Procore for External Partners

Quick Reference Guide: Access, Training & Expectations for Contractors, Suppliers, Vendors, and Design Partners

The Williams Companies, Inc. | Procore Center of Excellence | Version 1.0, September 2026

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1. Welcome to Procore

You have been invited to work with a Williams project team in Procore. Welcome. We are glad to have you on the project.

What Procore is

Procore is the cloud-based construction management platform Williams uses to plan, build, and close out projects. It is the single place where the project team shares drawings and specifications, asks and answers questions, routes submittals for review, logs daily field activity, and keeps a complete record of project decisions.

Why it matters to you

- **One source of truth.** You always work from the current drawing revision and the current specification, with no chasing email attachments.
- **Faster answers.** RFIs and submittals are routed, tracked, and time-stamped, so you can see exactly where your item sits and who has it.
- **A clear record.** Every question, response, and approval is captured, which protects both of us at closeout.
- **Free for you.** Procore access and Procore's own training library are provided at no cost to collaborators on a Williams project.

Procore is a project collaboration tool. It does not replace your contract, your purchase order, your safety qualification, or any invoicing or payment system. Those remain governed by your agreement with Williams.

2. How your access works

External access to Procore is **sponsored by the Williams project team**. There is no public sign-up page and no online request form. Your Williams project contact requests and approves your access, and all external users are created and managed directly inside Procore.

- **Project by project.** Access is granted for the specific Williams project you are supporting. Working on a second project means a second invitation from that project's team.
- **Role-based.** Your Williams project team assigns an external permission template that matches the work you were contracted to do.
- **Least access first.** Everyone starts with the lowest level of access that still lets them do their job. If you need more, ask your project contact to adjust it.
- **Company email first.** Use your own company email address whenever possible. A non-company address is allowed only if it is already in use for work performed at or adopted by Williams. Shared or generic mailboxes are not used for project accounts.
- **One account per person.** Procore accounts are individual and must not be shared. If you already have a Procore account with another owner, you will simply see the Williams project added to it.

Keeping your roster current. Please tell your Williams project contact when someone from your team joins the project, changes roles, or leaves your company. Prompt notice keeps the project directory accurate and makes sure the right people are receiving RFIs, submittals, and notifications.

3. Getting started: your first week

Work through these five steps before your first project task.

Step	What to do	Detail
1	Watch for your invitation	Procore emails your invitation from **notifications@procoretech.com**. If it has not arrived within a few business days, check your junk or quarantine folder, then contact your Williams project contact.
2	Create your account	Select the account-setup link in the invitation and register with your company email address. Choose a strong, unique password.
3	Set up multi-factor authentication	MFA is required for all external users. See Section 4 for a step-by-step walkthrough and save your recovery code before you finish.
4	Open the project and look around	Confirm you can see the Williams project, then open Home, Directory, Documents, and the other tools your project contact has confirmed for your scope. Tell your project contact right away if something is missing.
5	Complete the training	Watch the five core videos in Section 6. Allow about 45–60 minutes. Add the role-specific topics that apply to your scope.

Working in the field? Download the Procore mobile app (iOS or Android) and sign in with the same credentials. It is the fastest way to view drawings, capture photos, and respond to punch items on site.

4. Signing in and multi-factor authentication

Multi-factor authentication (MFA) is **enforced for all third-party users** on Williams projects in Procore. Procore sometimes refers to MFA as "2FA." Setting it up takes about five minutes and only needs to be done once.

Set up MFA in three steps

1. **Sign in.** Enter your company email address and password. If your own company already uses single sign-on with Procore, continue signing in the way you normally do.
2. **Choose a verification method.** An authenticator app is preferred; text message (SMS) also works. With an app, scan the QR code Procore displays and enter the temporary code. Microsoft Authenticator, Google Authenticator, and Okta Verify are all supported.
3. **Finish and save your backup.** Store the 32-digit recovery code somewhere secure. From then on, signing in means your password plus a temporary verification code.

Recognize the legitimate email

Check	What you should see
Subject	Two-Factor Authentication Required for The Williams Companies
Sender	notifications@procoretech.com

Action	Select **Set Up 2FA**
Never asked for	Procore and Williams will never ask you to email or text your password, your verification code, or your recovery code to anyone.

Special cases

- **No mobile device?** Use a desktop authenticator application instead.
- **Changed phones?** Use your saved recovery code to re-enroll, or contact Procore Support at support.procore.com.
- **Locked out?** Procore Support can help with account and sign-in problems directly; your Williams project contact cannot reset your MFA for you.

5. What you will do in Procore

What you see in Procore depends on the kind of work you were contracted to do. Your Williams project contact confirms the tools that are in scope for your company on your project.

Everyone starts here

- **Home / Project Overview**: find your project, your open items, and your project contacts.
- **Directory**: see who is on the project team and how to reach them.
- **Documents**: locate and download the shared project files you have been given access to.

Your access matches your scope. Delivery models vary: an EPC arrangement, a services-only scope, or a specialty contract may look different. Williams assigns the lowest level of access that still lets you do your job, and your project team can adjust it as the work evolves. If a tool you need is missing, just ask.

6. Your training path

Procore's training library is self-paced, role-based, and free to you as a collaborator. Start with the five core topics below. They cover the most common ways partners work with Williams project teams.

Step 1: Watch the five core topics

#	Topic	What you will learn	Where to watch
1	Overview & Navigation	Sign in, move between tools, and find project information.	https://v2.support.procore.com/product-manuals/project-overview-project/videos
2	Documents	Locate, download, and work from shared project files.	https://v2.support.procore.com/product-manuals/documents-project/videos
3	Drawings	View current drawings and confirm revisions.	https://v2.support.procore.com/product-manuals/drawings-project/videos
4	RFIs	Review questions, provide responses, and track status.	https://v2.support.procore.com/product-manuals/rfi-project/videos

5	Submittals	Upload required information and monitor review status.	https://v2.support.procore.com/product-manuals/submittals-project/videos

Step 2: Add what applies to your scope

Once your project contact confirms the tools in scope for your company, watch the Procore training videos for each of those tools. Every tool has its own video page in Procore's product manuals at https://v2.support.procore.com.

Step 3: Procore Certified: Subcontractor (recommended)

If you or your team will be working in Procore regularly, we recommend the **Subcontractor as a Collaborator** certification. It is self-paced, free, covers the key collaborator workflows end to end, and gives you a shareable certificate.

- **Course:** learn.procore.com/product-certification-subcontractor-as-collaborator
- **Learning portal:** learn.procore.com
- **Certification catalog by role:** support.procore.com/certification/courses
- **Vendor and subcontractor learning path:** support.procore.com/procore-learning-paths/specialty-contractor/vendor-subcontractor
- **Getting Started (new to Procore):** support.procore.com/getting-started

Recommended, not required. Procore certification is a strong foundation, but it does not replace any project-specific training, orientation, or qualification your Williams contract requires.

7. How we work together in Procore

These are the habits that keep a Williams project moving and keep everyone working from the same information.

- **Keep the work in Procore.** Submit and respond to RFIs, submittals, and project correspondence inside the platform rather than by side email, so the project record stays complete.
- **Respond by the due date.** Items assigned to you show a due date. If you cannot meet it, say so in the item's comments early rather than letting it go quiet.
- **Always build from the current revision.** Use the Drawings and Specifications tools to confirm you have the latest issued set before you order, fabricate, or install.
- **Wait for the approved submittal.** Do not proceed on material or fabrication until the submittal has come back with an approved status.
- **Attach the evidence.** Photos, markups, and supporting files attached to the item are worth far more than a description alone.
- **Use the right tool for the job.** RFIs are for contract clarification; Submittals are for product data and shop drawings; Correspondence is for general communication. Keeping them separate makes everything easier to find later.
- **Protect project information.** Project content is confidential. Share it only with people on your team who need it to perform the work, and do not repost it publicly.
- **Keep your people current.** Tell your Williams project contact promptly when someone joins, changes role, or leaves.

8. Before you are on site: safety, environment, and conduct

Williams is committed to **Zero Incidents** because we care about each other, our families, and the communities where we live, work, and serve our customers. We expect the same commitment from every company that works with us. The focus on health, safety, and the environment is never compromised to achieve another business objective.

Procore access is not a safety qualification. Contractor safety qualification, drug and alcohol compliance, operator qualification, background checks, and site orientation are managed separately through Williams Contractor Safety Management and the applicable compliance verification providers. Being set up in Procore does not authorize you to be on a Williams work site.

Core expectations on a Williams work site

- **Stop Work Authority belongs to everyone.** Anyone, Williams or contractor, can and must stop work when a hazard is not clearly understood or controlled. There is never a penalty for using it.
- **Qualified people only.** Supply a workforce that is trained, qualified, and competent for the tasks in your scope, with documented competency assurance available on request.
- **Minimum PPE.** Flame resistant clothing, hard hat, eye protection, hearing protection, gloves, and safety-toed boots, plus anything additional the scope, site, or pre-job plan requires.
- **Plan the work.** Job Safety Analysis, work permitting, and daily safety meetings are expected before and during the work.
- **Report everything, immediately.** Injuries, near misses, spills and releases, property damage, and unsafe conditions all get reported to your Williams representative right away.
- **Follow the stricter rule.** Where your program and Williams requirements differ, the more stringent requirement applies. Site-specific requirements always take precedence.
- **Own your subcontractors.** As the primary contractor you are responsible for holding your subcontractors to the same standard.

Environmental stewardship

- Confine all activity to the designated, approved work areas and respect every permit condition.
- Maintain spill kits, inspect tanks and containment regularly, and contain and report any spill or release immediately.
- Install and maintain erosion and sediment controls, manage waste properly, and keep public roads clean and safe.
- Stop work and notify your Williams representative if you encounter cultural or historical resources or protected species.

Business conduct

Williams' **Code of Conduct for Suppliers and Contractors** sets our expectations for human rights and labor practices, ethics and legal compliance, anti-bribery and fair dealing, conflicts of interest, and the protection of Williams' assets, technology, information, and privacy. If you are ever aware of or concerned about the conduct of a Williams employee or anyone acting on our behalf, please speak up.

Williams Action Line: 800-324-3606 or www.williams.ethicspoint.com. The line is available 24/7, and you may remain anonymous. Williams does not tolerate retaliation for reports made in good faith.

Where the full requirements live

Document	What it covers	Where to get it
Williams Contractor Safety Handbook	Minimum safety requirements for contractors working on Williams property, right-of-way, or projects.	www.williams.com/vendor-terms-conditions/ or scan the QR code on the on-site poster
Contractor Environmental, Health & Safety (EH&S) Management Requirements	PPE, compliance provider and operator qualification duties, drug and alcohol requirements, subcontractor management, incident investigation, security, and background checks.	Provided by your Williams representative or Contractor Management
Code of Conduct for Suppliers and Contractors	Ethics, human rights, environmental stewardship, and information protection expectations.	www.williams.com/vendor-terms-conditions/
Vendor Terms & Conditions	Standard commercial terms for doing business with Williams.	www.williams.com/vendor-terms-conditions/
Project-specific plans	Site-Specific Safety Plan, Emergency Action Plan, permit conditions, and orientation requirements for your project.	Your Williams project representative

Questions about safety qualification, compliance verification, drug and alcohol, or operator qualification? Contact Williams Contractor Safety Management at ContractorManagement@williams.com. These topics are handled by that team, not by the Procore project team.

9. Where to get help

Start with your Williams project team. They know your project, and they can reach a Procore Champion and escalate from there if needed. Going straight to your project contact is almost always the fastest route to an answer.

If you need help with…	Contact
Your invitation, project access, or permissions	Your Williams project contact, who will consult the project's Procore Champion and escalate if needed
How a Williams project uses a tool or workflow	Your Williams project contact
Sign-in, password, MFA, or other account and technical issues	Procore Support: support.procore.com

Procore training and certification	learn.procore.com
Safety qualification, compliance verification, drug and alcohol, operator qualification	ContractorManagement@williams.com
Ethics or conduct concerns	Williams Action Line: 800-324-3606 or www.williams.ethicspoint.com
Critical, project-stopping Procore issues only	**procoresupport@williams.com**

Your project contacts

Role	Name	Email / phone
Project name		
Project Manager / Construction Manager		
Document Controller / Project Admin		
Procore Champion		

10. Quick-start checklist

Print this page or keep it open as you get set up.

Done	Stage	Action
☐	Access	Received and opened the Procore invitation from notifications@procoretech.com
☐	Access	Created my account using my company email address
☐	Access	Completed MFA setup and stored my 32-digit recovery code somewhere secure
☐	Access	Confirmed I can open the Williams project and see the tools I need
☐	Access	Installed the Procore mobile app, if I will be working in the field
☐	Training	Watched the five core topics (Navigation, Documents, Drawings, RFIs, Submittals)
☐	Training	Watched the role-specific topics that apply to my scope
☐	Training	Considered the Procore Certified: Subcontractor course (recommended)
☐	Project	Confirmed my Williams project contacts in Section 9
☐	Project	Confirmed which tools are in scope for my company on this project
☐	Site readiness	Confirmed my company's safety qualification and compliance requirements are current with Contractor Management
☐	Site readiness	Completed the project's site orientation and reviewed project-specific safety requirements

Thank you for partnering with Williams. We are glad to have you on the project.

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