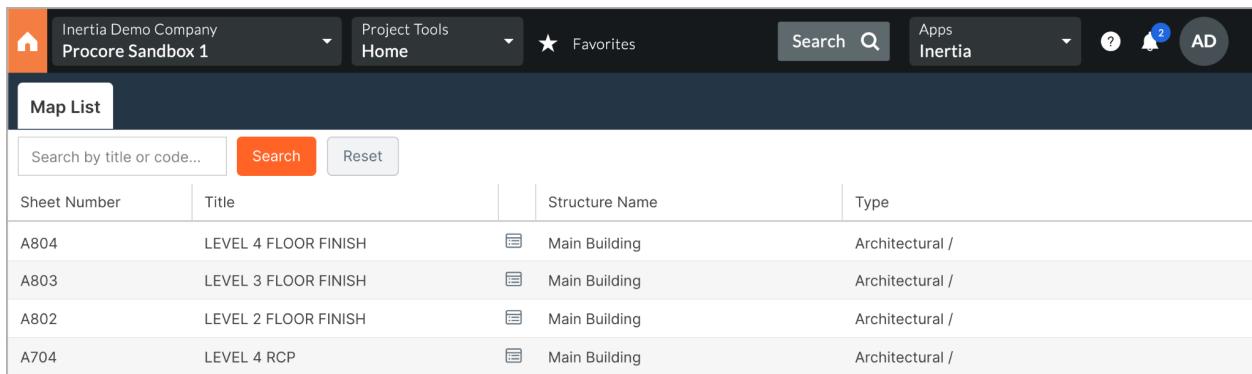


Quick Start Guide: Inertia + Procore Integration

Launch the Inertia app

1. From your Procore project home page, select the **Apps** dropdown menu in the upper right corner. Select **Inertia**.
2. Select **Launch**.
3. When the app loads, you will see the **Map List** tab with all Inertia ICD sheets for your project.

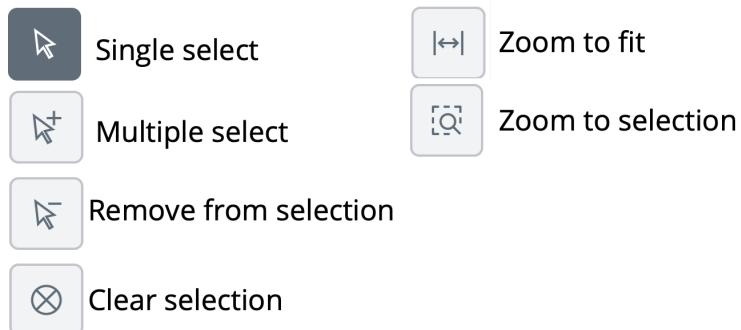


Sheet Number		Title	Structure Name	Type
A804		LEVEL 4 FLOOR FINISH	Main Building	Architectural /
A803		LEVEL 3 FLOOR FINISH	Main Building	Architectural /
A802		LEVEL 2 FLOOR FINISH	Main Building	Architectural /
A704		LEVEL 4 RCP	Main Building	Architectural /

Select and View ICD Sheets

1. To locate a sheet, use the **search** field in the upper left corner. You can search by sheet number, title, building, and type.
2. To open a sheet, double click the row, or select the details icon. 
3. **Select** by clicking an item or room on the sheet. Selected items are highlighted in **orange**.
4. When an item or room is selected, the **Location Report** will load in the right hand panel. Any records which are linked to the item will load in the corresponding tool section, such as Procore RFIs, Inertia Checklists, etc.

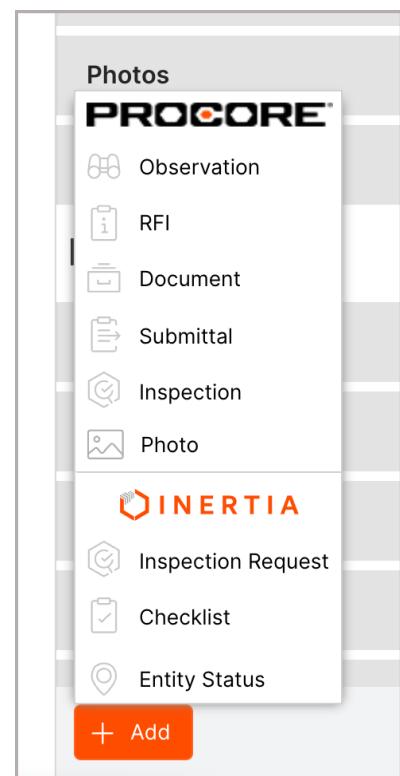
Sheet View Navigation



Tools

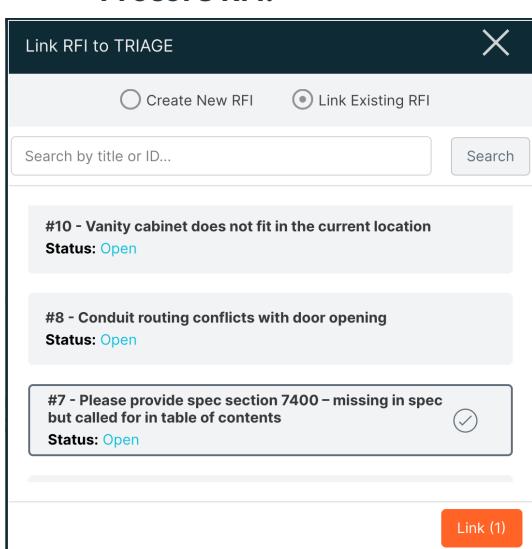
The Inertia + Procore integration allows you to create and link Procore and Inertia records directly to a room/item on the sheet.

- Procore RFIs
- Procore Observations
- Procore Inspection
- Procore Documents
- Procore Photos
- Inertia Inspections
- Inertia Checklists
- Inertia Entity Status



Create New or Link Existing Procore Records

1. With one or more rooms selected on the sheet, select the **Add** button from the bottom of the right hand panel.
2. Select the record type you would like to create or link, such as **Procore RFI**.



The image shows a modal dialog box titled "Link RFI to TRIAGE". At the top, there are two radio buttons: "Create New RFI" (unchecked) and "Link Existing RFI" (checked). Below this is a search bar with placeholder text "Search by title or ID..." and a "Search" button. The main area contains three list items, each representing an existing RFI:

- #10 - Vanity cabinet does not fit in the current location
Status: Open
- #8 - Conduit routing conflicts with door opening
Status: Open
- #7 - Please provide spec section 7400 – missing in spec but called for in table of contents
Status: Open

At the bottom right of the dialog is a large orange button labeled "Link (1)".

To **create** a new Procore record, select **Create New** at the top of the window. Enter the information for the record, and select **Create** to save. This creates a new Procore record, which is also linked to the room you selected.

To **link** an existing Procore record, select **Link Existing** at the top of the window. Search for your record(s), select the record you would like to link, and select **Link**.

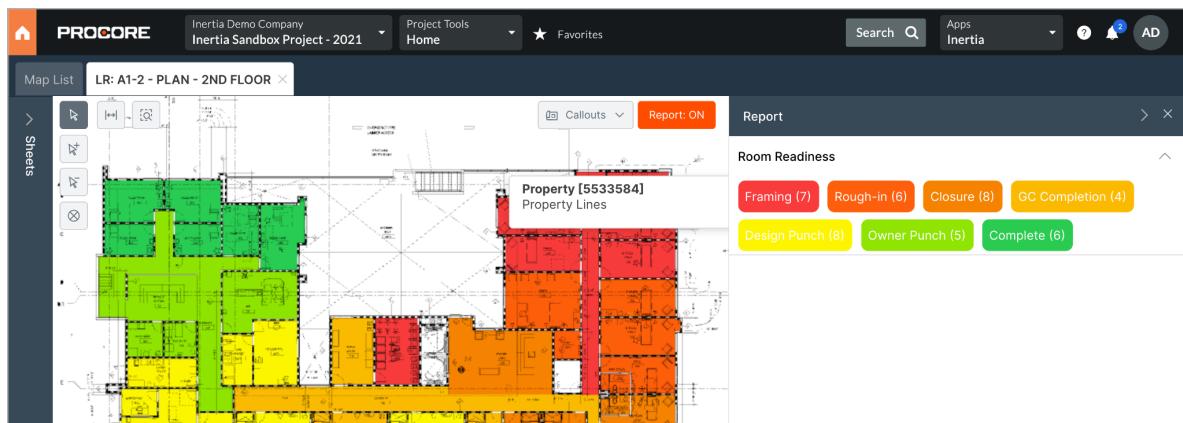
The record you created or linked is now linked to the room or item you selected from the sheet.

What if the room or item exists on multiple sheets?

Inertia's Intelligent Construction Drawings (ICDs) identify each element of the BIM model as a unique object. Whether a room is shown in one sheet of the drawing or ten- Inertia ICDs know it's the same room with the same properties and records. By linking your Procore record to a room or item on the Inertia ICD sheet using the steps above, the same records will be available on every other sheet where that same room is shown. No need to link the same record across multiple drawings, Inertia ICDs make this connection automatically.

Inertia Entity Status

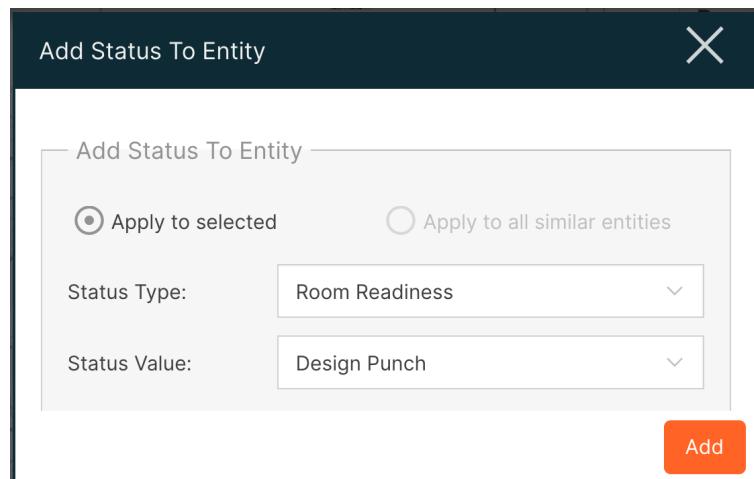
Inertia Entity Status Tracking allows users to know exactly how the project is progressing at every stage of the build. With just a few clicks, you can see the status of objects or activities, on our Intelligent Construction Drawings with corresponding colors. Entity Status is fully customizable to meet the needs of your project - equipment procurement, pre-punch room status - the possibilities are endless.



Add an Entity Status

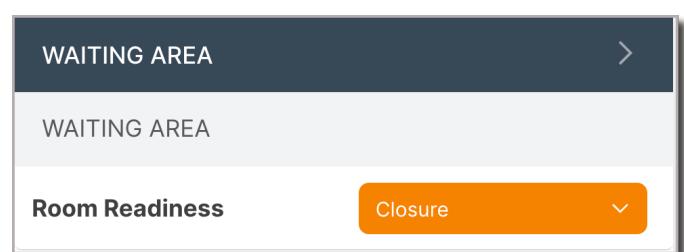
1. With one or more rooms selected on the sheet, select the **Add** button from the bottom of the right hand panel.
2. Select **Entity Status**.
3. Select the **Status Type**, and **Status Value**.
4. Select **Add**.

The Entity status has now been set, and will be shown at the top of the **Location Report** when this room is selected on the sheet.



Updating Entity Status

1. To update Entity Status, select a room or item from the sheet.
2. At the top of the **Location Report** panel, locate the Entity Status.
3. Select the Status dropdown (*shown here in orange, "Closure"*) and select a new status.



You're done! No need to save, the Entity Status will save automatically each time a new status is selected.

Inertia Checklists

Paired with our visual location tracking, Inertia lets you predefine workflows and checklists that enable you to proactively enforce best practices across the entire project. Customize and distribute checklists to keep your workflows standardized and on schedule. Inertia allows you to associate checklists with map locations and objects to make sure your project stays on track. Some popular checklists include Procurement, Room Readiness, Wall Closure, Ceiling Closure, etc.

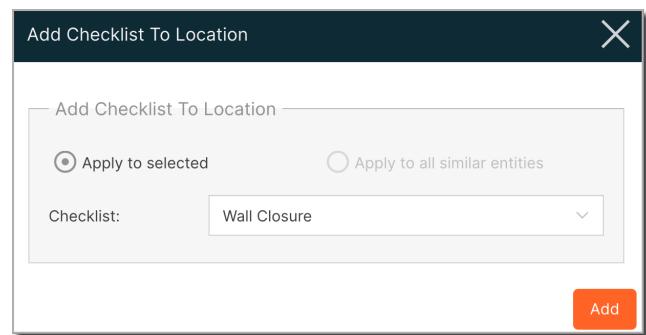
How are Checklists created?

To create or modify a checklist, contact help@inertiasystems.com to get started. We'll work with your team to configure the checklist as needed, and assign it to your project. We offer several prebuilt checklists for demonstration and training purposes, such as *Wall Closure*.

Adding Checklists to Locations

1. Select one or more items on the sheet.
2. Select the **Add** button from the bottom of the right hand panel.
3. From the menu, select **Checklist**.
4. Select the checklist from the dropdown menu, and select **Add**.

The checklist has now been linked to the location(s) and is ready for use. View the checklist in the **Checklist** section of the Location Report panel.



Completing a Checklist

1. **Select** an item or room from the sheet.
2. In the Location Report panel on the right hand side, click on the name of the checklist you would like to open.
3. Select the checklist item you would like to update.
4. Select from **Complete**, **Incomplete**, or **N/A**. If you would like to add any Results or Comments, record them here. You can also upload attachments at the bottom of each checklist item.
5. When you've finished updating the checklist item(s), select **Save All**. If the checklist is complete, the status will update to a **Complete** status.

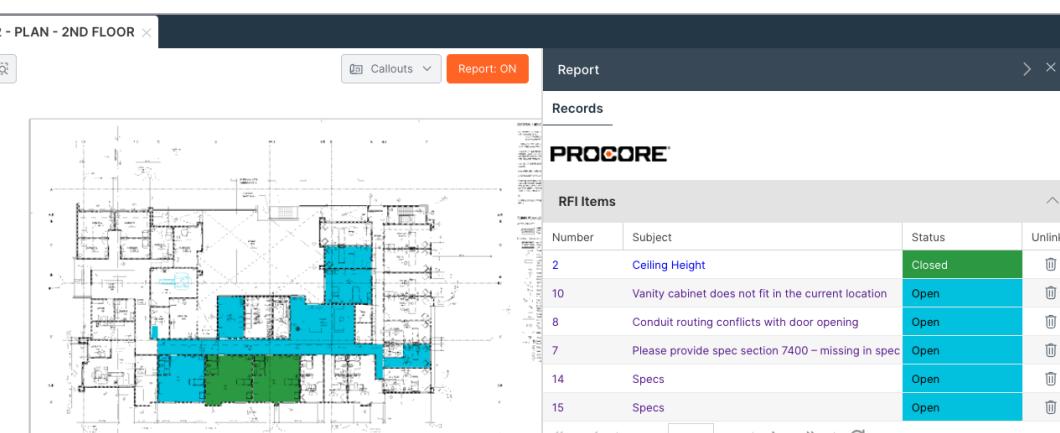
Did you know? Checklists can be updated in bulk using the Batch Answer feature!

Reporting

The Inertia + Procore Embedded experience offers powerful visual reports to maintain a complete, visual picture of your project. You can easily report on each of the record types linked to your ICD sheets, such as **Entity Status, Checklists, Procore RFIs, Procore Observations** and more.

Run a Report

1. From the sheet view, select the **Reports** button in the upper right corner of the sheet view.
2. **Select** the type of report you would like to run from the modules listed.
3. Run the report:
 - a. *Unfiltered Report:* To run an unfiltered report, select **Run Report** without selecting a filter. This will show you all records of that type on the sheet.
 - b. *Filtered report:* Make your selections from the filters, such as Due Date or Status, and select



A screenshot of the Inertia + Procore interface. On the left is a floor plan of a building with various rooms and fixtures. Some areas are highlighted in blue and green. On the right, there is a 'Report' sidebar titled 'PROCORE'. It contains a table titled 'RFI Items' with the following data:

Number	Subject	Status	Unlink
2	Ceiling Height	Closed	trash
10	Vanity cabinet does not fit in the current location	Open	trash
8	Conduit routing conflicts with door opening	Open	trash
7	Please provide spec section 7400 - missing in spec	Open	trash
14	Specs	Open	trash
15	Specs	Open	trash

Run Report. This will filter the report to the selections you have made.

The map will now highlight locations on the sheet with the selected record type attached, and list the records in the right hand Location Report panel.

Stop Reporting

1. To clear your report or stop reporting, select the **Report: ON** button in the upper right corner of the sheet view.
2. Select **Stop Reporting** in the bottom left corner of the window. Close the reporting selection window.

