

Overview of New To Do List

6.1 Release



HYPHEN
SOLUTIONS TM

Building Better Connections™

Table of Contents

Feature Function Comparison.....	3
Full Page View	4
Existing Features of the To Do List	5
Start Tasks.....	6
Complete Tasks	6
Percent Complete.....	6
Complete with Exceptions.....	7
Alerts	7
Checklist Items	7
Schedule Change Reasons	7
Schedule Change Supplier.....	8
Enter MPO Quantities	8
Task Type Filter.....	8
Task Filters.....	9
Supplier Filter.....	10
Subdivision and Phase Filters	10
Building Filter.....	10
Job Name Filter	10
Max Rows Filter	11
View Printable Link.....	11
Call Vendor Indicator.....	11
Identify Late Tasks.....	11
New Features of the To Do List	12
Reschedule Tasks.....	12
View Tasks with Exceptions.....	12
Task Notes	12
Send Notes to Supplier.....	13
Pick TBD Vendor	13
Identify SupplyPro Suppliers.....	14
View PO Status.....	14
Change Duration.....	14
Task Name Filter.....	14
Task Category Group Filter.....	15
Task Category Filter	15
Date Picker	15
Scrolling Data	16
Hide Filters	16
To Do List Date	17
Identify Possible Reschedules	17
Supplier Detail.....	18
Job Detail.....	19
Identify Hard Coded Dates	20
Identify Critical Path Tasks	20
Skip Tasks	20

Feature Function Comparison

Function	Old To Do List	New To Do List
Start Tasks	X	X
Complete Tasks	X	X
Reschedule Tasks		X
Enter % Complete	X	X
Mark/Remove Task Exceptions	X	X
View Tasks with Exceptions		X
Task Notes		X
Send Notes to Supplier		X
Exception Notes	X	X
Alerts	X	X
Pick TBD Vendor		X
Identify SupplyPro Suppliers		X
View PO Status		X
Manage Checklist Items	X	X
Enter Schedule Change Reason	X	X
Enter Schedule Change Supplier	X	X
Enter MPO Quantities	X	X
Change Duration		X
Task Name Filter		X
Task Type Filter	X	X
Task Filters (ahead/behind/in progress)	X	X
Supplier Filter	X	X
Subdivision/Phase Filter	X	X
Task Category Group Filter		X
Task Category Filter		X
Building Filter	X	X
Job Filter	X	X
Max Rows Filter	X	X
View Printable	X	X
Call Vendor Identifier	X	X
Date Picker		X
Scrolling Data		X
Hide Filters Feature		X
To Do List Date		X
Identify Late Tasks	X	X
Supplier Detail		X
Identify Possible Reschedules		X
Job Detail		X
Identify Hard Coded Dates		X
Critical Path Task Indicator		X
Skip Tasks		X

Full Page View

[Home](#)
[Jobs](#)
[Job Admin](#)
[Templates](#)
[Supply](#)
[Reports](#)
[ReportConnect](#)
[Manager](#)

BUILDPRO

Hyphen Builders*
Kevin Wright - kwright

Job Management
[Help](#)

To Do List

Subdivision: -All Subdivisions-
Category Group: -All Category Groups-
Category: -All-
Task Type: -All Task Types-

Building: -All Buildings-
Job Name: -All Jobs-
Task Name:
Supplier Name:

Task Filters:
Alerts
To Order on To Do List Date
To Order By To Do List Date (Late)
In Progress (In Lead Period)
In Progress (Actually Started)

Max Rows: 500
Date: 03/27/2007
Show Tasks

[View Printable](#)
[Hide Filters](#)

Tasks: 82

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	!	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
The Oaks Subdiv (Phase1)													
2923 Massive Oak Detail													
☒ Windows (P) (Late)	Montalvo Rain Gutter	Y	03/06/2007	03/09/2007	03/09/2007	!	x			ACK			
ALERT: Reschedule by Supplier ALERT: Unread Note from Supplier													
☒ Exterior Doors (P) (Late)	Montalvo Rain Gutter	Y	03/06/2007	03/20/2007	03/20/2007	!	x			SUB			
☒ Roof Shingles (P) (Late)	The Home Depot - Supply	N	03/07/2007	03/12/2007	03/12/2007	*		#					
☒ Exterior Clean (P) (Late)	Willie Smith	N	03/09/2007	03/12/2007	03/12/2007	*		#					
☒ Fireplace Install (P) (Late)	Montalvo Rain Gutter	Y	03/13/2007	03/20/2007	03/20/2007	!	x			SUB			
☒ Exterior Paint (P) (Late)	Trinidad Construction	N	03/13/2007	03/20/2007	03/21/2007	!	x			SUB		0 %	
☒ HVAC Rough (P) (Late)	Air Tech (Call)	N	03/15/2007	03/22/2007	03/23/2007	*		#					
☒ Plumbing Top Out (P) (Late)	Buckner Blvd. Plumbing	N	03/19/2007	03/26/2007	03/28/2007	*		#					
☒ Electric Rough (P) (Late)	Mendoza Electric	N	03/22/2007	03/29/2007	04/02/2007	*							
☒ ...	...	N	03/23/2007	04/02/2007	04/02/2007	*							

Schedule Change Reason:* Standard Reason #1
Schedule Change Supplier:* -Current Supplier-
Update

[Home](#)
[Sign Out](#)

Existing Features of the To Do List

Following is a list of functionality in the current To Do List and how the functionality is handled in the new To Do List. Then, in the next section, we'll look at new functionality added to the To Do List.

At first glance, you'll notice that the new To Do List has the look and feel of JME (Job Management Express). JME is the most widely used page in BuildPro; so many of the scheduling functions will be familiar.

The major difference in the To Do List is the way the filters are displayed/hidden. When the To Do List first appears, the filters are available and no data shown. This is to allow users to change the filters before the page is displayed. Filter defaults can be changed from the My Profile page.

After clicking the **Show Tasks** button, the To Do List will show all tasks for jobs the user is assigned to, based on the filter selections.

Start Tasks

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	!	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ HVAC Rough (P)	Air Tech	N	02/14/2007	02/21/2007	02/22/2007	*	☐	☐					☐

Previously, users had to start or complete a task in order to change any associated field (update start date, etc). Now, users may update any part of the task without starting or completing. Users may simply add a note, adjust dates, or manage alerts.

To start a task, click the check box in the **Start** column. Like JME, users may adjust the start or end dates. If the task is behind schedule (# symbol), it will start with tomorrow's date. If the Backdating module is on, the To Do List will allow the user to start the task with a back-dated start date. Symbols used in the To Do List are similar to JME and a complete list may be found in the Help page. Tasks that are already started will have an 'X' in the **Start** column, indicating that the task is already started. Click the **Update** button to update the page and start the selected task.

Complete Tasks

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	!	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Fence (P) (Late)	Anchor Fence	N	10/10/2005	10/16/2005	10/20/2005	!	x	☐		SUB		0 %	

Completing tasks is accomplished in the same manor as starting a task. Check the check box in the **Comp** column and click the **Update** button. The **End Date** may be adjusted before marking the task complete. Tasks that are complete will show the date the user completed the task in the **Comp** column.

Percent Complete

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	!	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Fence (P) (Late)	Anchor Fence	N	10/10/2005	10/16/2005	10/20/2005	!	x	☐		SUB		0 %	☐

Percent Complete is a module. This column will only appear if the module is turned on for the company. Unlike the old To Do List, users may enter a percent complete for the task and click the **Update** button without starting or completing the task.

Complete with Exceptions

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	I*	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ EPO: 6/21/2005 (P) (Late)	Freddie the Framer	N	06/22/2005	06/22/2005	06/22/2005	!	x	☒	☐	see			

To mark a task complete with exceptions, check the check box in the **Mark Excpt** column, check the check box in the **Comp** column and click the **Update** button. In order to mark the task with exceptions, the task must be marked complete. A new task filter has been added to allow users to see tasks with exceptions.

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	I*	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Fireplace Install (P)	Montalvo Rain Gutter	Y	03/13/2007	03/20/2007	03/20/2007	!	x	3/27	☒	see		99%	

Tasks with exceptions are identified by a red highlight around the check box in the **Comp** column. To remove the exception from a task, un-check the check box in the **Mark Excpt** column and click the **Update** button.

Alerts

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	I*	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Roof Shingles (P)	Montalvo Rain Gutter	Y	01/24/2007	01/28/2007		?	?			CAN			
ALERT: Unread Note from Supplier													

Alerts will appear under the task row for tasks that have alerts. The alert label is in red bold text to draw attention to the user. Alerts may be viewed or managed by clicking the hyperlink next to the alert label. The alert details will use the same pop up page as the current Alerts page, allowing the user to clear or take action on the alert. If the alert is cleared, the hyperlink will be removed and a message placed next to the alert showing the user that alert has been cleared.

Checklist Items

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	I*	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Exterior Paint (P) (Late)	Willie Smith	N	06/17/2005	06/24/2005	06/30/2005	!	x			SUB		0%	
☒ Pending ☐ Passed ☐ Failed Item 1													

Checklist items will appear under the task row. Checklist items must be set to Passed status before completing the task. In the new To Do List, users may update the checklist items without having to start or complete the task. To change the status on a check list item, click the radio button next to the check list item and click the **Update** button.

Schedule Change Reasons

Schedule Change Reason:*

No change to the **Schedule Change Reason** drop down box. This appears at the bottom of the page and still allows users to select a schedule change reason and apply to updates.

Schedule Change Supplier

Schedule Change Supplier:* ▼

No change to the **Schedule Change Supplier** functionality. This drop down box appears only when the module is on.

Enter MPO Quantities

Termite Pretreat						
SKU	Description	Qty Ord	Qty Ship	Qty Rcv	Qty Can	Rcv Now
CONTRACT	Termite Pretreat	1	0	0	0	

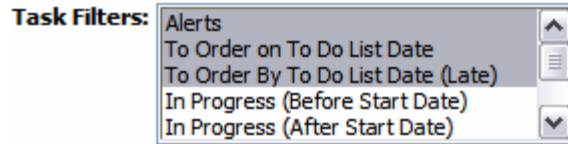
When the check box in the **Comp** column is checked for an MPO task, the MPO pop up window will appear to allow the user to enter the received quantities.

Task Type Filter

Task Type: ▼

The **Task Type** filter allows the user to filter the tasks in the To Do List by type (Measurement, Pause, Contract, Memo, PO, Reminder, Pay Point, or Work Order).

Task Filters



The **Task Filters** have been re-named and two new **Task Filters** have been added to the list. Because a To Do List **Date** has been added, the tasks that appear will be based on the To Do List Date selected. See To Do List Date section for more details.

Old To Do List	New To Do List
Order Alerts	Alerts <i>This filter will show tasks that have alerts regardless of task status or To Do List Date. If a task has more than one alert, all alerts will be displayed.</i>
To Order Today	To Order on To Do List Date <i>This filter will show tasks where the lead date is the same as the To Do List Date.</i>
To Order Before Today (Late)	To Order by To Do List Date (Late) <i>This filter will show tasks where the lead date of the task is before the To Do List Date.</i>
In Progress	In Progress (In Lead Period) <i>This filter will show tasks that are in progress and the To Do List Date is before the start date of the task. Labor/materials are ordered but the start date has not been reached.</i>
	In Progress (Actually Started) <i>New</i> <i>This filter will show tasks that are in progress and the To Do List Date is on or after the start date of the task. Labor/materials should be on the jobsite.</i>
To Complete Today	To Complete on To Do List Date <i>This filter will show tasks where the end date of the task the same as the To Do List Date.</i>
To Complete Before Today (Late)	To Complete by To Do List Date (Late) <i>This filter will show tasks where the end date of the task is before the To Do List Date.</i>
Completed Ending Today	Completed on To Do List Date <i>This filter will show tasks that are complete and the end date of the task is the same as the To Do List Date.</i>
	Tasks with Exceptions <i>New</i> <i>This filter will show tasks that have been marked with exceptions.</i>

Supplier Filter

Supplier Name:

The supplier drop down has been replaced with a text search box. This will help the To Do List page load faster. The search box will do a “starts with” search. To find ‘CC Interior Specialties, Inc.’, type ‘CC’ in the text box. This will filter the To Do List by tasks with that supplier.

Subdivision and Phase Filters

Subdivision:

Phase:

The default for the **Subdivision** filter is All Subdivisions. Selecting a specific subdivision will refresh the filters and populate the **Phase** filter with a list of phases for that subdivision. A list of jobs will also be populated in the **Job Name** filter of jobs that belong to the chosen subdivision. The **Subdivision** filter is initially populated with subdivisions for jobs where the user is assigned as a job user.

Building Filter

Building:

The default for the **Building** filter is All Buildings. Selecting a specific building will refresh the filters and populate the **Job Name** filter with a list of jobs in the selected building. The **Building** filter will only appear if the Multi-Family module is on. Buildings will only appear in the **Building** filter if the user is assigned to a job that belongs to a building.

Job Name Filter

Job Name:

The **Job Name** filter will default to All Jobs. The **Job Name** filter will only be populated if a subdivision/phase or building is selected. When a single job is selected, the To Do List will only display tasks for the selected job.

Max Rows Filter

Max Rows: 

The **Max Rows** filter defaults to 50. This setting may be changed from the Your Profile page.

View Printable Link

[View Printable](#)

After the **Show Tasks** button is clicked, the **View Printable** link will appear. This link is used to generate a printable version of the To Do List.

Call Vendor Indicator

[Ramer Concrete Inc.](#)(Call)

For suppliers that are marked as a Call Vendor, '(Call)' will appear after the supplier's name in the **Supplier Name** column.

Identify Late Tasks

[Foundation Prep](#) (P) (Late)

Tasks that are late, based on the To Do List Date, will have '(Late)' after the task name.

New Features of the To Do List

Following is a list of new features (functionality) that have been added to the To Do List.

Reschedule Tasks

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	!	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Brick/Stucco Material (P) (Late)	Baldo Brick Layers	N	01/17/2007	02/15/2007	02/15/2007	!	x	☐	☐	SUB			

To reschedule a task, enter the reschedule date in the date box of the **Resched Date** column and click the **Update** button. The task will be rescheduled and notice sent to the associated supplier.

View Tasks with Exceptions

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	!	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Brick/Stucco Material (P)	Baldo Brick Layers	N	01/17/2007	02/15/2007	02/15/2007	!	x	2/14	☒			99%	

As well as the ability to mark a task complete with exceptions, tasks that have been marked with exceptions will always appear on the To Do List regardless of the filters selected. To remove an exception from a task, un-check the check box in the **Mark Excpt** column and click the **Update** button.

Task Notes

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	!	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Plumbing Top Out (P) (Late)	Buckner Blvd. Plumbing	N	04/19/2006	04/26/2006	04/28/2006	*	#	☐	☐				
Notes:													

At the beginning of each task row, there is a new icon. This icon will expand or collapse a notes row for the associated task. The default for the notes row is closed. This is to allow the user to view more tasks within the scrolling window of the To Do List. Click the icon once to open the notes row. Click again to close. Opening or closing the notes row will not update or delete notes, only show or hide them.

Notes on the new To Do List could be called “Smart Notes”. These notes know the task status, whether the supplier is on SupplyPro, and other actions taken on the associated task. For example, if the user enters a note and clicks the **Update** button, the note will be saved as a job/task note. Starting or completing the task will enable the **Send Notes to Supplier** check box. This will allow the user to send the note to the supplier (instructions to supplier).

If the user marks the task complete with exceptions, the notes are saved as exception notes and will be sent to the supplier.

Send Notes to Supplier

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	IS	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
The Oaks Subdiv (Phase1)													
2923 Massive Oak Detail													
Windows (P) (Late)	Montalvo Rain Gutter	Y	03/06/2007	03/09/2007	03/09/2007	IS	x	☐		ACK			
Notes:		☐ Send Notes to Supplier											

Another feature of the “Smart Notes” is to allow users to send a note to the supplier if they are on SupplyPro without taking other action on the task. If the task is in progress, the **Send Notes to Supplier** check box will appear automatically, allowing the user to enter a note and send it to the supplier. The check box will not appear for suppliers that are not on SupplyPro. However, if the user checks the check box to **Start** or **Complete** the task, the **Send Notes to Supplier** check box will appear, allowing the user to enter notes that will be sent with the task/order (instructions to supplier on the fax/email).

Pick TBD Vendor

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	IS	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
Brick Labor (P) (Late)	Baldo Brick Layers ▼		04/28/2006	05/05/2006	05/25/2006		☐	#					☐

The new To Do List allows users to select a vendor/supplier for a TBD task without leaving the page. To change the supplier on a TBD task, click the hyperlinked supplier name. This will change the hyperlink into a drop down box. Select the correct supplier and click the **Update** button.

For non-integrated BuildPro users, the supplier hyperlink will allow users to change the supplier without having to drill down into the task (given that the user has the correct role to change a supplier).

Any supplier that can be changed (TBD or otherwise) will be a bold hyperlink. Non-bolded hyperlinks will open the supplier detail window to allow users to view supplier details such as phone numbers and email addresses.

If the Change TBD Vendor on In Progress Tasks module is on, the user may change the vendor if the task is in progress. This will change the vendor, send cancellation to the old vendor, and the new vendor will get the new PO with the original date. To change the date on the task/PO, change the vendor and change the **Reschedule** date; then click the **Update** button. This will send the PO to the new vendor with the new date.

Identify SupplyPro Suppliers

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	SP	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Gutters (P) MASTER TASK (Late)	Montalvo Rain Gutter	Y	01/16/2006	01/16/2006	01/16/2006		#						☐

A new column has been added to display the SupplyPro status of a supplier. The **SPro** column will indicate to users if the supplier subscribes to SupplyPro or not with a Y or N.

View PO Status

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	SP	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Gutters (P) MASTER TASK (Late)	Montalvo Rain Gutter	Y	02/12/2007	02/15/2007	02/15/2007	!	x			ACK			☐

The **PO Status** will display to users the PO or order status. Possible statuses include:

- o Submitted (SUB) – indicating that the order has been sent to the supplier.
- o Acknowledged (ACK) – indicating that the SupplyPro supplier has acknowledged the order.
- o Shipped (SHP) – indicating the SupplyPro supplier has shipped the order.
- o Partial Received (PRC) – indicating a partially received order.
- o Received Complete (REC) – indicating the order has been received complete.
- o Cancelled (CAN) – indicating the order was cancelled.
- o Pending Pricing (PPR) – indicating the order is pending pricing from the back office (EPO's only).

By placing the cursor over the **PO Status**, a tool tip will appear with the full wording.

Change Duration

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	SP	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Electric Rough (P) (Late)	Mendoza Electric	N	04/19/2006	04/26/2006	04/28/2006		#						☐

To change the duration of a task, change the **Start Date** or **End Date** of the task and click the **Update** button. BuildPro will automatically calculate the duration. An error will appear if the end date is before the start date.

Task Name Filter

Task Name:

A **Task Name** text box has been added to the To Do List. This search box will do a “starts with” search. To find ‘Install Appliances’, type ‘install’ in the text box. This will filter the To Do List by tasks that begin with ‘Install’.

Task Category Group Filter

Task Category Group:

Task Category:

A filter has been added to allow users to filter the To Do List by Task Categories. The default for this drop down box is 'All Category Groups'. By selecting a category group, the page will refresh with a list of Task Categories. Users may then select an individual **Task Category** or filter by all Task Categories within the selected group.

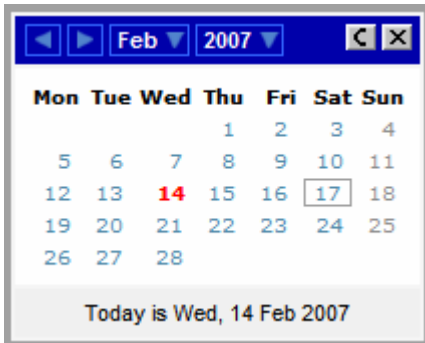
Task Category Filter

Task Category Group:

Task Category:

The **Task Category** filter will default to 'All'. Once a **Task Category Group** is selected, the **Task Category** filter will be refreshed with task categories from the selected **Task Category Group**. Click the **Show Tasks** button to generate the To Do List with the selected task categories.

Date Picker



Mon	Tue	Wed	Thu	Fri	Sat	Sun
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

Today is Wed, 14 Feb 2007

All date fields in the To Do List will use a date picker. This allows users to quickly select dates and ensure that dates are entered in the correct format.

Scrolling Data

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	1 st Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
Hill Top (Phase 1)												
Building 20												
☒ Landscape (P)	Trinidad Construction	N	01/10/2006	01/13/2006	01/13/2006	☐ #						☐
MASTER TASK (Late)												
☒ Final Grade (P)	Trinidad Construction	N	01/10/2006	01/13/2006	01/13/2006	☐ #						☐
MASTER TASK (Late)												
☒ Gutters (P)	Montalvo Rain Gutter	Y	02/12/2007	02/15/2007	02/15/2007	!	x	☐	ACK			
MASTER TASK (Late)												
McKinney Low Rent Apts Unit 1												
☒ Roofing Labor (P) (Late)	The Home Depot - Supply	N	04/19/2006	04/24/2006	04/25/2006	*	☐ #					☐
☒ Plumbing Top Out (P) (Late)	Buckner Blvd. Plumbing	N	04/19/2006	04/26/2006	04/28/2006	*	☐ #					☐
☒ Electric Rough (P) (Late)	Mendoza Electric	N	04/19/2006	04/26/2006	04/28/2006	*	☐ #					☐
☒ HVAC Rough (P) (Late)	Air Tech	N	04/24/2006	05/01/2006	05/02/2006	*	☐ #					☐
☒ Security System Rough (P) (Late)	Ranger America Security	N	04/26/2006	05/03/2006	05/03/2006	*	☐ #					☐
☒ Cabinets Delivered (P) (Late)	The Home Depot - Supply	N	04/28/2006	05/19/2006	05/19/2006	*	☐ #					☐
☒ ...	...	N	04/28/2006	05/19/2006	05/19/2006	*	☐ #					☐

Schedule Change Reason:* Schedule Change Supplier:*

Tasks: 100

As with other new pages in BuildPro, the To Do List will have frozen headers, allowing the user to scroll the data without losing the headers.

Hide Filters

[Hide Filters](#)

The **Hide Filters** link will remove the filter section at the top. This gives the user more room on the page to manage tasks.

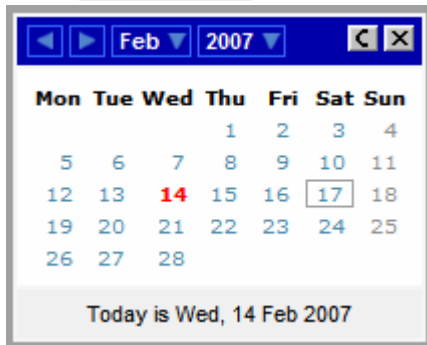
Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	1 st Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
The Oaks Subdiv (Phase1)												
2923 Massive Oak Detail												
☒ Windows (P) (Late)	Montalvo Rain Gutter	Y	03/06/2007	03/09/2007	03/09/2007	!	x	☐	ACK			
ALERT: Reschedule by Supplier												
ALERT: Unread Note from Supplier												
☒ Exterior Doors (P) (Late)	Montalvo Rain Gutter	Y	03/06/2007	03/20/2007	03/20/2007	!	x	☐	SUB			
☒ Roof Shingles (P) (Late)	The Home Depot - Supply	N	03/07/2007	03/12/2007	03/12/2007	*	☐ #					☐
☒ Exterior Clean (P) (Late)	Willie Smith	N	03/09/2007	03/12/2007	03/12/2007	*	☐ #					☐
☒ Exterior Paint (P) (Late)	Trinidad Construction	N	03/13/2007	03/20/2007	03/21/2007	!	x	☐	SUB		0 %	
☒ Fireplace Install (P)	Montalvo Rain Gutter	Y	03/13/2007	03/20/2007	03/20/2007	!	x	3/27	REC		99%	
☒ HVAC Rough (P) (Late)	Air Tech (Call)	N	03/15/2007	03/22/2007	03/23/2007	*	☐ #					☐
☒ Plumbing Top Out (P) (Late)	Buckner Blvd. Plumbing	N	03/19/2007	03/26/2007	03/28/2007	*	☐ #					☐
☒ Electric Rough (P) (Late)	Mendoza Electric	N	03/22/2007	03/29/2007	04/02/2007	*	☐ #					☐
☒ Brick/Stucco Material (P) (Late)	Arnolds Brick	N	03/23/2007	04/23/2007	04/23/2007	*	☐ #					☐
☒ Security System Rough (P)	Lone Ranger Security	N	03/27/2007	04/03/2007	04/03/2007	*	☐ #					☐
2924 Massive Oak Detail												
☒ Exterior Doors (P) (Late)	The Home Depot - Supply	N	02/23/2007	03/09/2007	03/12/2007	!	x	☐	SUB		0 %	

Schedule Change Reason:* Schedule Change Supplier:*

[Home](#) | [Sign Out](#)

To Do List Date

Date: 



A new feature for the To Do List is the To Do List **Date**. The default is always today's date to show the user all tasks (To Do List) for today. This new feature allows the user to see the To Do List for any given date. Remember that a late task today will not show up as late if the user navigates to a past date. Click on the date and click the **Update** button.

Identify Possible Reschedules

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	!	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Gutters (P) MASTER TASK (Late)	Montalvo Rain Gutter	Y	02/12/2007	02/15/2007	04/15/2007	!	x	☐		ACK			

A red flag next to the **Start Date** indicates a possible reschedule for the task based on the parent task.

Supplier Detail

Supplier Detail			
Supplier Name:	Trinidad Construction		
SupplyPro:	N	Alt Supplier Id:	0
Primary Contact:	Trinidad		
EMail Address:	sbctest@hyphensolutions.com		
Address:	unknown		
City:	unknown		
State:	TX	Postal Code:	75001
Phone:	214-876-0101	Fax:	9999999999
E-Destination:	sbctest@hyphensolutions.com		
EMail PO Submit:	Y	EMail PO Received:	Y
Acct E-Destination:	sbctest@hyphensolutions.com		
EMail PO Submit:	Y	EMail PO Received:	Y
Warr E-Destination:	sbctest@hyphensolutions.com		
EMail PO Submit:	Y	EMail PO Received:	Y
Backorder Capability:			
Complete Only: Y Ship and Backorder: N Ship and Cancel: N			
Preferred Backorder Selection: Complete Only			
Cancel Days:	3		
Procurement Vendor:	N		
Industries:	All		
Notes:			
E-Invoice: N	Catalog Name: Trinidad Construction Catalog		
TBD Supplier:	N		
Active:	Y		

Last Update: 9/6/2002

Clicking the supplier hyperlink will open the **Supplier Detail** window. A bold supplier hyperlink indicates the supplier may be changed. A non bold supplier hyperlink indicates the **Supplier Detail** window will open.

Job Detail

Job Detail Information			
Job Name:	3709 Tree Top		
Address:	3709 Tree Top		
Subdivision:	Treetop Estates		
Primary Contact:	Kevin Wright		
City:	Mckinney	Map Location:	
State:	TX	Zip:	75069
Phone:	(972) 728-8104	Fax:	(999) 999-9999
Plan:	0 - Hyphen Master	Lot:	33
Elevation:	A	Block:	C
Swing:	R	Legal Desc 3:	
Start Date:	2/1/2007	Legal Desc 4:	
Promised End Date:	5/1/2007	BuildPro Generated: Y	
Selection Sheet Received Date:			
Release Date:			
Contract Date:			
Financing Expire Date:			
Purchaser Name:	Stu and Stacy Barnes		

Clicking the 'Detail' hyperlink beside the job name in each blue row will open the **Job Detail** window. This window contains various information about the job including address, plan, elevation, swing, and legal information.

Clicking the job name hyperlink will take the user to the job actions page. If changes have been made to the To Do List and the user has not clicked the **Update** button, a warning message will appear asking the user to save the changes before navigating away from the page.

Identify Hard Coded Dates

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	!	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Roof Shingles (P) (Late)	Roy's Roofing	N	05/08/2006	05/11/2006	05/11/2006	!		☐		SUB			

The column between **End Date** and **Start** contains an exclamation point. This exclamation point indicates a date has been hard coded.

Identify Critical Path Tasks

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	*	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Exterior Paint (P) (Late)	Self Supplied	N	05/08/2006	05/15/2006	05/16/2006	*		☐					☐

The column between **End Date** and **Start** contains a star (asterisk). This star indicates the task is a critical path task. Critical path tasks are flagged by a process that runs nightly. Jobs added during the day may not indicate critical path tasks.

Skip Tasks

Task Name	Supplier Name	SPro	Lead Date	Start Date	End Date	*	Start	Comp	Mark Excpt	PO Status	Resched Date	% Comp	Skip
☒ Exterior Paint (P) (Late)	Self Supplied	N	05/08/2006	05/15/2006	05/16/2006	*		☐					☐

On the far right side of the To Do List is a column to allow users to skip a task. The check box to skip a task is based on user roles and task status.