Introductions:

Class time frame, Breaks, Bathroom locations & Technology- Screen up, Screen down

Computer Setup:

Google Chrome is the default browser -handouts
Set zoom to 100% for browser
Turn off pop up blockers
Control Panel → Settings→ Internet Options→ Privacy→ uncheck the "Turn off Pop-up Blocker"

Agenda:

History → Features → Benefits → how it works → Access & Troubleshooting.
System overview, the components & how to use them, schedule creation & Q & A session.
onSchedule- 30,000/month & 1,000,000.00 to build. NVR Paid for every change requested.

NVR owns SchedulePro & it's designed & optimized by NVR for NVR. Paperless environment that allows PJM's & vendors to collect, review & share their progress of construction electronically.

Features & Benefits:

Calendar & List Views	Mobile Access @ real time	Minimized Checklist
Drag & Drop Technology	Customizable Templates	2 Way Vendor Communication
Reduced PJM & Admin Time	UCS Integration	Automation

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## How SchedulePro works: UCS → SchedulePro → USER → Data Warehouse

SchedulePro system is automated: A sale is entered into UCS via Atlas. At 12am, the contract information is sent to SchedulePro. The SchedulePro user manipulates the system & the data is sent to the data warehouse. (Most reports are pulled from the Data Warehouse)
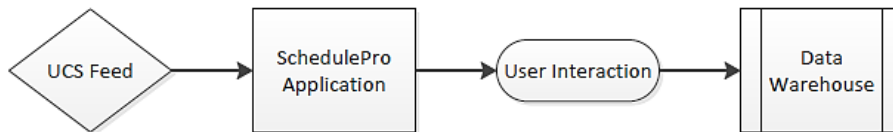
What if Change Order (Morning Room Added)? UCS updated with purchase & at 12am, the new information is sent to SchedulePro, including additional DUC's. **Removes Human Error Factor.**
SchedulePro can create data such as scheduled dates, issues & notes.

Automated Schedule Creation:
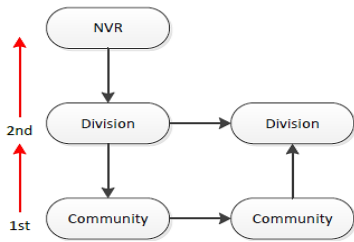
UCS sends 6 files of data nightly: Lot Details= Set#, Est. Set Date, Options. The Set# is important as it determines house type & DUC's. Other files included= Po's, Vendors, Lumber, Options, & Employee info.
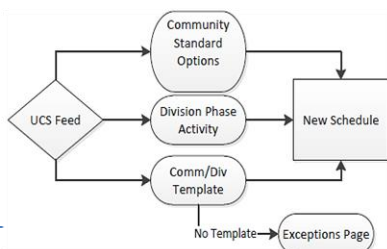
Exceptions

No Template (PJM)	**No Set/Ver # (SUPPORT)**
No Estimated Set Date (UCS)	**No Options**
Spec or Model	**Proto Type**

Types of Templates

Template Combinations
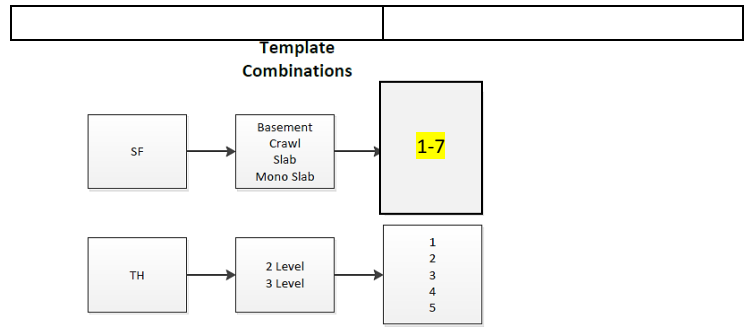
SchedulePro searches for the matching **Community Template→ Divisional Template→ Exceptions**. There is potential for **ZERO** time spent by PJM to set up their schedules.

Bonuses are based on HR 2.2 DUC & these days are based off of **Business Days & Set / Version #.** House Types include **SF= 1-7, TH= 1-5, CO=0, 1, 3**
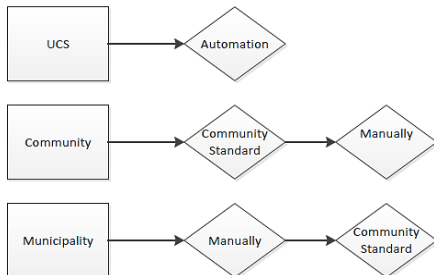
Template Tasks:

Tasks in SchedulePro consist of 2 types; Base & Option Tasks.
Base Tasks- show up in every schedule regardless of options.
Option Tasks- Only populate in schedule based on trigger & only if task is located in the Template Calendar.

Types of Task

Types of Options   **Types of Triggers**

UCS Options – Managed by ASD, 3 or 7 digit codes, manually added to SchedulePro by Support team.
Community Standard Options – Do not have a code; tend to be site specific, (Concrete Drive, Water & Sewer).
Municipality Option – Collection of Inspection tasks created by Divisional Gate Keeper.

Automation occurs nightly, based on UCS feed & adds or removes tasks based on options.
Community Standard Options are added to all schedules @ 1st creation & can always be removed manually.
Manual Options can be added or removed by user along with associated tasks on a lot by lot basis.
NOTE: All Options that have a DUC greater than zero must be added by BO/PM or CCM.

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Requesting Access: | NVR User | Vendor |

**NVR User:** Creating Account requires NVR Email Address & approval.
"NVR User" Access → Name & Email Address → Submit. Email must be NVR Email.

NVR Vendor: "Vendor" Access → Populate Fields → Submit. Vendor access requires Vendor #.

Vendors can have multiple accounts (20 managers=20 accounts) & can add/remove divisions they have access to in **My Profile** without assistance. **Users →My Profile →Add/Remove Divisions.**

Log in to reach "The Landing Page" → SchedulePro Icon to reach "The Dashboard": **PJS/PJM Review Task 1**

"The Landing Page" contains the Overdue Tasks Report, DUC Projections & Top 10 Vendors Issues.
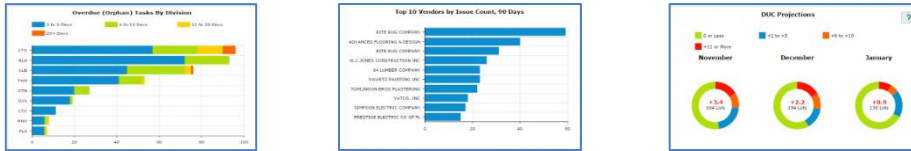
Overdue Tasks: BO/PM: As a refresher, what is an Overdue (Orphan) Tasks?   Task existing for 3 days, not completed, moved or duration extended. An Overdue Task chart is available by Division. (Select Div. to see all users).

User can filter through tasks by selecting duration they do not wish to see.
Tasks are based on business days & PJM should expect to make 1 call per Overdue Task.
Orphan Metric labels tasks by duration & quantity. Use details button to run reports.
NOTE: A link to the Overdue Task Report is available here.

BO/PM: BO Orphan Tasks can be lots that do not have a PJM assigned to them or starts that are not aligned on a start date. Starts must be positioned on the correct Start Date (Data Integrity). **BO/PM Review Task 1.**

BO/PM: An acceptable level of Orphan task? 3-5 days, but
every situation is different, e.g. 15 lots UC vs 3. Why do we care?
Sub dry runs, less trust & profitability, more calls & data integrity.
NOTE: When a schedule is opened, the oldest task appears 1st.

What is 1 example of an unacceptable Orphan Task over 6 days?
Should PJM ever have a lot that has not been updated? No, not really
BMP: PM's can turn off tasks so they can focus on what's pressing on Friday afternoon.
BMP: BO can list the PJM's name in backlog lots to reduce Overdue Tasks counts.

DUC Projections: BO/PM:
As a refresher, how are DUC Projections calculated? Projection is based on End of DUC task in schedule vs DUC over/under counter. See [?]

User can filter days by selecting color blocks.
User can filter DUC's from projections to divisions & to PJM.

BMP: Metric can serve as a snapshot of what may be going wrong in the PJM's world.
The PJM may be experiencing delays due to vendors, inspections department or bad soils.
PM can be proactive with a struggling PJM that may not want to get PM involved, but really should.

Top 10 Issues by Vendors: <u>BO/PM:</u>

As a refresher, what is an issue? Created at the task level, must be documented to notify vendors of problems, incomplete work or poor workmanship with a **<u>high priority</u>** to be resolved.

Lists all Issues created in the <u>last 90 days, open or closed</u>. Reports may go back further & link is available here. All NVR Users can see Issues throughout NVR, while Vendors can pull reports & respond to Issues on their end. <u>PM's:</u> PM can use to help manage & negotiate with vendors looking for more work or a price increase.
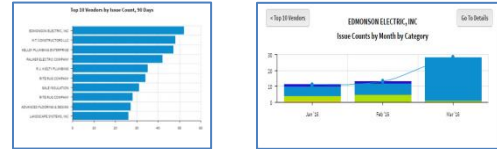
<u>BO/PM:</u> Reports: While we are talking about reports, let's review the reports Icon. **BO/PM Review Task 2.**

Issues Report: (Page 55)

As a refresher: An Issue is meant to notify vendors involved with the task of a problem, incomplete work or workmanship that does not meet NVR standards. It allows for quick access to the logged issues.
When could a PM use this report? Formal meetings with a vendor.

<u>BO/PM:</u> **Checklists Report:** (Page 61)

As a refresher: Quality Control Checklists are a series of items that a PJM is required to validate prior to completing a phase of construction on a given lot. (Only visible to NVR & docs can be attached to checklist) User cannot complete a task with an open checklist. All areas of a checklist must be completed in order to complete checklist. User must use none or N/A if no comments will be needed to complete.

<u>BO/PM:</u> **Usage Report:**

Option allows a PM to see exactly how the Div. is using the system compared to NVR averages (Red Line). User can toggle between Division usage & PJM usage. (Data may include read only access for new PJS's & PJM's) Compare the Prompting Tasks Vs Completed Tasks. This report can confirm or contradict what your thoughts are about a PJM's usage.

<u>BO/PM:</u> **Overdue (Orphan) Tasks Report:**

Option allows for quick access to all overdue tasks.

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"The Landing Page" contains the "Navigation Bar" & it allows Users can navigate through SchedulePro.
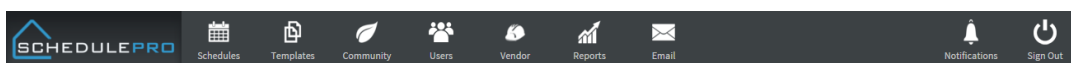
NOTE: Do not use the back button. Back button is not supported by SchedulePro but rather by Chrome. To return to the "Landing Page" use the SchedulePro icon.

The Navigation Bar Icons:

SchedulePro Icon: Return to previous page	**Lumber:** Plant Lumber Delivery Schedule
Schedules: View schedules at a high level and Starts Schedule (Lumber)	**Vendor:** Allows user to run vendor schedule reports by filtering.
Templates: Phase activities & Municipality Options & Available templates	**Reports:** Run reports on Issues, Checklists, Usage & Overdue Tasks
Community: All Communities @ 1X, CSO's, exceptions & multiple sites	**Email:** Search emails. (Daily Summary, View DS & click on category) Vendor says I'm not getting updates. Confirm emails sent, i.e. PW reset
Users: Filtering of employees, vendors & updating of your profile	**Notifications:** View of all corporate & local news

News:

Corporate News: Announcements include title, content, date, audience, more & attachments.
More=full message, **Envelope**= emailed, **People Icon**= who can see, **Document**= attachment.
Example Announcements: NVR Holiday, Outages, OSHA inspections, New Phase Specs, etc.

Local News: can be created by PM's, RPM & Area Lead. Attachments can include site plans, hyperlinks, etc. NOTE: When creating news, always select "Local" ONLY.

Recent Daily Batch Report: Personalized consolidated summary of recent emailed report.
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Return to "Schedule Summary Page"

Grey center section is called **"The Action Bar".** Objects in this area allow for action.
Lots listed in the area below **"The Action Bar"** are called **"The Data Grid"**.
NOTE: 3 viewing levels of SchedulePro: Schedule Summary, Lot & Task. Vendors can only see Task level.
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Schedule Summary:

The Schedule Summary is a dashboard for high level lot & schedule information.
This page allows for multiple community views & is totally customizable.
NOTE: NVR Rule: lots must be updated every 3 days min. =Orphan Task: **PJS/PJM Review Task 1**

Division/Community Filter: Filters divisions & communities user wants to see.
 Access is based on your assigned division access in your user profile.
NOTE: When a schedule is opened, the oldest task appears 1st.
Status Filter: Filters lots based on construction status. BMP: Recommend Backlog & UC checked.

Archive: A lot is archived when all tasks, checklists & issues are completed.
Backlog: Sold but not started or Sold but no Start Date in UCS. **Lot started when est. is locked in UCS.**
        Lots will be considered backlog for first 7 days of construction.
Under-Construction: UCS Start Date, not settled & **Bold Blue Text** in Start Date Column.

Columns Filter: Allows for customization of data. Order of columns is saved via cookies.
> Review all column categories. Discuss importance of **status category**.
> DUC Over/Under= difference between baseline & actual date of End of DUC.
> Demonstrate how to drag & drop columns in their preferred order.
> NOTE: Wrong PJM name in schedule, contact Area Lead or Administrator.
> NOTE: End of DUC is date of QAI. Recommend placing Projected PSD next to it.

BO/PM: Schedules not matching UCS with set & ver. will be highlighted & will need purging to correct.

Schedule Docs: Drawings associated with a particular lot.

Open Issues, Notes & Documents Counters: Quick access to items associated with the schedule.
PJS/PJM Review Task 3:

Issues Counter: Issues are created at the task level, must be documented to notify vendors of problems, incomplete work or poor workmanship with a high priority to be resolved.
Represents only open issues.

Once created, vendor is notified within 5 minutes. PJM's will receive an email when vendors leave comments. Issues can also contain documents & can be viewed in the same manner as a Task Doc but they are not shown in the counters. After 7 days & issue not resolved, becomes "Aging Issue" & the vendor is notified daily until closed. **PJS/PJM Review Task 3**

Keep the description short (2 sentences max) & create more detailed report in comments. Once created can be viewed in 3 locations: Schedule Summary Page, Single Lot Issue Counter & Task Detail. Icons will appear on tasks that they are applied to & will disappear once closed. Issues should be closed once item is corrected. NOTE: Category of issue is used to identify poor performing vendors (Review Categories).

Lot & Task Notes Counter: A brief statement of facts, topics or thoughts, recorded as documentation tied to a specific lot or task. Only NVR can see Lot Notes while the vendor & NVR can see Task Notes**.**
PJS/PJM, BO/PM Review Task 3.

> **Lot Note:** A running list or a specific documented item.
> > Only NVR can see & create, tied to lot & not task and cannot be deleted.
> > Ask when would you create a Lot Note? **Permit # or Appliances ordered.**

> **Task Note:** Note for a task.
> > Who can add & see a task note? **NVR & assigned vendor.**
> > Proactive Note-Lock box code is. Reactive Note-wrong grout color used.

Docs Counter: File that would benefit someone in the building process. **PJS/PJM Review Task 3**

> **Lot Doc:** Only NVR can see & create. Tied to lot, not task & only creator can delete it.
> > When would a PJM create a Lot Doc? **Customer information sheet.**

Task Doc: NVR & vendor can create & see the document. **Phase Spec/wiring diagram.**

Checklists: A summary of all checklists associated with the lot.

Summary/Starts Even Flow: Toggle used to view summary or upcoming starts. Green = Start & Red = NHO's.
View multiple communities at 1 time. All NVR holidays will be highlighted & ensure to use filters.
Click on Single Family & Town Home Lot Bar. Review data in Schedule Details. **PJS/PJM Review Task 11**
Demonstrate difference with TH's. TH's are grouped as a building & not individual units.

BO/PM: Lock Icon in a Lot Badge means the lot is locked & a UCS Start Date has been issued.
This area of SchedulePro should be used by BO/PM to move Projected Start Dates.
All lots should be on their correct start date by EOB daily.
If lot needs to move to May & the month is not visible, click lot, open schedule & change the start date.
Issue: Lot is locked in SchedulePro but on wrong day change date in UCS & nightly feed will correct.

Townhome Units- To set all the units to the same start date shuffle the deck by selecting the unit,
moving it off the day & returning & dropping it on the start day. **BO/PM Review Task 12.**

Export: Allows users to print scheduling information. **PJS/PJM Review Task 2**
BMP: The export is a Construction Status Report for weekly meetings for PJM's, PM's, SMR's, etc.

Single Lot Schedule:
Open a lot UC. Top black task bar w/ SchedulePro Logo is now called the **"Reduced Navigation Bar"**
Names of icons have disappeared along w/ notifications & Sign Out. Lot Badge ID & Done button are
now visible.

Schedule Detail Button: Allows for quick access to over/under DUC counter.

Info Tab: High level schedule info. ID template being used/confirm start package info.
BO/PM can add additional regional approved DUC's → Options →Manual Options →Update

History Tab: Complete history of lot & task movement. Filter by task & date. **Control F**
Demonstrate when a task was moved for a vendor: **PJS/PJM Review Task 11**
BO/PM: Single Lot History may help with vendor schedule conflicts. **BO/PM Review Task 10.**

Dates (Page 50): NVR DUC Bonus Program is based on calendar business days.
Non-working Days= NVR holidays & weekends.
Days in the calendar are already assigned non-working day status due to NVR Holiday.

Demonstrate how to create a non-working day. **Pick a date with a task assigned to it.** The
calendar will request that you move the task before creating the non-working day. The calendar
will not allow a task to be moved to a non-working day. Demonstrate how to add an additional
30 days to the schedule. NOTE: Dates do not affect DUC.

Options (Page 37)**:** Every option applied to the schedule.

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Schedule Options: A summary of UCS & Community Options that add tasks to the schedule.

UCS: Options that are dictated by UCS. You're **e**lectronic SAR. Updated nightly (show "Last Data-Feed Run"), sorted by "Date Inserted", Demonstrate ability to search using **Control F** for Color.

Manual Options (Single Lot Option): Review 90/10 Rule. All Community & Municipality Options available & the ones chosen. PJM can +/- for lot, but cannot +additional DUC's. Examples of Non-UCS code options=Driveways, Floor Screwing & Municipalities.
If community default is setup, task item is automatically assigned to lot.   **PJS/PJM Review Task 5.**
BO/PM: Can + Manual Options including ones that drives additional DUC's. **BO/PM Review Task 4**
Example: TH Filler Days →Options →Manual Options →Update

QAI Score: The Quality Assurance Inspection score earned.

Change Task Dates (Page 44)**:** Demo: Drag/Drop/Duration from Schedule View & Prompting.
What happens to tasks on the same day with prompting? **Current tasks remain.** **PJS/PJM Review Task 13**
   Demo: List View & Task Details. Review Lock/Unlock & Complete Task.
   List View Uses: Locate undefined vendor & phase activities.
    Ask when a PJM might want to lock a task? Customer meeting or material delivery.
   Baseline Dates drive your pay so Baseline Dates & Schedule Date should be same if poss.
   NOTE: Vendor no show, move task & document.

Multi-Select (Page 42)**:** Complete multiple tasks at once. Review toggle in **"Action Bar"**
   Toggle to Multi & select 2 tasks. Point out how tasks have changed colors. Show how "**Actions Button**" is now activated & review drop down. **PJS/PJM Review Task 12**

Filters Icon: Review filters button in "Action Bar". **There are 9 Choices.**
   Review Interior Vs Exterior colors. **Blue=Interior** / **Green=Exterior**.
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Task Details:
   Baseline duration is a result of your template & is PJM controlled @ template creation.
   User can change date or duration in task details.
   The Glue that holds everything together in SchedulePro is the Phase Activities.
   If a phase activity is turned off the task will not be visible to the vendor.
   Options are why the tasks appear in the schedule.

Task Details →Notes Tab: (Page 52)**:** A brief statement of facts, topics or thoughts, recorded as documentation tied to a specific lot or task.
Example: Rash Plumbing, great job cleaning up after install. 2-way communication. **PJS/PJM Review Task 3**

Task Details → Issues Tab: (Page 55)**:** Created at the task level, must be documented to notify vendors of problems, incomplete work or poor workmanship with a high priority to be resolved.

SchedulePro Training Guide

Once created, vendor is notified within 5 minutes. PJM's will receive an email when vendors leave comments. After 7 days & issue not resolved, becomes **"Aging Issue"** & the vendor is notified daily until closed. **PJS/PJM Review Task 3**

Keep the description short (2 sentences max) & create more detailed report in comments. Once created can be viewed in 3 locations: Schedule Summary Page, Single Lot Issue Counter (open or closed) & Task Detail. **Issue Docs can be uploaded to system.**

Task Details →Docs Tab: (Page 57): File that would benefit someone in the building process. NVR & vendor can create & see the document. **Wiring diagram. PJS/PJM Review Task 3**

Task Details →Vendor Tab (Page 65): * denotes primary vendor in UCS.
Vendors tied to phase in 2 ways-Primary Vendors & Non- Primary Vendor.
Primary & Manual vendors will see tasks while non-primary vendors will not.
Vendors assigned by UCS via the Community Vendor Table are Primary Vendors.
Vendors assigned by UCS Job Estimate are PO Vendors & will over write primary vendors.
NOTE: Switching vendor can be completed by PJM.

Multi-Lot View (Page 39): Comparison of multiple schedules (side by side) at 1X. **PJS/PJM Review Task 4**
Actions tab becomes highlighted when lots are checked. Select the action from the **"Action Bar"** & your selections will appear. A 2-week view will appear but advances 1 week at a time.

Prompting is available, **Sort** by Lot Ascending / Descending, Delivery Date Ascending / Descending. Sorting by lot# or Delivery date helps PJM stagger crews.
Column 1= selectable house link, house type & DUC +/-. Change schedule by drag/drop, duration, prompting, Multi-select, task details. Task filter available to limit # of tasks viewed.
NOTE: Schedules will always show lots with the earliest start on top.
_____

Action Button: Allows for a View, Refresh, Phase Activity Refresh, Resequence or Purge.

View: Allows for a view of the lots selected.

Refresh: The ability to reconfigure a single lot schedule to the latest version of a division or community template. This can be done for Backlog schedules that do not have an official UCS start date. Ensures you have the most updated template. Not available after start.
NOTE: Refreshing the template will not purge uploaded docs or established notes.
BMP- Recommended just before a start but must be done before any tasks are completed.

Phase Activity Refresh: Refreshes all divisional phases & affects entire division & not just a community or lot.
By turning OFF "Stakeout House" task will remain in the schedule but phase will be turned off & vendor will not be able to see task.

SchedulePro Training Guide

NOTE: Recommend no changes without conversation with Production Manager or CCM.
BMP- Recommended time frame for a Phase Activity Refresh is just before start, 1 lot at a time, as many times as you want (Don't select Community.)

Resequence: For a single lot schedule that is either Backlogged or Under Construction, the user can realign uncompleted tasks in a schedule according to the template that it was created from.

Purge: Feature is used when a house cancels or there is a physical problem with the lot. Lot must have a UCS start date & must be under construction.
A lot can be purged at any time but a <u>soft deadline is considered framing</u>.
BMP-Before purging a schedule, it's recommended that you get a second opinion & check with PM.

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Schedule Summary Icon: Location includes Schedule Summary & Start Schedule
Schedule Summary: High level view of schedules.
Starts Schedule: Manages start schedule with plant capacity in mind. Thurs starts new week.

Select Yard Code: SCP= Kings Mountain, CWT= Thurmont
Filters by Region & or Division
Weekly Capacity- Determined by planning dept. & plants
Weekly Totals- Quantity of packages the field is requesting
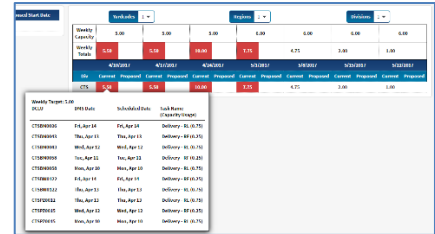
Select Current in week 1- displays deliveries in current week
NOTE: Current week 1 & 2 delivery & DMS dates should match
Capacity Usage column displays pkg. value- pkg. value will = week value
Weekly Target is the divisional target point value & **Red** point values allow the plants to forecast.
Pkg.'s moved o/s of firm week allows other users to see upcoming changes before DMS is updated.
Color codes: **Y=below capacity** **R=above capacity** **P=DMS date missing** P2= 2nd panel TH & Condos
*If plant moved delivery, SchedulePro is updated & PJM is notified by email.

Moving Starts: Select Start Schedules→ Run Report→ Select Region & Div.→ OK
Changing Start Date: Click on field to right of DCLU & select a working day
NOTE: Once date is selected an "X" will appear as well as the <u>new date</u>; click "X" to cancel
Review the chart to see how the change has affected your lumber pkg. requests.
Proposed Column= click on the # to see the details.

If the proposed column is **GREEN**, the change has not affected your weekly target.

If **RED**, the change has placed you over the weekly target.

By clicking on the details you may see the following:

*Packages in RED mean they are leaving the week

BLNRF0078	Fri, Jul 22	Tue, Jul 26	Delivery - RF (-0.25)
BLNRF0078	Fri, Jul 22	Tue, Jul 26	Delivery - RL (-0.75)

*Packages in BLUE mean they are entering the week

BLNRF0078	Fri, Jul 22	Tue, Jul 26	Delivery - RL (0.75)
BLNRF0078	Fri, Jul 22	Tue, Jul 26	Delivery - RF (0.25)

Click **SAVE** to change the start date of the house as well as **ALL** the baseline dates.

A user may search for a lot by using the Magnifying Glass Icon or can click on the Bell to view new schedules that have been added to the system & also see if a schedule has been added with a start date prior to the current week. NOTE: System is Automated BUT; new schedules still have to be slotted.

General Notes:

If a user leaves the page before saving, nothing will be changed	Chart is sorted by SchedulePro Date
This tool was designed to be used on a PC	Plant automation affects packages with a DMS date with firm weeks
DMS dates are updated on a nightly basis, not real time	Date request changes within firm weeks to follow current process

Template Icon (Page 15): **PJS/PJM Review Task 5**

> **Division Phase Activity:** A listing all active & inactive phase activities.
> Allows divisions to assign a phase to a task so specific vendors can see specific tasks in SchedulePro.
>
> **Municipality Options:** There are no inspection tasks in the NVR Master Template. Municipality Options can be created locally to better manage local inspection needs. Each division will have an individual referred to as a **"Gate Keeper"** assigned to manage inspection options.
>
> **Creating Municipality Options:** Template Icon→ Municipality Options→ +.
> Enter in the name of the Jurisdiction (Municipality) into the "Name" Field.
> From the list of "Municipality Inspections", select all inspections needed for your jurisdiction.
>
> **New Inspection Needed:** If the type of inspection is not currently listed, select the "Add" on the top right of the menu & add the "Name" of your inspection task.
> Select the task activity by entering "Interior" or "Exterior" in the "Category" window.
>
> "Phase Activity" = 2 options: Phase Activity or No Phase Activity
> "No Phase Activity (MISCX)" – by selecting, this inspection is only visible to NVR.
> By checking a task, the system will include the vendors responsible for the phase activity with a corresponding task. (Example, by choosing Frame Labor (110L), to a framing inspection, the vendor will be able to see in his schedule when the municipality inspection will take place. Select the "Create".
> NOTE: The word "Insp" & the bracket bars will be added by the system.

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Template Summary (Page 14)**:** A Template is a predetermined sequence of events.
The Template Summary area contains all available Templates & ability to create a new template.
3 types located in the Template Summary: NVR Master, Division Master & Community Template.
90/10 rule: Template Types: Created to match the NVR DUC Program with Base DUC's &
Options (additional DUCs). Only Options affecting DUC or + different tasks will be in SPro. Templates.

Attributes	SchedulePro Template
Type = 3 Product Type = SF Foundation = Basement	Business Days (M-F) = **55**
Type = 1 Product Type = TH Level = 2	Business Days (M-F) = 47

In SchedulePro Templates	NOT in SchedulePro Templates
Morning Room Ceramic Backsplash	Upgraded Plumbing Fixtures • Since the DUC and the schedule is not effected by the level of Fixtures

Template Restrictions:

Only (1) ACTIVE Template with the same attributes can exist is at each Hierarchy Level.

Example:
(1) Type 3-SF-Basement-Division Master (CTN)
(**1) Type 3-SF- Basement-Community Master (CTN-FG)**
(1) Type 3-SF-Basement-Community Master (CTN-DS)
~~(1) Type 3-SF-Basement-Community Master (CTN-FG)~~

How to copy a Template:
Click the Copy Button on the far right of the template you are trying to copy.
Select where to copy the template to (Division or Community). Click the "**Copy**" Button.
Note: If screen is empty check your filters. Demo Filters.

Reduced Navigation Bar allows user to view template information: Template Name/Foundation Type &
Total Calendar Days for the Template per the NVR DUC Program.

Click on Template to view. By Default, the Template is filled with all tasks available.
User can view the Template in multiple ways by using Calendar Vs List View.
NOTE: The system was developed to eliminate duplicate templates. If you're Division or Community is
not listed when you are trying to copy the Template, a template already exists meeting the criteria you
have requested to copy.

Trash Can= Allows user to delete templates he has created. **Click on Template**
Lot ID Badge= Describes the template type, type home & foundation & DUC's.
Copy Button= Allows user to copy & use the template. You can only copy 1 SF Type 3 community
Demonstrate a NVR Master Template by copying template to manipulate.
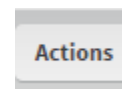Hopper= User area to sort & filter tasks.
Calendar= Business day view to sort & schedule tasks.

Auto Fill/Reset Tasks:

By Default, Calendar will be populate based on the sequence of the template copied from.

To **Reset** the Template or clear the calendar, use the following steps:
Click on the "**Actions**" Button in the toolbar

Actions

SchedulePro Training Guide
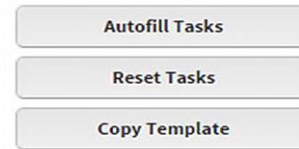
Select "**Reset Tasks**"
Confirm the "**Reset Template**" from the popup

To **Autofill** the Template (Will default to the NVR Master Template) use the following steps:
Click on the "**Actions Button**" in the toolbar
Select "**Autofill Tasks**"
Confirm the "**Autofill Tasks**" from the popup

| Autofill Tasks |
| Reset Tasks |
| Copy Template |

Filter/Sort in the Hopper:

The Task Hopper, located on the left side of your screen, contains all tasks that are not currently in a template, but available for use. Tasks in the Hopper can be filtered &/or sorted in multiple ways.

<u>Filtered by:</u>	<u>Sorted by:</u>
Exterior	Sequence- NVR Master Template
Interior	Alphabetical
All- Interior & Exterior	Option- Tasks sorted by options generated for
	Phase- Numeric order by phase construction

_____

Communities Icon: (Page 24) The Community Summary Page is a quick reference for all active communities by Division/Region. From the Community Summary Page, you can quickly see a high level view of Community Information, # of Backlog Schedules, # of Under-Construction Schedules, & # of Archived Schedules.

Community Standard Options: (Page 25) Community Standard Options are a way to create default option assignments (non-UCS code options) for schedules.
Examples of non-UCS options are driveways, water/sewer, seed/sod, & municipalities.
Default options assigned to communities are included in the new lot schedule when released from UCS.
<u>BO/PM:</u> Can add Community Options including the ones that add additional DUC's. **BO/PM Review Task 5.**

Adding a Community: Community → **+**.
Click on the "+" button located in the top **RIGHT** corner of your toolbar.
Complete the Community Name, Community Designator & Division. Select "Add".

Assigning Community Standard Options:

Click on the "Community" Icon in the Navigation Bar.
Select "Community Standard Options" from the Sub Menu.
Select the Division, Community & Choose the Option from the "Filter by Group".
Select the Option from the "Select Options" list.
Verify Option was added in "Selected Options" & click "Update".
Once assigned, a summary of the community options appears on the option page.
NOTE: Only the options with a check will be used in your community.

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Exceptions: Location of schedules missing critical information.

Multi-Lot Management: Recommend using this feature if products have the same start date

General Notes:

Managing Groups is **real time** with no overnight updating required	Recommend that 1 user manage grouping : Anyone can edit groups
New Building Schedules will automatically be set up as a group	Recommend not editing page on a consistent basis
Group feature can be used with SF, TH & Condo Products	Groups can be deleted

Create Group: Select Div.→ Community→ Plus Icon → & create group name
Add Lots to Group: Click Lots→ Select lots→ Update
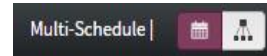**Linking Tasks:** Click Tasks→ Select Tasks to group→ Update
Copy Tasks to new group: Create Group→ Click Copy→ Select Group to copy to→ Click Copy
NOTE: System will not allow user to select lots already populated in an existing group
Select multiple lots to view from Schedule Summary Page & use Action button to View.

Page Summary:
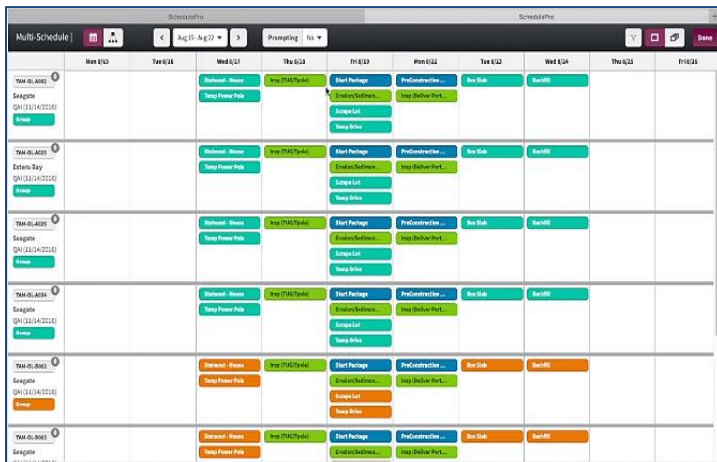Calendar & Group View Icons: Allows for view of all tasks or just grouped tasks.
NOTE: Group view ONLY accounts for grouped tasks.
Date sort: Allows for date sorting with 10 business days viewable at 1 time.
Prompting & Filter Button: Filter now includes ability to sort by QAI Date.
Single, Multi-select Button & Done Buttons. **Reminder: Use Done Button & not back arrow.**

Review: 5 lots visible, 10 days
Group Badge: All lots in Group
Task Red Button: View hidden tasks
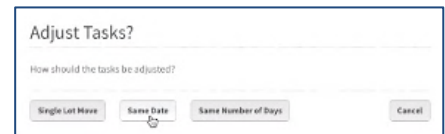1 Click Header Multi-select
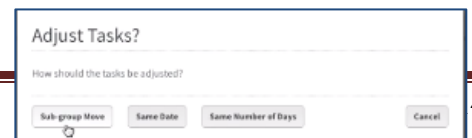
Adjusting Grouped Tasks
Single Lot Move- Moves task in single lot
Same Date- Moves all linked tasks to same date
Same # of days- (Staggers) moves all linked tasks correct # of days

Adjusting Sub-Groups

Select correct move from choices
Click on Single lot ID Badge & demo
*Review Return Button in single lot view**

Users Icon: PJS/PJM Review Task 15
Features include: All/NVR/Vendor sorting. Sort by letter or name but must select none to display all.
Feature allows for active/inactive sorting, column sorting by headers & email access.

User Security Profiles: Anyone can create a task note & task docs.

Vendor= Vendor can view only their task & they cannot create issues	**PM/BO**= Add/remove options with DUC's & create news
PJM= Can view everything but cannot add DUC's or create news	**NVR**= users can only create & view lot notes and docs

<u>BO/PM:</u> Page is useful to see the communities a vendor can view. Type in the vendor name & hit enter. The communities that the vendor is associated with will populate at the bottom. **BO/PM Review Task 16.**

My Profile Icon allows all users to change profile info including password. Allows vendors to filter divisions they have access to without admin assistance.

Truck Icon: Page contains 2 sections; Lumber & Plant
      Plant: NOTE: Firm Weeks- plant locked tasks or dates of deliveries
      Automation- allows for the plant to align SchedulePro with DMS

      Submitted By- Requests submitted by divisions or users that have saved **(Tuesdays)**
      Yard Codes- description of yard codes & tasks along with capacity values
      Unsupported Community Packages- EX: Richmond; allows users to ignore their values
      Monthly Lumber / Start Targets – aligns lumber with NVR start targets

      Lumber: NOTE: Users authorized by their division should be using this field <u>ONLY</u>
      Weekly Capacity- 6 weeks of a div.'s capacity needs (1st two firm – next 4= projections)
      Allows for managers to balance their load requests

      Filters- allows users to narrow their search: Comm. → Pkg. → Task
      Blue Start Dates = locked & in UCS   Notes- allows user to send notes to the plant
      DMS & SchedulePro dates should match in firm weeks- once updated, click **Submit Lumber**
      Changes – non firm week after submitted will not go to plant
      Changes – outside firm week in SchedulePro will show up here
      Changes made here will show up in the SchedulePro Application
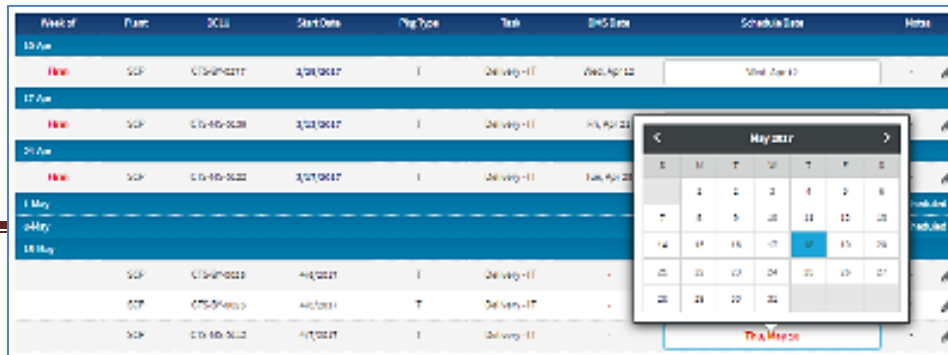
SchedulePro Resources

SchedulePro System Guide v02

SchedulePro Training Website= http://sprotrain.nvrinc.com

Video Link= https://vimeopro.com/nvrinc/multi-lot-management

SchedulePro Support= https://nvrprojects.atlassian.net/wiki/display/SS/SchedulePro+Support

Testing Questions

Review Tasks: PJS/PJM	Review Tasks: BO/PM
1. **Dashboard (Orphan Tasks, DUC, Issues)**	1. **Dashboard (Orphan Tasks, DUC, Issues)**
2. **All reports**	2. **All reports**
3. **Counter Buttons (Open Issues, Notes & Docs)**	3. **Counter buttons (Notes, Docs & Issues)**
4. **Multi-Lot Select**	4. **Manual Options**
5. **Manual Options**	5. **Community Standard Options**
6. **Community Standard Options**	6. **Vendor View Page**
7. **Templates (Creating & Editing)**	7. **Add a Doc, Note, Issue**
8. **Vendor View Page**	8. **Export (Schedule Summary & Vendor View)**
9. **Export (Schedule Summary & Vendor View)**	9. **Email Search (Use Live Site)**
10. **Email Search (Use Live Site)**	10. **Single Lot History**
11. **Single Lot History**	11. **Creating News**
12. **Multi Select**	12. **Moving/slotting Starts**
13. **Prompting**	13. **Purging/Refresh/Phase Refresh**
14. **Vendor: I can't see a task? Troubleshooting**	14. **Division Phase Activity Page**
15. **User Page**	15. **Vendor I can't see a task? Troubleshooting**
	16. **User Page**

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PJS/PJM Questions:

1. **Dashboard (Orphan Tasks, DUC, Issues) - What is an Orphan Task?** A task that has not been completed moved or had the duration extended for 3 days.

   How can the Dashboard help you with your duties? The Dashboard can be a quick overview of how a community is operating & allows user to drill down to gather more information.

2. **All Reports**- Reports can be used by any NVR user & can give insight to how one is performing.

3. **Counter buttons (Open Issues, Notes & Documents)** - Total of all Notes, Docs & Issues.

   Lot Notes & Docs vs Task Notes & Docs: What is the biggest difference between Lot Notes & Docs vs Task Notes & Docs? Only NVR can view Lot Notes & Docs while vendors can view Task Notes & Docs.

   What are the 2 types of Notes? A Lot Note which <u>can only</u> be viewed by NVR users & a Task Note which can be viewed by NVR users & vendors assigned to the task.

   How soon will the vendor receive a Task Note created by the PJM? The assigned vendor to the Task will receive the Task Note within 5 minutes of creation.

   What are the 2 types of Docs? A Lot Doc which NVR users <u>only</u> can upload & view & a Task Doc which can be uploaded by NVR & the vendor assigned to the task & <u>can be viewed by both</u>.

   Issues Button- Does the Issues Button Counter contain Open, Closed or All Issues? The Counter only displays the number of Open Issues.

4. **Multi Lot Schedule**- What does the Multi Lot function allow in SchedulePro? It allows for the comparison of multiple schedules (side by side) at one time. Show me how to Multi Select 3 Lots.

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5. **Manual Options-** What are Manual Options? They are a summary of all Community & Municipality Options available & the ones currently chosen.

   What are 3 examples of Manual Options: Driveways, Floor Screwing & Municipalities.

   Show me how to navigate to the Manual Options of a lot.

6. **Community Standard Options –** What are community Standard Options? They are a collection of non-UCS options such as water/sewer & seed/sod used as default assignments.

   Who can add these Options? Anyone can add the Options but PJS/PJM's cannot add Options that drive additional DUC's.

   Show me how to navigate to the Community Standard Options.

PJS/PJM Questions:

7. **Templates (Creating & Editing)** - Demonstrate how to navigate to the Template Summary Page.

   When would a PJS/PJM select a NVR Master Template to build their schedule? Never

   What does it mean when you're Division or Community is not listed when you try to copy a Template? It means that a Template already exists with the criteria that you are trying to copy.

8. **Vendor View Page-** The Vendor View page can be used to help with vendor workloads & scheduling. Page can be a quick view of just how busy a vendor may be in any given time frame.

9. **Export (Schedule Summary/Vendor View) -** Show me how to Export a Schedule Summary or a Vendor Report.

10. **Email Search (Use live site) -** Demonstrate how to conduct an Email Search for a Vendor.

11. **Single Lot History-** This function can be used when a vendor states that the PJM is changing the schedule at the minute; this tab will confirm or deny these allegations.

    Demonstrate how to get to the Single Lot History.

12. **Multi-Select-** What is feature used for? This feature can be used to complete multiple tasks at 1X.

    Show me where the Multi-Select toggle bar is & select 2 tasks & complete them.

13. **Prompting-** What is Prompting? The ability to adjust the remainder of the schedule following a task that has a completion date that is moving on the schedule.

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Name another instance when the Prompting feature could be of great use? It could come in handy with a new PJS while learning the system. Allows them time to think about each manipulation.

14. **Vendor: I can't see a task? Troubleshooting-** Vendor states that he cannot see his tasks? If you can see the vendor in the task details, its user error.
Vendor can't see task> check task: vendor not listed> check phase: no phase activity>turn on phase activity>conduct division phase activity refresh.

15. **User Page-** The User Page can be used to quickly pull up a vendor. A BMP for this page is to use it to locate the communities that a vendor can see in the system.

BO/PM Questions:

1. **Dashboard:**

   Orphan Tasks – What is an Orphan Task? A task that has not been completed, moved or had the duration extended for 3 days. Orphan Tasks can be lots that do not have a PJM assigned to them or starts that are not aligned on a start date.

   Reasons not to have Orphan Tasks include: Maintain Vendor Profitability & Trust, fewer dry runs & phone calls, Data Integrity.
   Every Orphan Task= 1 phone call & Tasks details are business days (days overdue & # of tasks)

   When a schedule is opened, the task that is the oldest will always appear first.
   Should there ever be a Lot that has not been updated? Absolutely not.
   Should a PJM have a task like Tile BS overdue for 1 week? Absolutely not.

   DUC Projections - How is this calculated & how do you use it? DUC Projections are based on End of DUC Task.

   This metric is a great snapshot of what may be going wrong for a PJM, i.e. bad ground.
   This feature allows you as a PM to be proactive with PJM's.

   Top 10 Issues by Vendors – Displays all issues open & closed, created in the last 90 days (Reports can go back further).

   As a PM, what is your definition of an issue?
   How do you currently get feedback on vendor's performance now? With this snapshot, there is no need to ask for criticism of vendors from PJM's

All NVR employees can view vendor's issues throughout the company for comparison.
Can be a great tool when hiring a vendor from another division.
The vendors can pull reports & respond to issues.

2. **Reports-** Reports can be used by any NVR user & can give insight to how one is performing.

   A Usage report will allow a PM to see division usage & PJM usage.
   (Note: May include read only access for new PJS's & PJM's).
   The PM can see exactly how a PJM is using the system i.e. prompting vs the completed tasks

   PM's- How can the reports be a helpful tool in your current role? They are a great proof source for formal vendor meetings concerning more work or monies.

3. **Counter Buttons (Notes, Docs & Issues) -** Total of all Notes, Docs & Issues.
   Lot Notes & Docs vs Task Notes & Docs: What is the biggest difference between Lot Notes & Docs vs Task Notes & Docs? Only NVR can view Lot Notes & Docs while vendors can view Task Notes & Docs.

BO/PM Questions:

What are the 2 types of Notes? A Lot Note which <u>can only</u> be viewed by NVR users & a Task Note which can be viewed by NVR users & vendors assigned to the task.

How soon will the vendor receive a Task Note created by the PJM? The assigned vendor to the Task will receive the Task Note within 5 minutes of creation.

What are the 2 types of Docs? A Lot Doc which NVR users <u>only</u> can upload & view & a Task Doc which can be uploaded by NVR & the vendor assigned to the task & <u>can be viewed by both</u>.

Issues Button- Does the Issues Button Counter contain Open, Closed or All Issues? The Counter only displays the number of Open Issues.

4. **Manual Options (Single Lot Options)** - What are manual options, how do you get to manual options who can add them? They are manually added or deleted options on per lot basis.

   PJM's can add or remove Manual Options in SchedulePro. Can BO or PM's also add or remove these options? Yes. BO & PM's can add or remove options, including ones that drive additional DUC's.

   BO/PM will determine the order of unit construction for condos & TH's (NV TH's predetermined).
   The PM or B/O, once sequence is determined adds appropriate days to the correct units

5. **Community Standard Options (Community Wide Options) –** Page is populated with Non-UCS Supported Options that are assigned to the communities. Area adds options to schedules.
   Does added DUC's affect lots under construction? No. A refresh must occur.

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Does BO users have the same edit rights that PM's have? Yes. BO & PM's can add Community Options including the ones that drive additional DUC's (PJS/PJM's cannot add).

BO/PM would normally only select item here if not supported by ASD such as Cottage Elevation Veneers & Stick Framing. <u>DO NOT</u> select TH or Condo unit order on this page. Why? Affect entire community.

Demonstrate for me how to navigate to the Community Standard Options.

6. **Vendor View Page** – The Vendor View page can be used to help with vendor workloads and scheduling. This page can be a quick view of just how busy a vendor may be in any given time frame.

7. **Adding a Document, Note or Issue –**Items added to the system to aid with construction & communication.

   Lot Doc: A Document is a file that would benefit someone in the building process.

<u>BO/PM Questions:</u>

Who can create & see a Lot Doc? Only NVR can see & create. Tied to lot, not task & only creator can delete it.

When would a PJM create a Lot Doc? **<u>Customer Information Sheet.</u>**

Task Doc: Can a vendor create a task Doc? Both NVR & Vendors can create & see Task Docs. Example of a Task Document: **<u>Phase Spec, wiring diagram or directions for a NSO.</u>**

Issue Doc: Attached by creator, viewed in the same manner as Task Doc.
NOTE: Issue Docs not shown in Schedule Summary/Single Lot Doc counters.

8. **Export -** Allows users to print scheduling information. Very helpful during meetings.

9. **Email Search-** All SchedulePro users can conduct an Email search.
   What could you use this feature for? Email Search is used to confirm when emails were sent. BO or PM can check when a vendor says that he is not getting Daily Summary Updates or you can see when a vendor resets their password.

   Status- Current status of all lots
   <u>Archived Lot</u>- What is an archived lot? When all tasks, checklist & issues have been completed.
   <u>Backlog Lot</u>- What is a Back Log Lot? Lots sold but not started or sold but UCS start date not entered.
   <u>Under Construction</u>- UCS star date, not settled & **Bold Blue Text**.

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Columns- What does the dash in the updated column section indicate? Updated Column with a dash will indicate that the lot has not been touched since it was created.

10. **Single Lot History**- What is the Single Lot History? The complete history of a task including who & when it was updated.

    When could you use this function? When a vendor states that the PJM is changing the schedule at the minute; this tab will confirm or deny these allegations.
    Show me how to navigate to the Single Lot History tab.

11. **Creating News- Who can create News? BO/PM/Administrators can create News.**

    When would be a good time to send out local news: Change in PJM's, new community or when a Division is closed. **Always select Local when creating news & every box must be filled out. Just 1 document can be uploaded at 1x.**

12. **Moving & Slotting Starts-** Slotting is the process in which the projected start date is determined.

    How would one go about re-slotting a start to a day outside the month visible on the screen? Open the Lot Badge & simply change the start date to the new month.

BO/PM Questions:

Summary/Starts Even Flow- What does the green & Red labels indicate? The green labels indicate a Start & the Red indicates a NHO (PSD).

What does the Lock Icon indicate in a label? It indicates that the task is locked & a UCS Start Date has been issued.

What does Building mean in the Lot Badge? It's identifying a Townhome building.
This area of SchedulePro should be used by BO/PM to move Projected Start Dates.

How would one adjust the start dates of a TH Building so that all the units started on the same date? BO/PM would pick up the Building Badge & drop it which will shuffle the deck.

13. **Purging, Refresh & Phase Refresh:**

    View – What does the view selection allow? Allows for multiple lots to be viewed at the same time.

    Template Refresh – What is a Template Refresh? The act of reconfiguring a single lot schedule to the latest version of a division or community template.

    Who can conduct a Template Refresh? All NVR employees can but only on backlog lots that do not yet have a UCS start date.

Reasons for refreshing: Template, Community Standard Option or Phase Activity change.
A great tool for adding missing tasks in the schedule.

Refresh in Action: Select Template, update & close. Select Backlog lot(s) & activate refresh.

When would BO or PM conduct a Template Refresh? It's recommended just before a start, but must be done before any tasks are completed. If done after tasks have been completed the completed task information will be lost. Template Refresh is not available after the start.

Purge – Who can conduct a Purge? BO/PM only.
Reasons for a Purge: Change of customer or house type for a lot.

When can you conduct a Purge? Anytime, but someone should be asking why?
What is the latest time frame that a lot may be purged? A lot can be purged at any time but a <u>soft deadline</u> is considered framing. Before purging, check with PM.

Phase Activity Refresh – Who can conduct a Phase Activity Refresh? BO/PM only.
Reasons for a Phase Activity Refresh: **Update all phase activities or turn ON or OFF Phase.**

<u>**BO/PM Questions:**</u>

What is the recommended time frame for a Phase Activity Refresh? BMP is just before the start. Multiple lots can be refreshed at once & as many times as needed.

14. **Divisional Phase Activity Page (UCS & SchedulePro Combined)** - What is the Divisional Phase Activity Page used for? A way for a division to assign a phase to a task so that a specific vendor can see specific tasks in SchedulePro. Page is used to <u>turn on Phase Activities & not Tasks</u>- Tasks will remain in the schedule or hoper. BMP-Sort by task or the PM may miss a phase activity.

    Schedule creation requires 3 items: Phase Activity, Community Standard Options & Template
    UCS- Phase Activity-Task- Vendor

    If a user makes a change to the page, does it affect the single community or the division? It affects the entire division.

15. **Vendor can't view Task Troubleshoot –** In a scenario where a vendor phones you & states that he cannot view his tasks in the schedule, what is your troubleshooting procedure? The administrator should open the task & 1st check for a phase activity, 2nd open the vendor tab & check for the correct vendor. If you can see the vendor, the vendor should be able to see his tasks & the problem is more than likely user error.

Vendor: I can't see a task? Vendor can't see task> check task: vendor not listed> check phase: no phase activity>turn on phase activity>conduct division phase activity refresh.

16. **User Page** – The User Page can be used to quickly pull up a vendor. A BMP for this page is to use it to locate the communities that a vendor can see in the system.