



System Guide  
v02



**SCHEDULEPRO**

**System Guide  
v02**

## Table of Contents

What is SchedulePro?	5
Benefits of SchedulePro	5
<b>Getting Started</b>	<b>6</b>
Request Access to SchedulePro	6
NVR Access	6
Vendor Access	7
Forgot Password	8
Contact Administrator	9
<b>News</b>	<b>11</b>
News Announcements	11
How to Read News?	11
Corporate News	12
Local News	12
How to Create a News Announcement	12
Notification (Email) from News Announcements	13
<b>Templates / Municipality Options</b>	<b>14</b>
What is a Template?	14
Template Hierarchy	14
(3 Types)	14
What are the different Types of Templates	14
Municipality Options	15
How to Create Municipality Options	15
Template Summary	16
How to use the Template Summary	17
Template Rules/ Restrictions	17
How to Copy a Template	17
How to View a Template	18
Add/Remove Options in Template	19
Autofill/Reset Tasks in Template	19
Filter/Sort the Task in the Hopper	20
Moving Tasks Prompting - NO	21
Moving Tasks	22
Prompting - YES	22
How to Change Task Duration	23
<b>Communities</b>	<b>24</b>
Community Summary Page	24
Adding Community	25
What are Community Options?	25
How to Assign Community Standard Options	25

<b>Schedule Creation</b>	<b>27</b>
How Schedules are Created	27
Why Schedules are Not Created (Exceptions)	27
Locating Exceptions	27
How Schedules are Updated with New/Removed UCS Options	28
<b>Start Dates &amp; Even Flow</b>	<b>29</b>
How to Access the Even Flow Screen	29
How to Read the Even Flow Screen	29
How to view Lot/Building Details	30
How to Edit the Start Schedule	31
UCS Start Dates vs. SchedulePro Start Dates	31
Start Date Rules	31
<b>Schedule Summary</b>	<b>32</b>
How to Access the Schedule Summary	32
Status Filter	32
Customize Schedule Summary (Columns)	32
Exporting the Schedule Summary (Excel)	32
Schedule Actions	33
Product or Version Changes	36
Lot Transfer or Cancellation	36
<b>Single Lot Schedules</b>	<b>37</b>
How to view a Single Lot Schedule	37
Calendar vs. List View	37
How to View Options for a Lot/Schedule	37
How to Manage Community or Municipality Options?	37
<b>Multi-Lot Schedule</b>	<b>39</b>
How to view a Multi-Lot Schedule	39
How to Sort the Multi-Lot Schedule	39
How to filter tasks in the Multi-Lot Schedule	40
Lot Information	40
<b>Managing Tasks</b>	<b>41</b>
Complete a Task	41
Reverting a task back to “Open”	42
Complete Multiple Tasks	42
Locking Tasks	43
Reschedule a Task (Drag/Drop)	44
Reschedule a Task (Task Details)	45
Reschedule a Task (List)	45
Change Task Duration (Drag)	46
Change Task Duration (Task Details)	46
What is Prompting?	47

How to use Prompting	48
Reschedule Multiple Tasks	49
<b>Dates (Working Days)</b>	<b>50</b>
How to Manage Working Days	50
<b>Notes</b>	<b>52</b>
What are Notes?	52
Lot Note vs. Task Note	52
How to Create Lot Note	52
How to Create a Task Note	53
How to Reply to a Note	54
<b>Issues</b>	<b>55</b>
What are Issues?	55
How to Create an Issue	55
<b>Documents (Attachments)</b>	<b>57</b>
What are Documents?	57
How to upload a Task Document	57
How to upload a Lot Document	58
<b>History</b>	<b>59</b>
What is a Schedule History?	59
<b>Checklists</b>	<b>61</b>
What are Checklists?	61
<b>Emails</b>	<b>63</b>
Overview	63
Daily Batch Summary	63
New Announcement	63
UCS Option Change Summary	64
Task Note (2-Way Communication)	64
<b>Vendor View</b>	<b>65</b>
What is Vendor View	65
<b>Terms and Definitions</b>	<b>66</b>
<b>Appendix</b>	<b>69</b>

---

## Overview

---

**What is SchedulePro?** **SchedulePro** is a Web-based Project Management solution designed to simplify and streamline the Construction Scheduling Process. It creates a paperless environment by allowing the Project Managers and Vendors to collect, review, and share their progress of the construction process electronically.

---

**Benefits of SchedulePro**

Integration with UCS

- e.g. Schedule Options, Vendor Assignments, Date Accuracy

Increase Efficiency

- e.g. User friendly application, easy to learn and use, iPad Capability

Real-Time Scheduling Information

- e.g. Schedule Dates, Options, Issues, Pictures, etc.

Consolidated User Access

- e.g. Multiple Division User Access, Multiple Vendor Profiles

Simplified Communication

- e.g. System Email Notifications batched

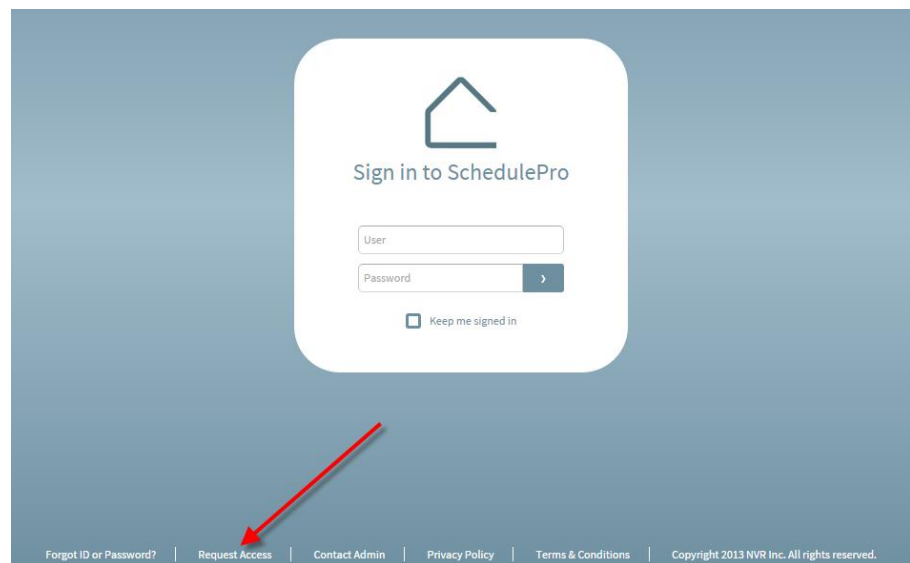
## Getting Started

---

### Request Access to SchedulePro

The steps below outline how to request access to NVR's SchedulePro Application

1. Open an Internet session and type the URL address <http://schedulepro.nvrinc.com> and press “**Enter**” on your keyboard.  
**NOTE:** Do not type “www” before the URL address
2. When the SchedulePro login page appears, click “**Request Access**” at the bottom of the screen.



### NVR Access

From the Request Access Screen

1. Click the “**NVR User**” Access
2. Enter in your “**First Name**”, “**Last Name**” and “**Email Address**” and click the “**Submit**” Button  
**NOTE:** “Email Address” must be your NVR Email Address

Request access to SchedulePro

Please enter the required information in the fields provided below and submit.

First Name  
Last Name  
Email Address

NVR User Vendor

Submit Cancel

3. An email from SchedulePro will be sent to your NVR email address containing your login information.

### Vendor Access From the Request Access Screen

1. Click the **“Vendor”** Access
2. Enter the following information:
  - **“Vendor Name”, “Vendor ID#” (NVR Issued), “Last 4 TIN Digits” (Tax ID), “Email Address”, “First Name”, “Last Name”, “Password”, and “Re-type Password”**
3. Click the **“Submit”** Button

Request access to SchedulePro

Please enter the required information in the fields provided below and submit.

Vendor Name  
Vendor ID#  
Last 4 TIN Digits  
Email Address

First Name  
Last Name  
Password  
Confirm Password

NVR User Vendor

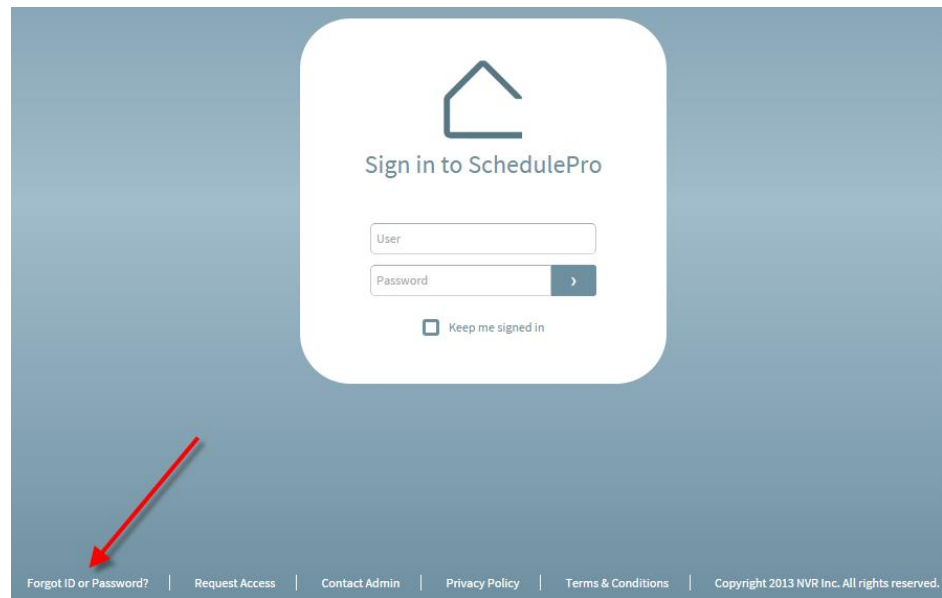
Submit Cancel

4. Complete the Vendor access process by clicking the **“Validation Link”** in the email sent from SchedulePro.



## Forgot Password

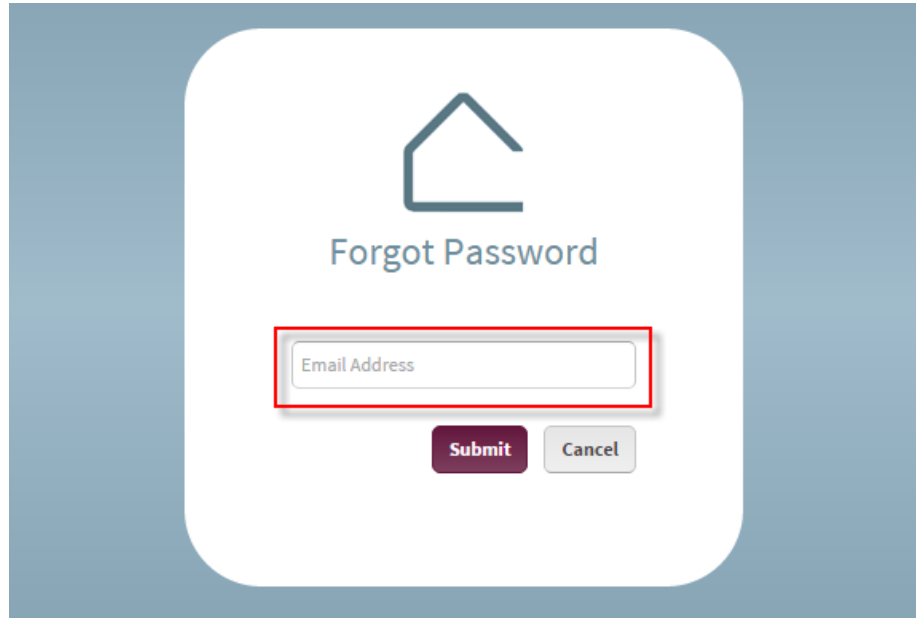
1. From the login screen, click "**Forgot Password**"



2. Enter the email address that is assigned to your account.
3. An email, with a temporary password, will be sent to the email address of the account

**NOTE:** There must be an Account with the email address assigned to it. If an account does not exist with the entered email address, no email will be sent.

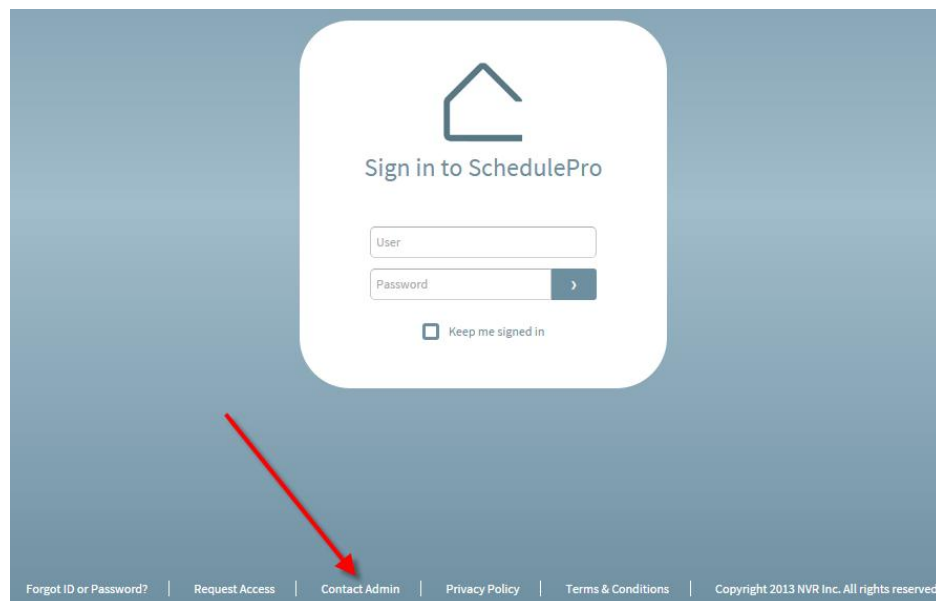




### Contact Administrator

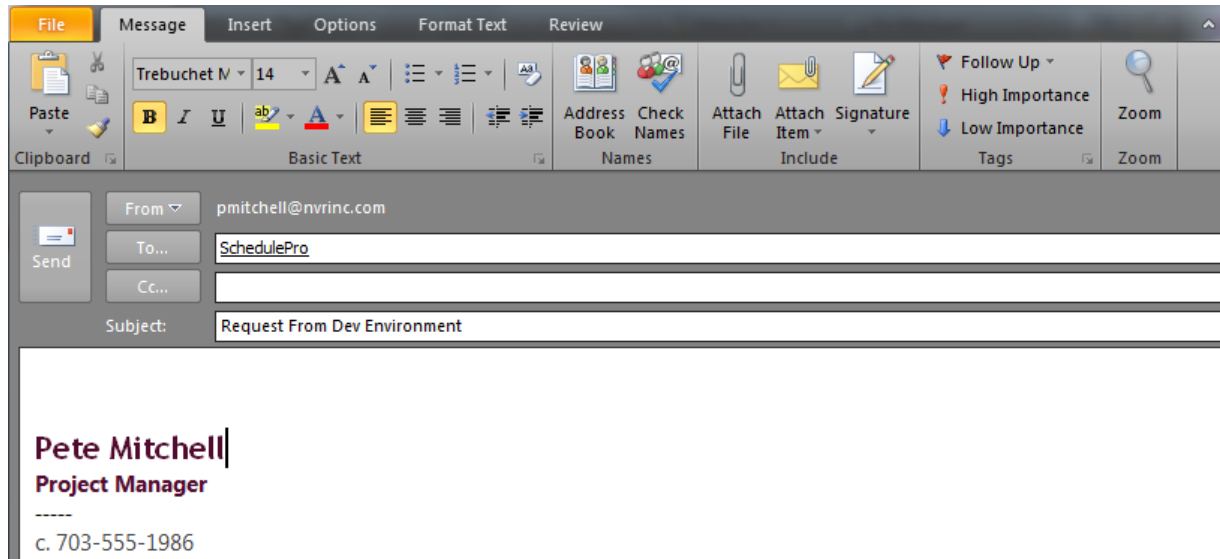
**Note:** The majority of questions or concerns can be answered by a Regional Lead. Regional leads are persons who are local to your area and are great resources for answering questions as needed. In most cases, if your Regional Lead cannot help you troubleshoot or answer your question they will contact the SchedulePro Administrator. Please contact your Regional Lead prior to going contacting the Administrator.

1. From the login screen, click “Contact Administrator”



2. Emails will pop-up from your default email application.

**NOTE:** When explaining your issues or concerns, please be as detailed as possible. This will only help in expediting of your issue or concern.



## News

### News Announcements

A way to post important announcements or notifications to both Internal (NVR) and External (Vendor) users, by allowing you to focus your audience and distribution regions.

### How to Read News?

The screenshot shows the SchedulePro user interface. At the top is a navigation bar with icons for Schedules, Templates, Community, DUC, Users, Vendor, Reports, Email, and Admin. Below the navigation bar, there are two columns of news items. The 'Corporate News' column contains two items: 'Erosion and Sediment Control Compliance' and 'Go Live (Monday July 13th) BLH, BLN, BLW, BLS, MDE'. The 'Local News' column contains two items: 'RYAN HOMES - INDIANAPOLIS DIVISION WILL BE CLOSED ON JULY 31st, 2015' and 'NVR EMAIL ISSUE: OUR EMAILS COULD BE GOING TO YOUR JUNK / SPAM'. Each news item includes a title, date, time, author, and a brief description. There are also icons for 'More', 'Audience', and a paperclip.



Click the **“More”** button to view messages that cannot be fully displayed on the screen



The paperclip indicates that there is an attachment as part of the announcement. Click the paperclip icon to view the attachment



The envelope indicates that the announcement was sent out via email



Click on the **“Audience”** button to view who the targeted users (Division(s) and/or Phase Activities) were for the announcement

**NOTE:** Users can always go back to the **News** (Announcement) page by clicking the **SchedulePro** logo in the upper left hand corner.

**NOTE:** If an announcement includes an attachment and is emailed, the attachment will not be included in that email. You will need to log into SchedulePro to view the attachment.

**Corporate News** Can only be created by Corporate Admin Users

**Examples of a Corporate New releases:**

- Phase Spec Changes
- Safety Recalls

**Local News** Can be created by Division Admin or Corporate Admin Users

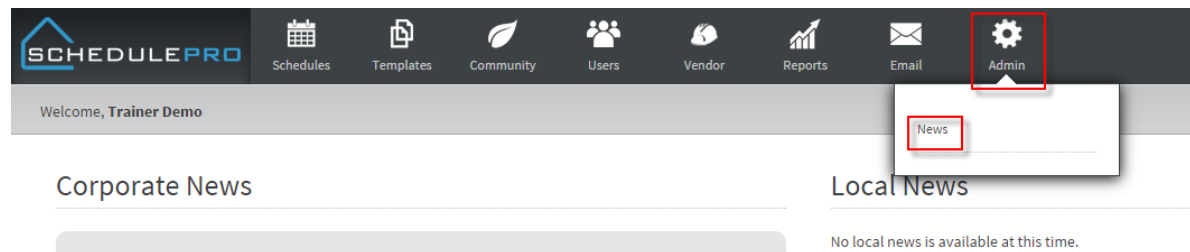
**Examples of a Local News releases:**

- Division or Region Announcements
- Office Closings
- Staff Changes

**How to Create a News Announcement** Only authorized users can create or manage News posts. (See Appendix A to view these user types)

Follow the following steps to create a News (Announcement) Post

1. Click on the “**Administration**” button on the far right of the Navigation Bar
2. Click on “**News**” in the drop-down



3. Click on the “+” button on the far right of the Toolbar



4. Enter in both the “Effective” and “Expires” dates for the News Announcement

**News** ✕

Effective (mm/dd/yyyy) When the Post will be visible

Expires (mm/dd/yyyy) When the Post will no longer be visible

**NOTE:** Posts that are no longer visible on the News Page can still be viewed in the Administration Section

5. Select the intended Audience. The Audience is who will be able to view and receive the News Announcement
  - **Everyone** = Both “NVR” and “Vendors” Users
  - **NVR** = Only “NVR” Users but not “Vendors” Users
  - **Vendor** = Only “Vendors” but not “NVR” Users
6. By selecting the “Email” option, the system will email a copy of the announcement to the intended audience
  
7. In the “Title” box, enter the title of the News Announcement you intend your audience to see
8. In the “News Content” box.
9. Select the targeted audiences
  - **Division Access** = What Divisions will see (and receive an email) the News Post
  - **Phase Access** = Vendors that are assigned to the Phase in the UCS Community Vendor Table will be able to see (and receive and email) the News Post
10. Attach a Document (not required) to be posted along with the News Post

**NOTE:** Attachments will not be emailed if the Email option was selected for the News Post

11. Click “**Create**”

**NOTE:** You can Update/Edit the News Post at any time by clicking on the Post in the Admin Section

---

---

**Notification  
(Email) from  
News  
Announcements**

Emailed News Announcements will contain the title, body of the message, who created it and how many attachments are connected to the email. A link at the bottom of the email will allow the user to go directly to the site to download/view any attachments.

---

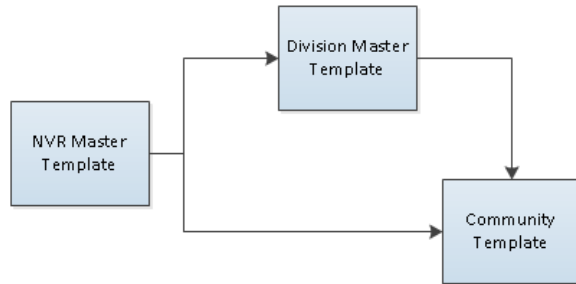
## Templates / Municipality Options

**What is a Template?**

A Template is a list of all potential tasks with every possible option and their option relationships

**Template Hierarchy (3 Types)**

- NVR Master - Corporate Controlled
- Division Master
- Community Master



**What are the different Types of Templates**

Templates are created to match the NVR DUC Program with Base DUC and Options (additional DUC).

**Example:**

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

Only Options that effect the DUC or add different tasks will be in SchedulePro Templates

**Example:**

In SchedulePro Templates	NOT in SchedulePro Templates
Morning Room Ceramic Backsplash	Upgraded Plumbing Fixtures <ul style="list-style-type: none"> <li>• Since the DUC and the schedule is not effected by the level of Fixtures</li> </ul>

**Municipality Options**

By default, there are no inspection tasks in the NVR Master Templates. Municipality Options are options that can be created locally in each Division to help users manage local Jurisdictional Inspections.

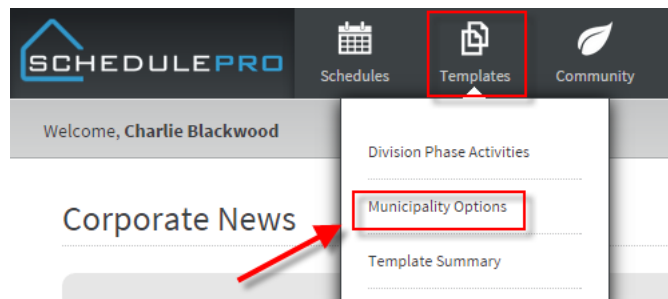
**Example:**

- Fairfax County requires a Framing and Zoning Inspection
- The user would create a Municipality Option for Fairfax County that would include a Framing and Zoning Inspection.

**How to Create Municipality Options**

**NOTE:** Each Division has a person dedicated to managing Municipality Options and is referred to as a ‘Gate Keeper.’ By having a single person managing the Municipality Options this keeps from having duplicate options created and keeps a consistency on the names of those options. Please contact your Division’s Gate Keeper if you need to add a Municipality Option.

1. Click on the “**Templates**” Button in the Navigation Bar and then “**Municipality Options**” in the drop-down.



2. Click on the “+” button on the far right of the Toolbar



3. Enter in the Jurisdiction (Municipality) Name into the “**Name**” Field
4. From the list of “**Municipality Inspections**” choose all inspection needed to meet the needs of your jurisdiction. If the type of inspection is not currently listed, select the “**Add**” button on the top right of the menu.
5. Add the “**Name**” of your inspection task.  
NOTE: the word “Insp” and the bracket bars will be added by the system. There is no need to manually add them into your inspection name.
6. Select the task active by entering “**Interior**” or “**Exterior**” in the “**Category**” window

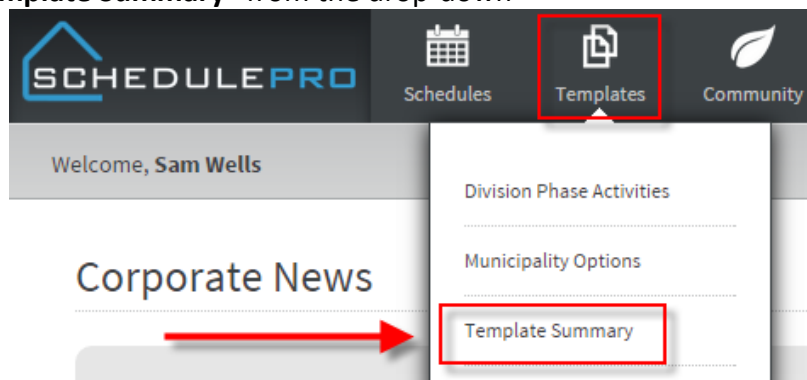
7. From the list of “Phase Activity” there are two (2) options:
8. **“No Phase Activity (MISCX)”** – by selecting this phase activity, you are choosing to have this Inspection only visible by NVR Employees.
9. By checking of a task, the system will include the vendors responsible for the phase activity with a corresponding task. (For 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 and potentially have a punch-out crew on site.
10. Once completed, select the **“Create”** button.

## Template Summary

The Template Summary Page is a list of all Templates available to users within their Division(s)

To access the Template Summary Page

1. Click on the **“Template”** button in the Navigation Bar
2. Click on **“Template Summary”** from the drop-down

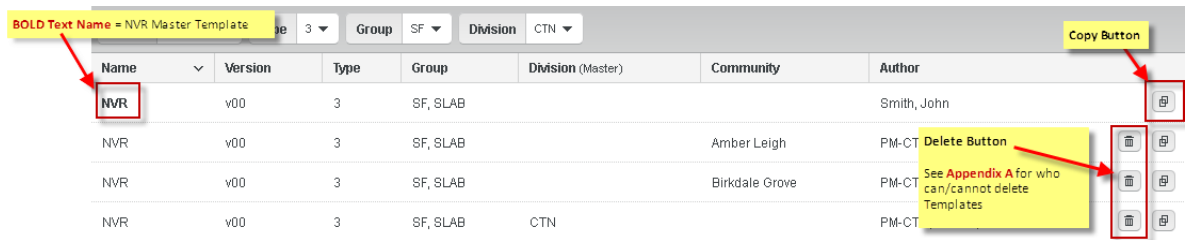




**How to use the Template Summary**

**Toolbar Filters**

Filter	Options
<b>Status</b>	Active – Template is available for Schedules Inactive – Template will not be used for Schedules (Admin Only)
<b>Type</b>	DUC House types available in the user’s Division(s) <b>Example:</b> 1,2,3 etc.
<b>Group</b>	SF – Single Family TH – Townhouse CO - Condo
<b>Division</b>	Division(s) the user has access to



**Template Rules/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**

The Copy function of Templates can be used in multiple scenarios

- NVR Master to Division Master
- NVR Master to Community
- Division Master to Community
- Community to Community
- Community to Division Master

**Steps to copy a Template**

1. Click the Copy Button on the far right of the template you are trying to copy. 
2. Select where to copy the template to (Division or Community)

### Copy Template

Copy To: **Division Master** Community

Division

CTN

### Copy Template

Copy To: Division Master **Community**

Community

AA - Abbington Phase 5-6      AG - Abbington Sf  
AQ - Antiquity                  AP - Applegate

**NOTE:** The system was developed to eliminate duplicate templates. If your Division or Community is not listed when you are trying to copy the Template, there is already a template meeting the same criteria as the one your trying to copy.

3. Click the **“Copy”** Button

### How to View a Template

1. Open the Template by clicking directly on the Template row.

Status	Active...	Type	3	Group	SF	Division	CTN
Name	Version	Type	Group	Division (Master)	Community	Author	
NVR	v00	3	SF, SLAB			Smith, John	
NVR	v00	3	SF, SLAB		Amber Leigh	PM-CTN, Security	
NVR	v00	3	SF, SLAB		Birkdale Grove	PM-CTN, Security	
NVR	v00	3	SF, SLAB	CTN		PM-CTN, Security	

2. From the Reduced Navigation Bar on the top of the screen you can view basic template information
  - Template Name / Foundation Type
  - Total Calendar Days for the Template per the NVR DUC Program
3. By Default, the Template is filled with all tasks available.
4. You can view the Template in multiple ways. Use the toggle on the right of the toolbar to edit the view.



Calendar View



List View

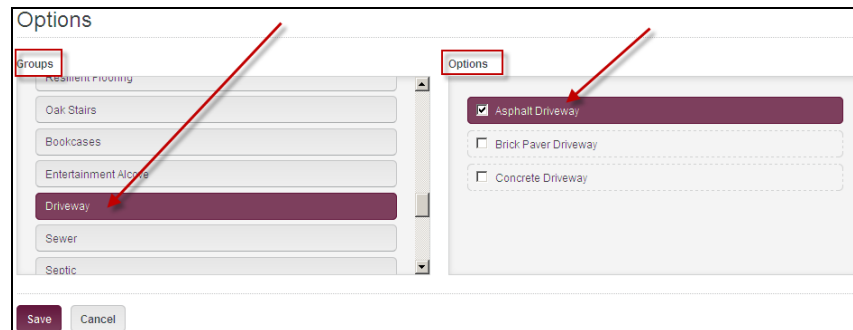
**Add/Remove Options in Template**

The ability to add and remove community options was developed to eliminate unnecessary tasks from schedules and allow for a more customizable schedule. By adding or removing an option from the template it will add or remove all tasks tied to the option from the Template.

**NOTE:** Some tasks may stay within the template because they are tied to another option

Steps to Add/Remove Options within a Template

1. Click the **“Options”** Button displayed in the toolbar
2. Select the Options from within the **“Group”** listing
3. Add or Remove the Option by clicking in the check box located under the **“Options”** window.



**NOTE:** Municipality Options need to be added at this page.

**Autofill/Reset Tasks in Template**

By Default, the Template Calendar will be populated based on the sequence of the template it was copied from.

To **Reset** the Template (clear the calendar) use the following steps

1. Click on the **“Actions”** Button in the toolbar
2. Select **“Reset Tasks”**
3. Confirm the **“Reset Template”** from the popup

To **Autofill** the Template (The sequence will default to the NVR Master Template) use the following steps

1. Click on the **“Actions Button”** in the toolbar
2. Select **“Autofill Tasks”**
3. Confirm the **“Autofill Tasks”** from the popup

**Filter/Sort  
the Task 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. The tasks in the Hopper can be filtered and/or sorted in multiple ways.

Filtered by

- Exterior
- Interior
- All – Interior and Exterior

Sorted by

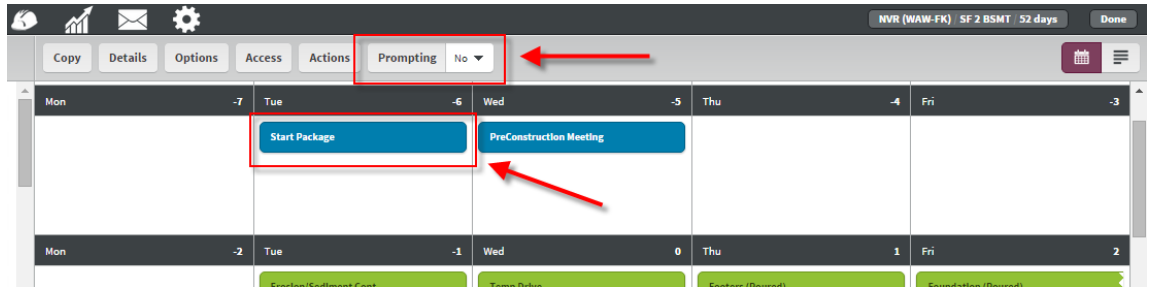
- Sequence – In order according to the NVR Master Template of when the task will take place
  - Alphabetical
  - Option – Tasks sorted by the options they are generated for
  - Phase – Numeric order by phase of construction
-

**Moving Tasks Prompting - NO**

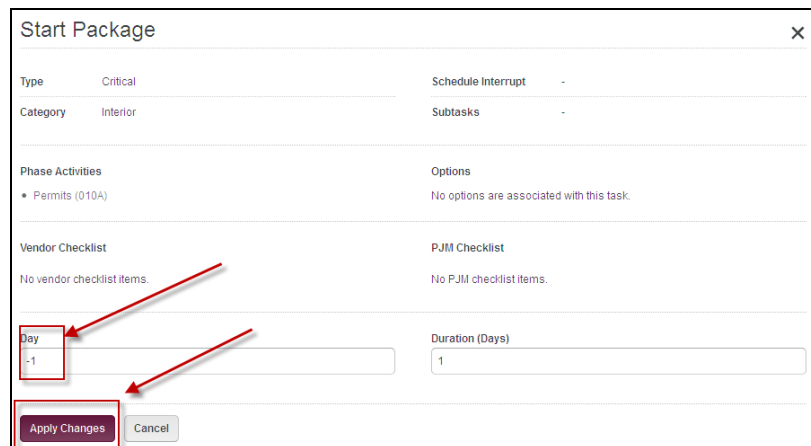
Tasks can be moved (change sequence order) within a Template using the following methods. These methods are to be used when trying **NOT** to affect future tasks.

**Within Task Details**

1. Click on the Task you want to edit

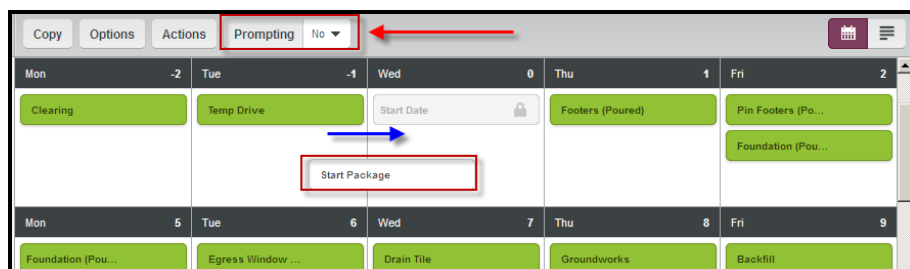


2. Change the Day and click "Apply Changes"



**Drag and Drop**

1. Select the Task you want to move while holding down the left mouse
2. Drag the task to the desired day and then release the left mouse button



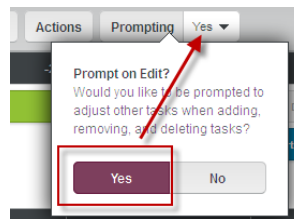
**Moving Tasks Prompting - YES**

Tasks can be moved (change sequence order) within a Template using the following methods. These methods are to be used when **TRYING** to affecting future tasks. Prompting is a way to quick adjust future tasks based upon a task change. There are four choices when prompting is set to “Yes”

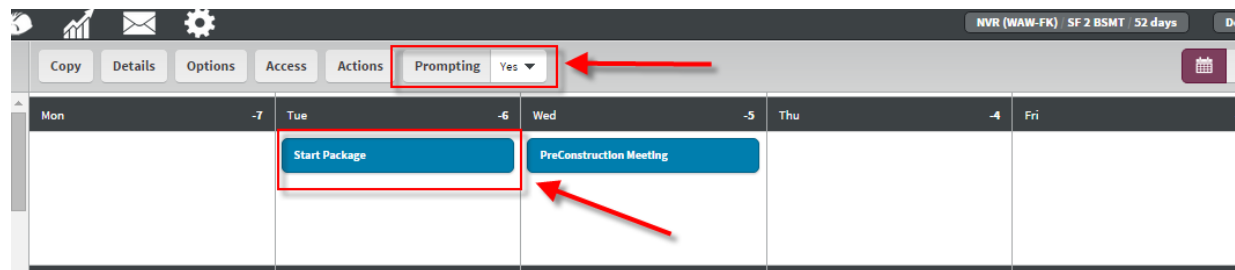
- **All** – Will affect all future task dates
- **Interior** – Will only affect future Interior Tasks
- **Exterior** – Will only affect future Exterior Tasks
- **None** – Will not affect any future tasks

**Within Task Details**

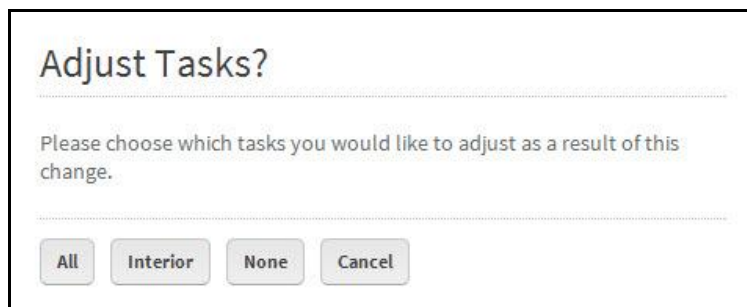
1. Locate the Prompting button in the Toolbar
2. Change prompting from “No” to “Yes”



3. Click on the Task you want to move in your template and while holding down the left mouse button, move the task to the desired new date.



4. Once moved to the desired location the “Adjust Tasks?” screen will appear. Select the appropriate option.



## How to Change Task Duration

Tasks Durations can be changed using the following methods:

**NOTE:** Changes in Duration can also be used with Prompting. See above section on Prompting = Yes

### Within Task Details

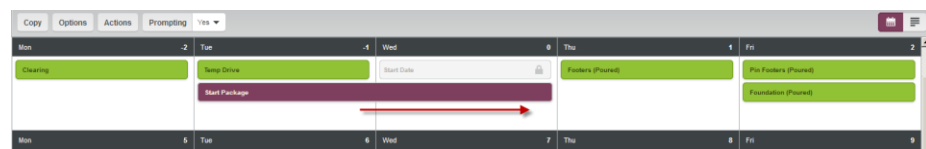
1. Click on the Task you want to modify the duration too.
2. Change the Duration by changing the “Duration (Days)” in the bottom right of the task detail screen.

The screenshot shows the 'Start Package' task detail screen. At the bottom, there are two input fields: 'Day' with a value of '-1' and 'Duration (Days)' with a value of '1'. Both fields have red arrows pointing to them. Below the 'Day' field is a red 'Apply Changes' button, also with a red arrow pointing to it. A 'Cancel' button is located to the right of the 'Apply Changes' button.

3. When complete, click the “Apply Changes” button

### From the Calendar

1. Put your cursor on the side of the task in which you want to extend the duration too.
2. Hold down the left button on your mouse
3. Drag the arrow to increase the Task’s Duration (reversing this process can reduce the duration)



## Communities

### Community Summary Page

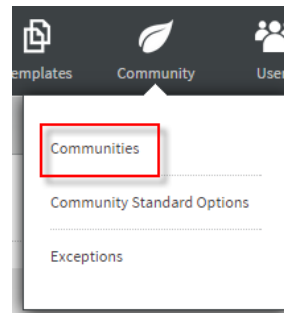
The Community Summary Page is a quick reference for all active communities by Division/Region. From the Community Summary Page you can quickly see a high level view of Community Information, # of Backlog Schedules, # of Under-Construction Schedules, and # of Archived Schedules

To access the Community Summary Page use the following steps:

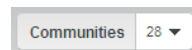
1. Click on the Community Icon button located in the Navigation Bar



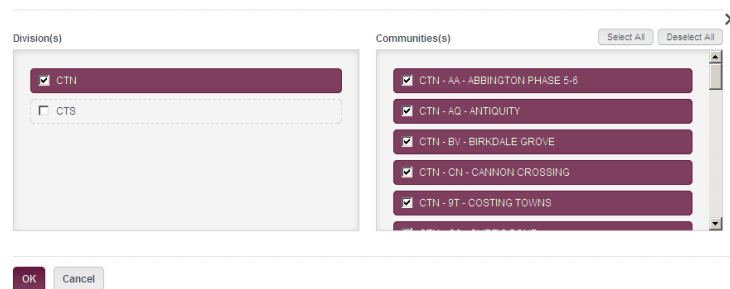
2. Click on “Communities” in the Sub Menu



3. Click on the “Communities” button in the Tool Bar



4. Select the Division(s) and Communities you want to view and click “Ok”





Region	Division Code	Division Name	Community Code	Serial Key	Community Name	Product Type	City	State	Zip	Count of Backlog Schedules	Count of Under-Construction Schedules	Count of Archived Schedules
Carolina Region	CTN	Charlotte North	AA	99639	ABBINGTON PHASE 5-6	SF	Harrisburg	NC	28078	0	0	0
Carolina Region	CTN	Charlotte North	AQ	98341	ANTIQUITY	TH	Cornelius	NC	28031	0	0	0
Carolina Region	CTN	Charlotte North	BV	100187	BIRKDALE GROVE	SF	Huntersville	NC	28078	0	2	0
Carolina Region	CTN	Charlotte North	CN	100155	CANNON CROSSING	SF	Concord	NC	28075	8	0	0

### Adding Community

SchedulePro is designed to have Communities automatically created directly from the integration with UCS. If there is a community that is not setup in UCS, use the following steps to add a Community:

1. Click on the “+” button located in the top left corner of your toolbar
2. Fill out the Community Name, Community Designator and Division. When complete, select “Add”.

New Community

Community Name: Falls Cove

Community Designator: FC

Division: Charlotte North

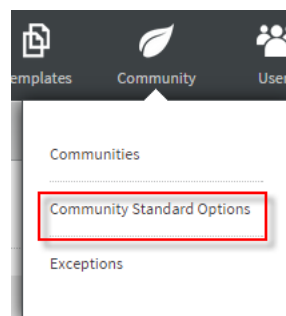
Add Cancel

### What are Community Options?

Community 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, and municipalities. If a Community has default options assigned, when a new lot is released from UCS, all the community options will be included in the new lot schedule.

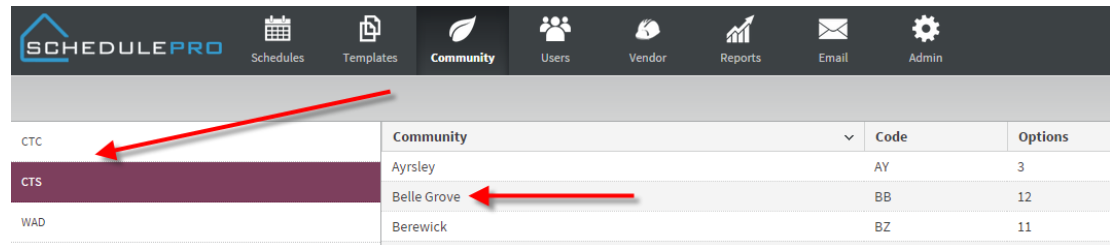
### How to Assign Community Standard Options

1. Click on the “Community” Icon in the Navigation Bar
2. Select “Community Standard Options” from the Sub Menu



3. Select the Division

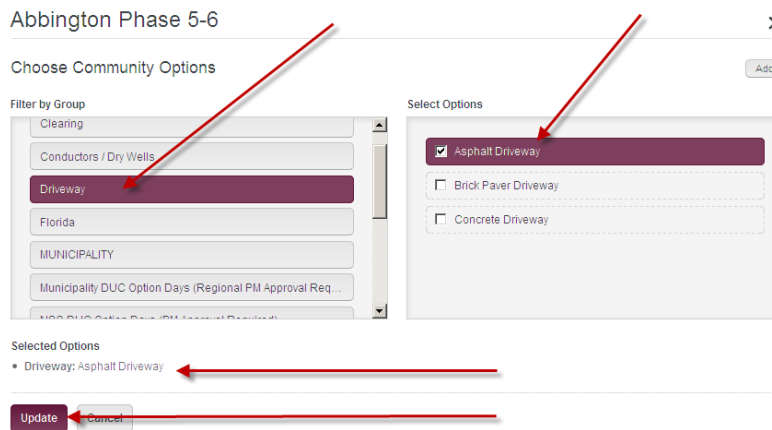
4. Select the Community



5. Chose the Option from the “Filter by Group”
6. Select the Option from the “Select Options” list.

**NOTE:** Only the options with a check will be used in your community

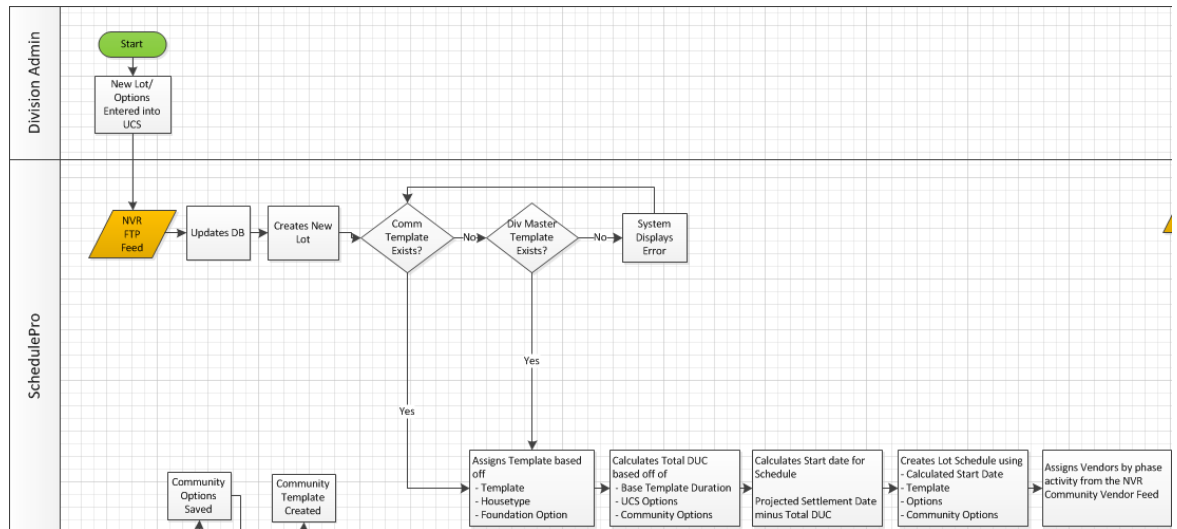
7. Verify Option was added in “Selected Options”
8. Click “Update”



**NOTE:** Municipality Options should be selected at the Community Standard Page. Other items to consider making Community Standards include Structured Wiring Extras and Resilient floors.

## Schedule Creation

**How Schedules are Created** Schedules are created automatically through data integration with UCS. On a nightly basis SchedulePro is updated with new UCS Data. The following map outlines how schedules are created in SchedulePro.



**Why Schedules are Not Created** During the integration process, SchedulePro will communicate with UCS to create a schedule based off the following criteria:

- (Exceptions)**
1. Division or Community template – Managed by Project Manager or Production Manager
  2. House Type and Version/Set number – Managed by SchedulePro Admin
  3. Projected Settlement Date – Managed by Division Back Office Admin
  4. Options – Managed by Division Back Office Admin

If the Schedule Pro is unable to match any of the above criteria above, it will place them into a folder called Exceptions. They will remain in this folder until the missing information is added and the next feed comes over.

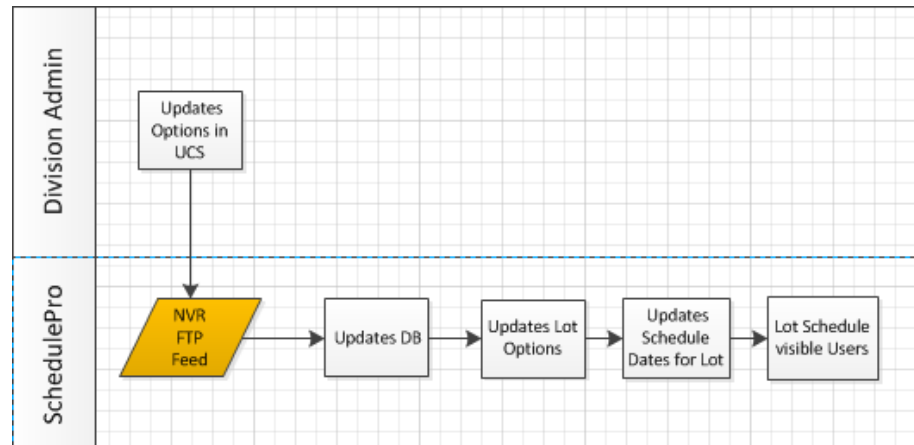
**Locating Exceptions**

To determine if your UCS lot feed is missing information

1. Click on the “**Community**” Icon in the Navigation Bar
2. Select “**Exceptions**” from the Sub Menu
3. From the list of lots, review the “Exceptions” column to determine what information is missing from your feed.

**How Schedules are Updated with New/Removed UCS Options**

Options inputted or removed in UCS (Change Orders) are automatically updated in SchedulePro on a nightly basis through data integration. The following map outlines how schedules are created in SchedulePro.



## Start Dates & Even Flow

---

### How to Access the Even Flow Screen

The calculation of the Start Date for Backlog Schedules ONLY happens one time when the initial lot information is sent over from UCS. The initial start date is calculated back from the initial settlement date. Once determined, all changes to the schedule will be based on the calculated start date. (i.e. if a home initially comes over from UCS without a morning room and Schedule Pro determines the start date to be January 1<sup>st</sup> and a settlement date of April 3<sup>rd</sup>. If the homeowner adds a morning room, adding 3 days to the building process, The calculated start date of January 1<sup>st</sup> will remain and the settlement date will be pushed back 3 days to April 6<sup>th</sup>.

To access the Even Flow Screen use the following steps:

1. Click on the “**Schedules**” Icon in the Navigation Bar
2. Click on the “**Start/Even Flow**” e Button in the Toolbar located on the top right corner.
3. Click on the “**Div/Comm**” Button in the Toolbar
4. Select the Division(s)
5. Select the Communities and click “**OK**”
6. Click on the Status Filter
7. Select “**Backlog**”

### How to Read the Even Flow Screen

1. The Even Flow Screen shows the number of Starts and PSDs within the Division(s) and Communities for a selected month. To change the Month click on the arrows to the left or right of the Date

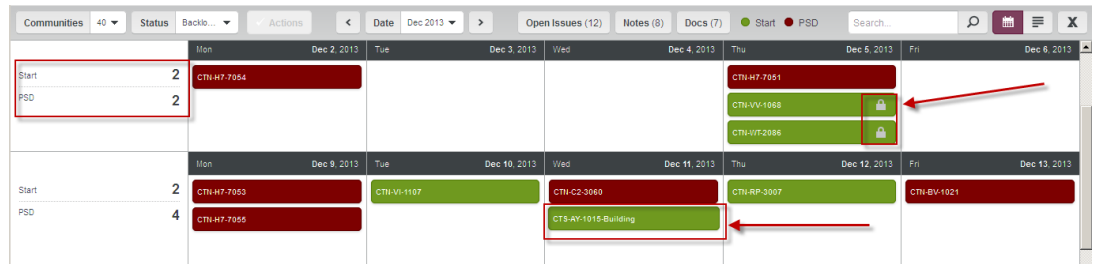


2. Each Block represents a Single Family Lot or a Building. Starts are designated in green and PSD in red.

**NOTE:** TH and CO Products will be listed by Building since HR Policy requires all units within a building to have the same UCS Start Date.

- The left column will show total Starts and PSDs by week for the Division(s) and Communities selected.

**NOTE:** Lots with the Lock Icon indicates that the lot can no longer move since there is a UCS Start Date for the lot or building



### How to view Lot/Building Details

To view information about a lot or a building from the Even Flow Screen click on the Lot or Building. Once selected, a window will appear with two (2) options, Information and History.

**Information** – will give you generic information regarding the home or building including: permit number, Project Manager, House Type, Elevation, Address and Template chosen.

### Single Family

Schedule Details ✕

Info
History

<b>Division</b> WAW	<b>Project Manager</b> -
<b>Community</b> Lovettsville Twn Center (LV)	<b>House Type</b> 2
<b>Lot/Unit</b> 0175	<b>Product Group</b> SF
<b>Building</b> -	<b>Product</b> Ravenna
<b>Address</b> 2 William Albert Way Lovettsville, VA 20180	<b>Elevation</b> Elevation D
<b>Home Owner</b> -	<b>Handling</b> P
<b>Set</b> RVN00-02	<b>Template</b> NVR-v02-2-SF,BSMT-WAW-LV
<b>Permit</b> B50423410100	<b>Additional DUC</b> 6
<b>Start Date</b> <input type="text" value="9/9/2015"/>	<b>Allowed DUC</b> 57
<b>End of DUC (B)</b> 11/30/2015	<b>DUC (Over)/Under</b> 0
<b>PSD Customer Meeting (S)</b> 11/20/2015	

OK

### TH Products

Building Details ✕

Division	Community	Building	Number of Units	Start Date
CTS	AY	1015	3	1/6/2014

Unit	Product	SetNo	Version	Allowed DUC	Permit	Template	End of DUC (B)	PSD Customer Meeting (S)
Ⓢ	COMPOSER II.5 UNIT	CTB05	01					
A	SCHUBERT	SBT00	01	71		NVR TH-00-2-TH2LVL-CTS-AY	03/18/2014	03/12/2014
D	MENDELSSOHN	MDL00	01	71		NVR TH-00-2-TH2LVL-CTS-AY	03/27/2014	03/21/2014
E	SCHUBERT	SBT00	01	71		NVR TH-00-2-TH2LVL-CTS-AY	03/17/2014	03/11/2014

OK

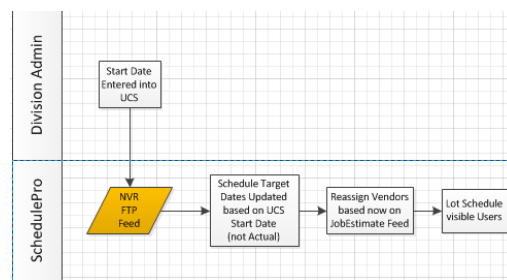
**How to Edit the Start Schedule**

To view/change the projected start date (Start Schedule) for Backlog Schedules, use one of the following two options from the Even Flow Screen

1. Drag the Lot to the new Start Date (moves within the month)
2. Click on the Lot and change the Start Date from the Lot/Building Details (moves outside of the month)

**UCS Start Dates vs. SchedulePro Start Dates**

Start Dates inputted into UCS are automatically updated in SchedulePro on a nightly basis through data integration. The following map outlines how UCS Start Dates will SchedulePro.



**Start Date Rules**

**Start Date Rules**

1. Initial Calculation of Start Date ONLY happens one time when initial lot info is sent from UCS
2. Updates from Even Flow Screen will override Initial Calculation and will update Schedules
3. UCS Start Date sent via FTP Feed will overwrite all and update Schedules

## Schedule Summary

---

### How to Access the Schedule Summary

1. Click on the “**Schedules**” Icon in the Navigation Bar
  2. Click on the Communities Button in the Toolbar
  3. Select the Division(s)
  4. Select the Communities
  5. Click “**OK**”
- 

### Status Filter

Lots in the Schedule Summary can be filtered by the following:

- **Backlog** – Sold but has not received a UCS Start Date
- **Under-Construction** – Schedule has a UCS Start Date
- **Archive** – All Issues, checklists and tasks are completed for a given lot

To filter the Schedule Summary by Status:

1. Click on the Status Button in the Toolbar
  2. Select the status(es) intended to view in the Schedule Summary
- 

### Customize Schedule Summary (Columns)

The Schedule Summary View can be customized to add, remove and/or reorder columns. To customize the Schedule Summary View use the following:

#### Adding/Removing Columns

1. Click on the “Columns” button in the Toolbar
2. Select any headers that you want to appear on your costume screen and deselect any you wish to not appear.

#### Order of Columns

By default, the columns will be added to the far right of the page.

1. Holding down the left button on the mouse on the “Column” header description
2. Drag the column to the new location

#### Sorting Data

1. Single Click on the Columns header description
- 

### Exporting the Schedule Summary (Excel)

The Schedule Summary view can be exported to Excel at any time. To export the Schedule Summary View, use the following steps.

1. Click the Export Icon on the far right of the Action Bar



2. Schedule Pro will generate your link to your Excel file in the bottom of your screen.



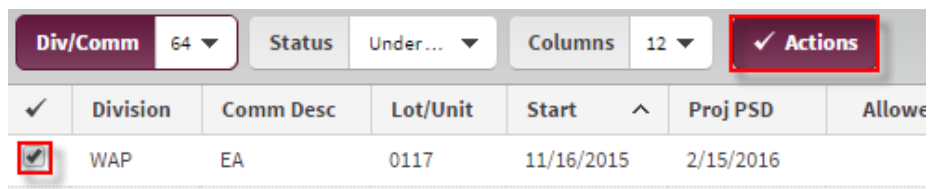
**Schedule  
Actions**

**Refresh**

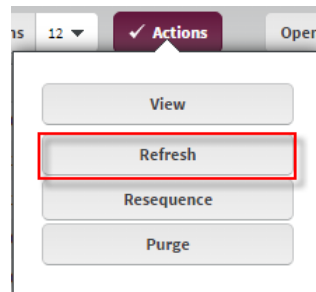
**NOTE:** Only available for Backlog Schedules

- Schedule will reconfigure to the latest version of the division or community template
- All issues, notes, docs will remain

1. Select the Backlogged lot by clicking on the checkbox to the left of the schedule.
2. The 'Actions' Button is now activated.



3. Select 'Actions', then select 'Refresh'



4. You will then need to confirm the Refresh.

### Confirm Refresh

Schedule will configure to the latest version of the division or community template on file. Are you sure you want to refresh this schedule?



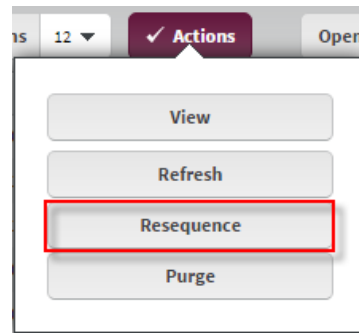
## Resequence

**NOTE:** Available for Backlog and Under-Construction Schedules

- Incomplete tasks will be placed in original order as listed on current template
  - Completed tasks will remain
  - Locked Tasks will remain
  - All issues, notes, docs will remain
1. Select the lot to be Resequence by clicking on the checkbox to the left of the schedule.
  2. The 'Actions' Button is now activated.

✓	Division	Comm Desc	Lot/Unit	Start	Proj PSD	Allowe
<input checked="" type="checkbox"/>	WAP	EA	0117	11/16/2015	2/15/2016	

3. Select 'Actions' then 'Resequence.'



4. You will then need to confirm the Resequence.

### Confirm Resequence

Incomplete tasks will be placed in original order as listed on current template, completed tasks will remain the same, and all issues, notes, docs will remain the same. Are you sure you want to resequence this schedule?

**Resequence** Cancel

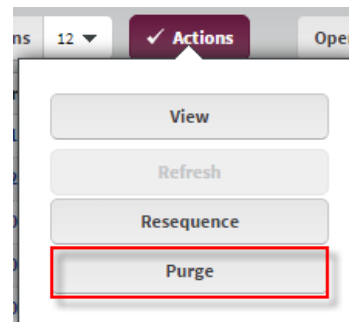
### Purge

**NOTE:** Available for Backlog and Under-Construction Schedules

- This action can only be done by a Back Office Admin or a Production Manager
  - **ALL** data will be lost
  - Schedule will be reset to current template on file using UCS start date as baseline
1. Select the lot to be Purged by clicking on the checkbox to the left of the schedule
  2. The 'Actions' Button is now activated.

Div/Comm	64	Status	Under...	Columns	12	✓ Actions
✓	Division	Comm Desc	Lot/Unit	Start	Proj PSD	
✓	WAD	H4	D302	5/21/2015	8/25/2015	

3. Select 'Actions' then 'Purge.'



4. You will then need to confirm the Purge.

### Confirm Purge

All data will be lost and schedule will be reset to current template on file using UCS start date as baseline. Are you sure you want to purge this schedule?

**Product or Version Changes** If a Customer decides to change the House Type after being entered into UCS, the “Purge” function must be applied to the schedule. \*Remember: ALL data stored in the schedule up to this point will be lost.

---

**Lot Transfer or Cancellation** If there is a Lot Transfer or a Lot Cancellation after being entered into UCS, the “Purge” function must be applied to the schedule. \*Remember: ALL data stored in the schedule up to this point will be lost.

---

## Single Lot Schedules

---

**How to view a Single Lot Schedule** To open/view a Single Lot Schedule use the following steps:

1. Click on the **“Schedules”** Icon in the Navigation Bar
2. Click on Schedule Summary from the Sub Menu
3. Click on the **“Div/Comm”** button in the toolbar
4. Select the Division(s)
5. Select the Communities
6. Click **“OK”**
7. Click on the intended lot (NOT the checkbox)

---

**Calendar vs. List View** There are two (2) ways to view a Single Lot Schedule

- Calendar View
- List View

To switch between views, use the toggle button on the far right of the Schedule Toolbar



**How to View Options for a Lot/Schedule** To view options for a lot/schedule click on the **“Options”** button in the toolbar. Within the Options popup, there are three sections (tabs)

1. Schedule - Options that have added from either UCS and/or as a Community Option that adds tasks to the schedule
2. UCS – Options that have been dictated by UCS. SAR
3. Manual Options - Show all of the community and municipality options available and the ones chosen

---

**How to Manage Community or Municipality Options?** The “Manual Options” tab within a schedule is a way to manage option assignments (non-UCS code options) for schedules.

Examples of non-UCS options are Driveways, Water/Sewer, Seed/Sod, and Municipalities.

If a Community has default options setup (see Community Option Section in Manual) the option will be automatically assigned to the Lot.

To add/remove an option from a schedule use the following steps

1. Check or uncheck the box to the left of the Option Group

---

2. Click the “Update” Button

Schedule UCS **Comm/Municipality**

Group	Code	Option
<input type="checkbox"/> Clearing	COMMUNITY	Lot Clearing
<input type="checkbox"/> Conductors / Dry Wells	COMMUNITY	Conductors / Dry Wells
<input checked="" type="checkbox"/> Driveway	COMMUNITY	Asphalt Driveway
<input type="checkbox"/> Driveway	COMMUNITY	Concrete Driveway
<input type="checkbox"/> Driveway	COMMUNITY	Brick Paver Driveway
<input type="checkbox"/> Florida	COMMUNITY	Florida Specific Tasks
<input type="checkbox"/> Septic	COMMUNITY	Septic
<input type="checkbox"/> Sewer	COMMUNITY	Public Sewer
<input type="checkbox"/> Sod / Seed	COMMUNITY	Sod
<input type="checkbox"/> Sod / Seed	COMMUNITY	Seed
<input type="checkbox"/> Termite Treatment	COMMUNITY	Soil Poisoning
<input type="checkbox"/> Termite Treatment	COMMUNITY	Borate Treatment
<input type="checkbox"/> Water / Well	COMMUNITY	Public Water
<input type="checkbox"/> Water / Well	COMMUNITY	Well Water

**Update** Close

3. Verify the Option Changes and click OK

Option Changes

The following options will be changed:

Option Name	Task Name	Schedule Date	Duration	DUC Adjustment	Action
ASPHALT DRIVEWAY	Asphalt Driveway	11/21/2013	1	0	ADD

Click OK to continue, or Cancel to discard changes.

**OK** Cancel

## Multi-Lot Schedule

### How to view a Multi-Lot Schedule

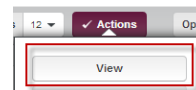
The Multi-Lot Schedule view is an area of the application, which allows the user to compare more than 1 schedule side by side at the same time. This view can be used for single family lots, townhouse building or condo buildings

To enter the multi schedule view use the action

1. Check the lots you wish to view

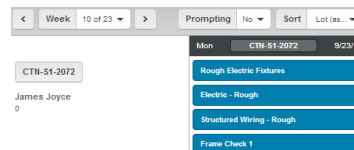


2. Select the “**Action**” from the navigation bar
3. Click the “**View**” option from the sub menu



4. Your selected lots will appear.

**NOTE:** The schedules will always show lots with the earliest start on top.

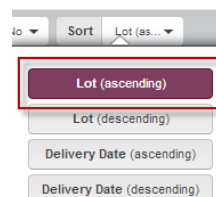


### How to Sort the Multi-Lot Schedule

The multi-lot view allows you to sort by lot number or delivery date.

The benefit of this feature is when a project manager needs to stagger trades throughout the week, they can make sure not to overlap crews.

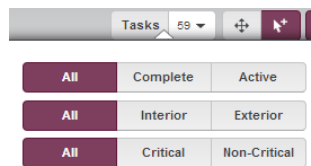
This can be done by click the “**Sort Filter**” and picking the ideal order.



**How to filter tasks in the Multi-Lot Schedule**

The task filter function is present throughout the application. The purpose is to limit the number of tasks a user has to see at one time.

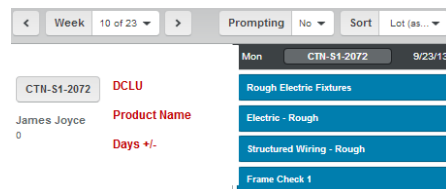
1. Click on the “Filter” button located in the navigation bar.
2. Select which combination you desire, if the button is highlighted the corresponding tasks will be visible in the calendar.



Update Image!

**Lot Information**

The lot information column is located in the far left area of the screen. It contains the DCLU, product name, and weather the house is behind or ahead of schedule based on the End of DUC task.





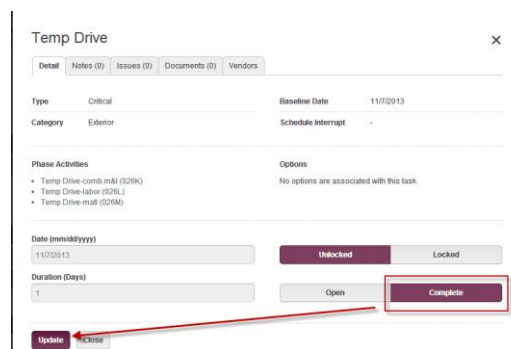
## Managing Tasks

### Complete a Task

To complete a task use one of the two the following methods:

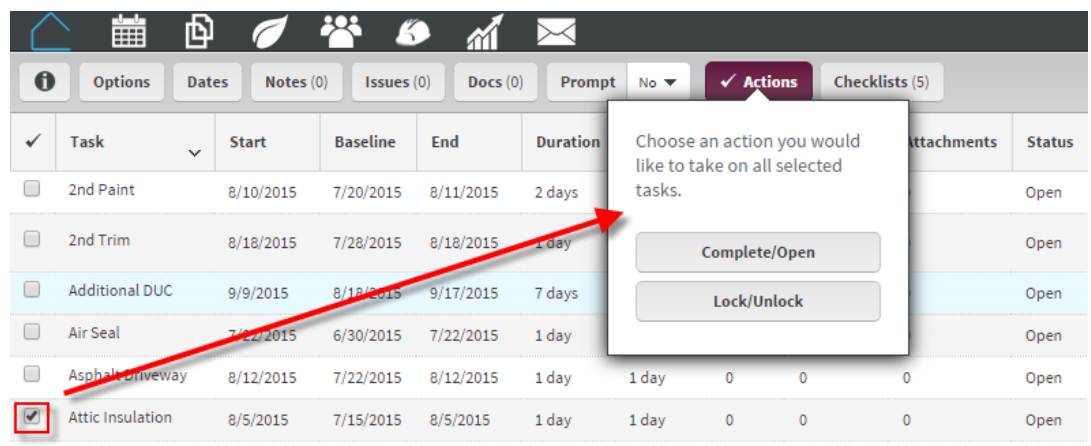
#### From within a calendar view:

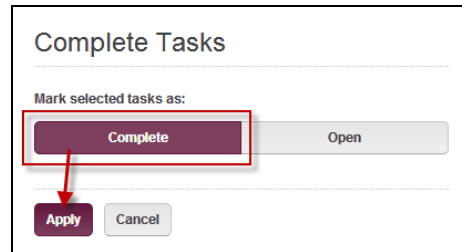
1. Click on the Task
2. Change the Status to **“Complete”**
3. Click the **“Update”** button



#### From within a lot list view:

1. Click the checkbox next to the task
2. Click the **“Actions”** button
3. Select **“Complete/Open”**
4. Select **“Complete”**
5. Click **“Apply”**





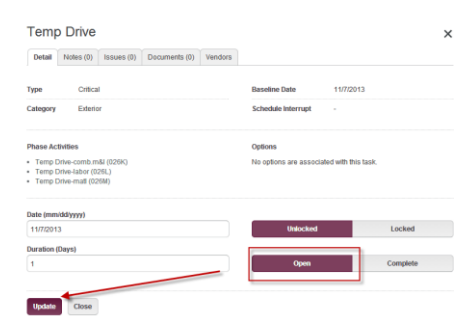
### Reverting a task back to "Open"

To revert a task back to "Open", use one of the two the following methods:

**NOTE:** Completed Tasks can only be reset to "Open" up to 11:59PM EST of the same day it was set to "Complete". After the 11:59PM EST cut-off, only System Administrators can change the status back.

#### From a calendar view:

1. Click on the Task
2. Change the status from "**Complete**" to "**Open**"
3. Click the "**Update**" button



#### From a list view:

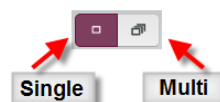
1. Click the checkbox next to the task
2. Click the "**Actions**" button
3. Select "**Complete/Open**"
4. Select "**Open**"
5. Click "**Apply**"

### Complete Multiple Tasks

To complete multiple tasks at the same time, use one of the following methods:

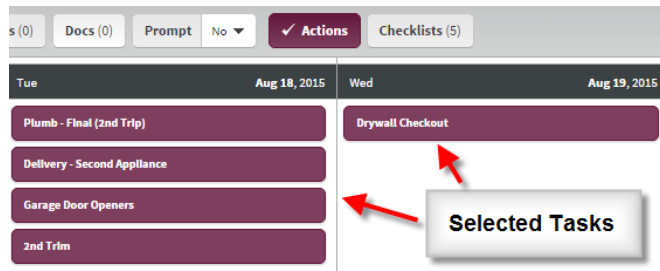
#### From a calendar view:

1. Change the selection toggle from "**Single**" to "**Multi**" Select



2. Select the tasks to Complete

- The Tasks will change to the color Maroon when selected



- Click the “**Actions**” button
- Select “**Complete/Open**”
- Select “**Complete**”
- Click “**Apply**”

**From a list view:**

- Click the checkbox next to the task
- Click the “**Actions**” button
- Select “**Complete/Open**”
- Select “**Open**”
- Click “**Apply**”

**Locking Tasks**

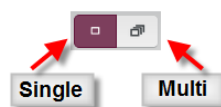
By locking a task, you will confirm that the task does not move in your schedule

**NOTE:** All attempts should be to NOT lock the DUC task. If locked, this task will not give the user or his/her manager an accurate projection of how many days the lot is over or under its Days Under Construction.

To lock a task(s) use one of the following methods:

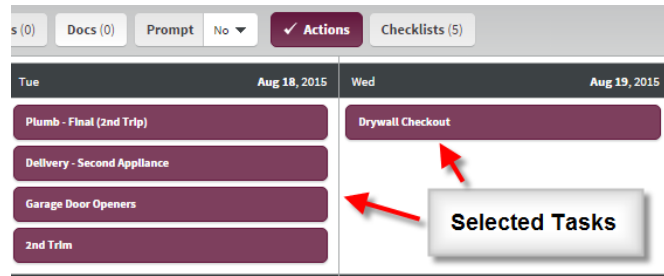
**From a calendar view:**

- To lock multiple tasks change the Selection Toggle from “**Single**” to “**Multi**” Select



- Select the task(s) you wish to lock.

- The Tasks will change to the color Maroon when selected



3. Click the **“Actions”** button
4. Select **“Lock/Unlock”**
5. Select **“Lock”**
6. Click **“Apply”**

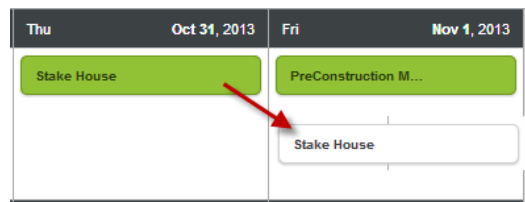
**From a list view:**

1. Click the checkbox next to the task(s) you wish to lock
2. Click the **“Actions”** button
3. Select **“Lock/unlock”**
4. Select **“Lock”**
5. Click **“Apply”**

**Reschedule a Task (Drag/Drop)**

Locate the task in the Calendar View you want to change the date it occurs

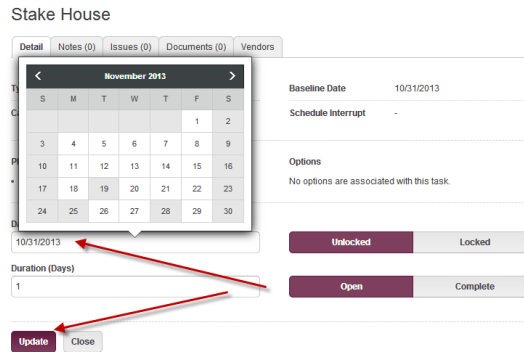
1. Select the Task you want to move while holding down the left mouse button
2. Drag the task from the current schedule date to the new schedule date



**Reschedule a Task (Task Details)**

Locate the task in the calendar view you want to reschedule

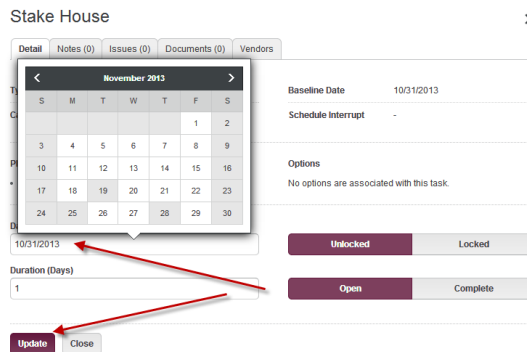
1. Click on the task you want to move to open task details
2. Change the “Schedule Date” to the new date and click “Update”



**Reschedule a Task (List)**

Locate the task in the List View you want to reschedule

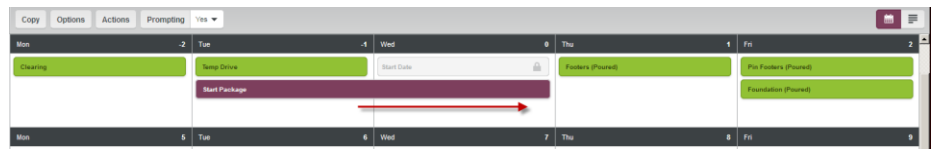
1. Click on the task you want to move
2. Change the “Schedule Date” to the new date and click “Update”



### Change Task Duration (Drag)

#### From the Calendar

1. Put your cursor on the right or left border of the task until you see a double arrow
2. Hold down the left button on your mouse
3. Drag the arrow to increase the task's duration of the task

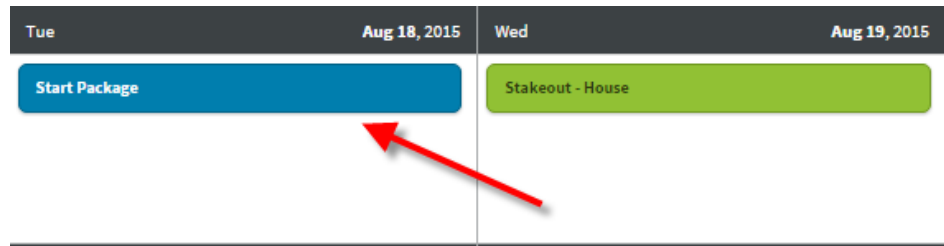


**NOTE:** Changes in duration can also be used with prompting. See section on “What is Prompting”

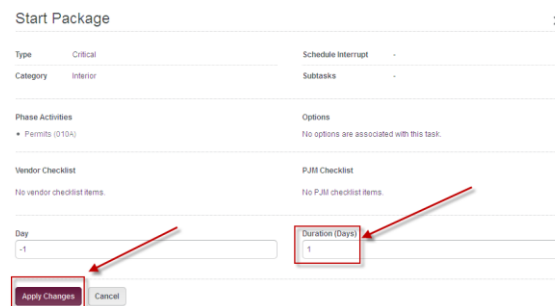
### Change Task Duration (Task Details)

#### Within Task Details

1. Click on the Task you want to change the duration to



2. Change the duration to the desired length.
3. Click “Update”



**NOTE:** Changes in Duration can also be used with Prompting. See section on “What is Prompting”

**What is Prompting?**

Prompting is a way to quickly adjust future tasks based upon moving a single task. Adjusting a schedule while using prompting can be accessed in the following:

- Schedule View
- Task Detail View

**Prompting Selections**

**Interior Schedules**

- This adjustment is made when you only want to move the interior path of your schedule.

**Example:** The Drywall finishers cannot skim the house because the block coat did not dry completely and they need to wait one more day. You would move “Drywall” out one day and adjust “Interior Schedules.” This will affect the following tasks Trim, Final Trades, and the rest of the interior tasks only. It will in turn affect the End of DUC and PSD (Customer Meeting) since the Interior Schedule is considered the critical path. It will not affect any outside tasks such as landscaping and sod.

**Exterior Schedules**

- This adjustment will only affect the exterior schedules; Brick, Siding, Gutters, Grading and exterior concrete work. (It will not affect your days under construction or interior tasks)

**Example:** The brick vendor needs an extra day to complete the brick front. You would move the task “Brick” out one day and adjust “Exterior Schedules.” This will move the Siding, Lead Walks, Final Grade, Trees and Shrubs and all other exterior tasks one day.

**All Schedules**

- This adjustment is made when you want to move every task in your schedule.

**Example:** The Lumber package is delayed due to plant labor shortages and you have to move the framers, rough trades, drywall and all the exterior tasks, etc.

**NOTE:** This adjustment **does not** reset your schedule to the Baseline task order

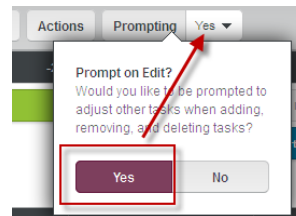
**No Schedules**

- This will only adjust the task you are on and nothing more. It is similar to the cutting and pasting functions in excel. (All other schedules will remain the same.)

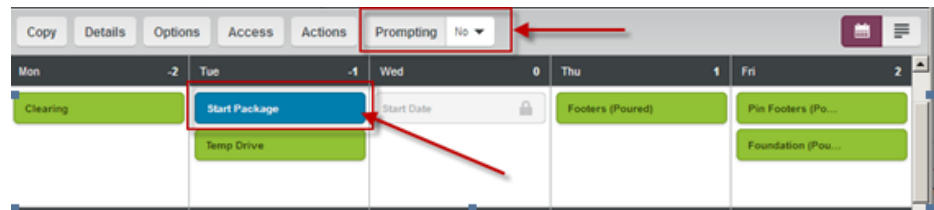
**Example:** Due to the weather, the mailbox cannot be installed. You want to move the task “Mailbox” out one day and adjust “No Schedules.” This move will have no impact upon the Interior Schedule, the Exterior Schedule, or the Days Under Construction.

## How to use Prompting

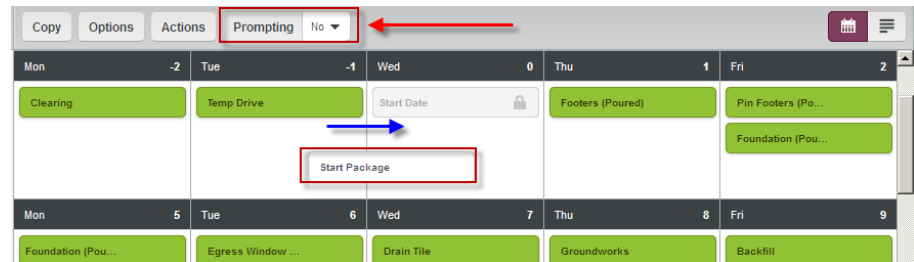
1. Locate the **“Prompting”** button in the Toolbar
2. Click on the on the button and select **“Yes”**



3. Click on the Task you want to edit



4. Change the task (schedule date or duration)



5. Select how to adjust the tasks based upon the task change

**Adjust Tasks?**

Please choose which tasks you would like to adjust as a result of this change.



**Reschedule Multiple Tasks** With the multi select tool, users are able to reschedule multiple tasks with one action. Using this method of task adjustment will save the user from manually moving tasks individually.

**NOTE:** You are only able to select one date to move the multiple tasks to.

1. Make sure the multi select tool is engaged



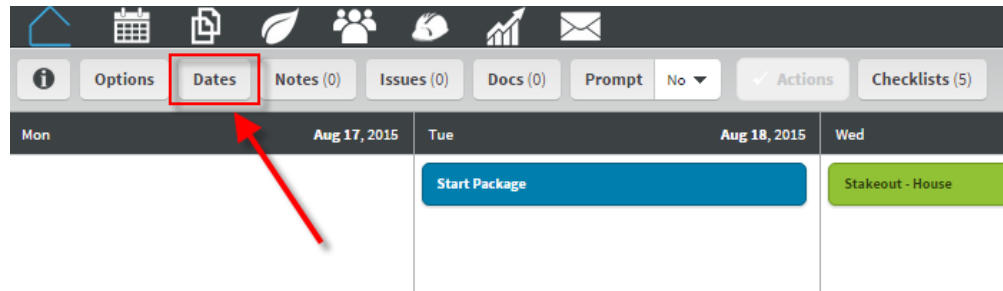
2. Select the tasks you wish to reschedule.
  3. Once your tasks are highlighted the action button should be active. Click on the button to view the drop down. Click Adjust
  4. A calendar will appear. Change the date and click Save.
-

## Dates (Working Days)

### How to Manage Working Days

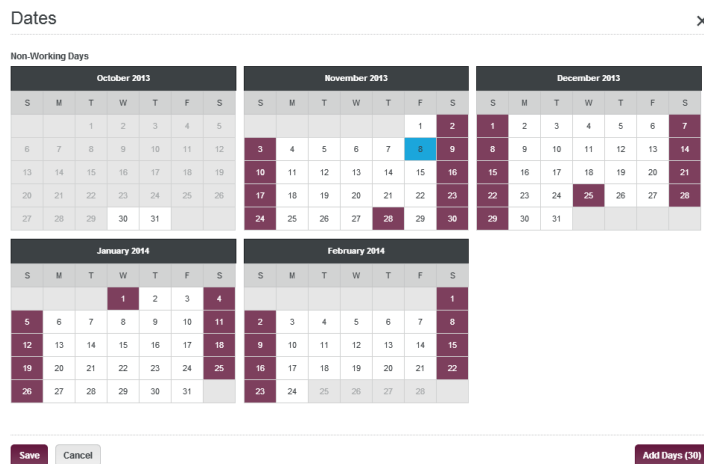
To align with the NVR DUC Bonus Program, SchedulePro will create schedules using Business Days (with the exception of NVR Designated Holidays). To manage Working Days vs Non-Working Days, use the following steps.

From within a single lot schedule, click on the “**Dates**” button

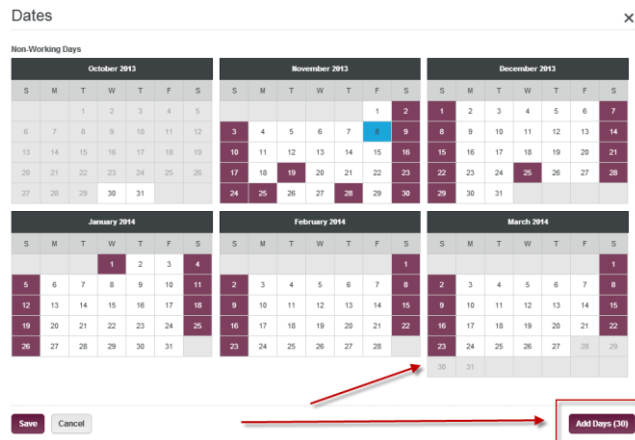


To change a working day to a non-working day, click on the date. The color of the date will change to maroon indicating it is now a non-working day.

**NOTE:** Changing a non-working day and making it a working day does not affect the allowed days under construction.



If the view produced on the screen to not give you enough usable calendar days, click the **“Add 30 Days”** button, then Save.



## Notes

### What are Notes?

A brief statement of facts, topics, or thoughts, recorded as a form of documentation tied to a specific lot or task.

### Lot Note vs. Task Note

There are two types of notes in SchedulePro: Lot Notes and Task notes.

#### Lot Notes

- Can only be viewed by NVR account holders who have access to the division the notes were added.

**Example:** Weather Impacts on Schedule, Customer Concerns, material list, etc.

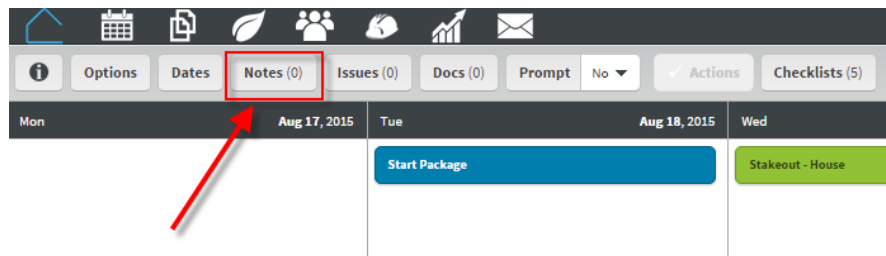
#### Task Notes

- Task notes can be view by all account holders who have access to the division and/or assigned to the phase.

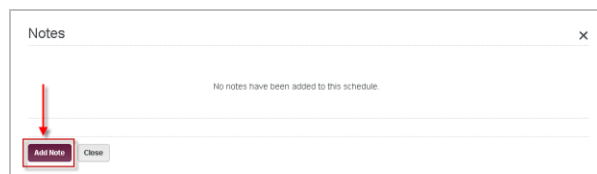
**Example:** Non-Standards, reminders or heads up notifications to a vendor, etc.

### How to Create Lot Note

1. Open a Single Lot Schedule
2. Click on the “Notes” button in the Action Bar



3. Click on the “Add Note” from the pop-up window



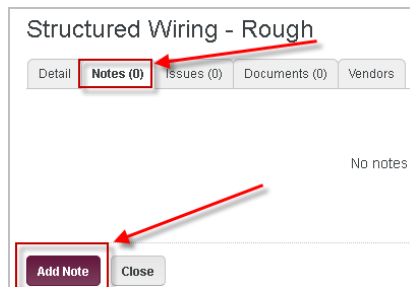
4. Input the Note into the text box and click the “Add Note” button

**NOTE:** Notice that the number in the “Notes” button increases.



**How to Create a Task Note**

1. Open a Single Lot Schedule
2. Click on the Task that you want to leave the Note in
3. Click on the “Notes” Tab within the Task Details
4. Click on the “Add Note” button in the Notes Tab



5. Input the Note into the text box and click the “Create” button

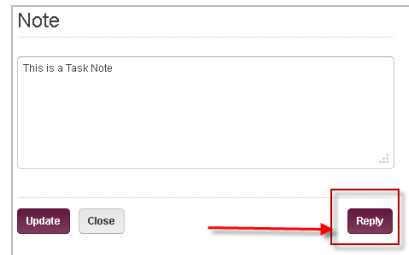
**NOTE:** Notice that the number in the “Notes” tab increased within the Task Details



### How to Reply to a Note

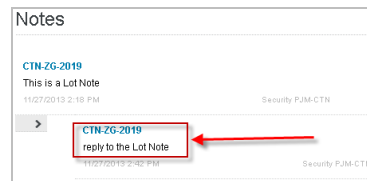
Replies to notes generated at the lot level can be made by anyone with NVR and Division access. This could be beneficial in communications between the PJM and the PM. Replies at the task level can be generated between NVR Users and the task vendor. This could be to remind vendors of the need to delete knobs on kitchen cabinets.

1. Open the existing note
2. Click the “Reply” button



3. Input the reply into the text box and click “Update” when complete

**NOTE:** Notice that the “Reply is indented to the original Note



## Issues

### What are Issues?

An issue created in SchedulePro is meant to notify vendors involved with the task of problem, incomplete work or workmanship that doesn't meet NVR standards. Once issues are created by an NVR user, the Vendor is notified. If the Issue remains Open after 7 days (meaning the issue is not resolved) that Issue becomes and **"Aging Issue"** and the vendor will be notified daily until closed.

Issues are created at a task level and require certain information to be entered by the user. One very important piece of information would be the **"Category"** of why this Issue is being logged. This will be used to help identify poor performance by vendors or service issues that need to be addressed. The following are the options currently available in SchedulePro:

### How to Create an Issue

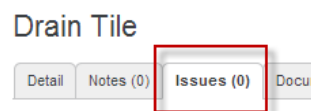
- Damage by Another Trade
- Incorrect material used
- Materials- Quality
- Materials- Availability
- Post Installation Damage
- Workmanship- Quality
- Workmanship- Availability

Issues can be created either by selecting a task or when completing a task checklist. To create an issue by selecting a task:

1. Select the task you wish to create an issue.



2. When the task detail window opens, click on the **"Issues"** tab, you will notice the number of issues logged to that task will appear on the tab.



3. With the **"Issues"** tab open, click the **"Add Issues"** button
4. A blank issue form will appear. Fill out the **"Status"**, **"Location"**, **"Vendor"** (if applicable), **"Category"** and **"Issue Description"**.

**NOTE:** You can add a document at this point by simply selecting the “**Attach Document**” button in the bottom right of the window. See the “Document (Attachments)” sections for more details.

5. Once you have filled out the required questions, click the “**Create**” button. You will be taken back to the schedule view when the issue is completed.

**NOTE:** Please keep descriptions short and to the point, 2 sentences maximum. More information can be left in the comment section once the issue is created as well as documents can be added (see Documents Attachemnts section). Be exact with the location (ie, Hall back, left of toilet)

6. Once an issue is created it can be viewed in 3 different locations
    - Schedule Summary Page (Only if open)
    - Single Lot Issue counter (Open or closed)
    - Task detail
- **Reminder:** Once an issue is completed by a vendor, the Project Manager or Supervisor must go back into issue to “Close” the Issue.



## Documents (Attachments)

### What are Documents?

A document can be any type of file that would be beneficial to a user involved in the building process. There are 3 types of Documents.

#### General Lot Document

They are only visible to NVR users. It is meant to store information that needs to be accessed easily. (i.e. copy of Customer Information Sheet.)

#### Task Document

They are visible to NVR Users and task assigned vendors. This might be a Phase SPEC for a new vendor or a diagram of wiring locations for an electrician

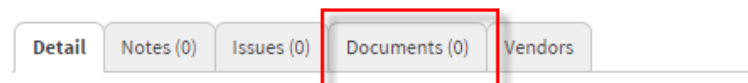
#### Issue Document

This would be attached by the creator of an issue and viewed the same way as a task Document. Only difference would be Issue Documents (attachments) are not displayed in Schedule summary or single lot Doc counters.

### How to upload a Task Document

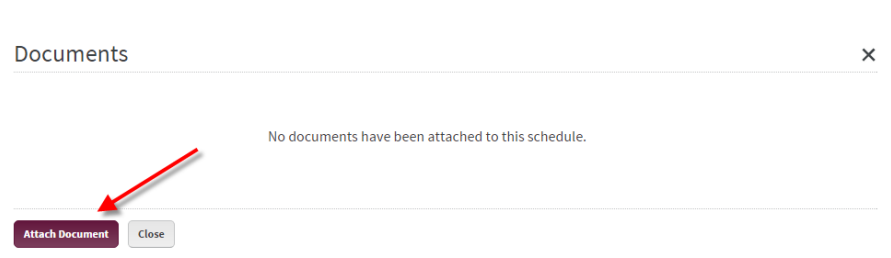
1. Click on any task
2. Select the "Documents" tab (just like when creating an issue)

### Stakeout - House



Type Information Phase Activities

3. Click the "Attach Document" button

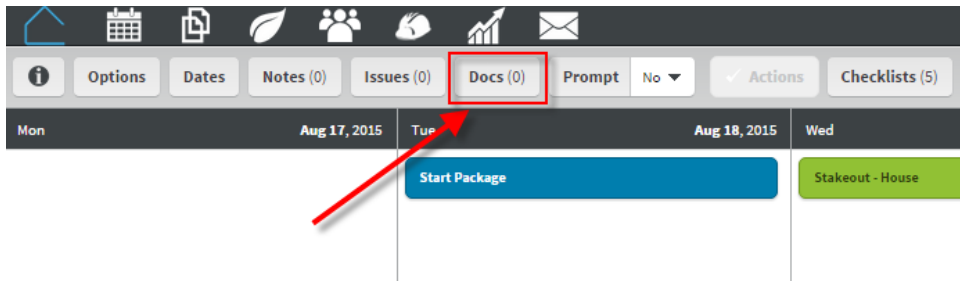


**NOTE:** Multiple documents can be added but need to be done individually.

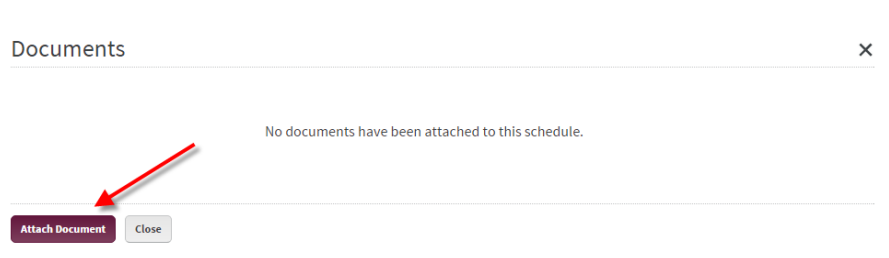
After selecting the document you wish to attach, click on the “Open” button. Your document now should be listed with the file name, date it was loaded and your name. The Documents tab counter should have increased by 1.

**How to upload a Lot Document**

1. Open a Single Lot Schedule
2. Click on “Docs” button in the Action Bar



3. Click on the “Attach Document” button in the pop-up window.



# History

## What is a Schedule History?

History is a tool that is meant to record any activities involving a specific lot. This function will allow PM/PJMs to verify when task schedule dates were moved, when issues were created and when checklists were completed. In addition, the history will show when the action was done and by whom. The History feature can be found inside the Info button at the top of every Single Lot Schedule in the Action Bar and is listed in ascending order by activity date.

1. Click on Info button in the Action Bar



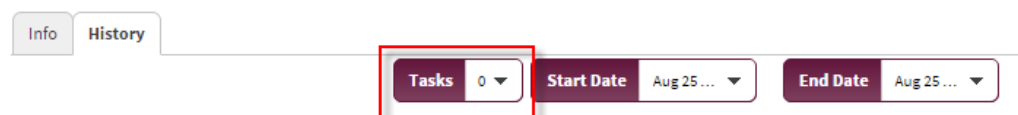
2. Select the History Tab

### Schedule Details



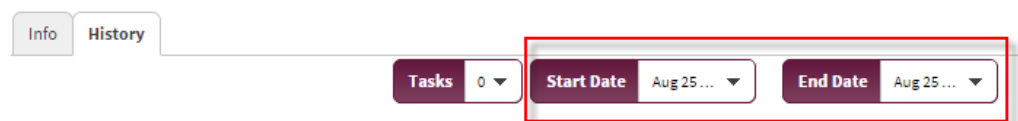
3. Select the Tasks you want to view

### Schedule Details



4. Specify your Start and End date range that you would like to search then the list will appear

### Schedule Details



### History

---

User	Action	Item	Value	Date
User	Update Task Date*	End of DUC	01/24/2014 to 01/28/2014	12/17/2013
John Smith	Create	Schedule	CTN-RD-3289	12/17/2013
John Smith	Update Task Date	Start Package	11/06/2013 to 11/07/2013	12/17/2013

---

**NOTE:** When using the Laptop, “Ctrl+F” is a function that can be used to quickly search the whole list using key words.

---

## Checklists

### What are Checklists?

Quality Control Checklists are a series of items that a Vendor or Project Manager is required to validate and/or provide information on prior to completing a phase of construction on a given lot.

In some instances, these checklists are required to be completed prior to submitting a purchase order for payment. Issues can also be created off of a checklist list when an inappropriate response is given. This will allow a user to complete the task but document that there was an improper response and that the appropriate parties were notified.

### Visibility

- PJM checklists are visible to NVR User
- Vendor Checklists are visible to NVR Users and assigned vendors

To complete a checklist:

1. Click on the task to view the details
2. Select the “**Checklist**” Tab
3. A list of all checklists, relating to a given task will be listed.
4. Click on the checklist you wish to complete.

Slab

Detail	Notes (0)	Issues (0)	Documents (0)	Checklists (1)	Vendors
Title	Assign	Count	Status	Completed Date	Completed By
Fdn	Vendor Checklist	0 out of 2	Incomplete	-	-

5. After answering all of the questions required, click “**Submit**”.

**NOTE:** If a text box exists on a checklist then something must be entered in that area.

Use “none” or “N/A” if no comments are needed.

**NOTE:** You can also attach a document if you choose and print out the checklist if needed.

Checklist - Fdn ×

1. **Question #1**

2. **Question #2**

File	Date	Author
open issue list.png	1/26/2014	Steve Smith

open issue list.png

6. Once you hit submit you will return to the Checklist tab with the date you or the vendor completed it.

Count	Status	Completed Date	Completed By
2 out of 2	Complete	Jan 26 2014 11:08AM	Steve Smith

---

## Emails

---

**Overview** SchedulePro Emails are designed to maximize communication while limiting the volume. When possible notification will be batched based on the vendors access.

---

**Daily Batch Summary**

**WHEN:** Approximately 3:30PM EST Daily

**TO:** Project Manager  
Supervisor  
Production Manager  
Vendor (based on task assignment and Division access)

**WHAT:**

- 1. Schedule Changes**  
Task Schedule Date changes (old or new) are within 7 business days
  - 2. New/Updated Issues**  
New Issues or updates that were made to previously created issues
  - 3. Aging Issues**  
Assigned to the Vendor (issues open for more than 7 days)
  - 4. Notes**  
Summary of Task Level Notes created that day by NVR and/or Vendor
- 

**New Announcement**

**WHEN:** Real Time (if designated by Announcement creator. See News/Announcements Section)

**TO:** NVR Employees (based on Division Access)  
Vendor (based on Phase Activity and Division access)

**WHAT:** Content of Announcement

**NOTE:** Attachments to Announcements will not be sent via Email

**From:** SchedulePro Admin [mailto:noreply@nvrinc.com].....  
**Sent:** Friday, January 17, 2014 11:43 AM  
**To:**  
**Subject:** NVR SchedulePro Announcement

Title	Safety Regulations
Attachments	1
Created	User, Test

NVR homebuilding operations serve 27 metropolitan areas in fourteen states, including Maryland, Virginia, West Virginia, Pennsylvania, New York, New Jersey, Delaware, Indiana, Illinois, Ohio, North Carolina, South Carolina, Florida and Tennessee, as well as Washington D.C. Founded in 1948 in Pittsburgh, Pennsylvania to provide housing in the expanding post-war economy, Ryan Homes has constructed more than 325,000 homes. Today, Ryan Homes offers housing styles to suit a wide range of consumers needs, including single-family, townhouse or garden condominium. NVHomes offers additional architectural details and designer elements tailored to suit the most discriminating of tastes. Established in 1980, NVHomes has earned a reputation for luxury, quality and value throughout its communities in Virginia, Maryland, Delaware and Pennsylvania. Fox Ridge Homes is one of the largest homebuilders in the Middle Tennessee area, and is committed to building high-quality, competitively priced homes in a timely and efficient manner. Founded in 1961, Fox Ridge Homes primarily serves first-time homebuyers and first-time move-up buyers in the Nashville area. Heartland Homes was created in 1984 to offer luxury homes of the highest quality at an affordable price. Since then, Heartland has built over 3,000 homes in western Pennsylvania by combining personalization with a customer-friendly experience that keeps it simple. Heartland offers single family, townhome, and villa style homes to

**UCS Option  
Change  
Summary**

**WHEN:** Approximately 7AM EST Daily

**TO:** Project Manager  
 Supervisor  
 Production Manager  
 Local Administrator  
 Vendor (based on Division access)

**WHAT:** Summary of all Option Changes (added or removed) for Lots Under-Construction.

**Task Note  
(2-Way  
Communication)**

**WHEN:** Real Time (within 5 minutes)

**TO:** Vendor (based on task assignment and Division access)  
 Project Manager assigned to the lot where the Task note was created

**WHAT:** Two way communication between an NVR Project Manager/Supervisor and the Vendor assigned to the Task where the note was created.



## Vendor View

---

### What is Vendor View

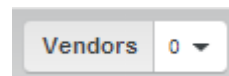
Vendor view or Vendor Task Summary is a similar page that vendors will see. Although their page has fewer features, they will be able to view their scheduled tasks in the same manor.

Similar to the Schedule Summary page for NVR users, vendor view has the same filters and counters that are present in the NVR Users view. This will allow them to continually get updates and manage their workloads.

As an NVR user you have the ability to view all tasks for all vendors in any division or communities that you have access to. The one benefit of this page is being able to forecast a vendor’s workload and adjust accordingly.

To access this page do the following steps:

1. Click on the “**Vendor**” button located on the main menu
2. Select the communities you wish to view
3. Set your date range (range is based on scheduled date of tasks)
4. Just like Schedule Summary view, vendor view allows you to add/remove columns and also change the order.
5. If you wish to see a specific vendor or vendors simply click on the “**Vendors**” filter button



6. Start typing the name of the vendor you want to find, the name will appear as you type. Click on the name and then click “**Add to Search**”. The vendors name should now appear at the bottom of the window with their vendor ID.
7. Once your vendor(s) have been selected, click the “**Search**” button
8. A list of all tasks the vendor is assigned to will appear. For easier viewing you may choose to group the tasks.
9. To use the “**Group By**” feature. Click the “**Group By**” button, a submenu will appear allowing you to group the tasks by community, date or task name.

\*This screen will allow you to manage the tasks exactly as you do throughout the application. However, the only function that does not work the same would be changing the schedule date or completing the task.

**NOTE:** You can also choose to export the list to excel.

## Terms and Definitions

---

- Action Bar** Light Gray bar used throughout the application that allows user to control what is seen on the screen.
- Aging Issue** An issue that remains to be open seven days after being created.
- Archive Lot** A lot in which all tasks have been completed.
- Automation** The process in which UCS sends specific files nightly to SchedulePro in order to create schedules or update information pertaining to a created lot.
- Autofill Tasks** Term used with templates that will move all the tasks from the template hopper and place them on the template calendar in the sequence according to the NVR Master Template.
- Backlog Lot** A lot that has been created in SchedulePro, but does not have an official start date according in UCS.
- Community Standard Page** Feature in SchedulePro that allows the NVR user to predetermine what community standards should be applied to an individual schedule at the time of schedule creation.
- Ctrl + F** Control Find: Web based search feature
- Division Phase Activities** A way for a division to assign a phase to a task so that the specific vendor(s) can see specific tasks in SchedulePro
- Exceptions** Folder within SchedulePro that will list the lots that cannot be created through automation due to missing template, missing options, no projected settlement date or not NVR house Set/Version #.
- F5** Refresh: Web based refresh feature
- Filter** Pertaining to the Action Bar, Filter is the term that allows the user to control what they want to see on a particular page.
- History** Feature inside of SchedulePro that allows a user to research the activity of a task, including when it was updated, who updated, ect.
- Info** A pop-up window that includes specific information about a schedule including lot information and DUCs.

- Issue** A note that needs to be documented from an NVR user to a Vendor with a high priority to be resolved.
- Landing Page** Initial screen that is seen once a user logs into SchedulePro. Also the main page to view Local and Corporate News.
- Lot Document** A document that can be uploaded to the system within a specific lot to be viewed by NVR users only.
- Lot Note** Test that can be made and stored within a specific lot to be viewed by an NVR user only.
- Municipality Option** The individual local inspections that an NVR user can create to manage the inspection process of a schedule.
- Navigation Bar** Top, dark gray, bar in SchedulePro that allows the user to Navigate throughout the application.
- Neglected Lot** An individual lot where the schedule has not been updated within the past three days.
- Orphan Task** An individual task that exists three days from the present date, but has not been completed, moved or had the duration extended.
- Phase Activity** Also referred to as 'Glue', Phase Activity is what allows the Vendor to see a task based on the phase that the Vendor is associated with.
- Prompting** The ability to move the remainder of the schedule following a task that has a completion date that is moving on the schedule.
- Purge** Process in which an individual lot schedule and all of its information is deleted from the system in order to be recreated with new information. This is only done if the house has an official UCS start date and is Under Construction.
- Refresh** The ability to reconfigure a single lot schedule to the latest version of a division or community template. This can only be done for Backlog schedules that do not have an official UCS start date.
- Resequence** For a single lot schedule that is either Backlogged or Under Construction, the user can realign uncompleted task in a schedule according to the template that it was created from.
- Reset Tasks** Used in the template to remove the majority of the tasks from the template calendar and places them in the template hopper.

<b>Schedule Summary Page</b>	A page within SchedulePro that allows the user to have a custom view of the lots that they want to see.
<b>Security Profiles</b>	Each SchedulePro user has a security profile based of their role with the application: <ul style="list-style-type: none"><li>• Vendor – Able to see specific tasks, notes and issues pertaining to their phase, including able to create notes and documents for their tasks.</li><li>• Project Manager/Supervisor – Able to create templates, manage schedules, create notes, issues and documents.</li><li>• Back Office &amp; Production Manager – Same as the PJM/Supervisor. Can also change options that affect DUCs.</li></ul>
<b>Single Lot Schedule</b>	The schedule of a specific lot.
<b>Slotting</b>	Process in which the projected start date is determined.
<b>Task Detail</b>	Information pertaining to an individual task
<b>Task Document</b>	A document that can be uploaded to the system at a task level by either NVR or Vendor users and viewed by both NVR and the Vendor associated with the tasks.
<b>Task Note</b>	Two way communication: Text that can be made by both NVR and Vendors that is stored within a specific task and can be viewed by both NVR and Vendor.
<b>Template</b>	A sequence of tasks used to create and individual schedule.
<b>Template Calendar</b>	Area of the template with a sequence of numbered days that resembles a calendar
<b>Template Hopper</b>	Left hand space on a template where unnecessary tasks can be set aside, not to be used when a schedule is created.
<b>Under Construction Lot</b>	A schedule that has an official UCS start date.
<b>Whitelist</b>	Pertaining to an internet provider or email provider, the ability to mark an email address so that it is not marked as spam. Some may need to contact their internet/email provider if they do not receive emails from SchedulePro.
<b>Zoom Setting</b>	Web based feature: SchedulePro works best when zoom is set to 100%



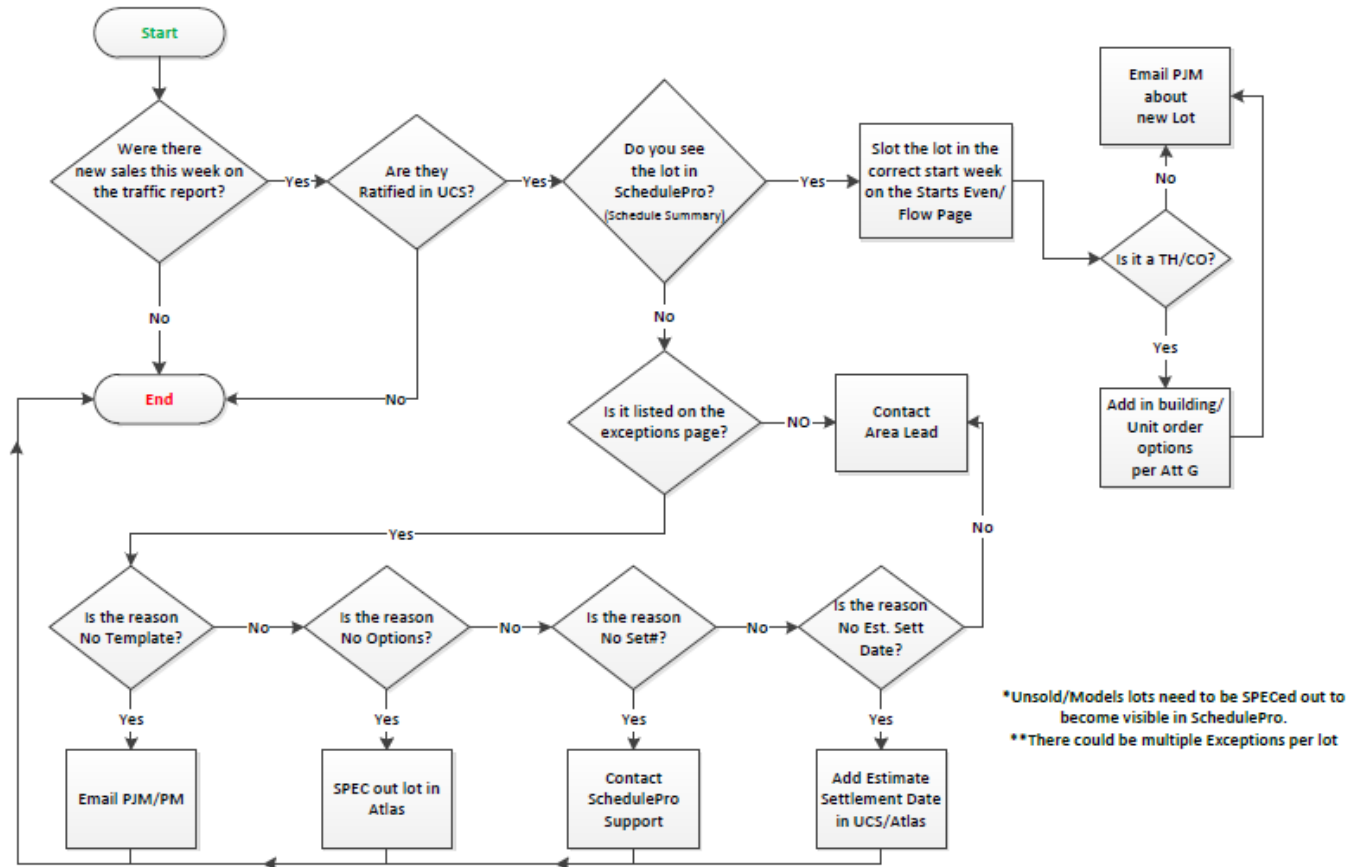
# Appendix

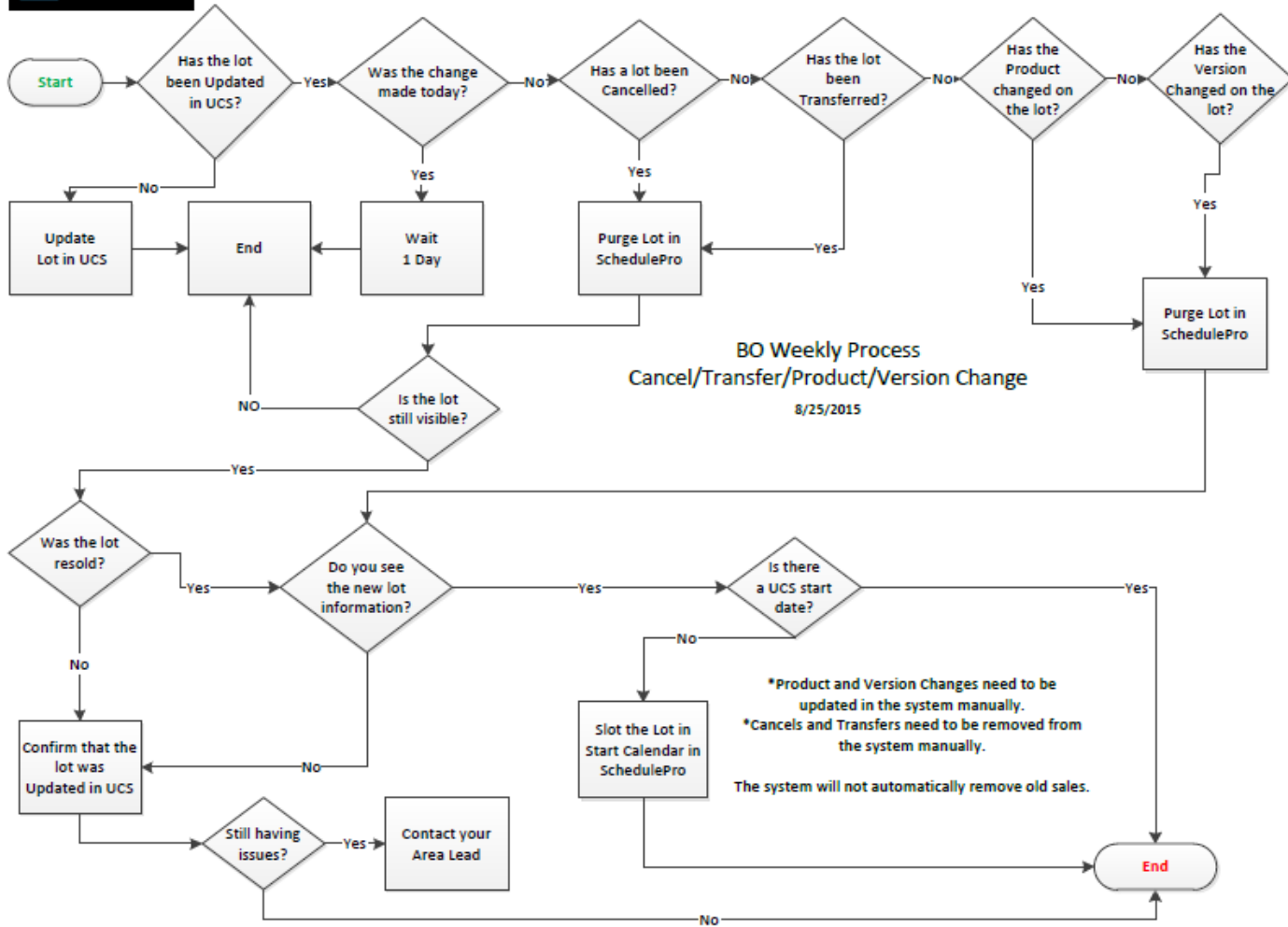
## Security Matrix

Security Roles	PJM / Supervisor	PM	Local Admin	Vendor	Vendor - Distributor	Plant	Read - Only	Corporate	Corporate Admin
<b>Screens</b>									
<b>Schedules</b>									
Community Overview	All within their division(s)	All within their division(s)	All within their division(s)	No Access	No Access	No Access	All	All	Full Control
Single Lot Calendar	All within their division(s)	All within their division(s)	All within their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
Single Lot List	All within their division(s)	All within their division(s)	All within their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
Multi - Lot	All within their division(s)	All within their division(s)	All within their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
Notes	Add, Edit, Delete notes they created within their division(s) Reply to any within their division(s)	Add, Edit, Delete notes they created within their division(s) Reply to any within their division(s)	Read Only	Reply only Assigned to their vendor number	Reply only Assigned to their vendor number	Reply only Assigned to their vendor number	Read Only	Read Only	Full Control
Docs	Add, Edit, Delete docs they uploaded within their division(s)	Add, Edit, Delete docs they uploaded within their division(s)	Read Only	View only Assigned to their vendor number	View only Assigned to their vendor number	View only Assigned to their vendor number	Read Only	Read Only	Full Control
Issues	Add, Edit, Delete	Add, Edit, Delete	Read Only	View only Assigned to their vendor number	View only Assigned to their vendor number	View only Assigned to their vendor number	Read Only	Read Only	Full Control
Checklists	Complete	Complete	Read Only	View only Assigned to their vendor number. Complete Vendor Checklists assigned to them	View only Assigned to their vendor number. Complete Vendor Checklists assigned to them	View only Assigned to their vendor number	Read Only	Read Only	Full Control
Start Calendar	Read Only	Edit	Edit	No Access	No Access	Read Only	Read Only	Read Only	Full Control
Vendor	View all vendor schedules in their division(s)	View all vendor schedules in their division(s)	View all vendor schedules in their division(s)	View only schedules for their vendor number	View all schedules within an assigned "Phase". Example would see both 240L and 240M if they were assigned to 240M	No Access	View all vendor schedules in their division(s)	View all vendor schedules in their division(s)	Full Control
<b>Templates</b>									
Template Summary	All within their division(s)	All within their division(s)	All within their division(s)	No Access	No Access	No Access	All	All	Full Control
Tasks	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Read Only	Full Control
Options	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Read Only	Full Control
Municipality Options	Add, Edit, Delete only municipalities they created	Add, Edit, Delete only municipalities within their division(s)	Add, Edit, Delete only municipalities within their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
Custom Tasks	Add, Edit, Delete only custom tasks they created	Add, Edit, Delete only custom tasks within their division(s)	Add, Edit, Delete only custom tasks within their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
Master Templates	No Access	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Full Control
Division Master Templates	Add, Edit, Delete only templates they created Read Only all templates within their division(s)	Add, Edit, Delete templates within their division(s)	Add, Edit, Delete templates within their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
Community Templates	Add, Edit, Delete only templates they created Read Only all templates within their division(s)	Add, Edit, Delete templates within their division(s)	Add, Edit, Delete templates within their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
<b>Community</b>									
Manual Communities	Read Only	Add Comm not in UCS Feed within their division(s)	Add Comm not in UCS Feed within their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
Manual Lots	Read Only	Add Lot not in UCS Feed within their division(s)	Add Lot not in UCS Feed within their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
Comm Vendors	Read Only	Assign Vendors to Phase/Activity not in UCS Feed within their division(s)	Assign Vendors to Phase/Activity not in UCS Feed within their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
Comm Options	Add Edit Delete Community Standard Options in their division(s)	Add Edit Delete Community Standard Options in their division(s)	Add Edit Delete Community Standard Options in their division(s)	No Access	No Access	No Access	Read Only	Read Only	Full Control
Create Manual Schedule	No Access	Add Edit Create Manual Schedule in their division(s)	Add Edit Create Manual Schedule in their division(s)	No Access	No Access	No Access	No Access	No Access	Full Control
Exceptions	Read Only within their division(s)	Resolve exceptions within their division(s)	Resolve exceptions within their division(s)	No Access	No Access	No Access	Read Only within their division(s)	Read Only within their division(s)	Full Control
<b>DUC</b>									
Housetypes	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Add Edit Delete	Full Control
Product Groups	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Add Edit Delete	Full Control
Foundations	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Add Edit Delete	Full Control
Products	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Add Edit Delete	Full Control
DUCs	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Add Edit Delete	Full Control
Summary	Read Only	Read Only	Read Only	No Access	No Access	No Access	Read Only	Add Edit Delete	Full Control
<b>Reports</b>									
Checklist Report	Can Run	Can Run	Can Run	Can Run	Can Run	Can Run	Can Run	Can Run	Full Control
<b>Admin</b>									
Master Checklists	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Add Edit Delete	Full Control
Reason Codes	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Add Edit Delete	Full Control
NVR Holidays	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Add Edit Delete	Full Control
E-Mail Matrix	No Access	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Full Control
Notifications	No Access	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Full Control
Master Divisions	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Add Edit Delete	Full Control
Imports / Exports	No Access	No Access	No Access	No Access	No Access	No Access	No Access	No Access	Full Control
<b>Landing Page</b>									
Corporate Announcements	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Ability to post announcement	Full Control
Local Announcements	Read Only for division(s)	Ability to post announcement to their division(s)	Ability to post announcement to their division(s)	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Ability to post announcement	Full Control
<b>Users</b>									
NVR	Edit only their profile Read-Only for all of their division(s)	Edit only their profile Read-Only for all of their division(s)	Edit only their profile Read-Only for all of their division(s)	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Full Control
Vendor	Read Only for their division(s)	Read Only for their division(s)	Read Only for their division(s)	Read Only accounts under their Master Vendor ID	Read Only accounts under their Master Vendor ID	Read Only accounts under their Master Vendor ID	Read Only for their division(s)	Read Only for their division(s)	Full Control



**Best Practice**  
BO Weekly Process  
New Sale  
8/25/2015

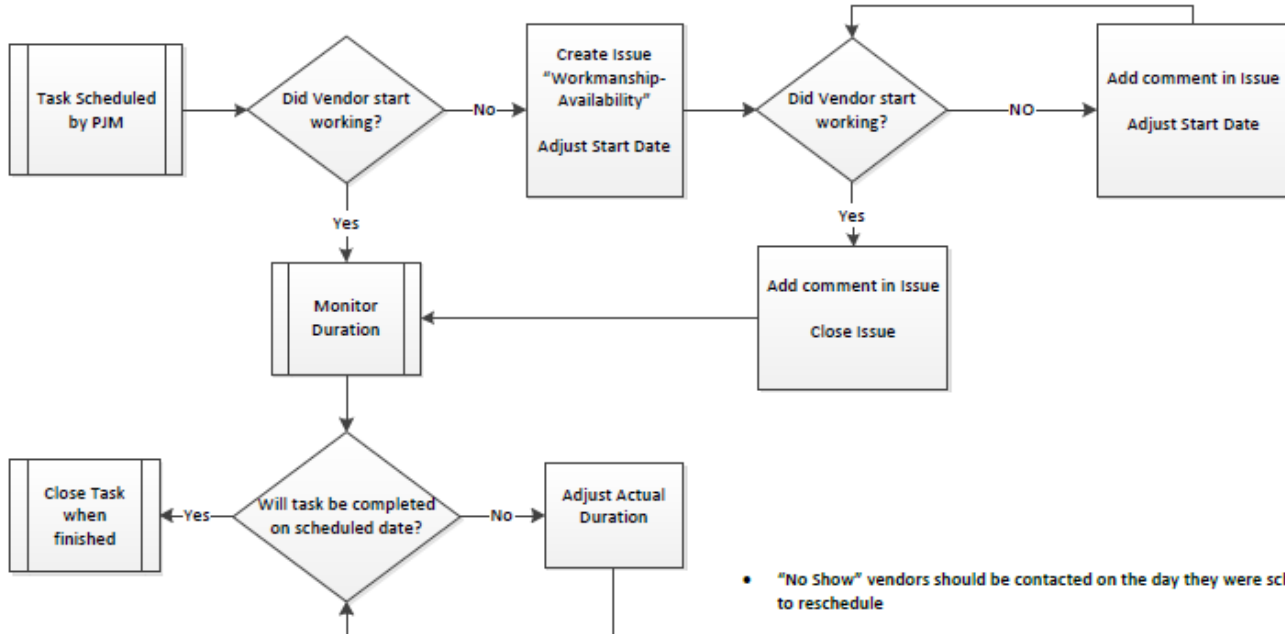




## Best Practice

### Vendor Availability

8/6/2015

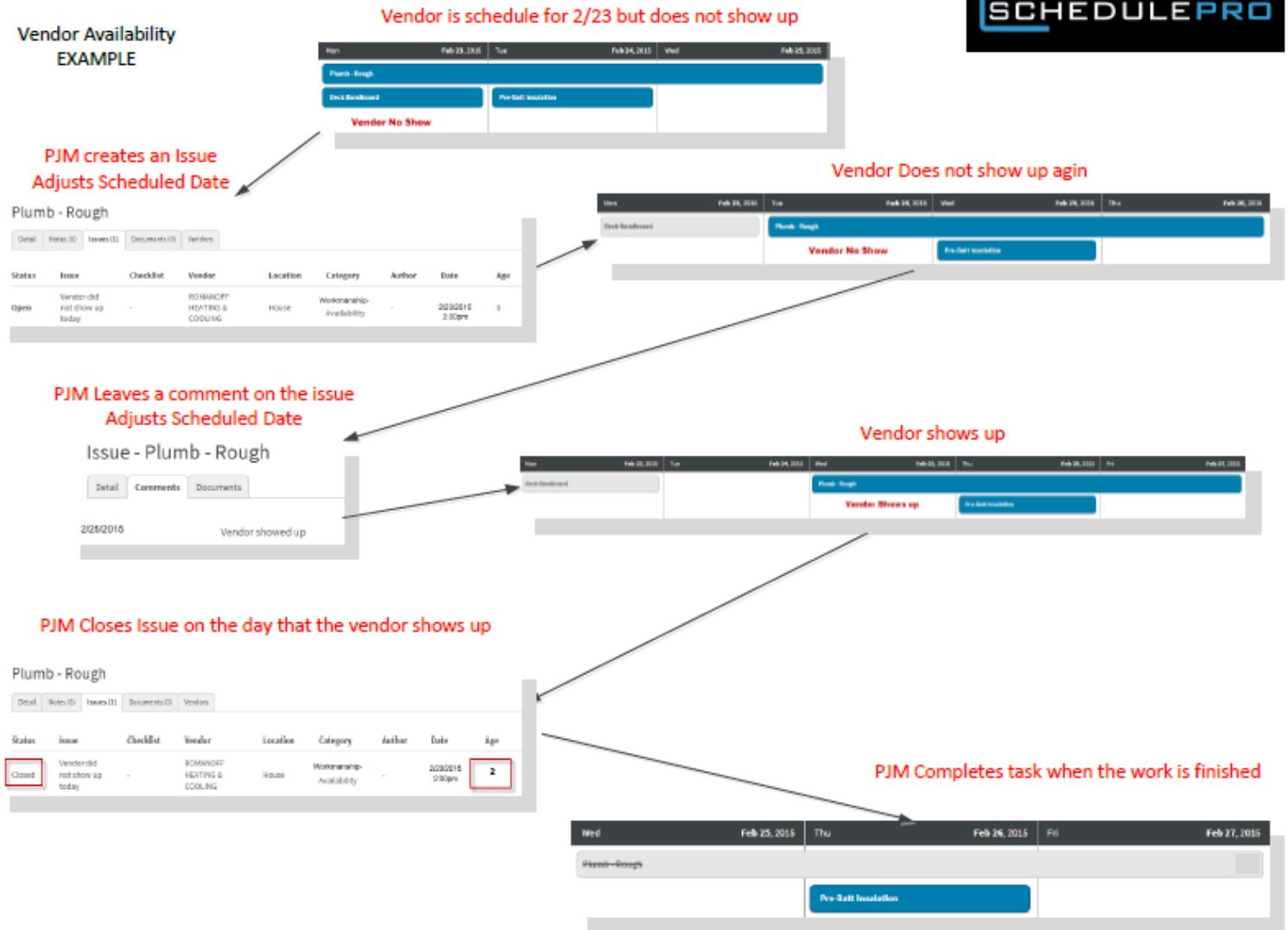


- "No Show" vendors should be contacted on the day they were scheduled to reschedule
- Issues should have the category of "Workmanship - Availability"
- Issues should be closed on the day that the vendor shows up
- Issues over 7 Days should have management involvement (PM/RPM)
- Actual Duration should match amount of time it took vendor to complete the work



## Best Practices

### Vendor Availability EXAMPLE



Plumb - Rough

Status	Issue	Checklist	Vendor	Location	Category	Author	Date	Age
Open	Vendor did not show up today	-	ROMANOFF HEATING & COOLING	House	Workmanship-Availability	-	2/23/2015 2:00pm	0

Issue - Plumb - Rough

2/25/2015 Vendor showed up

Plumb - Rough

Status	Issue	Checklist	Vendor	Location	Category	Author	Date	Age
Closed	Vendor did not show up today	-	ROMANOFF HEATING & COOLING	House	Workmanship-Availability	-	2/25/2015 2:00pm	2



**Notes**
