



SCHEDULEPRO

Vendor User Guide

SchedulePro System Guide, Revised October 2015

Produced by NVR, Inc Pittsburgh, PA

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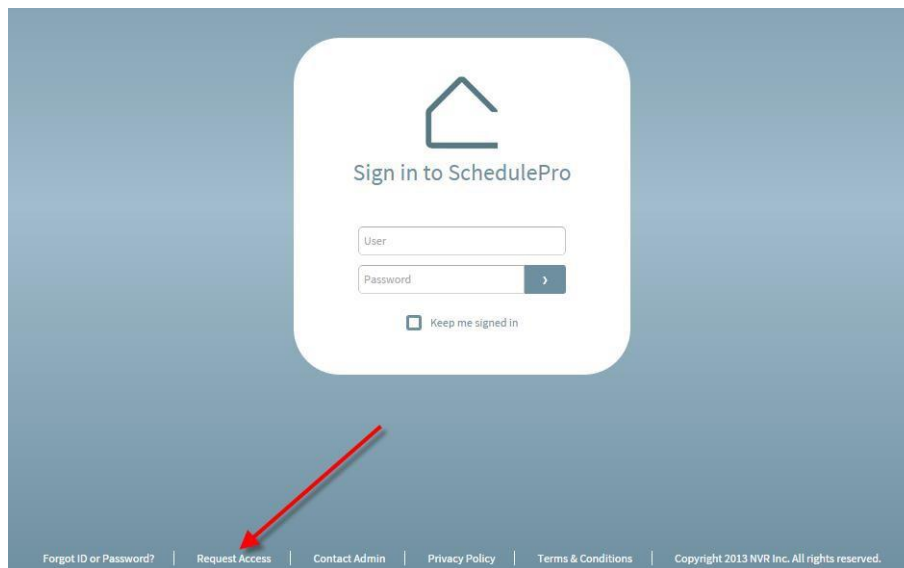
Logging In

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

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

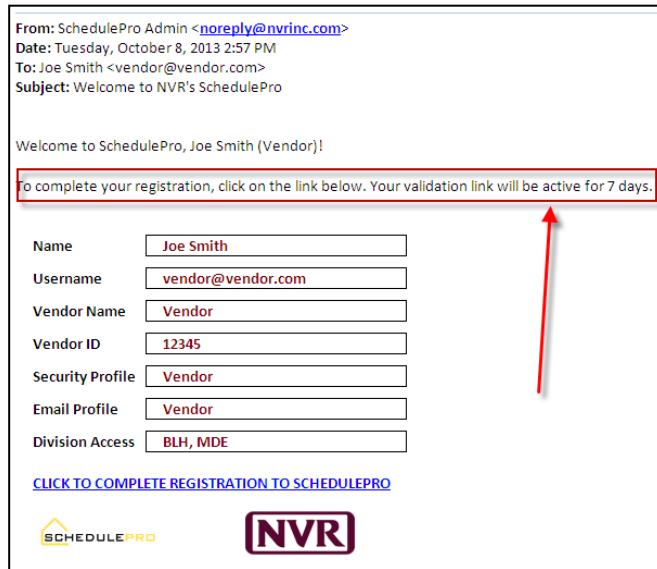
When the SchedulePro login page appears, click "Request Access" at the bottom of the screen.



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

Sample Email:

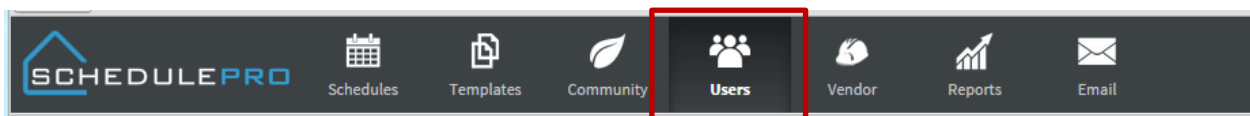


Users - My Profile

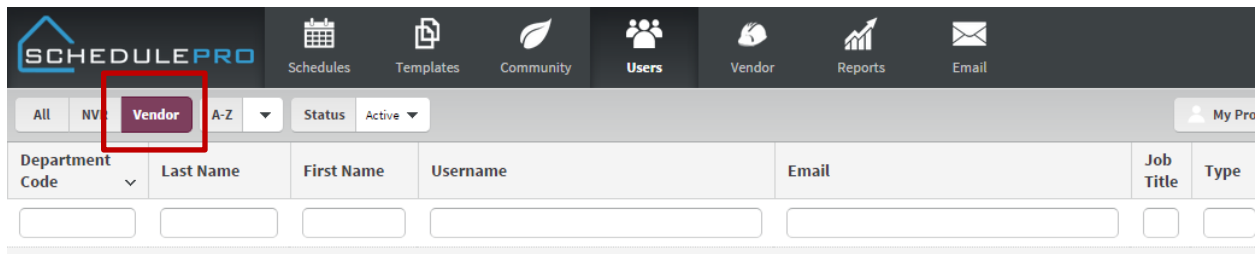
To make changes to your own login once you have created it, you can follow the steps below.

If you need to make any changes that you do not have access to in this screen, you can contact your administrator using the instructions in the next section.

1. Select ‘Users’ from Main Menu bar

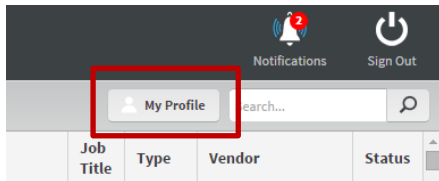


2. Select ‘Vendor’ and you should see any user tied to your vendor number who has a log in.



Note: Users can only make changes to their own profile. You cannot make adjustments to another user's profile. If you do need to make changes and you do not have access to that user's login, you need to contact your Administrator.

3. Select 'My Profile' from top right side of screen to make changes to division access.



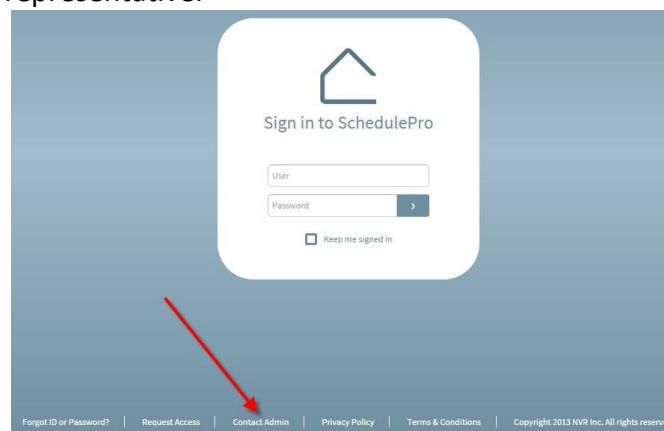
- a. Changes you can make in this screen:
 - i. Division Access: Determine what divisions the users gets updates and information for
 - ii. Change your password

A screenshot of the 'Account' settings page. The page is titled 'Account' and contains several input fields and dropdown menus. The 'First Name' field contains 'Jamie' and the 'Last Name' field contains 'Minett'. The 'Username' field contains 'Jminett' and the 'Password' field contains '.....'. The 'Phone Number' field contains '412-250-2662' and the 'Email Address' field contains 'jminett@nvrinc.com'. The 'Security Profile' dropdown menu is set to 'Local Admin'. The 'Division Access' section shows four checkboxes: 'HHN', 'HHS', 'PGS', and 'PTN', all of which are checked. The 'Active' button is highlighted in purple. A red box labeled 'ii.' is placed over the password field, and another red box labeled 'i.' is placed over the 'HHS' checkbox in the Division Access section.

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.

From the login screen, please do not click on “**Contact Administrator**” until you have reached out to your local NVR representative.



News

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 release:

- Division or Region Announcements
- Office Closings
- Staff Changes

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.

Schedule View/ Reports

Here vendors are able to view their scheduled tasks for anything that is tied to their 5 digit NVR vendor number.

This allows vendors to continually get updates and manage their workloads.

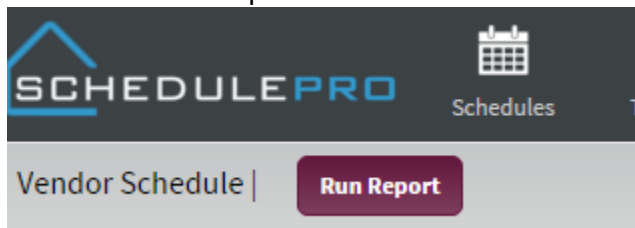
The one benefit of this page is being able to forecast a vendor's workload and adjust accordingly.

To access this page do the following steps:

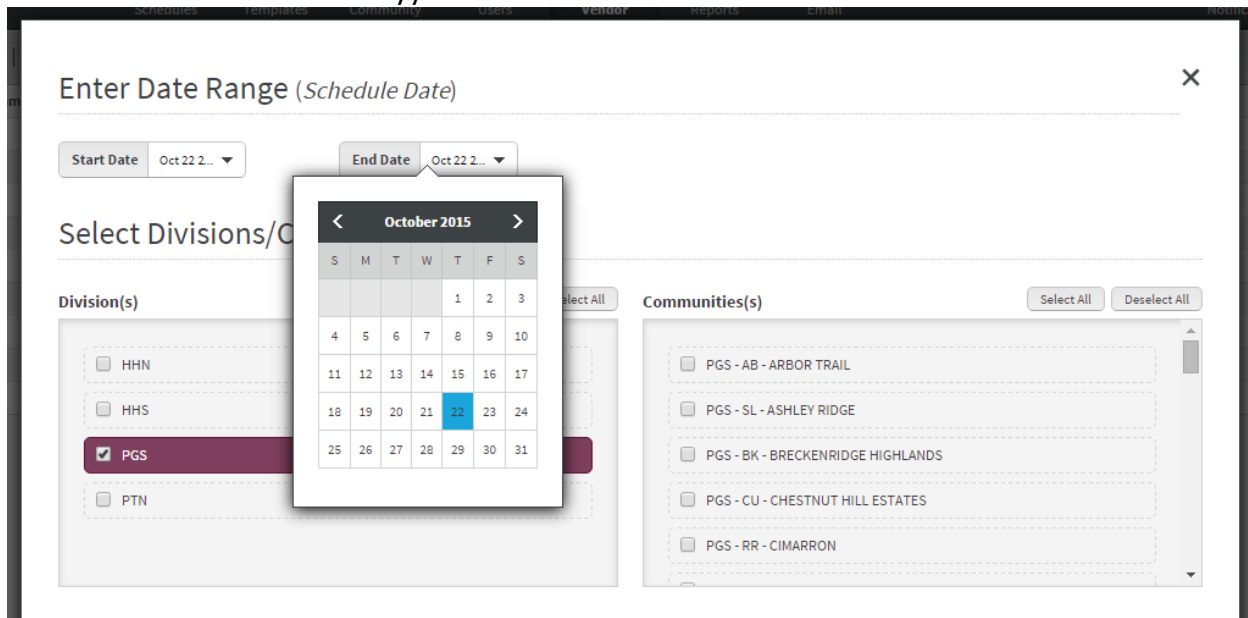
1. Click on the **"Schedule"** button located on the main menu



2. Select the **"Run Report"**



3. Set your date range (default will select current day range) and select the divisions and communities you would like to see.



4. Once your vendor(s) have been selected, click the **"Execute"** button



5. A list of all tasks the vendor is assigned to will appear. For easier viewing you may choose to group the tasks.
6. 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. Using the Export button on the top right side of the screen, you can load a “snapshot” of the information into an excel spreadsheet.

- Once you have exported the information into Excel, you will no longer be using live updated information in the Schedule Pro System.
- You can use all the data exported into Excel to create your own filters and spreadsheets, data is also more easily printed this way.

Please ask your NVR administrator if you need any help with exporting your report to Excel.

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.

Task Notes

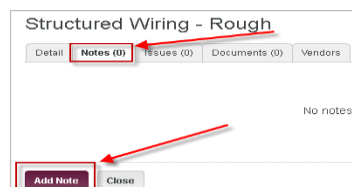
- Task notes can be view by all account holders who have access to the division and/or assigned to the phase.
- Task notes can be created by a vendor or an NVR user.

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

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

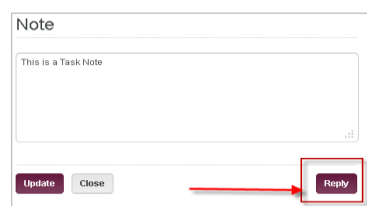
NOTE: Notice that the number in the “Notes” tab increased within the Task Details



How to Reply to a Note

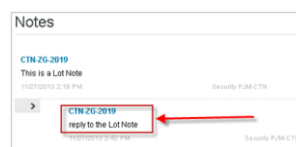
Replies to notes generated at the lot level can be made by anyone with NVR and Division access. This could be beneficial in communications between the PJM and the PM. Replies at the task level can be generated between NVR Users and the task vendor. This could be to remind vendors of the need to delete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

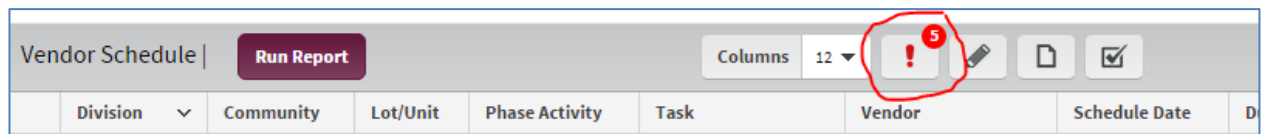


Issues

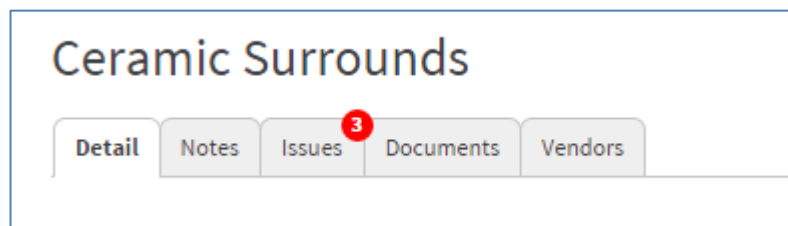
An issue created in SchedulePro is meant to notify vendors involved with the task of problem, incomplete work or workmanship that doesn't meet NVR standards. Once issues are created by an NVR user, the Vendor is notified. If the Issue remains Open after 7 days (meaning the issue is not resolved) that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

Once an issue is created it can be viewed in 3 different locations

- Schedule Summary Page (Only if open)



- Task detail



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: (NOT viewable by VENDORS)

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:

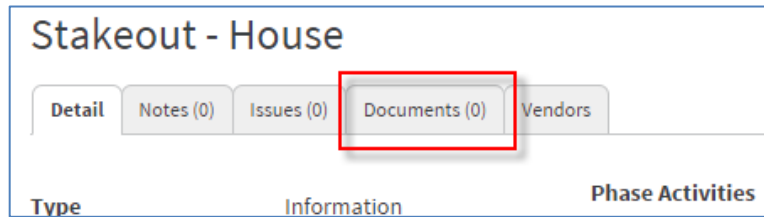
They are visible to NVR Users and task assigned vendors. This might be a Phase SPEC for a new vendor or a diagram of wiring locations for an electrician

Issue Document:

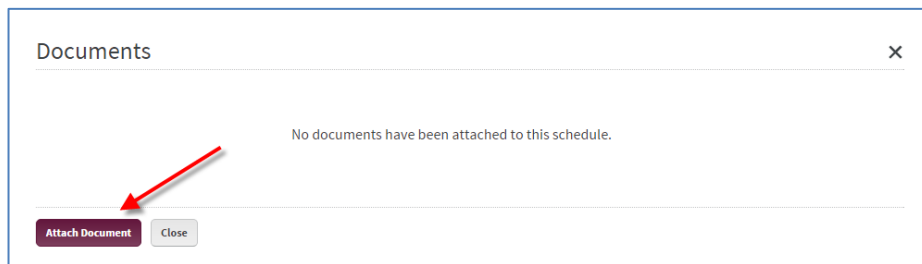
This would be attached by the creator of an issue and viewed the same way as a task Document. Only difference would be Issue Documents (attachments) are not displayed in Schedule summary or single lot Doc counters.

How to upload a Task Document

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



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.

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 comment is required.

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

Checklist - Fdn X

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:

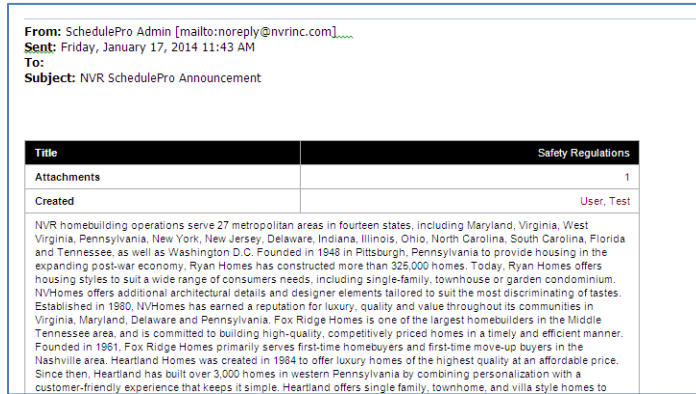
WHEN: Real Time (if designated by Announcement creator. See News/Announcements Section)

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. You will need to log into Schedule Pro to view any attachments on announcements.

Example Announcement Email:



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 communications are between an NVR Project Manager/Supervisor and the Vendor assigned to the Task where the note was created.