# BuildPro

## *System Administrator User Guide*

5.20.13

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## Contact Customer Care

Support for this product is available from the Customer Care Center and online.

| | |
|---|---|
| **Telephone** | 877-508-2547 |
| **After Hours Telephone** | 877-508-2547 or 972-728-8180 |
| **Hours** | You can reach the Customer Care Center Monday through Friday, 7 a.m. to 7 p.m., Central Standard Time. |
| **Email** | support@hyphensolutions.com |
| **Mail** | Hyphen Solutions™, Ltd.<br>16301 Quorum Dr Suite 100A<br>Addison, TX 75001 |
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## Report Issues to Customer Care

The following items should be included when reporting issues to our Customer Care Center. Including these items will help expedite resolution. The Hyphen Solutions Customer Care Center can be reached at **1-877-508-2547** or by email at **support@hyphensolutions.com**.

| | |
|---|---|
| **Job Number** | |
| **Template** | |
| **User Name** | |
| **Task Name/Type** | |
| **PO Number if applicable** | |
| **Vendor Name** | |
| **Division Name** | |
| **Region** | |
| **Detailed Issue Description:** | |
| **Ticket # assigned by Customer Care:** | |

## Use This Guide

This training guide contains information and step-by-step procedures for using this application. This document is written for beginning users and assumes no familiarity with the application's interface. This document is a training guide and is designed to be used with interactive training as given by a certified Hyphen Solutions consultant. Use this guide in conjunction with the training and the Help tool to answer your basic questions. For questions beyond the scope of this document, contact the Customer Care Center.


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# 1 System Admin Basics

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- System Administrator responsibilities
- Logging in to BuildPro as a System Administrator
- Managing profiles and resetting passwords
- Updating Cost Codes

## System Admin Overview

The BuildPro System Administrator is one of the most critical roles in the successful set up, adoption and use of BuildPro. The BuildPro System Administrator has expanded user functionality, security and responsibility in the application. As the System Administrator, you will have Super User ability meaning you will be able to do more in BuildPro than anyone in your division.

A user is a person who has access to BuildPro for any reason. As defined later, most users will have the same access privileges. However there are different security roles that can be assigned to users.

The security roles are the level of security a user has within BuildPro. The security roles control the area of the application in which a user can access. The System Administrator is the highest security role available. Every company and each division within a company must have a System Administrator. The limits and capabilities of these roles are also discussed in this training guide. Custom roles can be created by your BuildPro Consultant, if needed.

As System Administrator, it is important that you attend all user training in addition to this training. The more training sessions you attend, the more comfortable you will be with the application and the kind of tasks you will be required to do as System Administrator.

## Security

All of Hyphen Solutions' websites are located on secure servers. Secure web sites begin with https://; non-secure sites begin with http://. In order to access our programs, you must make sure that you type the Internet address correctly.

Type https://www.hyphensolutions.com/build, or the address your Consultant provides, in the address field of your browser to access BuildPro.

You must log out of BuildPro before closing your browser. If you close your browser without logging out, your session will be continue and if you try to login later from a different browser session, BuildPro tell you that you are already logged in and you must “force” the sign in. Remember that you have many more rights than most users and therefore should not share your User ID and password with anyone.

## System Admin Responsibilities

A BuildPro System Administrator is typically a division level back-office employee with full access to the BuildPro system. He or she has all the responsibilities and rights of the Job Primary User and Job User plus the following.

- Create new communities/subdivisions/organizations
- Create new users and assign roles
- Assign users to jobs
- Assign users through integration setup, which allows them to view and schedule jobs as soon as they are imported into BuildPro from an ERP System
- Modify job information (such as description, address, etc)
- Create, copy, and modify templates


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- Cost code assignment in templates
- Change job statuses (ex. Active, Inactive, Cancelled, etc)
- Pause Tasks / Hold Jobs
- Reset lost passwords

## BuildPro Tabs

### Typical Construction Manager Tabs


FIGURE 1. Tabs a typical construction manager can access

Construction managers typically have three tabs. Most of their time will be spent in the Jobs tab.

### System Administrator Tabs

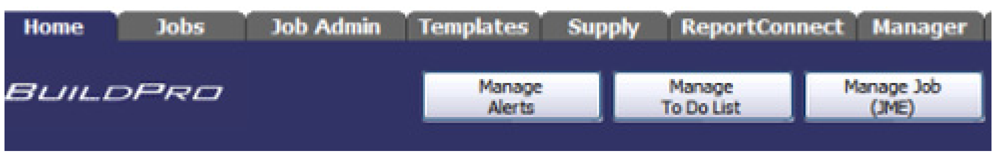


FIGURE 2. Tabs a system administrator can access

System Administrators have access to all seven BuildPro tabs. Most of your time will be spent in the following tabs:

- **Job Admin tab** - Use to assign jobs to users, do approvals, manages phases and buildings.
- **Templates tab** - Use to view and manage all aspects of templates and plan translations.
- **Manager tab** - Use to manage users, your organization, cost codes, task categories, EPOs, Pause/Hold reasons and schedule change reasons.

## Logging In

Your company may not be using the general BuildPro website. If your company is using a different URL to access BuildPro please write the address here:

**https://** ______________________________________________

**To log in to BuildPro:**

1. Open Internet Explorer.
2. In the Address bar of Internet Explorer, type https://www.hyphensolutions.com/build.

**3.** Press the **Enter** key. The BuildPro login screen opens.

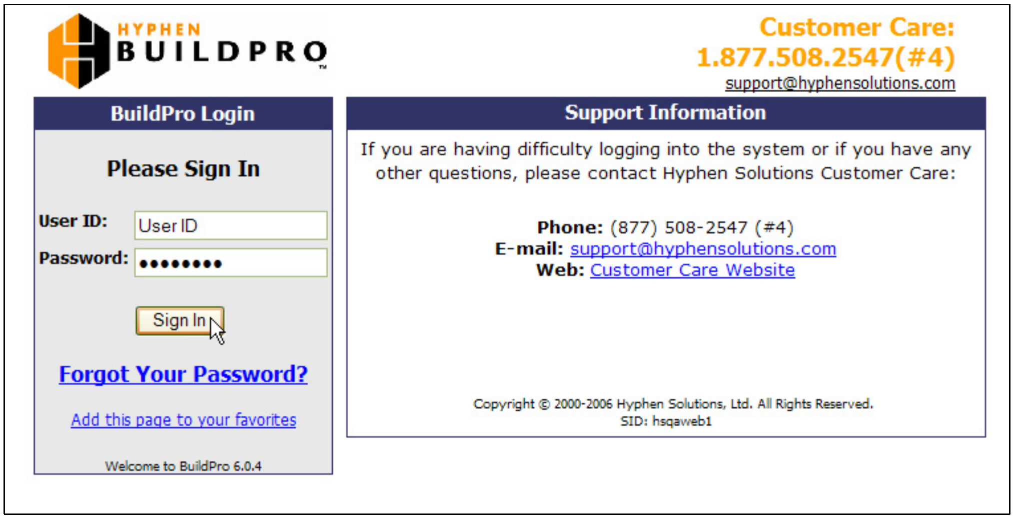


FIGURE 3. BuildPro Login page

**4.** In the **User ID** field, type your User ID.
**Note:** User IDs are not case-sensitive.

**5.** In the **Password** field, type your password.
**Note:** Passwords are case-sensitive

**6.** Click the **Sign In** button. The BuildPro Home page opens.
**Note:** If you are logging in for the first time, you will be prompted to change your password. Enter your current password in the **Old Password** text box. Enter your new password in the **New Password** text box, then again in the **Confirm New Password** text box. Click the **Update** button to continue logging in.

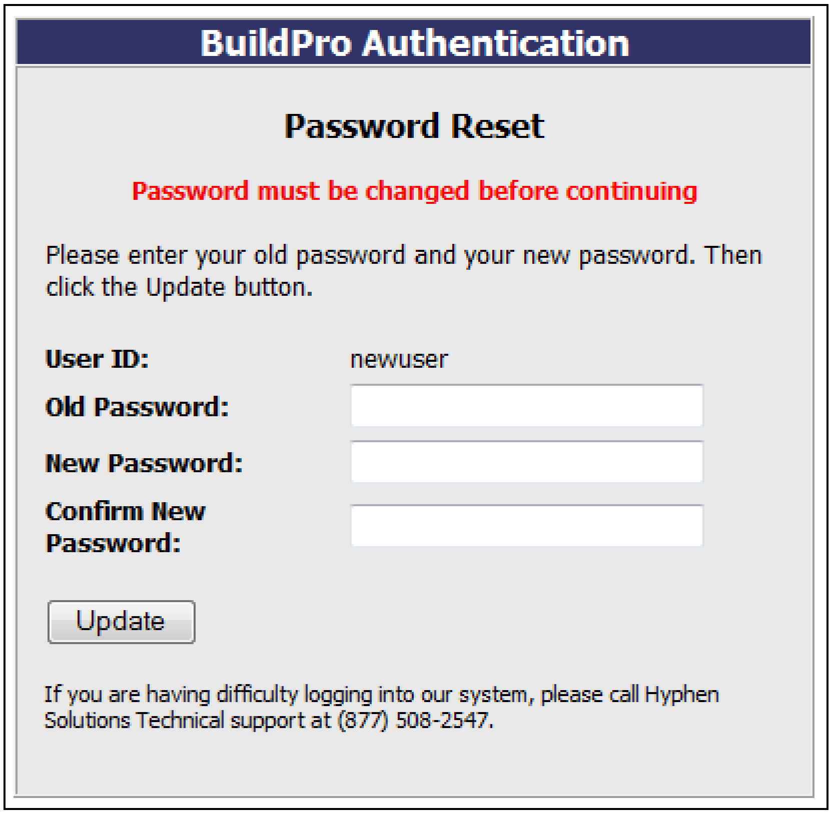


FIGURE 4. Change Password Before Logging In

If you have forgotten your password, you can use the Retrieve Password functionality on the Login page to retrieve your password by email.

**To retrieve your password:**

1. Open the BuildPro Login page.

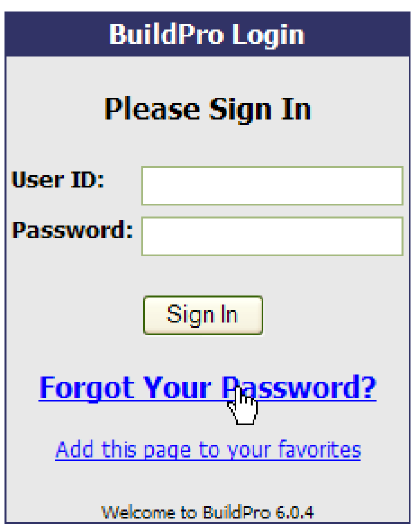


FIGURE 5. BuildPro Login page

2. Click the **Forgot Your Password?** link on the left side of the page. The Request Password page opens.


FIGURE 6. Request Password page

3. Enter your **User ID** and **Email Address**.
   **Note:** The email address must match the email address in your User Profile in BuildPro.

4. Click the **Email My Password** button. Your BuildPro password will be emailed to you within the next few minutes.

## General Password Information

Below is a list of BuildPro rules regarding passwords:

- Passwords are case sensitive
- The minimum password length is 4 characters; no special characters or numbers are required. This is the default for each BuildPro company. To change the minimum password length (up to 10) contact Customer Care.
- When changing your password, you may not use your previous password. This is the default for each BuildPro company. To change the number of last passwords that may not be used (up to 10) contact Customer Care.
- User passwords do not expire by default. Passwords may be set to expire which will force the user to create a new one before logging into BuildPro. To change the number of days before a password expires, go to the User Detail page. To change the default days that appears in the User Detail page when adding a new user contact Customer Care.
- If a password is reset or changed by a System Admin from the User Detail page, the user will be forced to change it before logging in to BuildPro.
- Newly created users must change their password the first time they login.

## BuildPro Home Page

The first page you see when you log in to BuildPro is the Home tab. This tab gives you a quick glance at today's activities. Activities are separated by applications (BuildPro, Inspections, SWIM, and EPO Approvals). Each application has its own section with alerts and other activities. The section(s) you see will depend on which application(s) your company uses and your role.

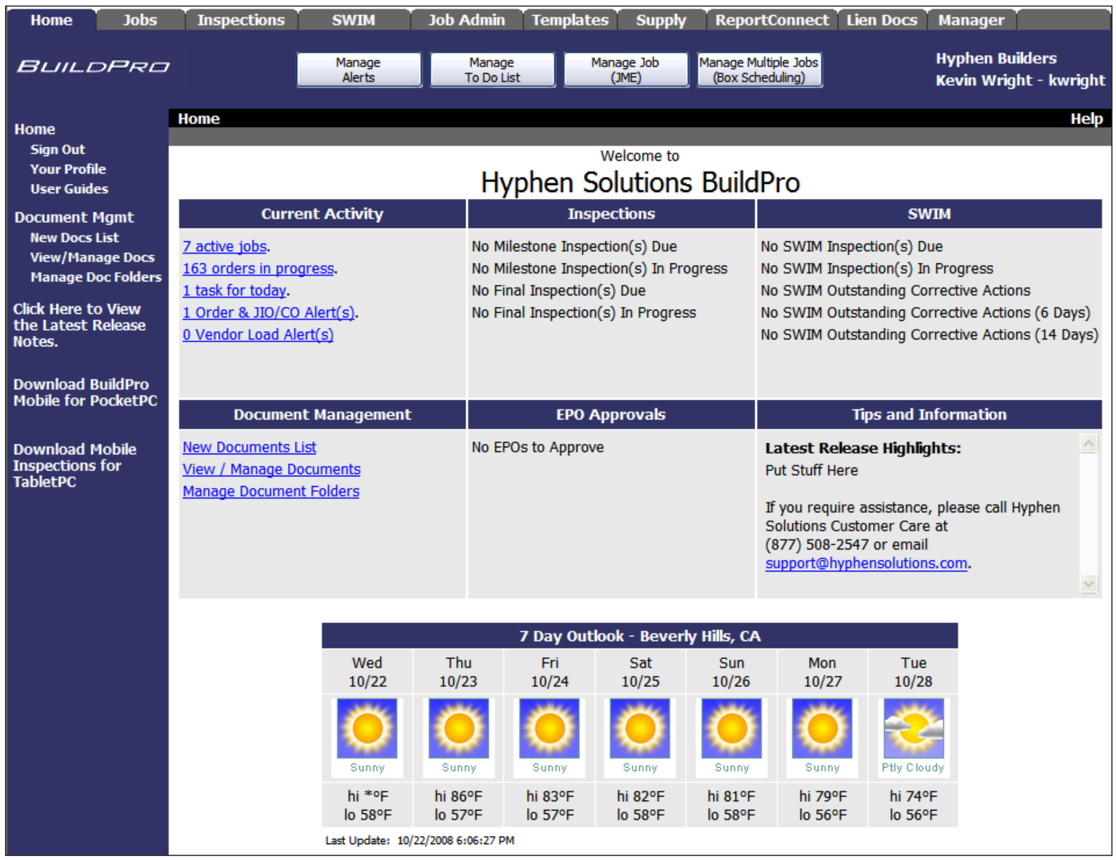


FIGURE 7. BuildPro Home Page

### Current Activity

This section contains a list of activities and alerts related to BuildPro.

- **Active Jobs** - Represent the total number of homes you are building.
- **Orders in Progress** - Represents the total number of tasks that have been started but not completed.
- **Tasks for Today** - Represent the tasks that are due to start or complete today, or that are late.
- **Order Alerts** - Represent communication (or failed communication) with suppliers that you should be aware of and address. If your company uses the JIO functionality, JIO and CO alerts will appear here.
- **Change Orders** - Represent changes to completed orders. Here you can see orders that are changed and are in completed status (Optional. Applies to Integrated environments only).
- **Vendor Load Alerts** - Represents the number of conditions where a supplier or trade has more tasks to perform than number of crews.

### Inspections

This section contains a list of activities and alerts related to the Inspections functionality. Refer to the Inspections User Guide for information regarding Inspections.

### SWIM

This section contains a list of activities and alerts related to the SWIM functionality. Refer to the SWIM User Guide for information regarding SWIM.

### Document Management

This section contains links to newly added documents, view or manage documents, and manage document folders. Refer to the chapter on Managing Document Folders for more information.

### EPO Approvals

This section displays an alert if you have EPOs to approve. The alerts in this section only appear if you have the Multiple EPO Approval Levels module turned on. Contact Customer Care for more information regarding this module.

### Tips and Information

This section displays the highlights of the latest release in addition to contact information for Customer Care.


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## Information and User Documentation

The Information and User Documentation section lets you see important information and gives you a link to download the most current documentation for BuildPro. You can also view training documents and release notes through the BuildPro Document Center by clicking the link on the left nav.


FIGURE 8. Information and User Documentation section

## 7 Day Outlook

The 7 Day Outlook shows the current weather conditions for the next 7 days based on the zip code you enter in your profile. See the next section, "Your Profile" for more information.

## Your Profile

All information specific to you, as a BuildPro user, is located on the Your Profile page. This includes password maintenance, your location and contact information, how you want notifications sent to you. It also includes preferences for how you want the To Do List, Job List, and Box Scheduling to appear.

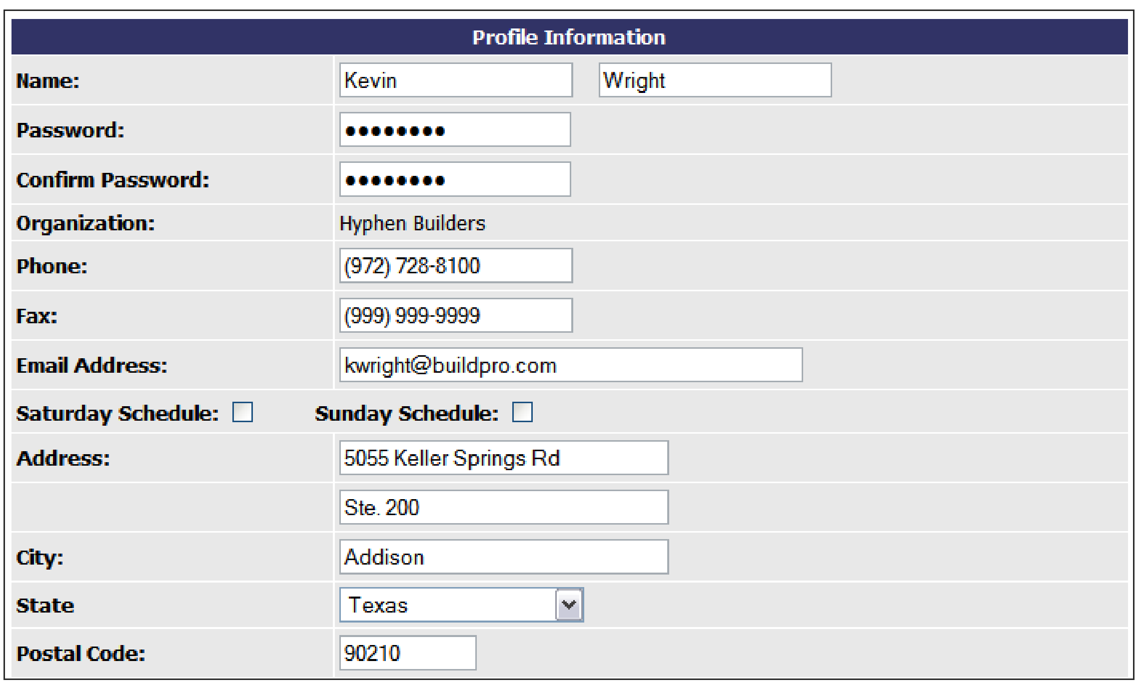


FIGURE 9. Your Profile page in BuildPro

First, you should change your password so that only you know it. Your password should include both letters and numbers to make it more secure. After you change your password, make sure that you remember it or it will have to be reset.

**To update your password:**

1. In the **Password** field, type your new password.
2. In the **Confirm Password** field, retype your password.
3. Click the **Update Profile** button.

The User Preferences and other sections below the Profile Information section allows you to configure BuildPro settings. Refer to the Construction Mgr Training Guide for an explanation of these.

## Reset Other User Passwords

As a system administrator, you will be one of the only users in your company or division to have the rights to reset passwords for others. You should also set up an internal process for having users reset their passwords. You are also encouraged to work with your IT department to ensure your company's security policies are properly followed in BuildPro.

When you get a request to retrieve a user's password, go to the User Detail page and change the user's password. Your company may have password requirements based on BuildPro modules regarding password security. Those requirements may include:

- Minimum password length.
- Not re-using passwords.
- Set password expirations

**To reset a user's password:**

1. Click the **Manager** tab.
2. Click the **User Manger** link. (or click the **User Search** link in the left nav)
3. Click the **User Search** link.
4. In the **Last Name** field, type the last name of the user whose password you are resetting.
   **Note:** You can search for users based on user name, first name, last name, or organization. You can also perform "fuzzy" searches by typing the first few letters of the user's name.



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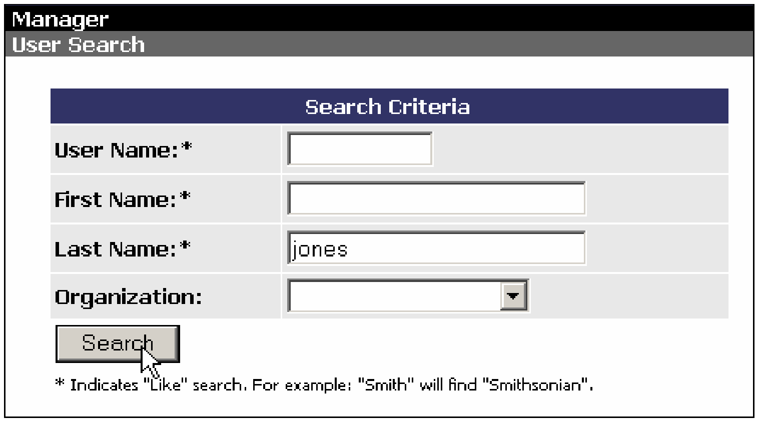


FIGURE 10. Search for a user

5. Click the **Search** button.

6. Click on the correct user's name from the list of results.

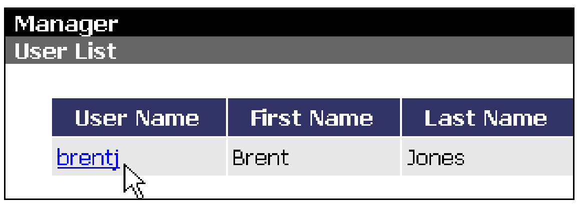


FIGURE 11. Choose a user from the User List

7. In the **Password** field, enter a new password.

8. Confirm the new password by entering it once again in the **Confirm Password Change** field.

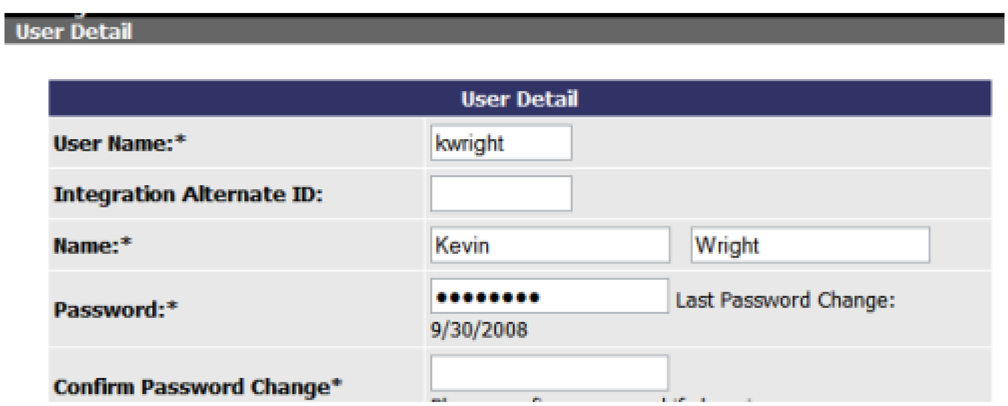


FIGURE 12. Change a user's password

9. Click the **Update User** button.

### Change Other User Settings

The User Detail page may also be used for the following actions:

- Change the User name
- Set password expirations
- Change a user's Organization, Phone, Fax, Email, and Address
- Grant access to other applications
- Change EPO or MPO approval amounts
- Change user status
- Add or remove roles


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## Cost Codes

Cost Codes (or Account Codes) are codes used by your back-office accounting system to track costs. Cost Codes are mapped to Tasks in BuildPro. As the BuildPro System Administrator, one of your responsibilities will be making sure that the cost codes used by your accounting system also exist in BuildPro. Other cost code functions you may be responsible for include:

- When BuildPro is being implemented you need to confirm that all cost codes your office uses, for building homes, are in the ERP System.
- Before the cost codes come over to BuildPro (via integration), you must confirm that all the cost codes needed are flagged for use by BuildPro.
- In BuildPro, you will need to confirm that all the cost codes you use exist in the cost code list within the Cost Code Manager.
- In all BuildPro templates you will need to confirm that the appropriate cost codes are assigned to the appropriate PO task. This can be done by someone in the Purchasing department.
  **Note:** Items 1 and 2 can be done internally within your company. Items 3 and 4 can be done within BuildPro. 1 and 2 are for integrated users of BuildPro.

## Confirm Cost Codes in BuildPro

Use the following steps to confirm that all cost codes you use exist in BuildPro. Before you begin, you must have a complete list of your cost codes. Cost codes must exist in BuildPro before you begin building scheduling templates.

**To confirm cost codes in BuildPro:**

1. Locate a complete list of your cost codes.
2. Click on the **Manager** tab.
3. Click the **Cost Code Manager** link.
4. Click the **Cost Code Set** for your organization. The list of cost codes sent over from the ERP System is displayed. For non-integrated users of BuildPro, you may update existing cost codes by correcting the name or description in the text box and clicking the **Update Cost Codes** button. Use the section at the bottom to add new cost codes.
5. Review this list and note any cost codes that your company uses that are not in the list.
   **Note:** Cost Codes that are not being used should be reported to your ERP system administrator and removed. You may also uncheck the check box labeled Active on the Cost Code Set Detail page. Cost Codes that are not Active will not appear in the drop down box when mapping the Cost Codes to Tasks in a Template. If this page does not allow you to update the Active flag, contact Customer Care in regards to Module# 46. You must also have a role that allows you to update this page.

## Confirm Cost Codes in Templates

**To confirm cost codes in a template:**

1. Click the **Templates** tab. A list of Active Templates is displayed.

| Template Name | Status | Elevation | Check/View Errors | Update |
|---|---|---|---|---|
| **814 - DFW HERITAGE** | | | | |
| 611 & 612 - DFW Master Predecessor II | Active | A | | Advanced View |
| 611 & 612 - DFW Master Predecessor II | Active | A | | Advanced View |
| 814 - DFW Heritage 2 Story - Final KW | Active | A | | Advanced View |
| 814 - DFW Meritage 1 Story - Final 1/16 | Active | A | | Advanced View |
| 814 - DFW Meritage 2 Story - Final 1/16 | Active | A | | Advanced View |
| **815 - DFW LEGACY BUILDERS** | | | | |
| 613 - Legacy Master Predecessor | Active | b | | Advanced View |
| 815 - DFW Legacy - MF starter | Active | b | | Advanced View |
| 815 - DFW Legacy - SF | Under Construction | b | Check/View Errors | Advanced View |
| **819 - HOUSTON HERITAGE** | | | | |
| 651- Houston New Predecessor | Active | A | | Advanced View |
| 819 - LARGE | Under Construction | A | Check/View Errors | Advanced View |

FIGURE 13. Template list

2. Click on the name of a Template. The **Template Actions** page opens.

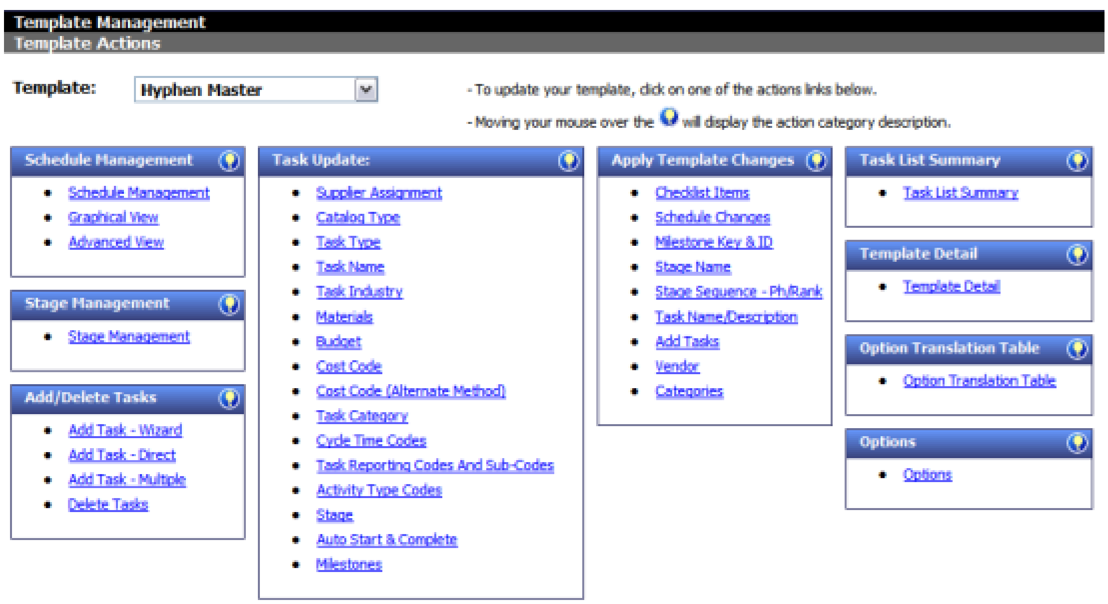


FIGURE 14. Template Actions page

3. Click the **Cost Code** link under **Task Update** section. The **Task Update: Cost Code** page opens.

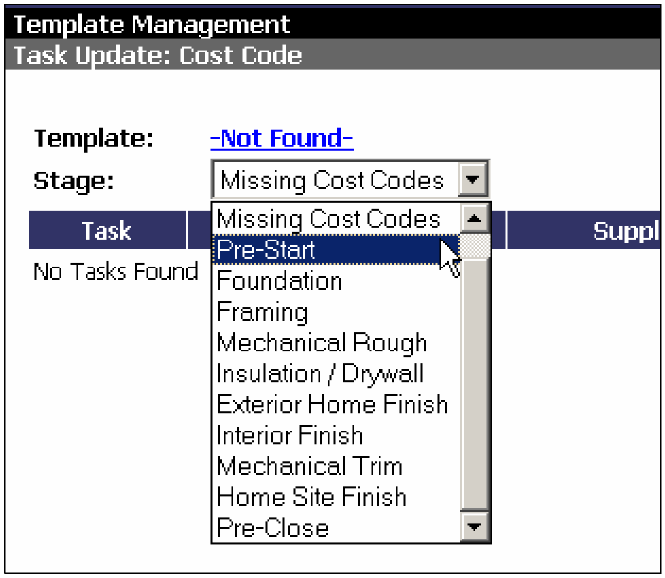


FIGURE 15. Task Update: Cost Code page

4. Select the first stage from the **Stage** drop-down list. A list of Tasks for that stage is displayed.

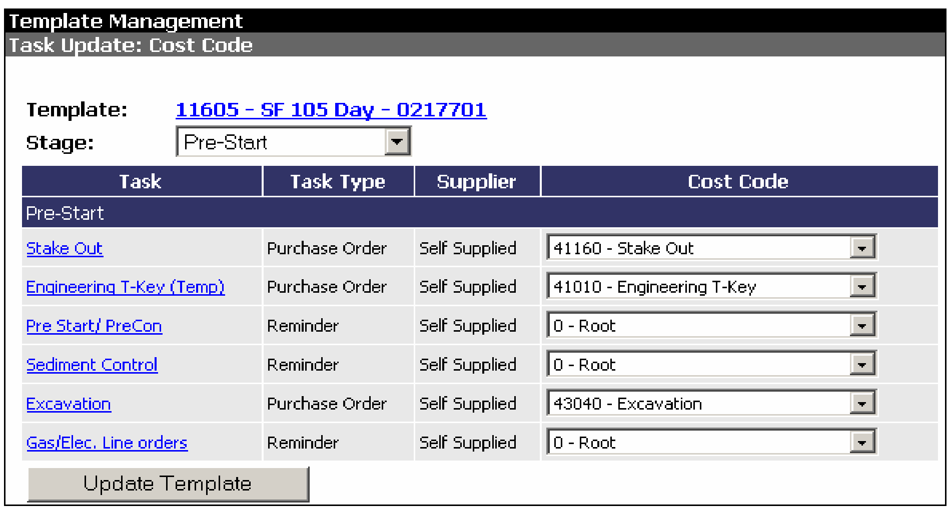


FIGURE 16. List of cost codes for Pre-Start stage

5. Confirm that each purchase order Task corresponds to the appropriate Cost Code.


FIGURE 17. Confirm cost code corresponds with task

6. Repeat these steps for each template and each stage of the template.
**Note:** If you see a task with an incorrect cost code, you can change the code. See below for the instructions.

**To change a cost code:**

1. Click on the **Cost Code** drop-down list and choose the appropriate cost code for each task.
2. Set the cost code to **0 -Root** for each **Reminder** and **Memo** task.
3. Click the **Update Template** button.
4. If you cannot find a Cost Code for each Purchase Order Task, note the Task that is missing a correct Cost Code. Report the missing Cost Code back to the person who manages your ERP System to have it added. Or if you are using BuildPro in a non-integrated manor, go back to the Cost Code Manager page and enter the missing cost code.
**Note:** Only Active Cost Codes will appear in the drop down boxes.

## Add Schedule Change Reasons

Adding Schedule Change ReasonsThe Schedule Change Reason List shows you all of the reasons for changing a schedule that are setup for your company.

1. Click the **Manager** tab.
2. Click the **Schedule Change Reason List**. The Schedule Change Reason List page opens.

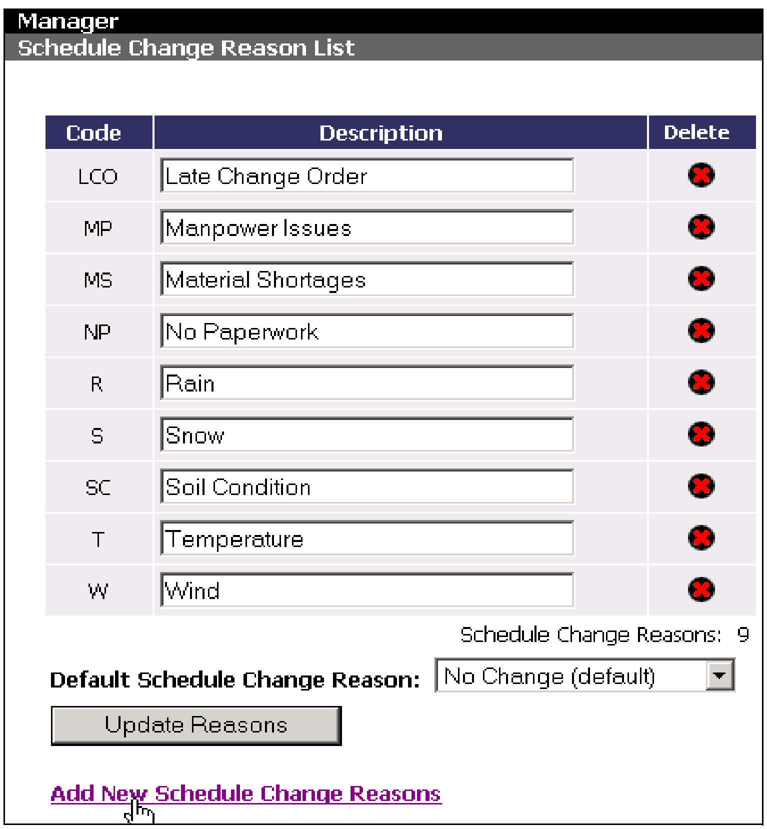


FIGURE 18. Schedule Change Reason List

3. Click the **Add New Schedule Change Reasons** link. The Add Schedule Change Reasons page opens.
4. In the **Code** field, type a letter or number code for your schedule change reason.

5. In the **Description** field, type a description for your schedule change.
   **Note:** These codes are typically created by you and should be unique. If possible, they should also relate to the description. For example, “RO = Reorganization.”

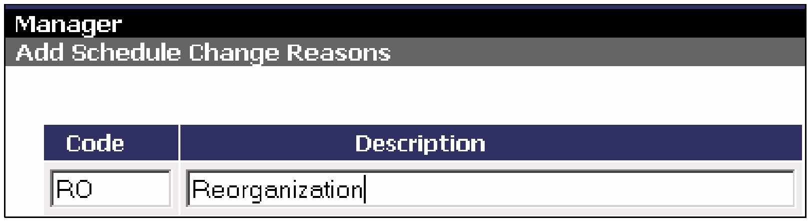


FIGURE 19. Add Schedule Change Reasons

6. Click the **Add Reasons** button at the bottom of the page.

## Change the Default Schedule Change Reason

If you do not choose a default reason, the user will have to select one each time he or she updates the job schedule. If you set the default to, for example, No Change, the user will only need to select a reason when updating the schedule with tasks that deviate from the schedule.

**To change the default schedule change reason:**

1. From the Schedule Change Reason List page, click the **Default Schedule Change Reason** drop-down list and choose the reason you want to appear as the default reason.

2. Click the **Update Reasons** button.
   **Note:** If you do not choose a default reason, the user will have to select one each time he or she updates the job schedule.

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# 2 Managing Orgs & Subdivisions

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Structuring organizations in BuildPro
- Adding and managing subdivisions and organizations

## Managing Orgs & Subdivisions Overview

As a System Administrator in BuildPro, you have the ability to add subdivisions as needed. Your top-level division should have been created, but you can add subdivisions as your company begins building new communities. These instructions are to help you add a new subdivision to a division's organization. Organizations are sometimes referred to as Orgs.

Organizations in BuildPro typically reflect your company's hierarchical organizational structure:

**Company** → **Division** → **Subdivision** → **Job**

Organizations control what data a user can view (in reports) and update (in templates). Users and subdivisions are assigned to organizations. Jobs are assigned to subdivisions. Users can manage (add, change, or delete) information from their organization down.

An example of how subdivisions work:

- User J. Builder is assigned to the subdivision Rolling Hills but not Sweet Valleys.
- Rolling Hills is a subdivision/community in the Dallas Division of the Hilltop Homes Company.
- Sweet Valley is another subdivision in the Dallas Division of Hilltop Homes.
- Job: 1234 Oak is in the Rolling Hills subdivision
- Job: 4567 Sycamore is in the Sweet Valley subdivision.
- J. Builder runs a report in BuildPro to show the status of his or her jobs. He or she will see 1234 Oak in Rolling Hills on the report, but not 4567 Sycamore in Sweet Valley because he or she is not assigned to that subdivision/community.

## View an Org

**To view an organization:**

1. Click the **Manager** tab.
2. Click the **Organization Manager** link.
3. Click the **Organization List** to view the organization. Your company's or division's organization/subdivisions are displayed.
   **Note:** The Organization Lists sorts by organization name in alphabetical order within each organization level.

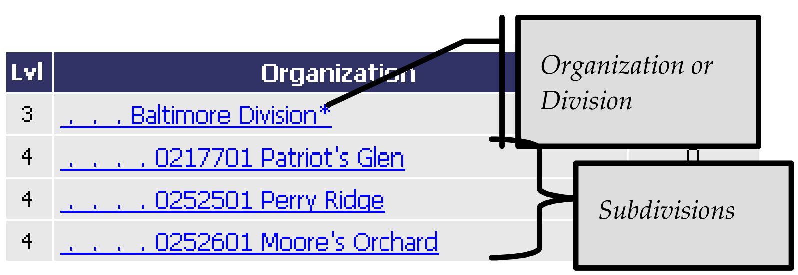


FIGURE 1. Organization List

## Add a Subdivision

As your division starts new subdivision or communities, you will need to add them to BuildPro as organizations. You should consult with your Hyphen Solutions contact prior to filling out the organizational details as some functionality may not be used by your company.

**To add a subdivision:**

1. Click the **Manager** tab.
2. Click the **Organization Manager** link.
3. Click the **Organization List** link.
4. Click the **Add Child** link to the right of the division name.
   **Note:** Choose the top level organization or division to which the new subdivision or organization belongs.
5. Complete each section of the form with the information pertinent to the subdivision.
   **Note:** See the section titled "Organization Detail Fields" for more detail.

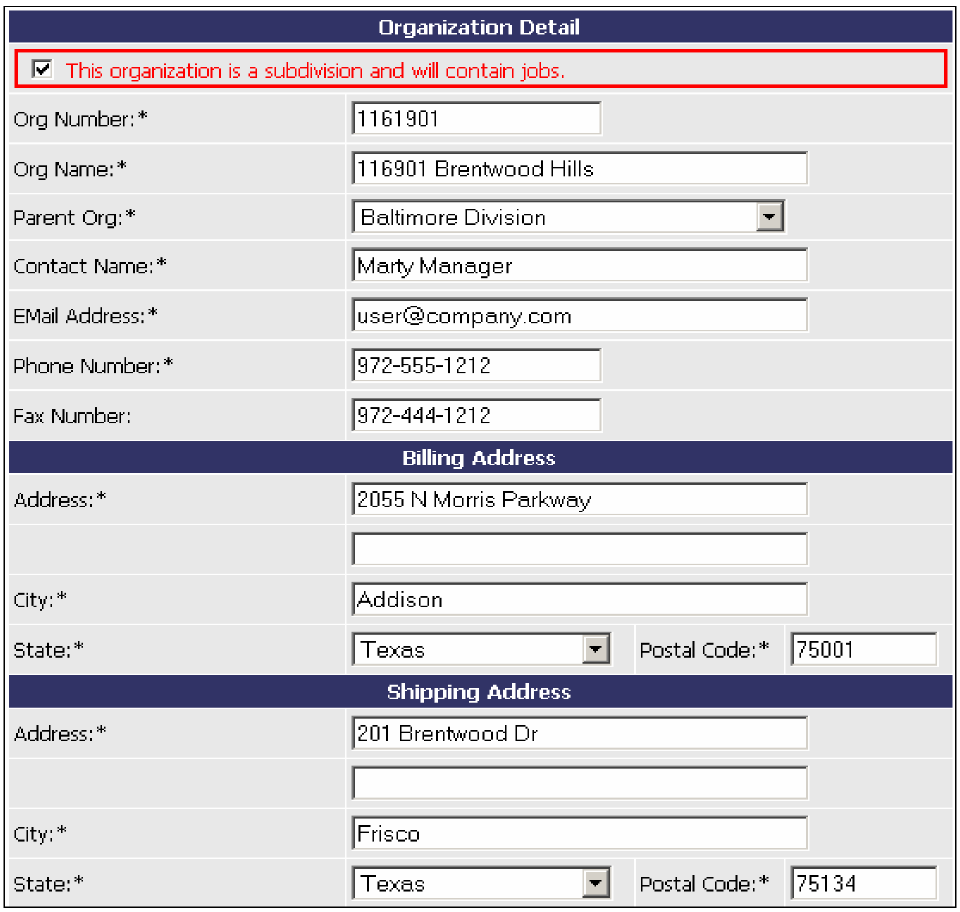


FIGURE 2. Organization Detail page

6. Click the **Add Organization** button at the bottom of the page. BuildPro confirms the organization has been added.


FIGURE 3. Organization has been added

7. Click on the **Integration** tab of the **Organization Detail** page.
8. Choose a **Primary User** from the drop-down list.
9. Click the **Update Organization** button.

## Organization Detail Fields

### Organization Detail

- **Org Number** - Unique number assigned to this organization. Should match the organization number in the integrated ERP System.
- **Org Name** - Organization Name
- **Parent Org** - Upon setup in BuildPro, a default **"**top-level**"** organization is assigned to you called "YourCompanyName - Org." If you are viewing an existing organization, this field shows your parent org and cannot be changed. To add a child organization, select the parent organization in which the child organization is assigned.
- **Org Type** - Choose an org type to determine whether you can add subdivisions or jobs to the organization.
- **Contact Name** - Point of contact for this organization or community.
- **Email Address** - Email address for the contact name.
- **Phone Number** - Phone number for the contact name.
- **Fax Number** - Fax number for the contact name.

### Billing Address

- **Address** - Street address where invoices are sent for payment. This pre-populates in POs for suppliers
- **City** - City where invoices should be sent.
- **State** - State where invoices should be sent.
- **Postal Code** - Zip code where invoices should be sent.

### Procurement Address

- **Address** - Street address where invoices are sent for payment. This pre-populates in POs for suppliers
- **City** - City where invoices should be sent.
- **State** - State where invoices should be sent.
- **Postal Code** - Zip code where invoices should be sent.

### Shipping Address

- **Address** - Street address where items/materials should be sent (usually a trailer or a model home). This pre-populates in POs for suppliers
- **City** - City where items should be sent.
- **State** - State where items should be sent.
- **Postal Code** - Zip code where items should be sent.

### Authorization Information

**Note:** These functions require a module to be turned on by your BuildPro consultant.

- **EPO Authority Amount** - Shows the dollar amount of approval authority for the organization.
- **Warning** - Determines whether the user gets a warning when going over the limit of an EPO. If checked, the user only gets a warning and the EPO is sent to the vendor without approval.
- **Locked** - If Locked is selected, it will not allow the EPO to be sent to the vendor without approval.
- **MPO Authority Amount** - Shows the dollar amount of approval authority for the organization.
- MPO Authority Percent - Shows the percentage of approval authority for the organization.
- **Approval Notification Time Limit** - Reflects the time between notices sent to the first, second and third levels of approval.
- **Approval Notification Start Time and End time** - Shows the normal business hours that the approval notifications would run. For example: if an EPO is sent for approval at 4:30 p.m., and the start and end times are set for 8:00 a.m. and 5:00 p.m., and the time limit is set for 1 hour, the first notification is sent out immediately, but the second would not be sent until 8:00 a.m. the next morning.
- **Approval Notification Level 1, 2, and 3** - These fields are the e-destinations of the person(s) to approve the EPO.

### Legal Information

- **Legal Text for PO Format** - Enter legal text in this field, and it will appear in the Legal Information section of the PO formatter. Only users with certain PO formatters and with division-level access will see this section.
- **Legal Text for WA Format** - Enter legal text in this field, and it will appear the Legal Information section on the EPO Work Authorization formatter. This text box will only appear if the Work Authorization Functionality module is turned on and if the organization is a division-level org.

### Vendor Loading

- **Maximum Days for Alert** - This field is used for calculating when to notify you in case of an overload condition . This is defined from the current date through the current date plus the maximum days parameter. The default is 0 days, which will not show any alerts on the home page.

## Integration Tab

This information appears with the Summary tab information when you are adding the organization. After it is added, this information moves to the Integration tab.

### Integration Information

- **Primary User ID** - After the Org has been created and the integrated users set up, click the Integration tab of the Org and fill type all the Primary User ID information.
- **EPO Email** - Type the email address of the person EPOs will go to for approval. This will populate the EPO address field under the Job Details page. This field is required if you use Letter EPOs. This field can also be updated from the Integration tab.
- **Transmit EPO** - If checked, this field allows or suppresses the transmission of emails or faxes to the vendor.
- **Saturday Workday** - If checked, this subdivision works Saturday.
- **Sunday Workday** - If checked, this subdivision works Sunday.

## Assign Integrated Users

When a job populates into BuildPro each user that is assigned in the Integration tab of the organization will automatically be given access to the job. It is not recommended that construction managers be assigned at this level. Examples of users we recommend be assigned at this level are: Back Office Personnel and Area Managers. To assign the user as a Primary User, click the Organization link. See the section titled Primary User Assignment for more detail.

**To assign integrated users to an organization:**

1. From the **Manager** tab, click the **Organization Manager** link.
2. Click the **Organization List** link.
3. Click a **Subdivision** link. The Organization Detail page opens.

| Lvl | Organization |
|---|---|
| 1 | . 00 - HERITAGE CORPORATION (E1)* |
| 2 | . . 600 - TEXAS |
| 3 | . . . 601 - NORTH & CENTRAL TEXAS REGION |
| 4 | . . . . 610 - DFW |
| 5 | . . . . . 814 - DFW HERITAGE |
| 6 | . . . . . . Candle Meadow |
| 6 | . . . . . . Celina Estates |
| 6 | . . . . . . Craig Ranch |
| 6 | . . . . . . Crawford Farms |

FIGURE 4. Organization List



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4. Click the **Integration** tab.

5. Click the **Change Integration Job User Assignment** link at the bottom of the page.

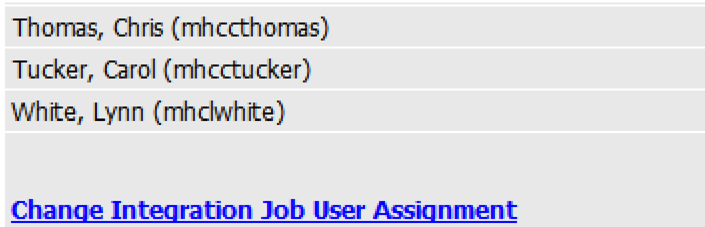
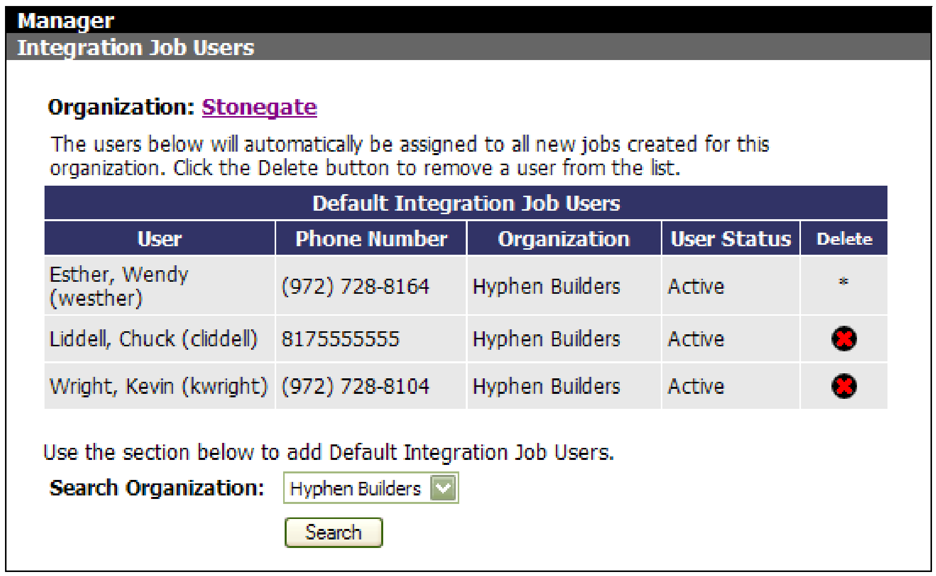



FIGURE 5. Integration tab of the Organization Detail page

6. Choose a division-level organization from the **Search** drop-down list.

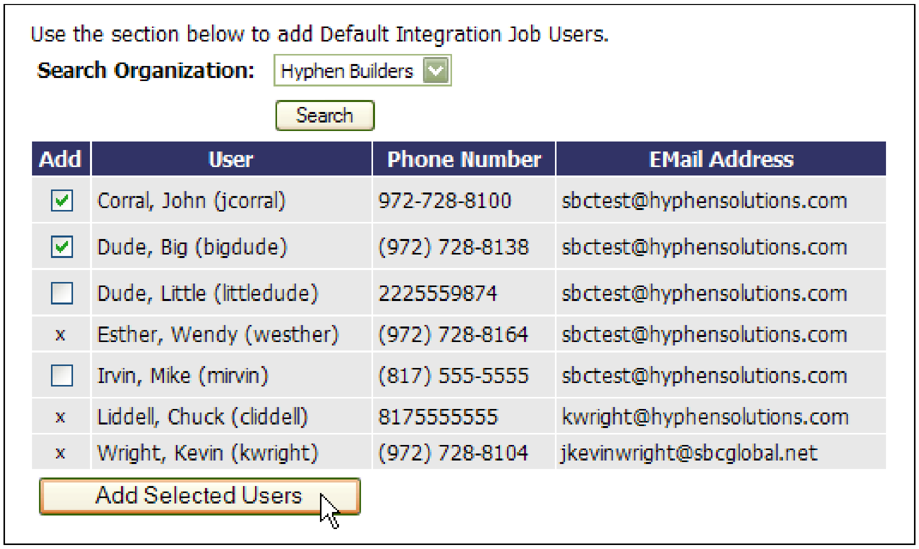



| User | Phone Number | Organization | User Status | Delete |
|---|---|---|---|---|
| Esther, Wendy (westher) | (972) 728-8164 | Hyphen Builders | Active | * |
| Liddell, Chuck (cliddell) | 8175555555 | Hyphen Builders | Active | |
| Wright, Kevin (kwright) | (972) 728-8104 | Hyphen Builders | Active | |

FIGURE 6. Integrate Job Users page

7. Click the **Search** button. The list of active users is displayed.

8. Check the **Add** check box to the left of the user you want to add.

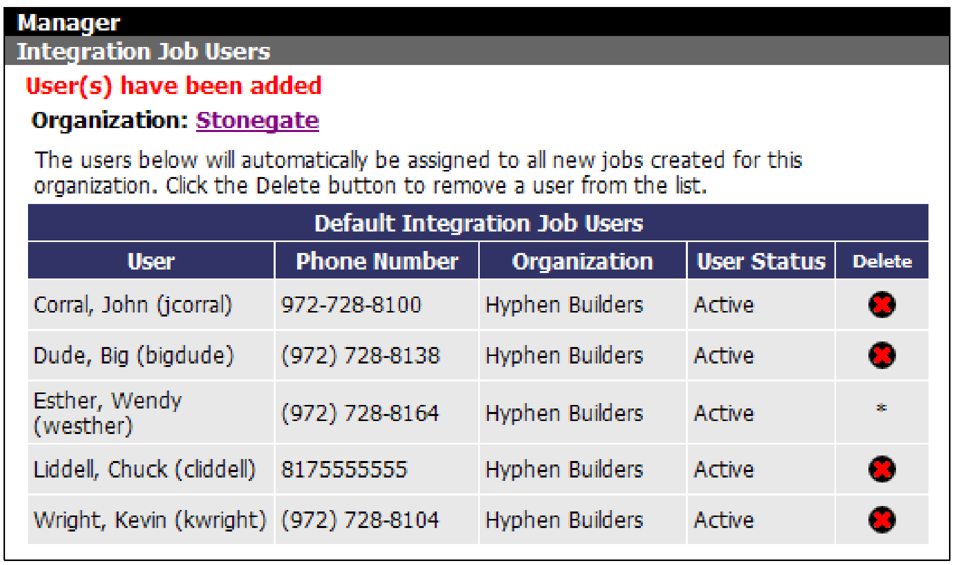



| Add | User | Phone Number | EMail Address |
|---|---|---|---|
| ☑ | Corral, John (jcorral) | 972-728-8100 | sbctest@hyphensolutions.com |
| ☑ | Dude, Big (bigdude) | (972) 728-8138 | sbctest@hyphensolutions.com |
| ☐ | Dude, Little (littledude) | 2225559874 | sbctest@hyphensolutions.com |
| x | Esther, Wendy (westher) | (972) 728-8164 | sbctest@hyphensolutions.com |
| ☐ | Irvin, Mike (mirvin) | (817) 555-5555 | sbctest@hyphensolutions.com |
| x | Liddell, Chuck (cliddell) | 8175555555 | kwright@hyphensolutions.com |
| x | Wright, Kevin (kwright) | (972) 728-8104 | jkevinwright@sbcglobal.net |



FIGURE 7. Add an integrated user

9. Click the **Add Users** button. BuildPro confirms the user has been added.




| User | Phone Number | Organization | User Status | Delete |
|---|---|---|---|---|
| Corral, John (jcorral) | 972-728-8100 | Hyphen Builders | Active | |
| Dude, Big (bigdude) | (972) 728-8138 | Hyphen Builders | Active | |
| Esther, Wendy (westher) | (972) 728-8164 | Hyphen Builders | Active | * |
| Liddell, Chuck (cliddell) | 8175555555 | Hyphen Builders | Active | |
| Wright, Kevin (kwright) | (972) 728-8104 | Hyphen Builders | Active | |

FIGURE 8. BuildPro confirms user has been added

10. To assign the user as a Primary User, click the **Organization** link. See the section titled Primary User Assignment for more detail.

## Add Holidays

The Holidays tab of the Organization Detail page lets you view, add, and delete company holidays for an individual organization. Current holidays default to the highest organization within your company. However, if a holiday is added at a lower organization, any jobs associated to that organization will use the new holiday and not refer any further up the organization for any other holidays. So, if you add a holiday to a lower organization, you must add all other company holidays at this level. If your office is a regional or divisional office for a larger company, you usually do not need to do this as holidays are usually set at the corporate level.

Holidays that are added to the division or community will automatically be included in all future job schedules. For existing jobs, those holidays will be included after the job schedule is updated. This may make your schedules appear longer than they actually are.

**To create a new division-specific holiday:**

1. Click the **Manager** tab.
2. Click the **Organization Manager** link. The Organization Manager page opens.
3. Click the **Organization List** link. The Organization List page opens.
4. Click the **Organization** name to which you want to add holidays. The Organization Detail page opens.
5. Click the **Holidays** tab.

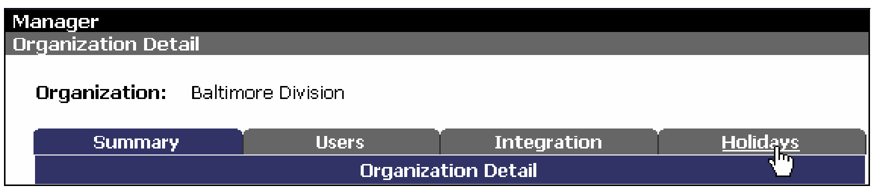



FIGURE 9. Organization Detail page

6. In the **Add New Holidays** column, type the date of the holiday you want to add. **Note:** Verify the holiday you are adding does not already exist in the list above the Add New Holidays section.

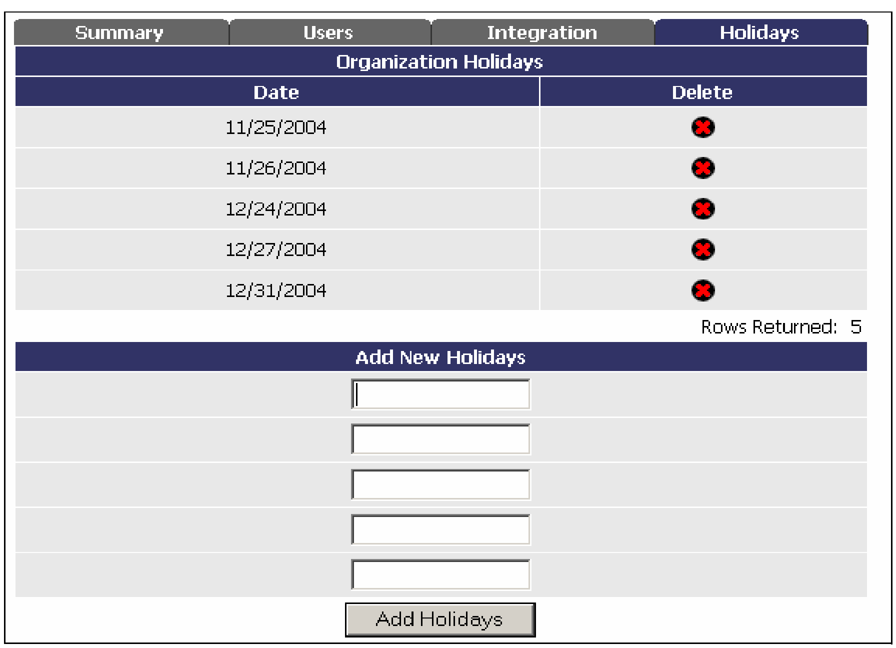



FIGURE 10. Holidays tab of the Organization Detail page

7. Click the **Add Holidays** button.
8. To delete a holiday, click the delete icon next to the holiday you want to remove.

# 3 Managing Document Folders

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Accessing Folder Management
- Adding Sub-Folders
- Editing Folder Details
- Adding Recurring Folders
- Editing Recurring Folders

## Folder Management Overview

Only users with the Document Folder Admin role can access Folder Management. The Document Folder Admin role allows the user to perform all Document Admin functions. This role also allows the user to add, edit, and delete folders as well as control supplier access to folders through the organizational structure.

### System Folders

The Document Management system has a standard set of folders known as system folders. For each BuildPro company, a system folder is automatically created for each org level: Company, Region (not all builders have regions), Division, Subdivision, Phase, and Job.

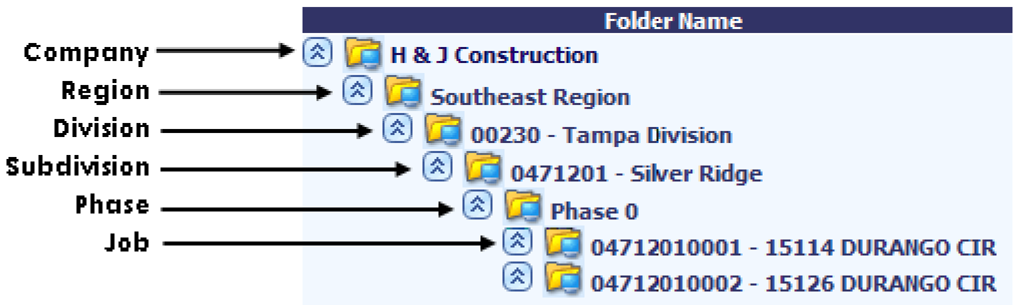



FIGURE 1. System folders

### Recurring Folders

Document Folder Admins can create recurring folders, which are automatically added to a new system folder when it is created. For example, if a user wants every job to have folders for Phone List and Active Communities, the user could set up two recurring folders at the job level called Phone List and Active Communities. When a new job is created, a Job system folder is created for it that also automatically includes two folders called Phone List and Active Communities.

You can also choose to add the new recurring folders to existing jobs. This way, all existing and new job system folders will contain these two recurring folders.

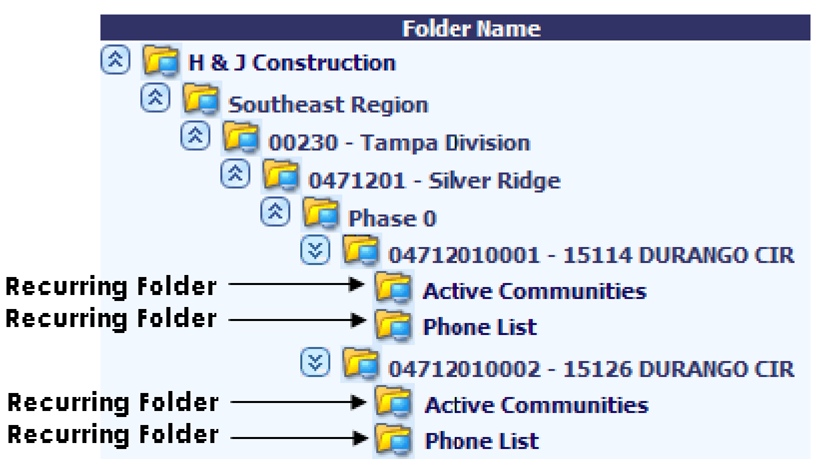



FIGURE 2. Recurring folders

## Folder Management Rules

Keep these business rules in mind when managing the document folders:

- Every org level (e.g., division, job, etc.) has its own system folder. When a new org is created, a system folder is automatically added to the company's folder structure.
- The system folders and documents are tied to the org. If you delete an org, like a job, the job system folder and all of its documents are also deleted.
- System folders cannot be deleted. Only manually created folders and recurring folders can be deleted. If you want to delete a system folder, you must delete that org on the Manager tab in BuildPro.
- Users can view and update folders up to their org level. Users can view but not update folders above their org level.
- A company user can set up recurring subfolders for regions and divisions, which are automatically added when a new org is created.
- A division user can set up recurring subfolders for phases, subdivisions, which are automatically added when a new org is created.
- Manually created and recurring folders cannot have subfolders. Only system folders can have subfolders.

## Access Folder Management

**To access folder management:**

1. On the BuildPro Home page, click the **Manage Document Folders** link in the **Document Management** box. The Manage Document Folders page opens.

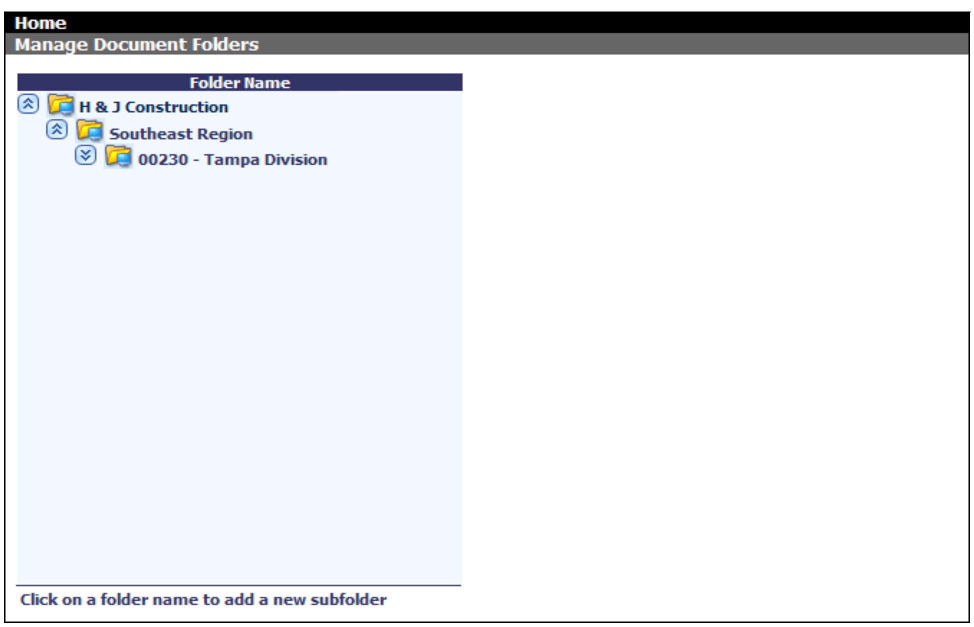



FIGURE 3. Manage Document Folders page

2. Click on the down arrow next to a folder to view all of its sub-folders. The down arrow changes to an up arrow.

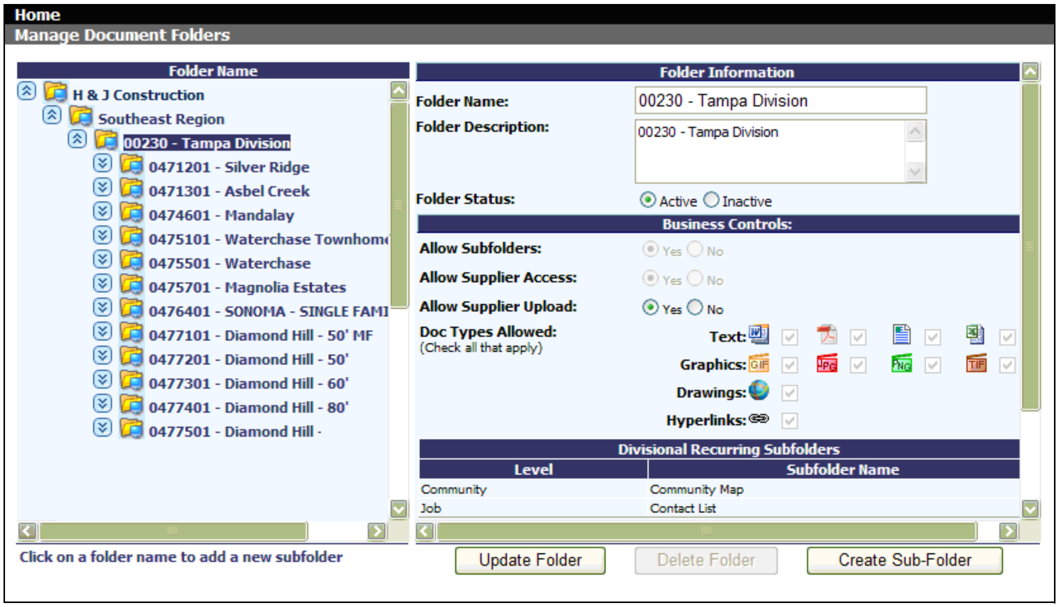


FIGURE 4. Manage Document Folders page - view detail

3. Click on the **Folder Name** to view the Folder Detail on the right side of the page.
   **Note:** If the folder contains subfolders, they will appear under the folder on the left side.

## Folder Detail - Page Fields

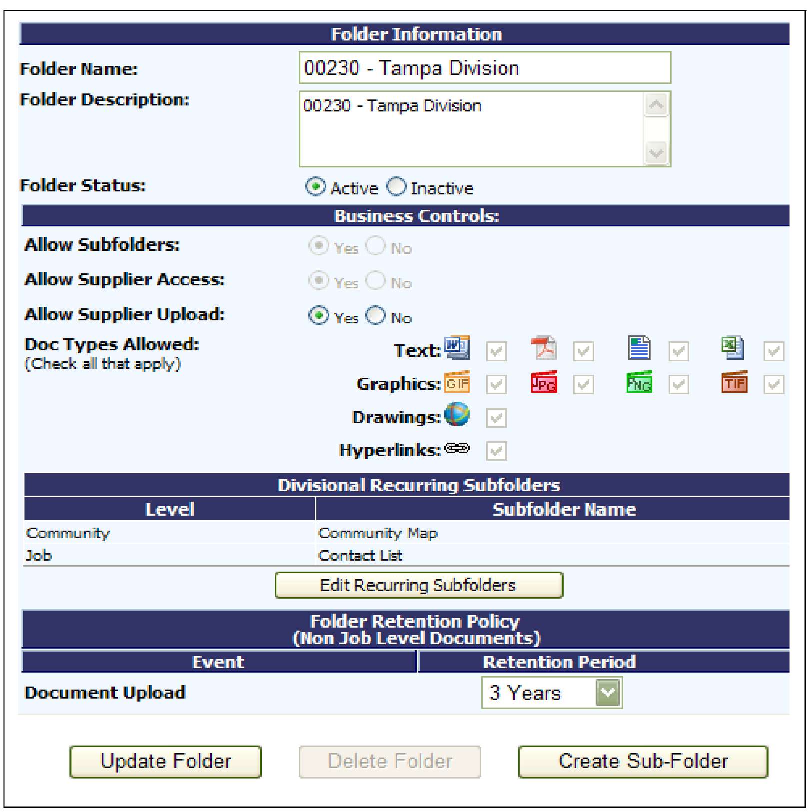


FIGURE 5. Manage Folder Documents - folder detail

### Folder Detail

- **Folder Name** - Displays the folder name, which the user can edit.
- **Folder Description** - Describes the contents of the folder. This description is displayed as a tool tip when the user moves the cursor over the folder name.
- **Folder Status** - If the folder is active, all Document Mgmt users can see and access this folder. If the folder is inactive, only Document Folder Admins can view and access this folder.

### Business Controls

- **Allow Subfolders** - For the initial version of Document Mgmt, all manually created folders have this option set to 'No.' Only system folders can have subfolders.
- **Allow Supplier Access** - 'Yes' means SupplyPro users have access to the contents of this folder. When a BuildPro user uploads a document, the user chooses which suppliers are allowed to access the document. 'No' means that SupplyPro users cannot access the contents of this folder.
- **Allow Supplier Upload** - 'Yes' means SupplyPro users can upload documents into this folder. Any documents that suppliers upload will be counted against the builder's total allowed disk space. 'No' means that SupplyPro users cannot upload documents into this folder.
- **Doc Types Allowed** - In the initial version, all supported doc types will be allowed in all folders. A future version will allow admin users to control which doc types are allowed in each folder.

### Company/Divisional Recurring Subfolders

*(only available on company or division folders)*

- **Level** - Displays the org level at which the recurring subfolder will be created. Company users can set up recurring folders for regions and divisions. Division users can set up recurring folders for subdivisions, phases, and jobs.
- **Subfolder Name** - Name of the recurring subfolder which will be inserted when a new org is created at the designated org level.

### Folder Retention Policy

- **Non Job Level Documents** - All folders at org levels other than a job: Company, Region, Division, Subdivision, and Phase.
  - **Event** - Date the document was uploaded into BuildPro.
  - **Retention Period** - The user can choose a time period for keeping the document active, which starts from the event, the date the document was uploaded into BuildPro. After the assigned time period is complete, the documents are archived.
- **Job Level Documents** - All folders at the job level.
  - **Event** - Date the job closes.
  - **Retention Period** - The retention period starts from the event, the date the job closes. Doc Mgmt automatically uses the builder's archive period from BuildPro to determine the document retention period. After the retention period is complete, the documents are archived.

## Add a New Sub-Folder

**To add a new subfolder:**

1. Open the Manage Document Folders page.
2. Click on the **Folder Name** of the folder to which you want to add a subfolder.
   **Note:** You can only add manually created subfolders to system folders.

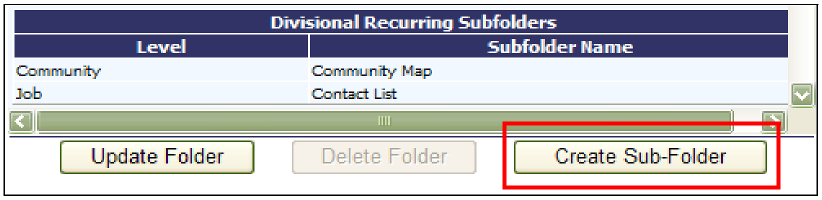



FIGURE 6. Manage Document Folders page - create sub-folder

3. Under the Folder Information section on the right side, click on the **Create Sub-Folder** button. The New Folder Information section appears.

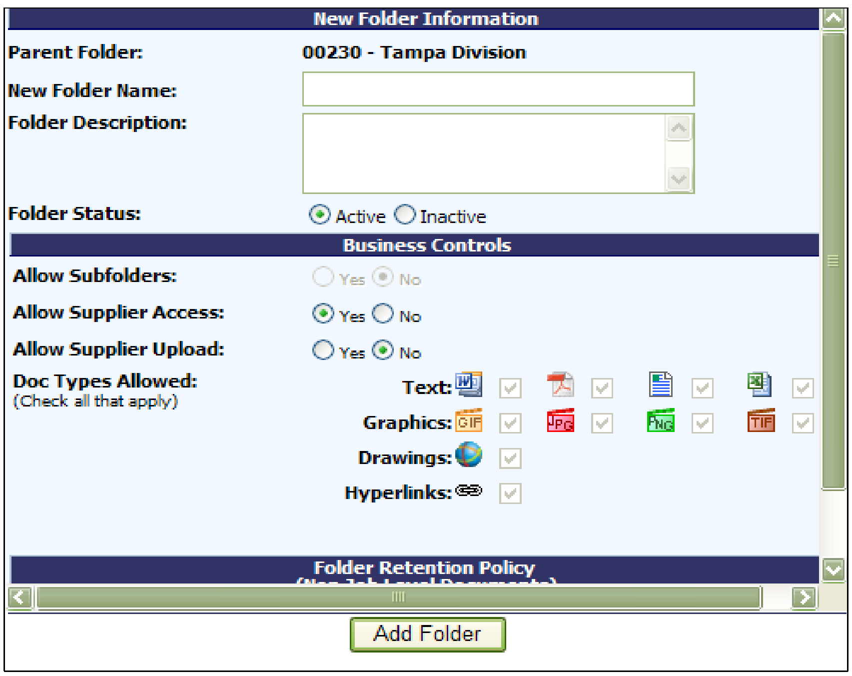



FIGURE 7. Manage Document Folders page - New Folder Information section

4. Enter the **New Folder Name** and **Folder Description**.
5. Choose the **Active Status** of the folder.
   **Note:** Choose Inactive to hide the new folder from the View/Manage Documents page.
6. Choose whether to **Allow Supplier Access**, defaults to **Yes**.
7. Choose whether to **Allow Supplier Upload**, defaults to No.
8. Change the **Folder Retention Period**, if necessary.
9. Click the **Add Folder** button.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## Edit an Existing Folder

**To edit an existing folder:**

1. On the BuildPro Home page, click the **Manage Document Folders** link in the **Document Management** box. The Manage Document Folders page opens.
2. Click on the **Folder Name** of the folder you want to edit. The Folder Detail appears on the right side of the page.

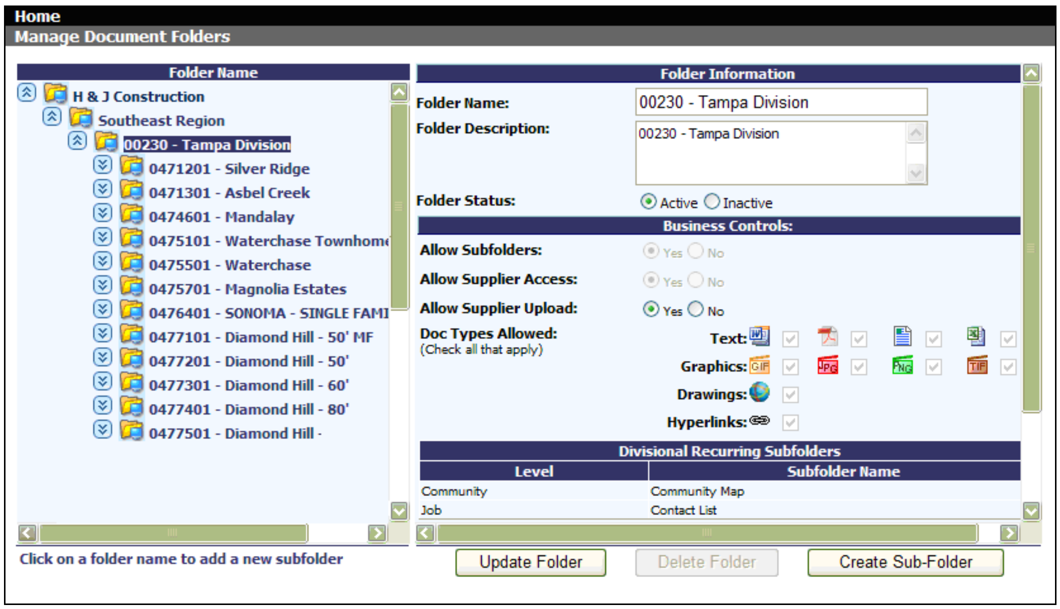


FIGURE 8. Manage Document Folders page - folder detail

3. Edit the **Folder Detail** as necessary.
4. Click the **Update Folder** button at the bottom of the page.

## Add New Recurring Folder

**To add recurring subfolders:**

1. On the BuildPro Home page, click the **Manage Document Folders** link in the **Document Management** box. The Manage Document Folders page opens.
2. Click on the **Folder Name** of the **Company** or **Division** folder you want to edit. The Folder Detail appears on the right side of the page.
3. Click the **Edit Recurring Subfolders** button. The Recurring Folder Maintenance pop-up window opens.
   **Note:** This option only appears in Company or Division level folders.

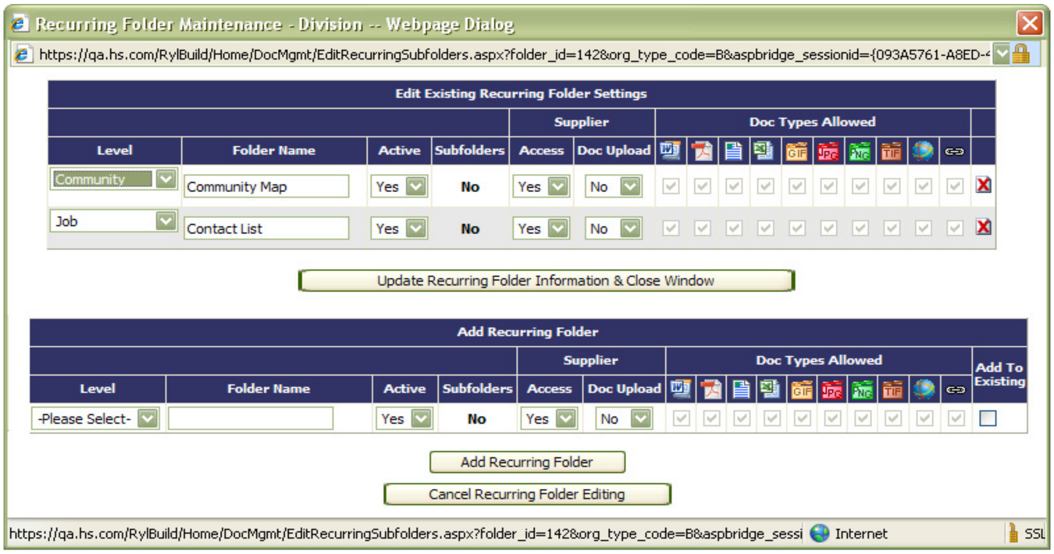


FIGURE 9. Edit/Add Recurring Folder pop-up window

4. Choose the **Level**, **Folder Name**, **Active Status**, **Access**, or **Doc Upload** options.

5. Click the **Add to Existing** check box on the right side of the row to add the new recurring folder to all existing folders at the same org level. For example, if you are adding a new recurring folder to a job, this check box will add the new recurring folder to all existing job folders.

6. Click the **Add Recurring Folder** button.

## Edit Recurring Folder

Once you set up a recurring folder, you can edit the properties to change the name or org level of the recurring folder.

**To edit existing recurring subfolders:**

1. On the BuildPro Home page, click the **Manage Document Folders** link in the **Document Management** box. The Manage Document Folders page opens.

2. Click on the **Folder Name** of the **Company** or **Division** folder you want to edit. The Folder Detail appears on the right side of the page.

3. Click the **Edit Recurring Subfolders** button. The Recurring Folder Maintenance pop-up window opens.
   **Note:** This option only appears in Company or Division level folders.



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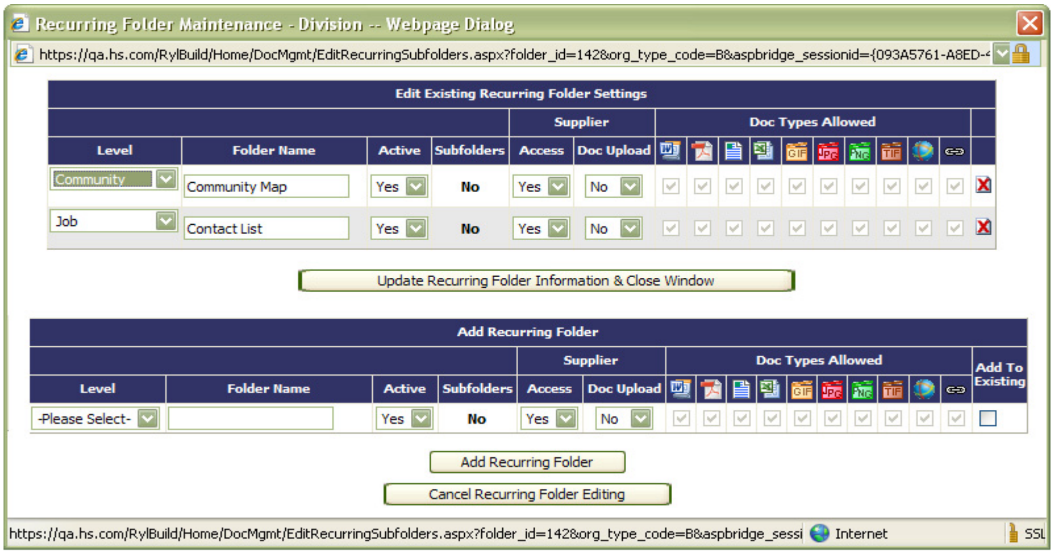


FIGURE 10. Edit/Add Recurring Folder pop-up window

4. Edit the **Level**, **Folder Name**, **Active Status**, **Access**, or **Doc Upload** options.
5. Click the **Update Recurring Folder Update & Close Window** button. The updates to the recurring subfolders appear in the Folder Detail.

Refer to the Construction Mgr Training Guide for instructions on how to upload, modify, and delete documents.

# 4 Users & Roles

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Adding users to BuildPro
- Roles in BuildPro
- Assigning Integrated Users
- Primary Users vs. Job Users
- Adding or Removing Jobs from a User

## Users & Roles Overview

As the BuildPro System Administrator, you will be responsible for adding new users to BuildPro and assigning them a role. You will also need to understand how to assign and remove jobs from users as well as what to do when employees leave the company.

## Add Users

**To add users:**

1. Click the **Manager** tab.
2. Click the **User Manager** link. (or click the **Add New User** link in the left nav)

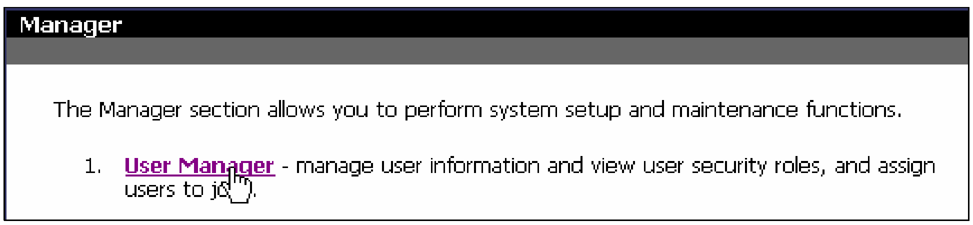


FIGURE 1. Manager tab

3. Click the **Add a New User** link.

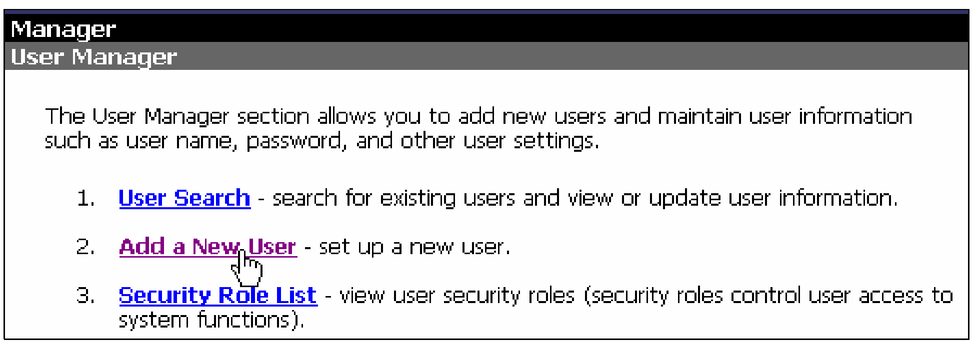


FIGURE 2. User Manager page

4. Complete the **User Detail** page with the correct user information. See the next section for details of each field on this page.
   **Note:** Be sure to complete all the fields marked with an asterisk *.


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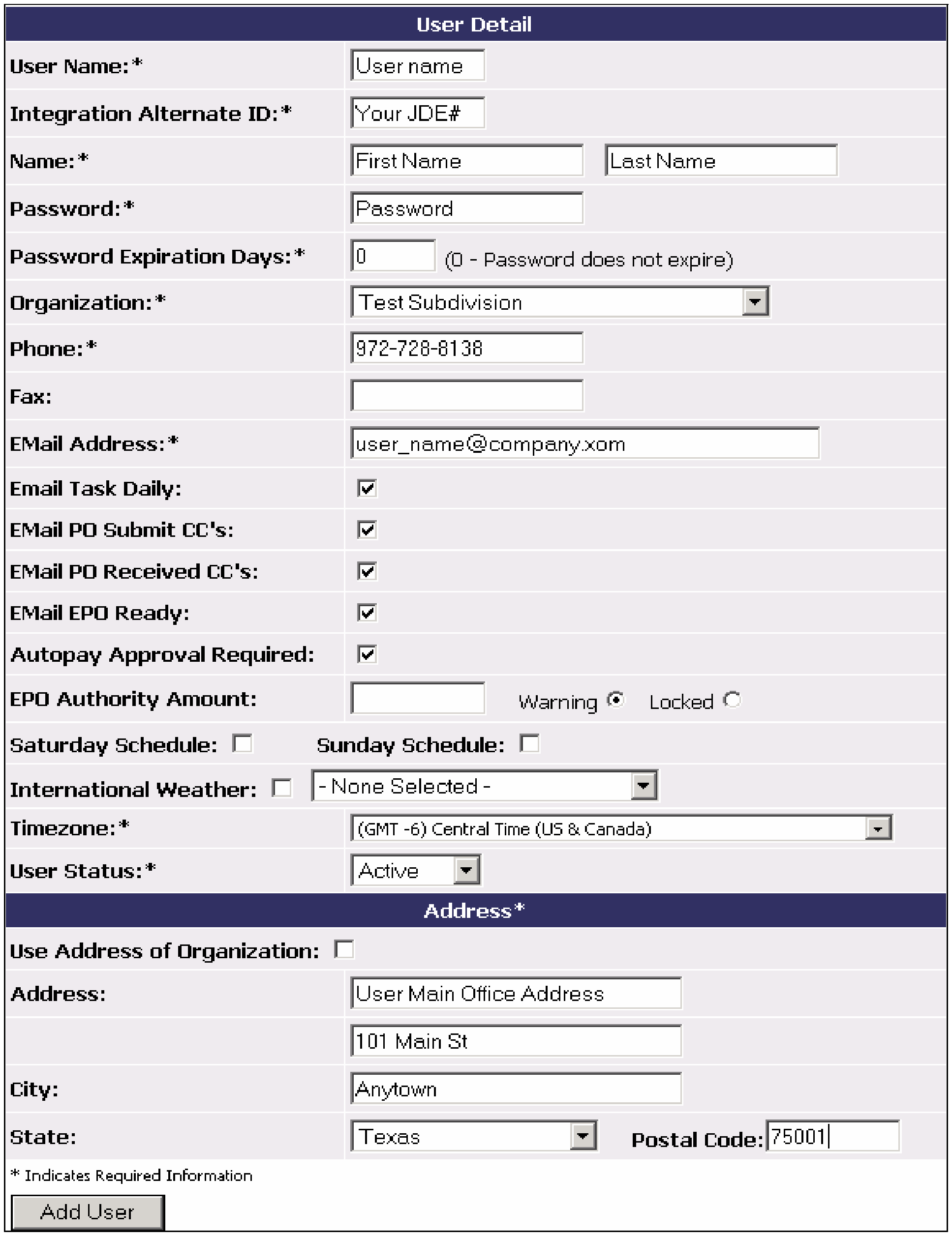


FIGURE 3. User Detail page

5. Click the **Add User** button. The User Role Detail page opens
   **Note:** For more information, see the section titled "Assign Roles."

## User Detail Fields

Below are a list of fields found on the User Detail page and how they are used.

### User Detail

- **User Name** - Name of User. This is typically a 2 or 3 letter code and the first initial of the user's first name and the full last name up to 8 characters. Ex. ABCJDoe. The lettered code is assigned by your BuildPro consultant.
- **Integration Alternate ID** - For integrated users. If user detail is sent to BuildPro via integration, enter the user's ID from the back office accounting system. This field is modularized and may not appear on this page.
- **Name** - User's full name. Ex. Jane Doe.
- **Password** - Usually set to "password" initially. The user should change it at first login.
- **Password Expiration Days** - If you want your users to change their passwords at regular intervals, type the number of days until the password expires in this field. The default is 0 for no expiration.
- **Organization** - Select from the drop-down menu of available organizations the organization with which the user is associated. Users are usually set at their Division level.
- **Phone** - User's main phone number.
- **Fax** - User's fax number.
- **Email Address** - User's complete email address. Ex. jdoe@companyname.com
- **Email Task Daily** - If checked, indicates whether to send the user a daily email with a list of scheduled tasks.
- **Email PO Submit CC's** - If checked, indicates that the user receives notification when a purchase order (task) is submitted.
- **Email PO Received CC's** - If checked, indicates the user receives notification when a purchase order (task) has been completed.
- **Email EPO Ready** - If checked, indicates the user receives email notification when an EPO is marked "ready".
- **Autopay Approval Required** - If checked, any Autopay tasks submitted for completion, by this user, require approval.
- **EPO Authority Amount** - Maximum dollar amount for which the user may create an EPO without approval.
- **Warning** - This determines whether the user gets a warning when going over the limit of an EPO. If checked, the user only gets a warning and the EPO is sent to the vendor without approval.
- **Locked** - If Locked is selected, it will not allow the EPO to be sent to the vendor without approval.
- **MPO Authority Amount** - Maximum dollar amount the user may go over the original dollar amount of a Measurement PO when completing the PO (task).
- **MPO Authority Percent** - Maximum percentage the user may go over the original dollar amount of a Measurement PO when completing the PO.


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- **Saturday Schedule** - This is a default setting that is used when the user is creating a job. This setting will allow the job schedule to automatically include Saturday when creating the schedule. This setting may be changed before the job is created.
- **Sunday Schedule** - This is a default setting that is used when the user is creating a job. This setting will allow the job schedule to automatically include Sunday when creating the schedule. This setting may be changed before the job is created.
- **International Weather** - If checked, prompts the system to display weather from the country selected from the drop-down menu.
- **Time Zone** - Select the appropriate time zone for the user from the drop-down menu.
- **User Status** - Options are “Active” and “Disabled.” The default is “active.” When set to “Disabled” the user may no longer login to BuildPro.

### Address

- **Use Address of Organization** - Check this if you want to use the organization address already entered into the database as the user’s address.
- **Address** - User’s Street Address, if different from the organization's primary street address. Ex. Superintendents may want to use their construction office address.
- **City** - User’s City if different from the organization’s primary city.
- **State** - User’s State if different from the organization’s primary state.
- **Postal Code** - User’s zip code if different from the organization’s primary zip code.
- **PDA Profile Assigned to this User** - This section appears after a user has been added. Click the Add PDA Profile link to add a profile for this user so he or she can use BuildPro from their PDA, if this is a part of the implementation.
- **Roles Assigned to User** - This section appears after a user has been added. If, after viewing the roles assigned to the user, you want to add or remove a role, click the Add or Remove Roles link to access the User Role Detail page.
- **Alternate Organizations** - This allows a user to belong to more than one organization. A user that belongs to multiple organizations may go their user profile to change the org for which they wish to view information. To assign the user to additional organizations, click the Add or Remove Alternate Organizations link. This section only appears after roles have been assigned to the user.

## Email Notifications

**A user may change their email notification settings:**

1. Click the **Home** tab.
2. Click the **Your Profile** link on the Left Nav Bar. Your Profile page opens.

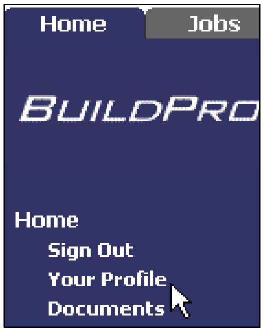


FIGURE 4. Home tab

3. In the **Email** column of the **User Preferences** section, select the check box next to the option(s) you want.
   **Note:** If you select the Email PO Submit, Email PO Received, and Email EPO Ready fields, you will receive an electronic copy of each notification sent to the supplier. If you select the Email Tasks Daily check box, you will receive a list of tasks each day via email.

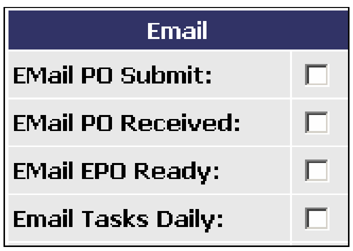


FIGURE 5. Email column of Your Profile page

4. Click the **Update Profile** button.

## Roles in BuildPro

Functionality in BuildPro is controlled through the role the user is assigned. Roles control access to various tabs within BuildPro. The more tabs a user has across the top of BuildPro, the more functionality he or she has. Roles provide access to page tabs, pages, links, and functionality.

When users are first created, you are asked what role assignment(s) to give them. Before doing this you must understand BuildPro user roles.

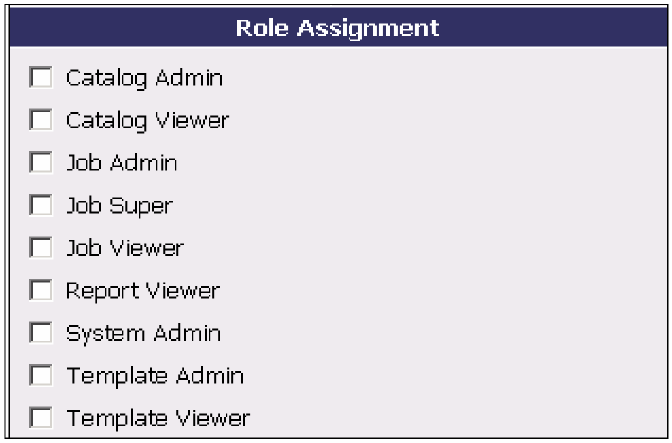


FIGURE 6. BuildPro standard user roles

## Standard User Roles

Each user is assigned at least one role, and the role that this user is assigned will control only his/her functionality. If you need your users to have different mixes of functionality than are present in the default roles, custom roles can be created (consult your Hyphen Solutions contact about creating custom roles). These custom roles will apply only to your company (and thus will not be seen by other companies).

- **Catalog Admin**
  Typical title: Purchaser
  Purchases and maintains line items in the BuildPro catalog. Also, works with materials, resources and "item masters."
- **Catalog Viewer**
  Typical title: Purchaser Assistant
  Same as Catalog Admin but can only view the catalog in BuildPro.
- **Job Admin**
  Typical titles: IT System Administrator, Area Manager
  Usually a back-office Administrator who sets up jobs in BuildPro, enters job details, EPOs, and creates and maintains information about the jobs in BuildPro.
- **Job Super**
  Typical titles: Superintendent, Construction Manager, Builder
  Uses the system on a day-to-day basis to order and schedule all the various homebuilding tasks. One of the most common users.
- **Job Viewer**
  Typical title: VP
  Might assist the Job Admin. Has access to the job info but cannot update the jobs.
- **Report Viewer**
  Typical titles: Accounting, Production, VP
  Has access to reports only.
- **System Admin**
  Typical title: IT System Administrator

Typically a user above the Job Super role. Knows how a home is built and can build and maintain templates in BuildPro.

- **Template Admin**
  Typical titles: Area Manager, Division Manager
  Typically a user above the Job Super role. Knows how a home is built and can build and maintain templates in BP.
- **Template Viewer**
  Typical title: Auditor
  Same as Template Admin but can only view templates.

## Assign Roles

When assigning user roles, you must understand all 3 methods of access control. Remember the following:

- Each user must be assigned at least one role, and the role that this user is assigned will control only his/her functionality.
- Modules are different from roles in that modules (functions) can be turned on or off for an entire company by Hyphen Solution. Functions are always "on", but must be assigned to a role.
- A PDA profile only controls what a user sees on their PDA device. It has no effect on what he/she would see on the browser version of BuildPro.


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**To assign user roles:**

1. Click the **Manager** tab.
2. Click the **User Manager** link. (or click the **User Search** link in the left nav)

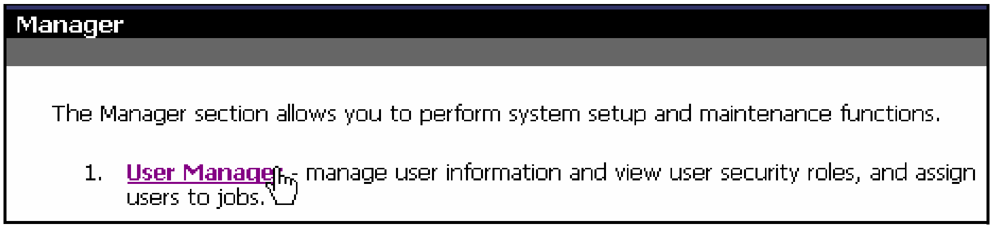



FIGURE 7. Manager tab

3. Click the **User Search** link. The User Search page opens.

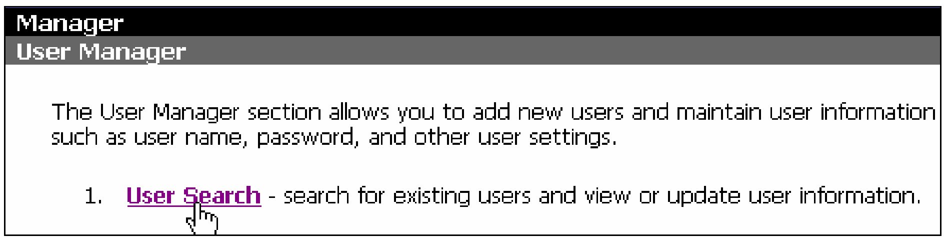



FIGURE 8. User Manager page

4. Enter search criteria for the user to which you want to assign a role.
5. Click the **Search** button. The results appear on the User List page.
6. Click the user name link of the user to which you want to assign a role. The User Detail page opens.

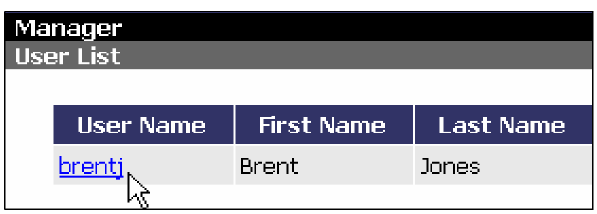



FIGURE 9. User List page

7. In the **Roles Assigned to User** section, click the **Add or Remove Roles** link.
**Note:** Access to this link is controlled by a role function. If you cannot see this link, contact your job admin.

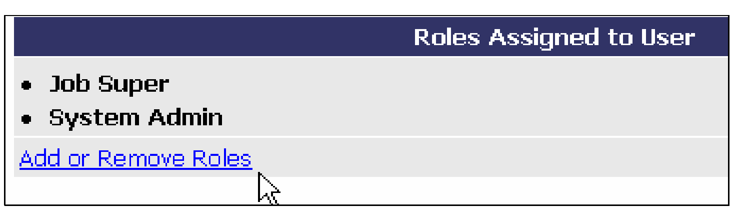



FIGURE 10. User Detail page

8. Click the check box next to the role(s) you want to assign the user.
   **Note:** Roles are cumulative. If a user is assigned more than one role, the user will be allowed to perform any task that either role allows.

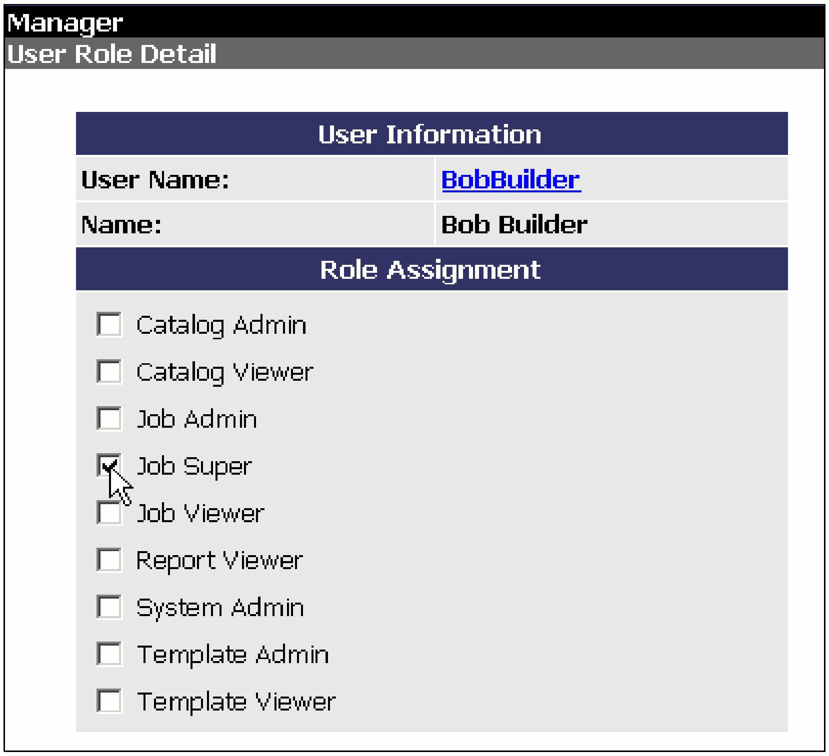



FIGURE 11. User Role Detail page

9. Click the **Update** button. BuildPro confirms that the user has been updated.


FIGURE 12. BuildPro confirms user has been updated

## Job Users vs. Primary Users

Job Users and Primary Users can be set by Organization, prior to loading jobs from integration. Users are then assigned automatically as jobs are loaded to a specific subdivision or community.

- **Job User**
  Has the ability to Start, Complete, Schedule and Reschedule tasks within a specific job. If the Job User is different from the Job Primary User, the notification being sent will indicate the Job User's information as well as the Job Primary's information as the primary contact. The Job User of a job can be assigned automatically through integration, as well as manually through BuildPro.
- **Primary User**
  Is ultimately responsible for a specific community or subdivision. The Primary User's name, phone number, fax number, and email address will be included as the primary contact on all notifications sent to suppliers from BuildPro. The Primary User of a job can be assigned automatically through integration, as well as manually through BuildPro.

## Assign Job Users to an Organization

**To assign job users to an organization:**

1. From the **Manager** tab, click the **Organization Manager** link.
2. Click the **Organization List** link.
3. Click the **Organization/Subdivision** name to which you want to add a user. The Organization Detail page opens.


FIGURE 13. Organization List page

4. Click the **Integration** tab to add a user to the integration.

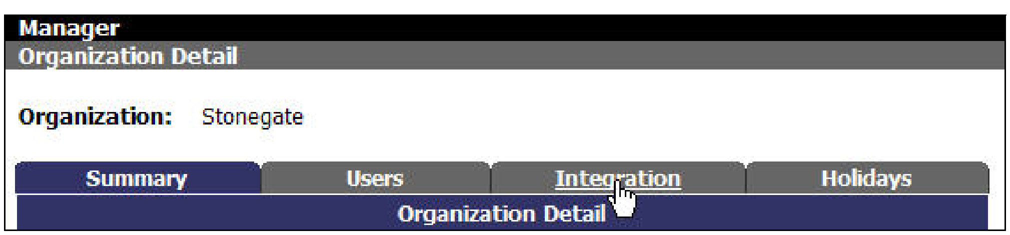
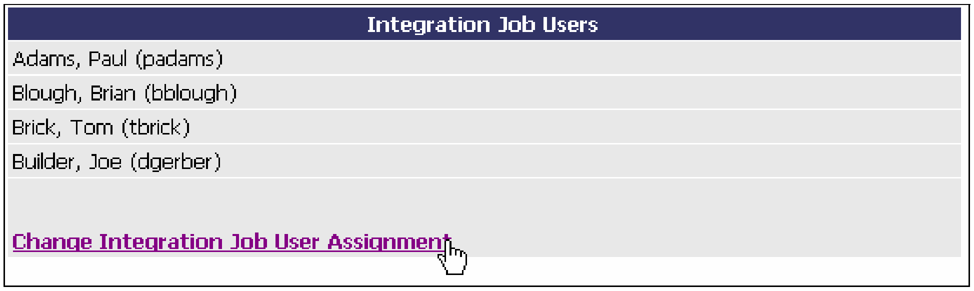



FIGURE 14. Organization Detail page

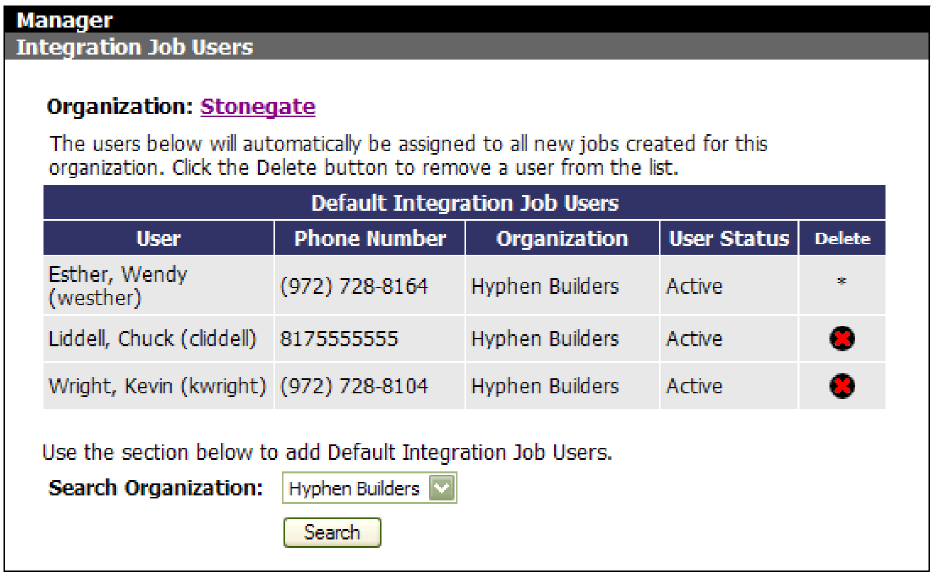
5. Click the **Change Integration Job User Assignment** link. The Integration Job Users page opens.



| Integration Job Users |
|---|
| Adams, Paul (padams) |
| Blough, Brian (bblough) |
| Brick, Tom (tbrick) |
| Builder, Joe (dgerber) |
| Change Integration Job User Assignment |

FIGURE 15. Integration tab of the Organization Detail page

6. Choose a division-level organization from the **Search Organization** drop-down list.



**Manager**
**Integration Job Users**

**Organization:** Stonegate

The users below will automatically be assigned to all new jobs created for this organization. Click the Delete button to remove a user from the list.

| Default Integration Job Users | | | | |
|---|---|---|---|---|
| **User** | **Phone Number** | **Organization** | **User Status** | **Delete** |
| Esther, Wendy (westher) | (972) 728-8164 | Hyphen Builders | Active | * |
| Liddell, Chuck (cliddell) | 8175555555 | Hyphen Builders | Active | |
| Wright, Kevin (kwright) | (972) 728-8104 | Hyphen Builders | Active | |

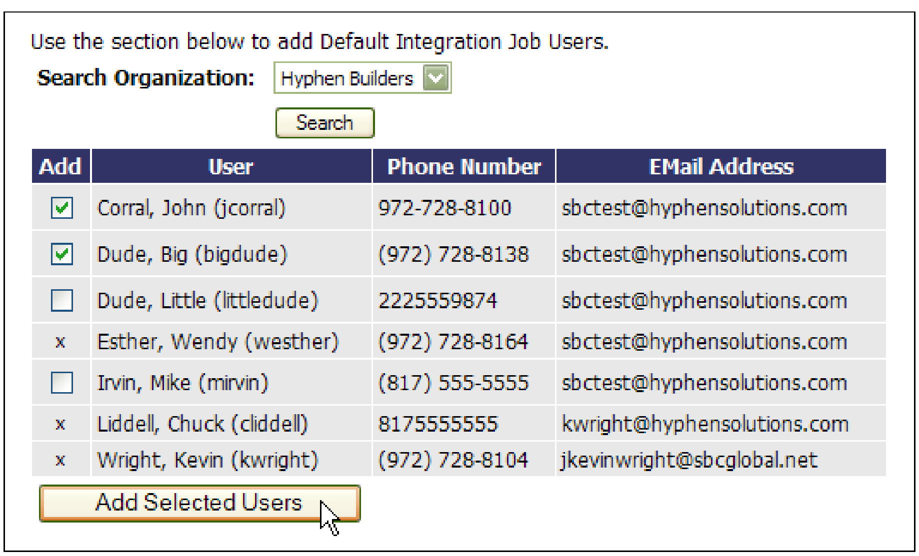
Use the section below to add Default Integration Job Users.

**Search Organization:** Hyphen Builders

Search

FIGURE 16. Integration Job Users page

7. Click the **Search** button.
8. Click the **Add** check box next to the user you want to add.



Use the section below to add Default Integration Job Users.

**Search Organization:** Hyphen Builders

Search

| Add | User | Phone Number | EMail Address |
|---|---|---|---|
| ☑ | Corral, John (jcorral) | 972-728-8100 | sbctest@hyphensolutions.com |
| ☑ | Dude, Big (bigdude) | (972) 728-8138 | sbctest@hyphensolutions.com |
| ☐ | Dude, Little (littledude) | 2225559874 | sbctest@hyphensolutions.com |
| x | Esther, Wendy (westher) | (972) 728-8164 | sbctest@hyphensolutions.com |
| ☐ | Irvin, Mike (mirvin) | (817) 555-5555 | sbctest@hyphensolutions.com |
| x | Liddell, Chuck (cliddell) | 8175555555 | kwright@hyphensolutions.com |
| x | Wright, Kevin (kwright) | (972) 728-8104 | jkevinwright@sbcglobal.net |

Add Selected Users



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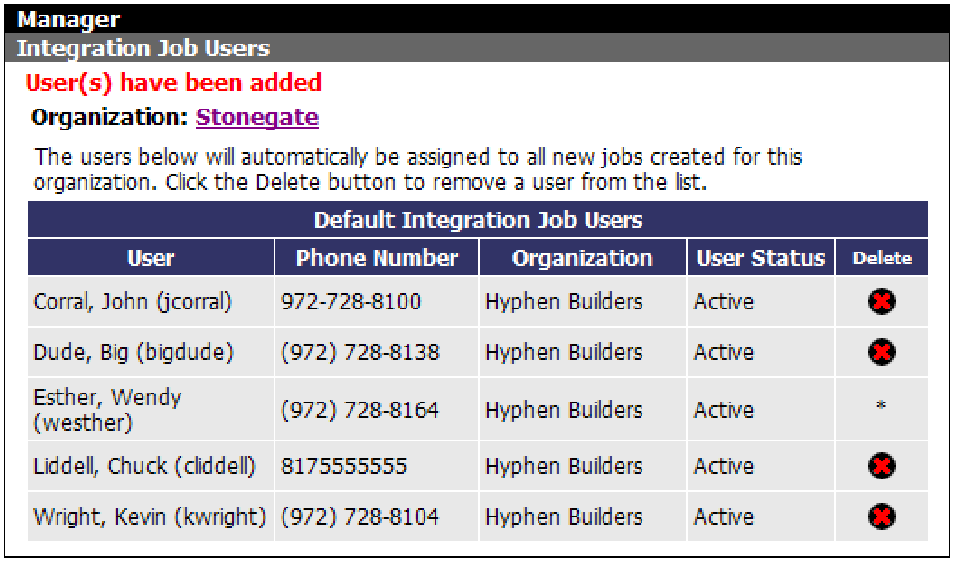
FIGURE 17. Add user

9. Click the **Add Users** button. BuildPro confirms the user has been added.
**Note:** To assign the user as a Primary User, see the section titled "Assign Primary Users" for more details.


Manager
Integration Job Users
User(s) have been added
**Organization:** Stonegate
The users below will automatically be assigned to all new jobs created for this organization. Click the Delete button to remove a user from the list.

| Default Integration Job Users | | | | |
|---|---|---|---|---|
| User | Phone Number | Organization | User Status | Delete |
| Corral, John (jcorral) | 972-728-8100 | Hyphen Builders | Active | |
| Dude, Big (bigdude) | (972) 728-8138 | Hyphen Builders | Active | |
| Esther, Wendy (westher) | (972) 728-8164 | Hyphen Builders | Active | * |
| Liddell, Chuck (cliddell) | 8175555555 | Hyphen Builders | Active | |
| Wright, Kevin (kwright) | (972) 728-8104 | Hyphen Builders | Active | |

FIGURE 18. BuildPro confirms user has been added

## Assign Primary Users to an Org

For integrated users, if a new job comes into BuildPro and it is unassigned, a Primary User is automatically assigned to this job. The Primary User is then responsible for assigning the job to a job user.

While the Primary User is ultimately responsible for the subdivision, job users are able to view and work jobs in the subdivision.

**To assign primary users to an organization:**

1. Click the **Manager** tab.
2. Click the **Organization Manager** link.
3. Click the **Organization List** link.
4. Click the **organization** (subdivision) you created.


FIGURE 19. Organization List page

5. Click the **Integration** tab.


FIGURE 20. Integration tab of the Organization Detail page

6. Choose a primary user from the **Primary User** drop-down list.

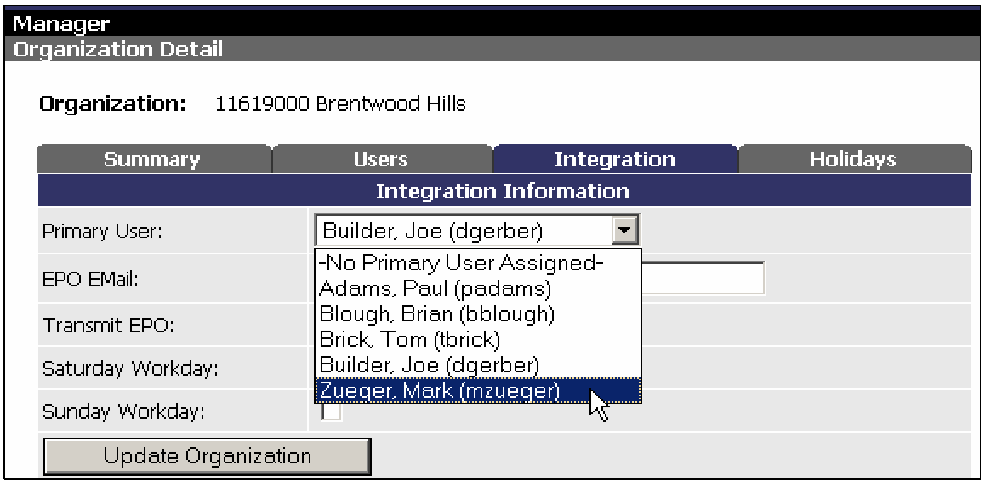



FIGURE 21. Choose a primary user

7. Click the **Update Organization** button. BuildPro confirms the organization has been updated and the integrated user assigned.


FIGURE 22. BuildPro confirms organization has been updated

## Assign Job Users

Job users are BuildPro users who have access to view information about a specific Job. There are two ways to assign Job Users:

1. By Job - use this method to select one Job and assign/un-assign many Users.
2. By User - use this method to select one User and assign/un-assign many Jobs.

**To assign job users:**

Click the **Job Admin** tab. Under the **Job User Assignment** heading in the Left Nav click **By Job** or **By User**. The corresponding page will open.


FIGURE 23. Job User Assignment: By Job or By User

### By Job

**To assign By Job:**

1. Choose a **Division**. The **Community** and **Job** filters will be populated with a list of Communities from the selected Division. If you are assigned to a Division, that Division will be pre-selected with a list of Communities from your Division.
2. Further narrow your search by choosing a **Community** from the Division. The list of **Jobs** will be populated based on the Community/Job chosen. You may also filter the list of **Available** Users and/or Jobs with the **User Status** and **Job Status** filters.
3. Click the **Show Job User Assignment** button.

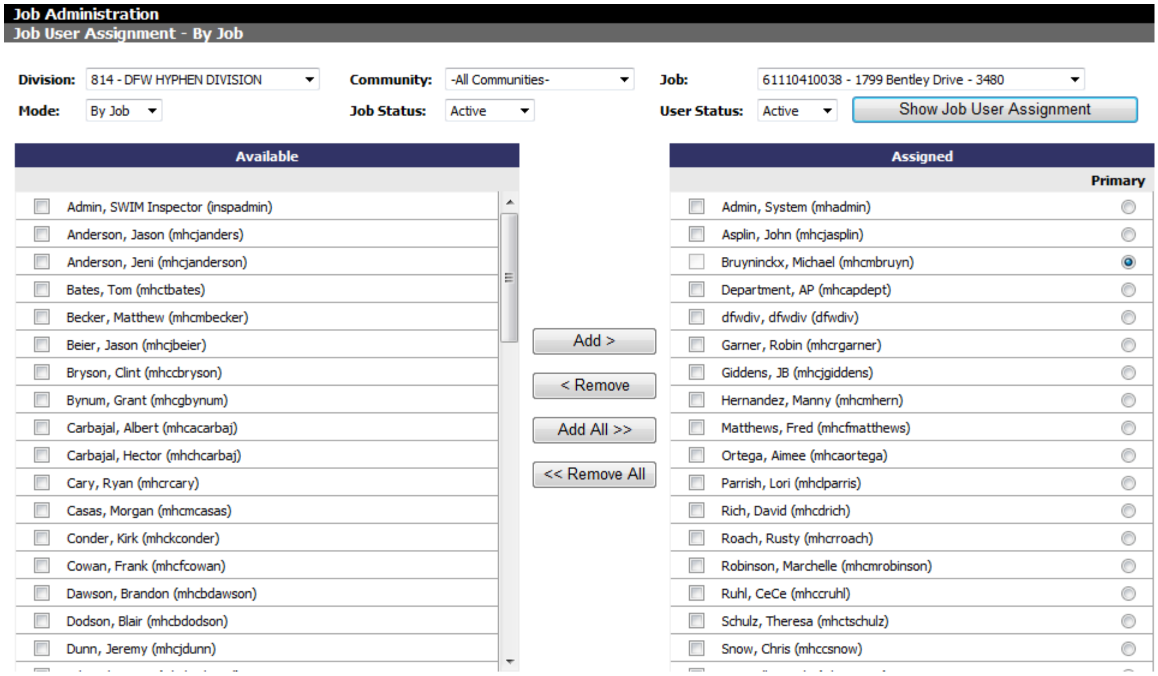



FIGURE 24. Job User Assignment: By Job

4. The list of **Available** Users that may be assigned are displayed on the left side and Users currently **Assigned** are displayed on the right. The Available list is populated with Users from your Division and down.

5. Use the check boxes in the **Available** column to select Users you wish to assign to the Job. You may check them individually and then click the **Add** button. The User assignment will be updated immediately. The selected users will now appear in the **Assigned** column. You may also use the **Add All** button to assign all Available users; no need to select them, just click the **Add All** Button. The Assigned list is populated with all Users assigned to the Job regardless of Org. You may not un-assign Users from a Job that are above your Org.

6. To un-assign Users from the selected Job, click the check box(s) next to the User(s) in the **Assigned** column and click the **Remove** button. To un-assign all Users click the **Remove All** button; no need to select them; just click the **Remove All** button. The **Assigned** column contains all Users assigned to the Job from all Orgs. The check box next to Users from Orgs above you will be disabled. You may not un-assign those Users from Jobs.

**Note:** Clicking the **Remove All** button will remove all users except the **Job Primary**. A Job in BuildPro must have a Job Primary. To change the current Job Primary (for the selected Job) use the radio button next to the list of Users. Changing the Primary is effective immediately.

**Note:** If your company uses the Alternate Orgs module, the option in the Division filter will based on your current Org assignment. To assign/un-assign Jobs from another Division, change your Org by going to Your Profile. When you return to this page you will see that Division in the filter.



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**Note:** Use the **Mode** filter to quickly change to **By User** mode.

## By User

**To assign By User:**

1. Choose a **Division**. The **Community** and **User** filters will be populated with a list of Communities from the selected Division. If you are assigned to a Division, that Division will be pre-selected with a list of Communities from your Division.

2. Further narrow your search by choosing a **Community**. Choose a **User**. You may also filter the list of **Available** Jobs and/or Users with the **Job Status** and **User Status** filters. Communities are populated based on the Division selected. Users are populated based on assignment from the Division. If your company uses the Alternate Orgs module, Users with their current Org as the selected Division will be shown in the User filter.

3. Click the **Show Job User Assignment** button.

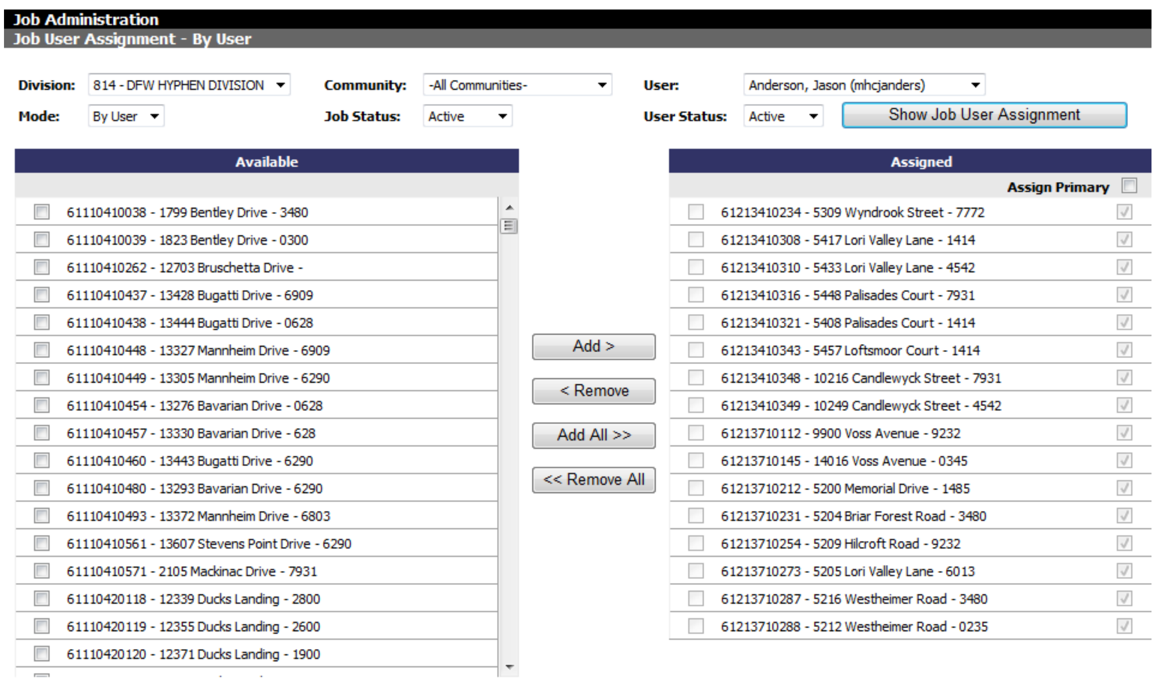


FIGURE 25. Job User Assignment: By User

4. The list of **Available** Jobs that may be assigned are displayed on the left side and Jobs currently **Assigned** are displayed on the right.

5. Use the check boxes in the **Available** column to select Jobs you wish to assign to the User. You may check them individually and then click the **Add** button. The Job assignment will be updated immediately. The selected Jobs will now appear in the **Assigned** column. You may also use the **Add All** button to assign all Available Jobs; no need to select them, just click the **Add All** Button. The list of Jobs in the **Available** column are from the selected Division.

6. To un-assign Jobs from the selected User, click the check box(s) next to the Job(s) in the **Assigned** column and click the **Remove** button. To un-assign all Jobs click the **Remove**

**All** button; no need to select them; just click the **Remove All** button. The **Assigned** column contains all Jobs assigned to the User from the selected Division. The check box left of the Jobs will be disabled if the selected User is the Primary. In order to un-assign the Job, you must change the Primary. Use the By Job Mode to change the Primary; then un-assign the User.

**Note:** To assign the selected User as the Job Primary for all Jobs in the **Assigned** column, use the **Assign Primary** check box. Changing the Primary is effective immediately.

## Disable a User

BuildPro does not allow you to delete users for accounting reasons, so you must instead disable users who are no longer allowed to log into BuildPro.

**To disable a user:**

1. In BuildPro, click on the **Manager** tab. The Manager page opens.
2. Click on the **User Manager** link. The User Manager page opens.
3. Click on the **User Search** link. The User Search page opens.
4. Enter all or part of the user's **User Name**, **First Name**, or **Last Name**.
5. Click the **Search** button. The User List page opens.
6. Click on the **User Name** of the user you want to disable. The User Detail page opens.
7. Scroll to the bottom of the **User Detail** section, above **Address**.
8. From the **User Status** drop-down, choose **Disabled**.

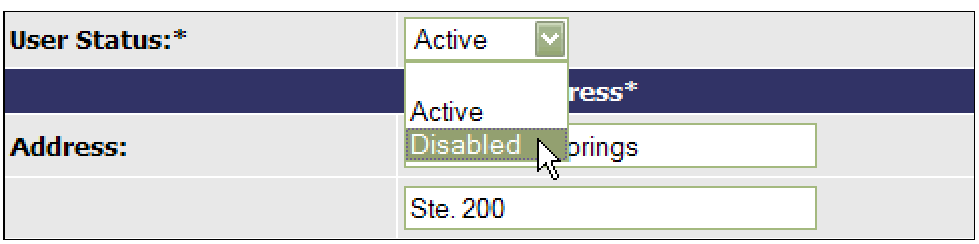


FIGURE 26. Disable user on the User Detail page

9. Click the **Update User** button under the **Address** section. The user has been disabled. The user will no longer be able to log into BuildPro, and no more jobs can be assigned to this user.

# 5 Managing Suppliers

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Adding Suppliers
- Updating Supplier Information
- Creating TBD Suppliers
- Updating E-destinations

## Managing Suppliers Overview

In order for BuildPro to be an effective tool, the supplier information in the system must be correct. In a non-integrated system the BuildPro system administrator must to add and update supplier information in BuildPro.

In an integrated environment, the supplier information is electronically transferred from the back-office ERP System. It is also maintained in the back-office system and changes are transmitted to BuildPro. No changes are made in BuildPro.

## Add a Supplier

**To add a supplier:**

1. Click the **Supply** tab.

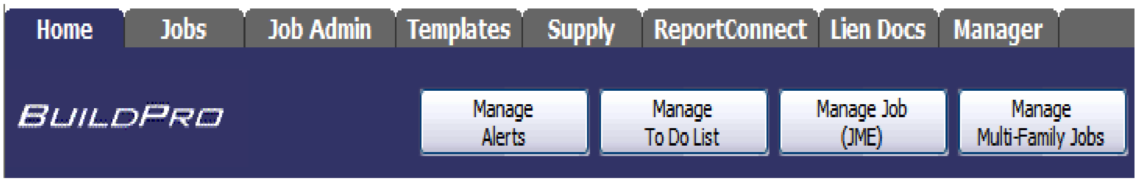


FIGURE 1. Supply tab

2. Click the **Add a New Supplier** link under the Supplier Management section. The Add a New Supplier page opens.


FIGURE 2. Click the Add a New Supplier link

3. Enter the supplier's information in the **New Supplier Information** section.

FIGURE 3. Add a New Supplier - New Supplier Information

4. Enter the supplier's contact information in the **Primary Location** section.

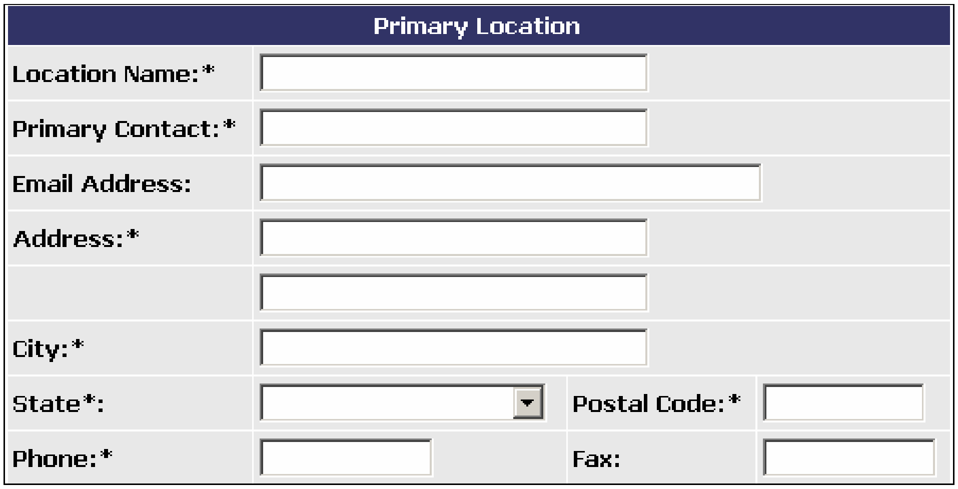


FIGURE 4. Add a New Supplier - Primary Location

5. Enter the supplier's relationship information in the **Primary Relationship** section.

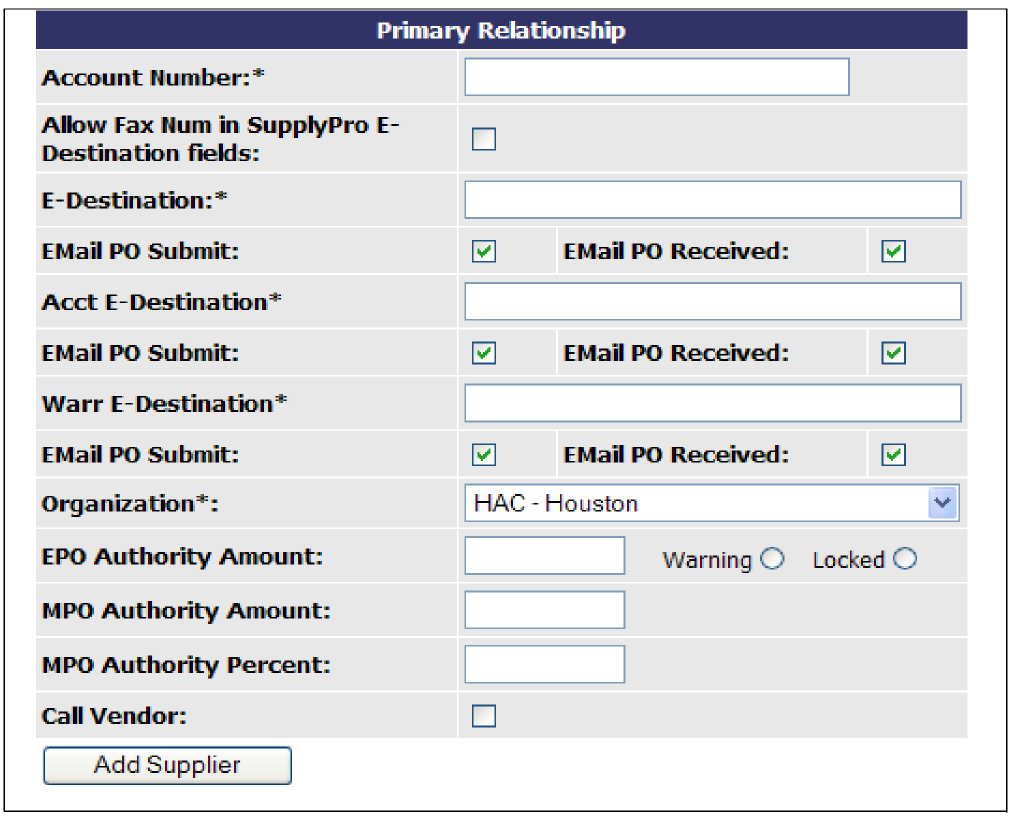


FIGURE 5. Add a New Supplier - Primary Relationship

6. Click the **Add Supplier** button at the bottom of the page.

## Add a New Supplier Form Fields

### New Supplier Information

- **Supplier Name** - Type the name the supplier does business as.
- **Cancel Days** - The minimum number of days before the ship date that this supplier will allow you to cancel your orders.
- **Back Order Capability** - Select the appropriate box for how this supplier can handle back orders.
- **Complete Only** - Tells the supplier to wait to ship everything in the order after until he or she has all the materials.
- **Ship and Backorder** - Tells the supplier to ship everything he or she has for the order and backorder the rest.
- **Ship and Cancel** - Tells the supplier to ship what he or she has of the order and cancels anything not in stock.
- **Preferred Backorder selection** - Select the appropriate box for the supplier's standard method of handling back orders.
- **Notes** - Type any special circumstances about this supplier you want to have on record.

### Primary Location

- **Location Name** - For example, “Main,” “HQ,” or “South.”
- **Primary Contact** - The name of the primary order contact.
- **Email Address** - The email address of the primary order contact.
- **Address** - Fields with asterisk are required.

### Primary Relationship

- **Account Number** - Type the supplier's account number with your company.
- **Allow Fax Num in SupplyPro E-Destination Fields** - Restrict a supplier from entering a fax number in the SupplyPro e-destination fields. The SupplyPro user must enter an email address in the e-destination instead. When the check box is **unchecked**, the supplier will not be able to receive faxes from this builder account.
- **E-Destination** - Type the supplier's email address. Separate multiple addresses or fax numbers with a semicolon. If the supplier does not have an email address, type their fax number in this format: **1areacodefaxnumber@ faxmail.com**. For example, 12125551212@faxmail.com.
- **Email PO submit** - If checked, POs will be emailed to the E-destination when they are submitted in BuildPro.
- **Email PO received** - If checked, a completion notice will be emailed to the supplier when the order is marked complete in BuildPro.
- **Accounting & Warranty E-destination** - BuildPro will also email to additional e-destinations. Type the e-destinations for additional contacts in the Acct and Warr E-Destinations fields. These contacts do not necessarily have to be in the specified departments. The email will go to the address regardless of which department the person is in.


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- **Organization** - Select your division from the Organization drop-down menu.
- **EPO Authority Amt** - Type the maximum amount that EPOs can be approved for this supplier.
- **MPO Authority Amt** - Type the maximum amount that MPOs can be approved for this supplier.
- **MPO Authority Percent** - Type the maximum percentage that MPOs can be approved for this supplier.
- **Call Vendor** - If checked, "Call Vendor" will appear on the job schedule to alert Construction Managers to call the vendor for changes. This is used for suppliers that do not have email or fax capability. It is a reminder for the BuildPro user that this supplier must be called.

## Update Supplier Information

Non-integrated users will need to update supplier information in BuildPro as it changes. For example, if a supplier updated their phone number or email address, you would take the following steps.

Some integrated users may need to update supplier information in BuildPro on an ongoing basis after the initial list is loaded into BuildPro. Consult with your Hyphen contact for more details.

**To update supplier information:**

1. Click the **Supply** tab.

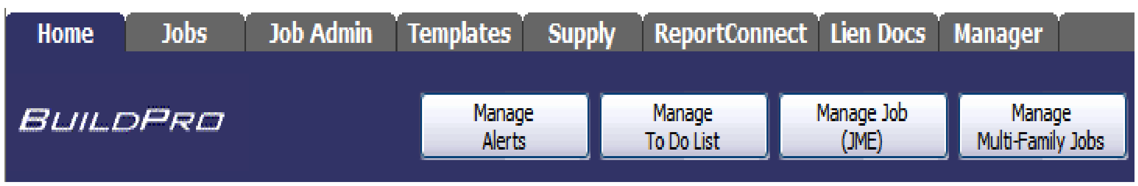



FIGURE 6. Supply tab

2. Click the **Supplier List** link under Supplier Management. The Supplier List page opens with blank filters.

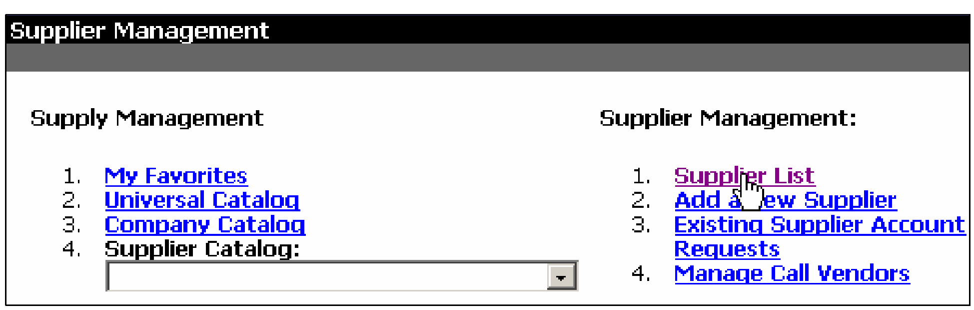



FIGURE 7. Supplier Management page

3. Enter the first few letters or all of the supplier's name in the **Supplier Name** field.
**Note:** Or, to see all suppliers, do not type anything in the Supplier Name field and click Search.

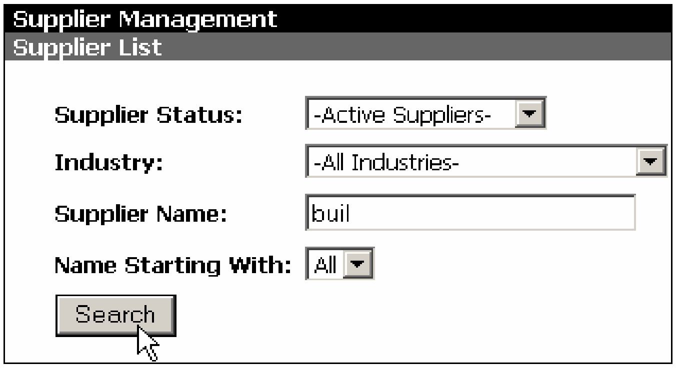
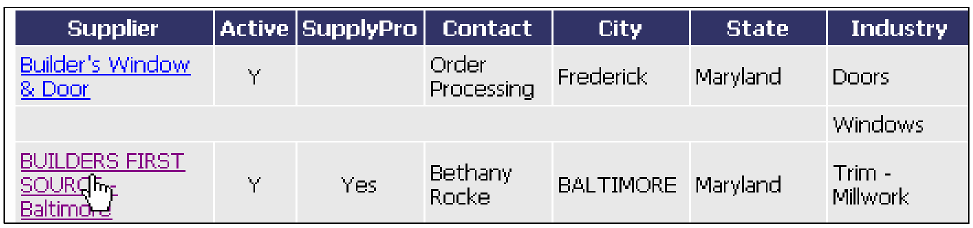



FIGURE 8. Select from the filters

4. Click the **Search** button. The Supplier List page opens.



| Supplier | Active | SupplyPro | Contact | City | State | Industry |
|---|---|---|---|---|---|---|
| Builder's Window & Door | Y | | Order Processing | Frederick | Maryland | Doors |
| | | | | | | Windows |
| BUILDERS FIRST SOURCE - Baltimore | Y | Yes | Bethany Rocke | BALTIMORE | Maryland | Trim - Millwork |

FIGURE 9. Supplier List results

5. Click the **Supplier Name link** of the supplier you want to update. The Supplier Summary page opens.
6. If the supplier is on SupplyPro, the only information you can change here is under the **Supplier Detail** section. If the supplier is not on SupplyPro, you can edit the other information.
7. Click the **TBD Supplier** check box to mark or unmark the supplier as a TBD supplier.
8. Click the **Active** check box to activate or inactivate the supplier.
9. Click the **Update Supplier** button at the bottom of the page.

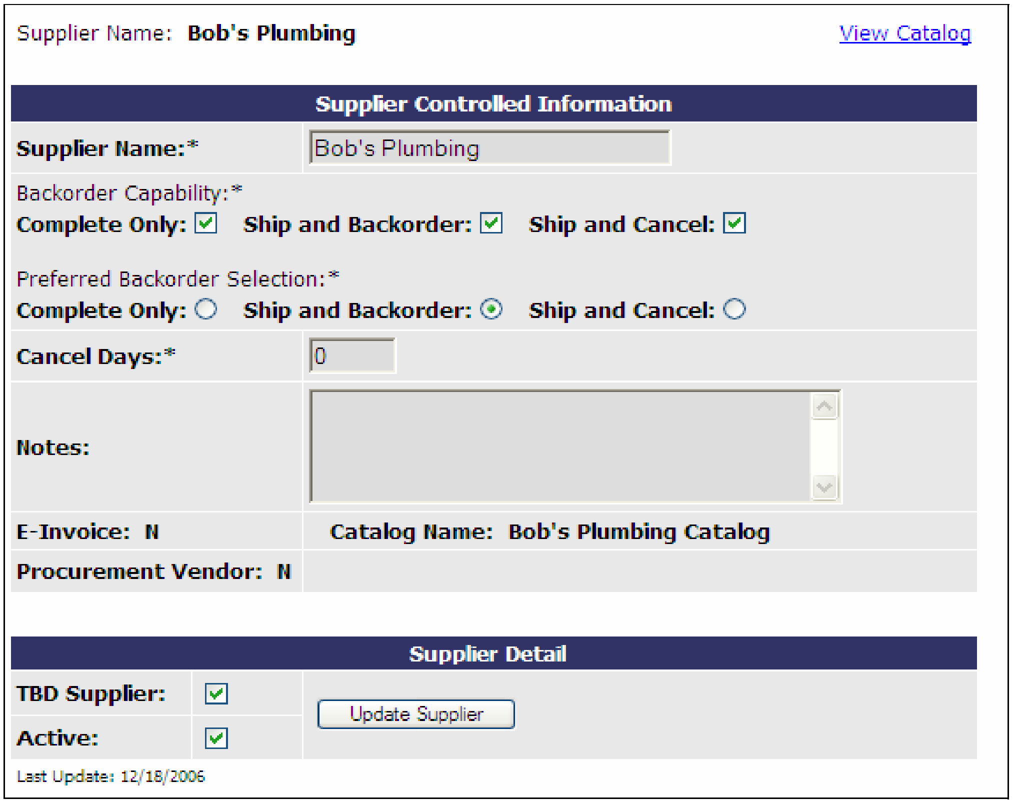



FIGURE 10. Supplier Summary page

## Update the Supplier's Location

**To update the supplier's location:**

1. On the Supplier Summary page, click the location you want to update in the **Location** column. The Supplier Location Detail page opens.

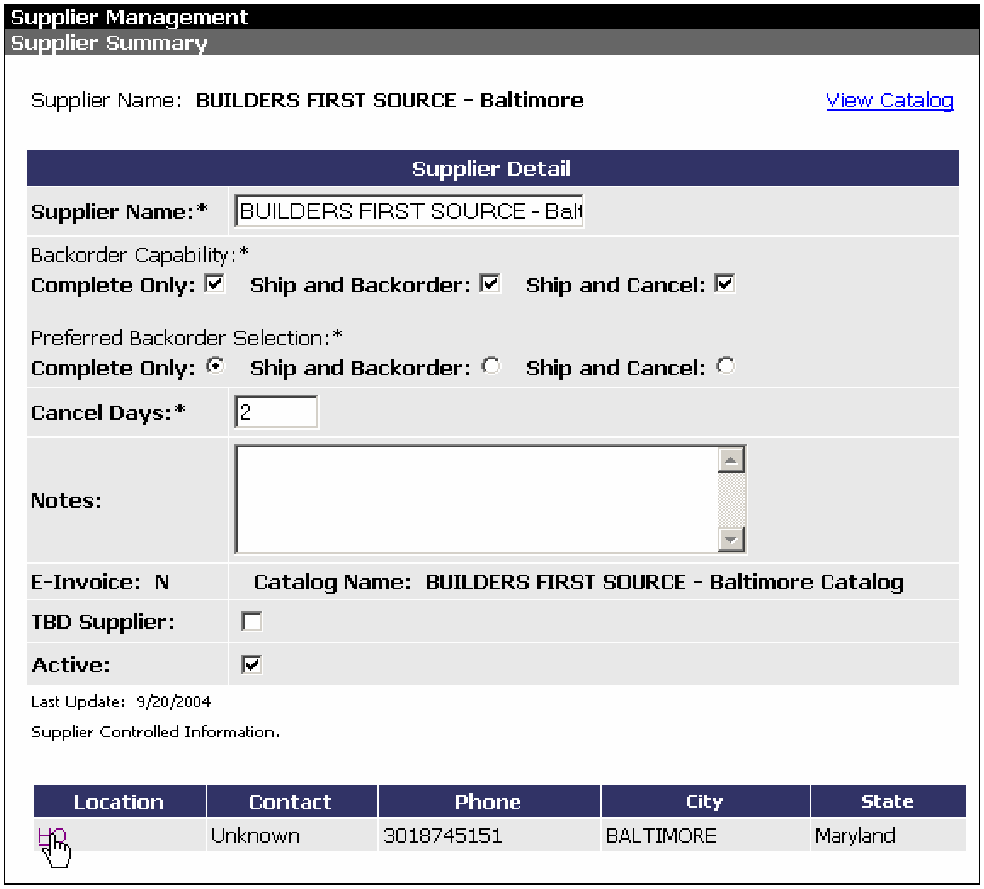



FIGURE 11. Supplier Summary page

2. Enter the supplier's updated information.

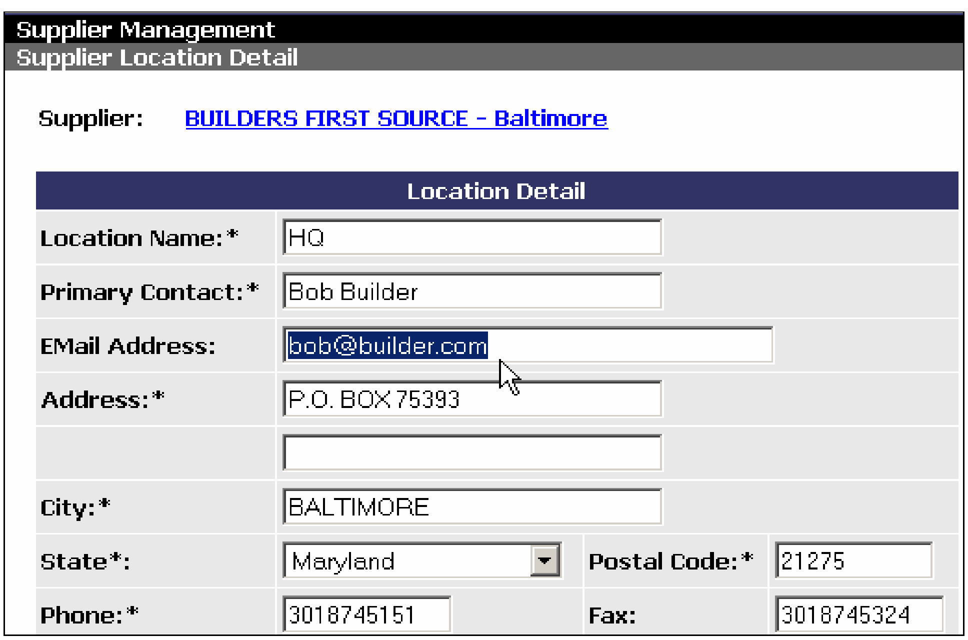



FIGURE 12. Supplier Location Detail page



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3. Click the **Update Supplier Location** button. BuildPro confirms the supplier information has been updated.

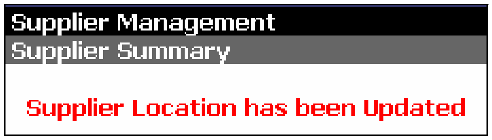



FIGURE 13. BuildPro confirms supplier location has been updated

## Update the Supplier E-Destination

The E-Destination field is used to transmit order information to a specific supplier. The E-destination field can contain an email address (or addresses) or a fax number. An email address is usually better because it's a much faster way to communicate with the supplier.

Updating supplier E-destinations (whether it is done manually or via the ERP System) is a critical task in BuildPro. If E-destinations are not updated, suppliers will not receive orders or communication from BuildPro users. If the supplier is using SupplyPro, he or she must update the information in SupplyPro.

The following information should be updated from suppliers and put into BuildPro:

- Supplier Contact name
- Supplier Account Number (if applicable)
- E-destination (the email address to which orders should go)

**To update a supplier's E-Destination:**

1. Click the **Supply** tab.


FIGURE 14. Supply tab

2. Click the **Supplier List** link under Supplier Management. The Supplier List page opens with blank filters.

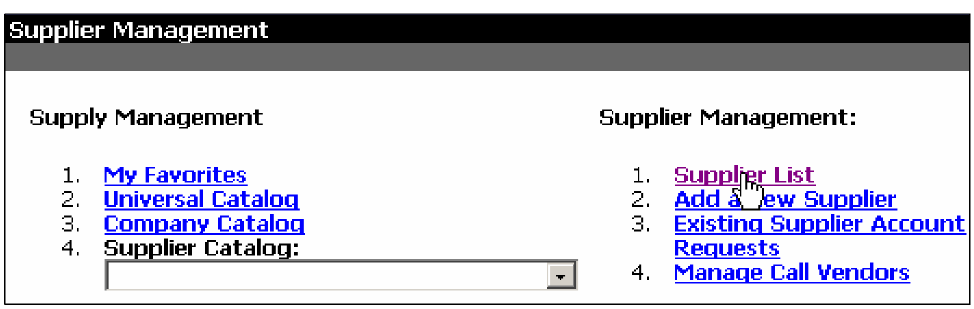



FIGURE 15. Supplier Management page

3. Enter the first few letters or all of the supplier's name in the **Supplier Name** field.
**Note:** To see all suppliers leave the Supplier Name field blank and click Search.

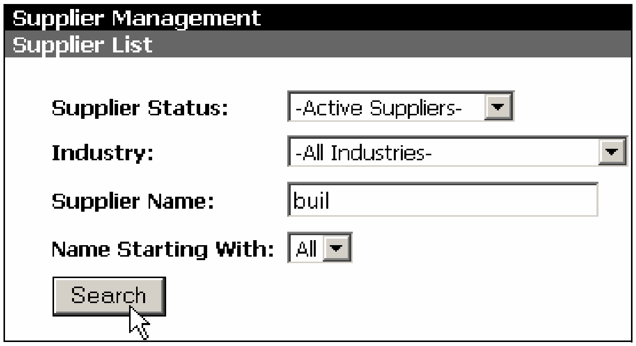
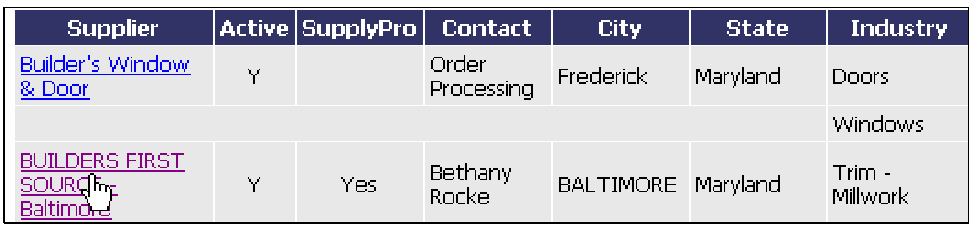



FIGURE 16. Select from the filters

4. Click the **Search** button. The Supplier List page opens.



| Supplier | Active | SupplyPro | Contact | City | State | Industry |
|---|---|---|---|---|---|---|
| Builder's Window & Door | Y | | Order Processing | Frederick | Maryland | Doors |
| | | | | | | Windows |
| BUILDERS FIRST SOURCE - Baltimore | Y | Yes | Bethany Rocke | BALTIMORE | Maryland | Trim - Millwork |

FIGURE 17. Supplier List results

5. Click the **Supplier Name link** of the supplier you want to update. The Supplier Summary page opens.

6. Click the **Organization** link that corresponds to your supplier. The Organization/Supplier Relationship page opens.

| Organization | Account Number | E-Destination | Alt Supplier ID | Pricesheet |
|---|---|---|---|---|
| Baltimore Division | 00116-1051897 | Troach@masterbrandcabinets.com | 1051897 | Default |

- Add Organizational Accounts to Supplier

FIGURE 18. Supplier Summary page

7. Enter or change the supplier's **E-Destination**.

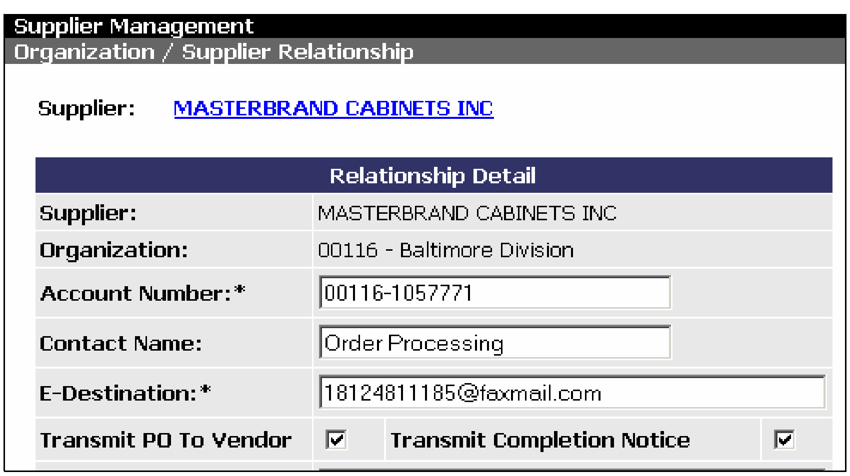



FIGURE 19. Organization/Supplier Relationship page

8. Click the **Update Relationship** button at the bottom of the page. BuildPro confirms that the supplier has been updated.

## Create TBD Suppliers

TBD Supplier means "To Be Determined Supplier." The TBD functionality was designed to give homebuilders the ability to select suppliers in cases where the supplier has not been selected prior to the start of a job. TBD is a placeholder supplier used until you choose the correct supplier. TBD tasks cannot be started until they have a supplier selected for the task.

**To create a TBD supplier:**

1. Click the **Supply** tab.

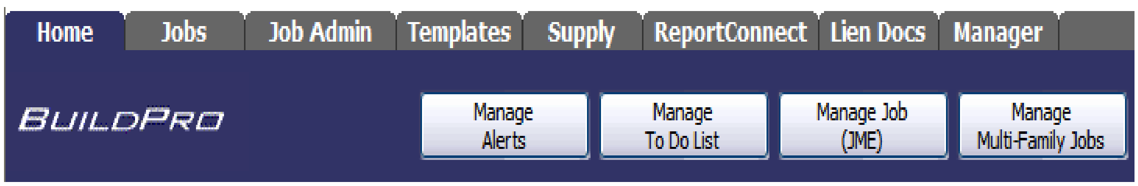



FIGURE 20. Supply tab

2. Click the **Add a New Supplier** link under Supplier Management. The Add a New Supplier page opens.

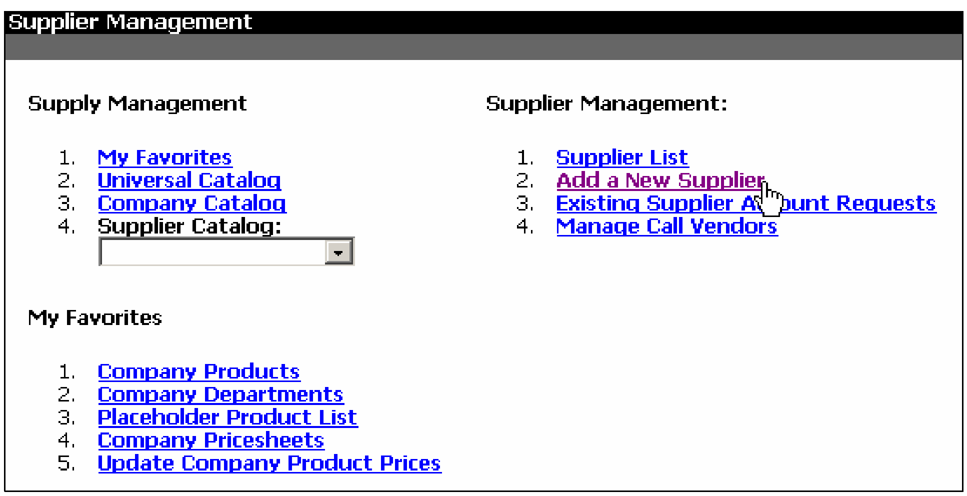



FIGURE 21. Supplier Management page

3. Enter generic **TBD** information in all the required (*) fields.

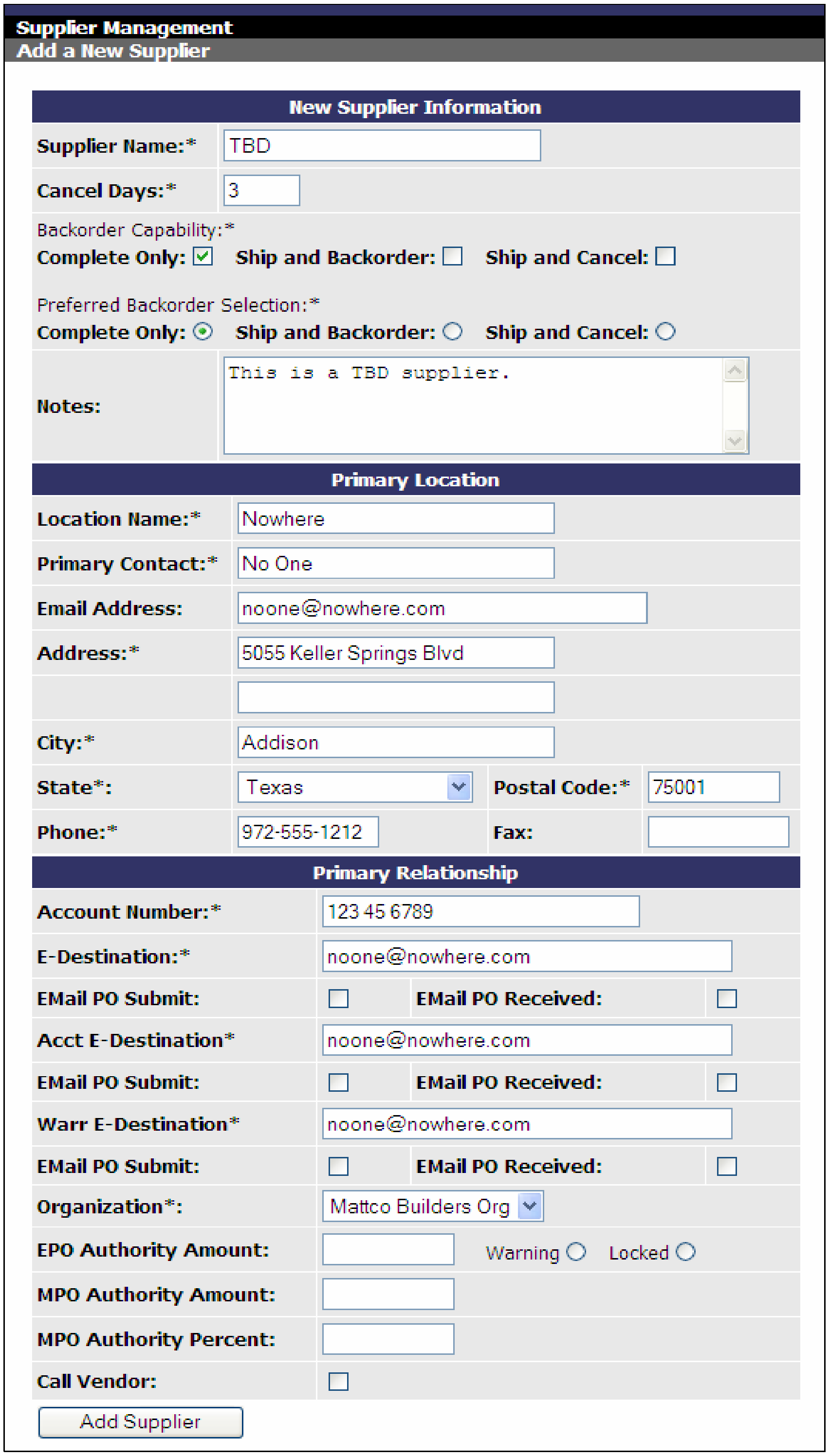



FIGURE 22. Add a New Supplier page

4. Clear all of the **Email PO Submit:** and **Email PO Received:** check boxes.

5. Click the **Add Supplier** button. The Supplier Summary page opens for the new TBD supplier.



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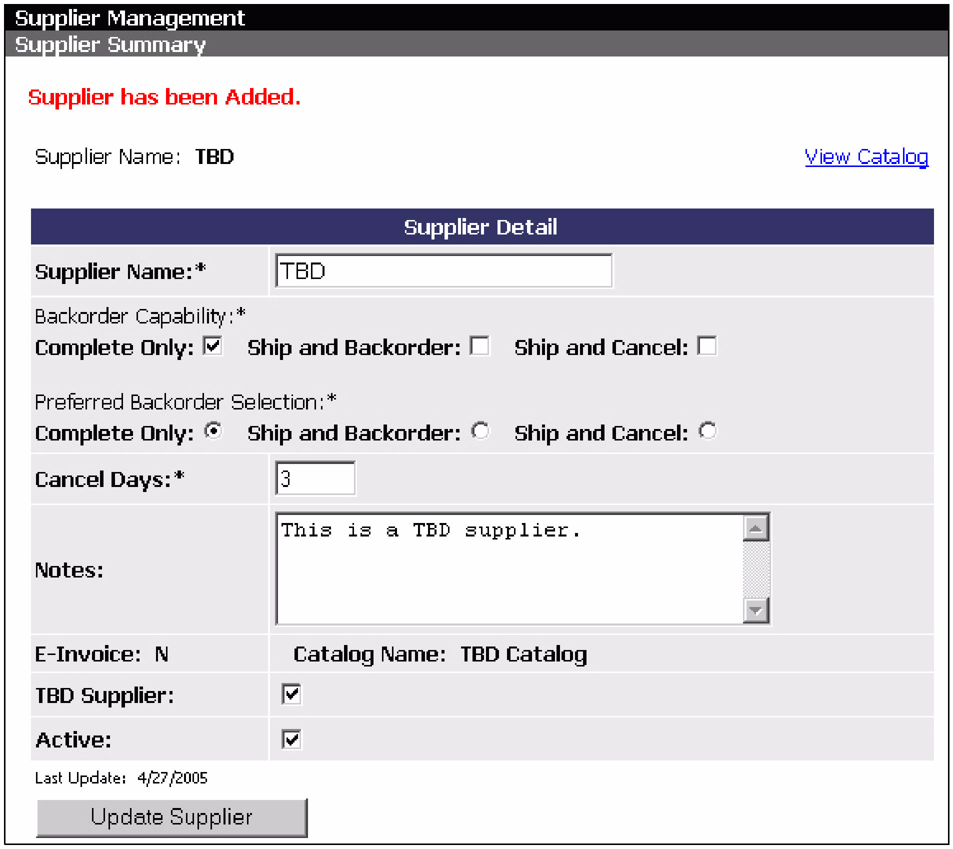



FIGURE 23. TBD Supplier Detail page

6. Click the **TBD Supplier** check box in the **Supplier Detail** section.
7. Click the **Update Supplier** button. BuildPro confirms the Supplier has been updated.

# 6 Managing Templates

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Building templates in BuildPro
- Testing templates in BuildPro
- Troubleshooting templates in BuildPro

## Managing Templates Overview

BuildPro uses templates to store different types of construction schedules. Templates can be created to reflect construction schedules for a particular plan or model, for a particular community or division, or for different building processes. You can have as many templates as you want; however the more templates you have means the more you must manage.

Job schedules are created from the schedule information within a template. Templates are independent of each other. They are not linked to each other.

Once a template or job is created, information added or changed in the original template does not update the job created from the template. If a mistake or omission is discovered in a template, you may use the Apply Template Changes functionality in BuildPro. See the Apply Template Changes to Jobs section of this chapter.

The **Template Management** page lets you add, change and view construction schedule templates. You can have as many schedule templates as you want.

## View Templates

In order to manage your templates after they are originally created, you will need to be able to view and modify them.

**To view templates:**

1. Click the **Templates** tab. The organization templates are listed.

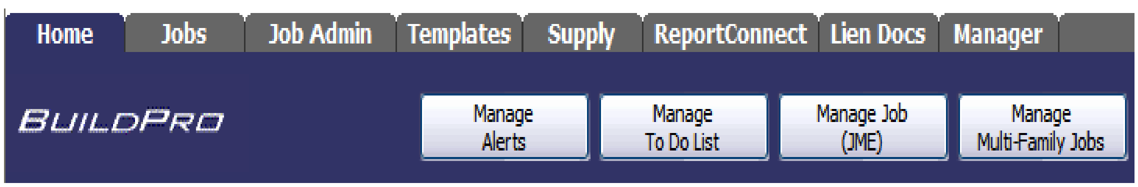
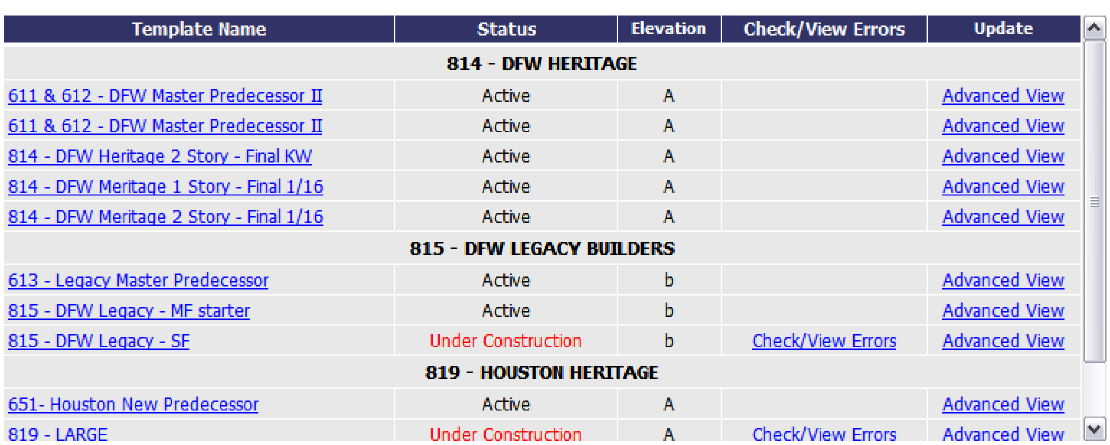



FIGURE 1. Templates tab

2. Click the **Template Name** link of the template you want to view. The Template Actions page opens.



| Template Name | Status | Elevation | Check/View Errors | Update |
|---|---|---|---|---|
| 814 - DFW HERITAGE | | | | |
| 611 & 612 - DFW Master Predecessor II | Active | A | | Advanced View |
| 611 & 612 - DFW Master Predecessor II | Active | A | | Advanced View |
| 814 - DFW Heritage 2 Story - Final KW | Active | A | | Advanced View |
| 814 - DFW Meritage 1 Story - Final 1/16 | Active | A | | Advanced View |
| 814 - DFW Meritage 2 Story - Final 1/16 | Active | A | | Advanced View |
| 815 - DFW LEGACY BUILDERS | | | | |
| 613 - Legacy Master Predecessor | Active | b | | Advanced View |
| 815 - DFW Legacy - MF starter | Active | b | | Advanced View |
| 815 - DFW Legacy - SF | Under Construction | b | Check/View Errors | Advanced View |
| 819 - HOUSTON HERITAGE | | | | |
| 651- Houston New Predecessor | Active | A | | Advanced View |
| 819 - LARGE | Under Construction | A | Check/View Errors | Advanced View |

FIGURE 2. Template List

3. Click the **Schedule Management** link from the Schedule Management section. The Schedule Management: Stage View page opens.

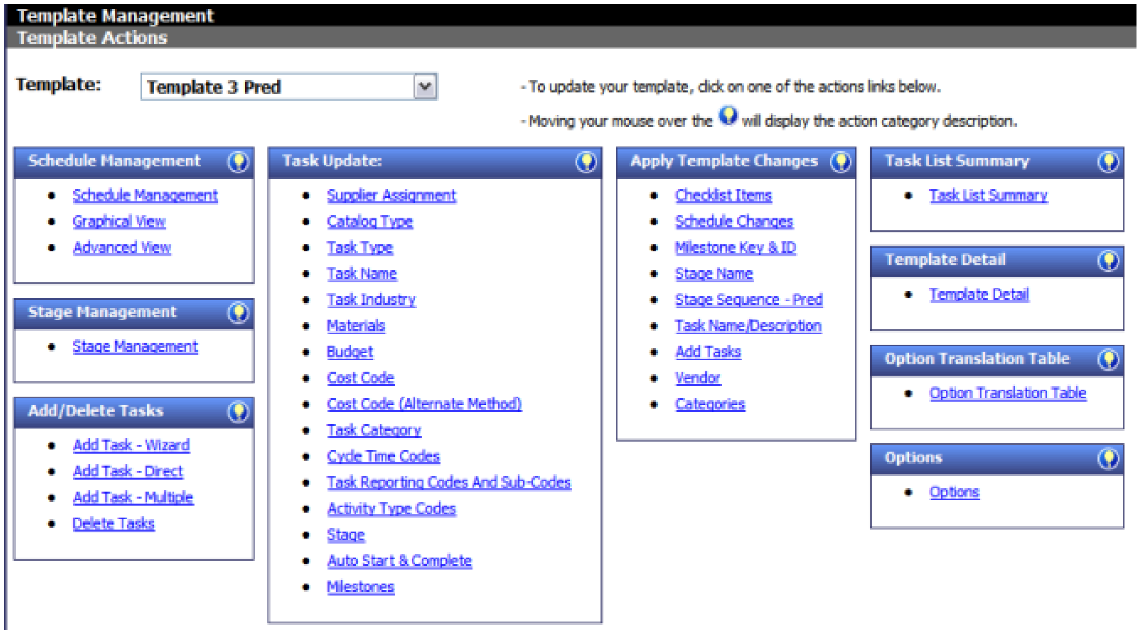



FIGURE 3. Template Actions page.

4. Click on a **Stage Name** link to view all the tasks in that stage.

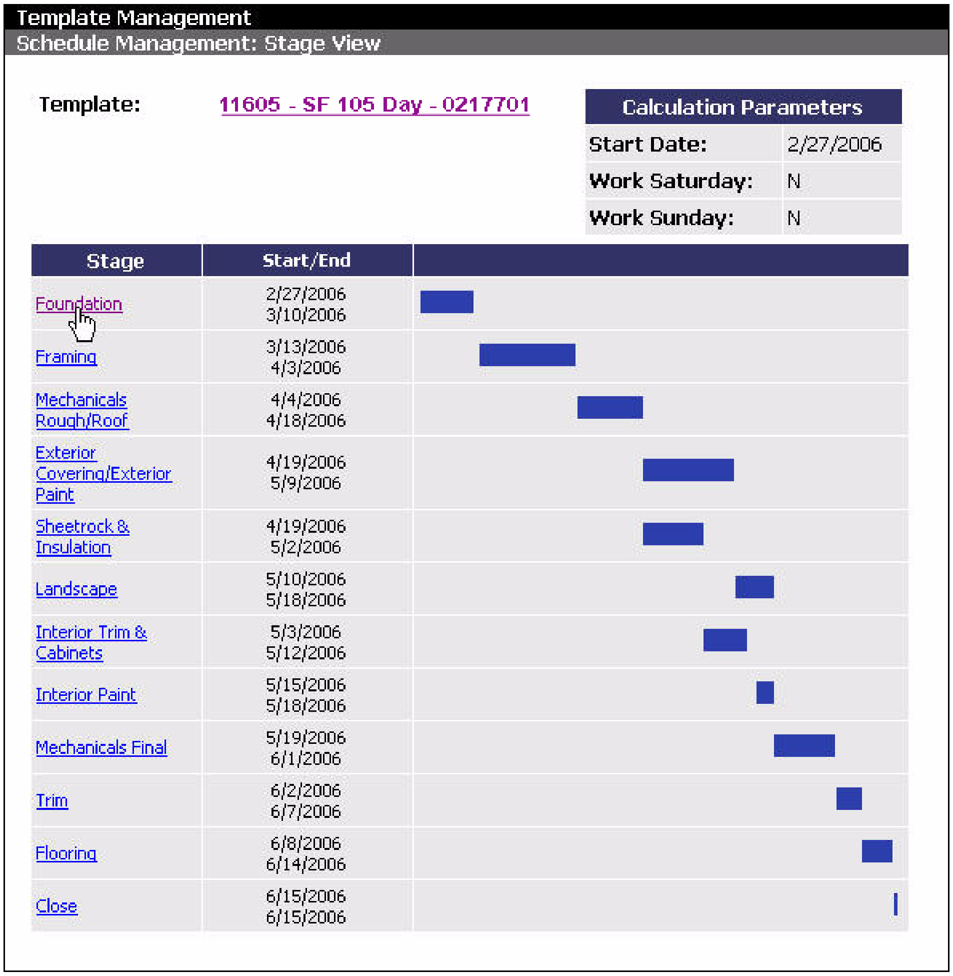



FIGURE 4. Schedule Management - Stage View

5. Click the **Switch to: Advanced View** link to see all details for this template.

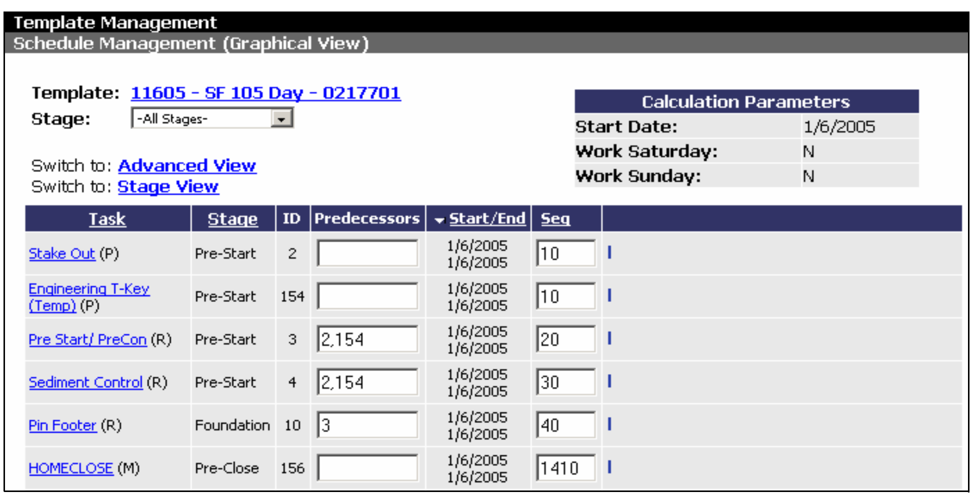



FIGURE 5. Schedule Management - Graphical View

**Note:** In the Advanced View, you can see and change template components such as task predecessors, sequence, lead time, duration, and offset.

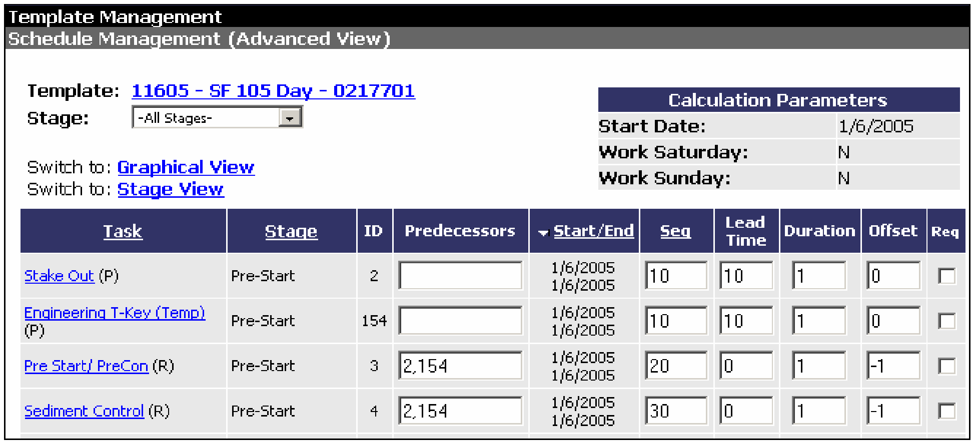



FIGURE 6. Schedule Management - Advanced View

## Template Calendar View

The Template Calendar View allows users to print out a copy of a template displaying the tasks as they would fall on a calendar according to the logic in the template. This allows for better visualization of the template and allow for easier edits during template building. This tool can be used both in template creation and in template reviews.

The calendar is laid out in a seven days per week format, showing all days for a single month at a time. Tasks are listed in cells underneath the appropriate date according to the start date and logic built into the template. Tasks are listed within a cell in order by task sequence number. Users can view the **Previous** and **Next** months by clicking the **<< back** or **forward >>** arrows next to the month name. The user can print the template calendar, but only the current view will print. To print the entire template calendar, the user must print each successive month that displays the template tasks.

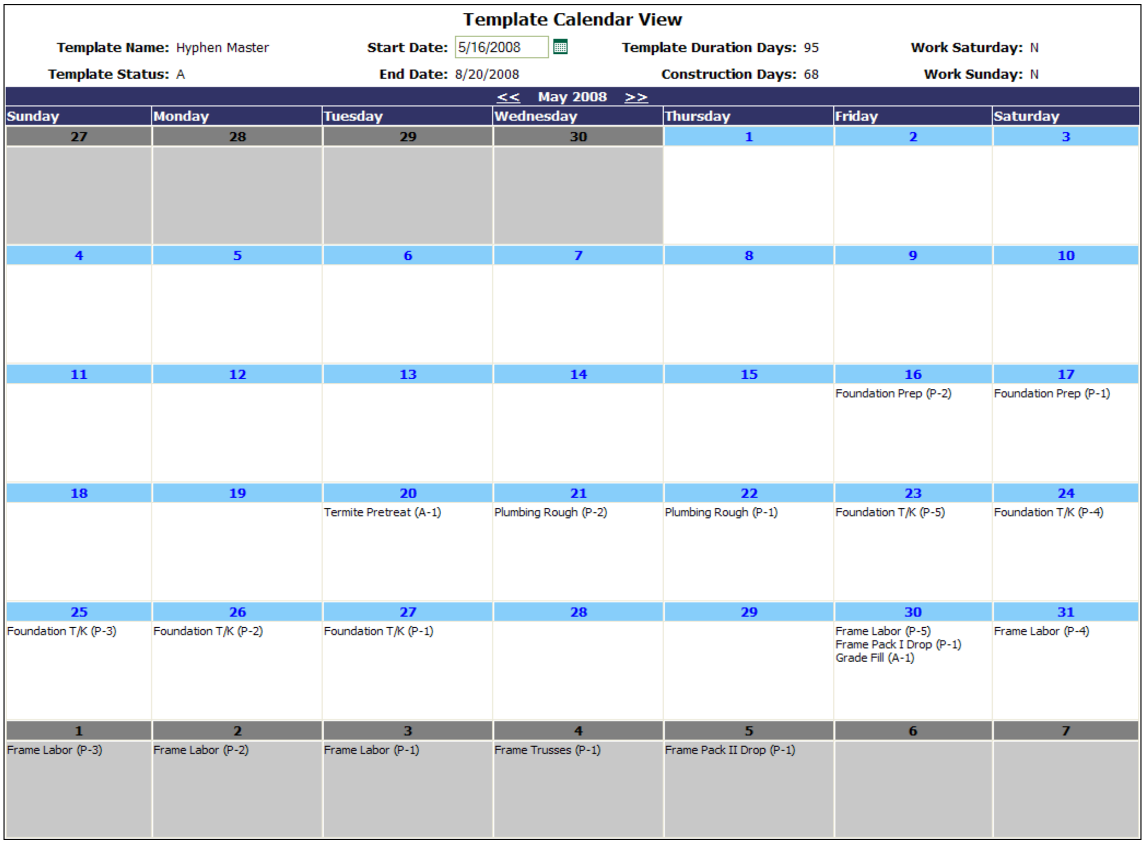



FIGURE 7. Template Calendar View

**To access the Template Calendar View:**

1. Click on the **Templates** tab.
2. Click on a **Template Name** link. The Template Actins page opens.
3. Click on the **Template Calendar** link on the Left Nav Bar. The Template Calendar View opens in a new window.
4. To view the template starting on a new date, click the calendar icon next to the **Start Date** field. The calendar pop-up window opens.
5. Click on a **Date** to select it. The template calendar adjusts to the new date.
   **Note:** Manually enter a date by typing in the date and pressing the **Enter** key.

## Create New Templates

BuildPro uses templates to store different types of construction schedules. Templates are created to reflect construction schedules for a particular plan or model, for a particular community or division, or for different building processes. You can have as many templates as you want. The initial templates are created by Hyphen in Prep. Additional templates can be created by copying an existing template.

The following information is maintained for templates:



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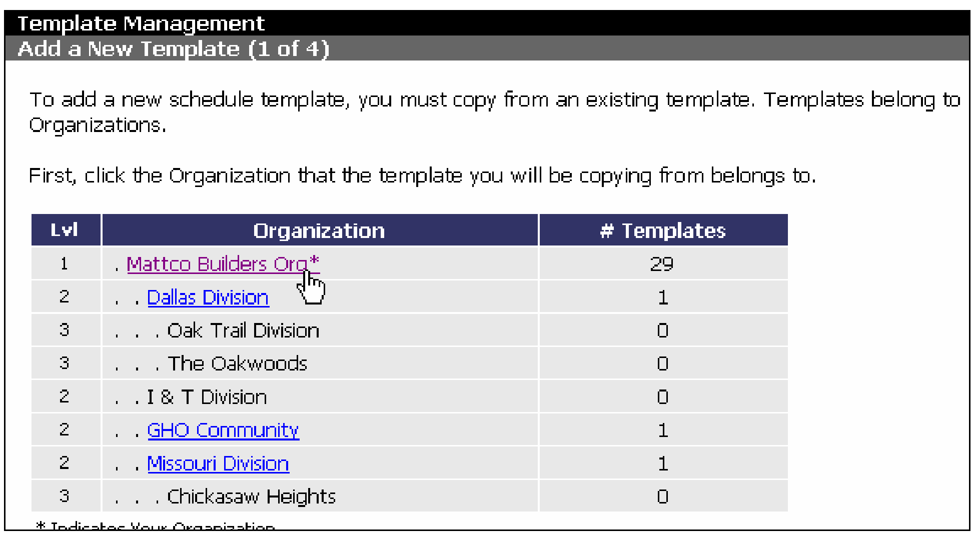
- Assignment of account or cost codes to individual tasks
- Assignment of schedule-related data to individual tasks (duration, lead time, critical path dependencies)
- Assignment of labor and/or materials to individual tasks
- Assignment of budgets to individual tasks
- Categorized tasks by task type, which controls what system functions are available for the task. Ex. Task types include Purchase Order, Work Order, Contract, etc.

**To create a template:**

1. Click the **Templates** tab.
2. Click the **Add a New Template** link on the Left Nav.


FIGURE 8. Add a New Template link

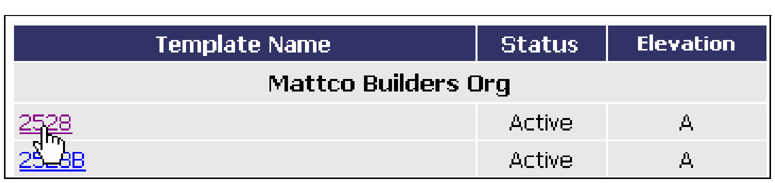
3. Click the **Organization Name** link which contains the template you want to copy. The list of templates in that organization appears.




| Lvl | Organization | # Templates |
|---|---|---|
| 1 | . Mattco Builders Org* | 29 |
| 2 | . . Dallas Division | 1 |
| 3 | . . . Oak Trail Division | 0 |
| 3 | . . . The Oakwoods | 0 |
| 2 | . . I & T Division | 0 |
| 2 | . . GHO Community | 1 |
| 2 | . . Missouri Division | 1 |
| 3 | . . . Chickasaw Heights | 0 |

FIGURE 9. Add a New Template (1 of 4)

4. Click the **Template Name** link you want to copy. The template opens in Stage View.



| Template Name | Status | Elevation |
|---|---|---|
| Mattco Builders Org | | |
| 2528 | Active | A |
| 25?8B | Active | A |

FIGURE 10. Template List

5. Click the **Next** button at the bottom of the page.

6. Enter the **New Template Information**.
   **Note:** Fields with an asterisk * are required.

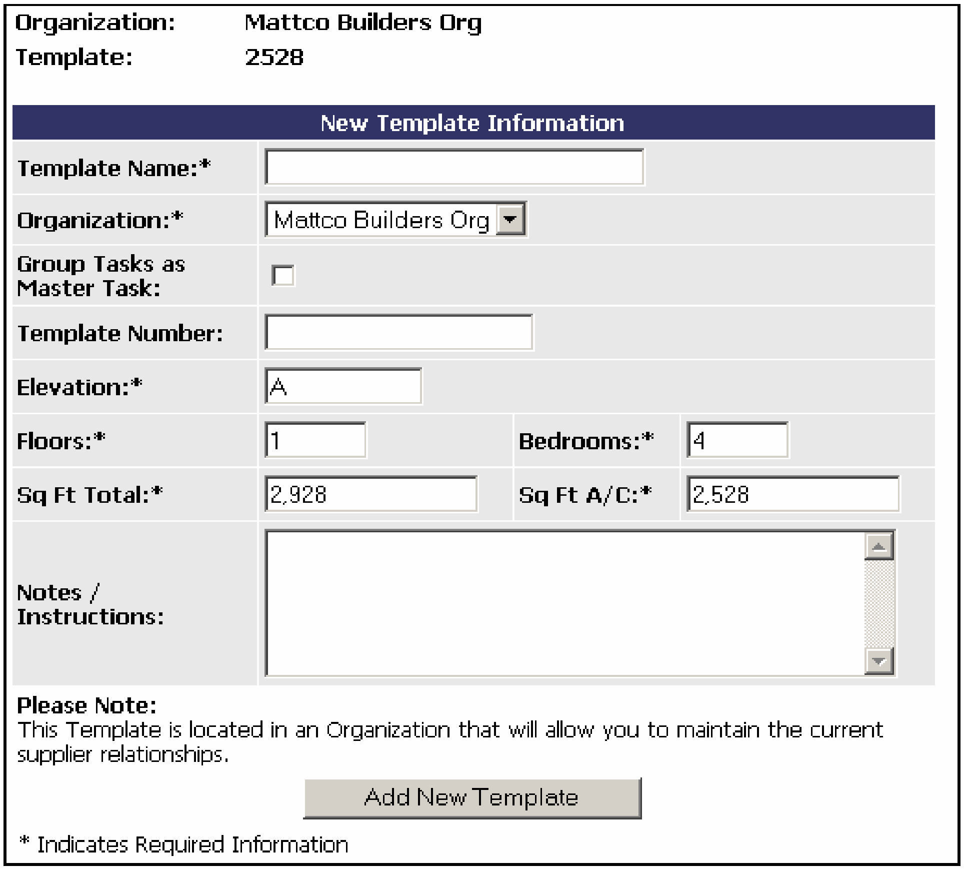



FIGURE 11. Add a New Template (4 of 4)

7. Click the **Add New Template** button. BuildPro confirms the new template has been added.

Once the new template has been added, BuildPro goes back to the Template Actions page. From this page, you can access the Template Task page, where you can update the task schedule, detail, and items.

**To update the Template tasks:**

1. Go to the **Template Actions** page.
2. Use any of the links in the **Task Update** section to modify tasks in the newly created template. For example, to change suppliers or trades, click the **Supplier Assignment** link.
3. Use the links in the **Schedule Management** section to modify scheduling attributes for each task (lead times, durations, predecessors, etc).
4. Click the **Template Detail** link in the **Template Detail** section to change details regarding the template (template name, number, task category groups, etc).

**Note:** After making any changes to a template, you can quickly navigate back to the **Template Actions** page by clicking the template name at the top of the page.

## Link Reminders and Memos to POs

This functionality gives users the ability to associate a Memo or a Reminder task to a PO task within the same template. Therefore if a PO task is placed into the job, the associated Memo or Reminder will also be placed in the job based on the current scheduling rules of BuildPro. If the PO task is not placed in the job because there is not a back-office purchase order, then the associated Memo or Reminder task is not placed in the schedule. This applies only to Memos or Reminders that have been linked to PO tasks. All other Memos and Reminders will be added to the job when the job is created.

For Memo tasks, users can choose the same supplier as the supplier on the associated PO task when the job is created. Copying a template will copy over the linked relationships to the new template. Only integrated companies can use this functionality.

**To link reminders and memos to POs:**

1. Click on the **Templates** tab.
2. Click on a **Template Name** link. The Template Actions page opens.
3. Click on the **Supplier Assignment/Link Reminder and Memos to POs** link. The Link Reminders and Memos to POs page opens.

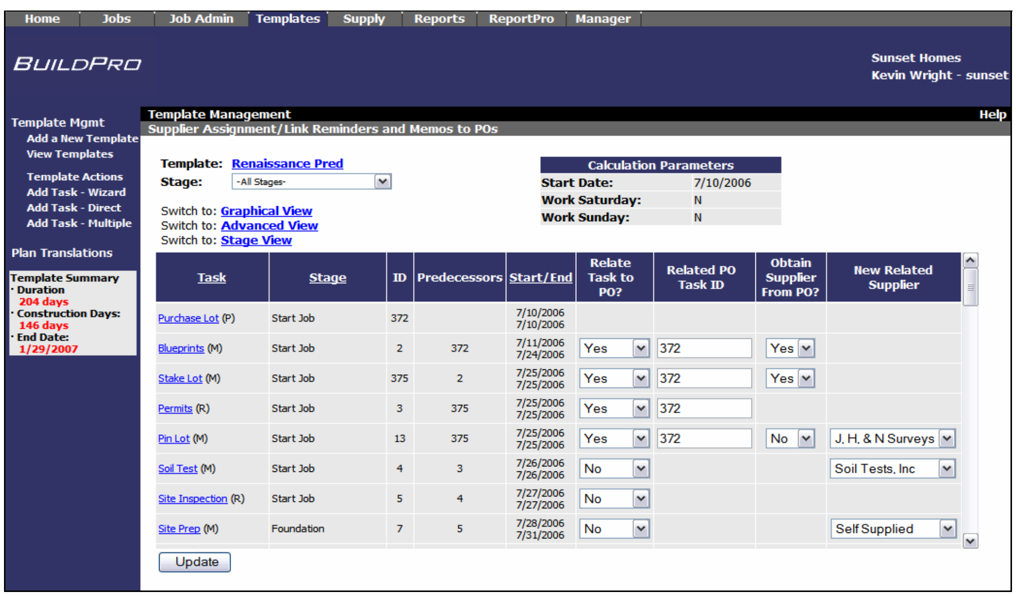



FIGURE 12. Link Reminders and Memos to POs page

4. Next to each task, choose **Yes** or **No** from the **Related Task to PO?** box.
5. If you choose **Yes**, a free-form text field appears in the **Related PO Task ID** column. Enter a number in the **Related PO Task ID** field for each task.

6. If the task is a memo, you have the option to choose the same supplier for the memo as the PO. Choose **Yes** or **No** from the **Obtain Supplier From PO?** box.
7. If you choose **No**, a drop-down list appears in the **New Related Supplier** column. Choose a supplier from the **New Related Supplier** drop-down list.
8. Click the **Update** button. BuildPro confirms that you have linked the reminder or memo to a PO.

## Template Edit Check

The template edit check checks for certain criteria when template pages are updated. Edit checks are performed only on the pages where one of the edit check conditions apply. For example, an edit check for duplicate cost codes will not be performed on the Update Task Name page where only the task name can be updated.

The template edit check looks for four different errors when a template update is made in BuildPro:

- **Multiple Root Tasks** - The template has more than one task without a predecessor. There must be only one task in the template without a predecessor. (Predecessor schedule only)
- **PO Tasks without Self-Supplied Supplier** - There are PO type tasks in the template that are set to a real supplier instead of being set to self-supplied. (Integrated companies only; predecessor and stage/rank schedules)
- **Duplicate Cost Codes** - Two tasks that have the same cost code associated to both. There must only be one cost code assigned to a task in each template. Does not check for duplicate '0 - Root' cost codes; these are usually assigned to Memos and Reminders. (Integrated companies only; predecessor and stage/rank schedules).
- **Loop in the Schedule** - A task's child is also a parent or parent to an earlier task in the schedule. (Predecessor schedule only)

### Template Management Page

The Template Management page displays the **Under Construction** status if one of the edit check errors has been found. Clicking the Check/View Errors link will run the associated template through all edit checks and if errors are found, the Template Edit Check page will be displayed; giving the user a list of errors and suggested places the errors can be fixed. If no errors are found during the edit check, the Under Construction status is removed.

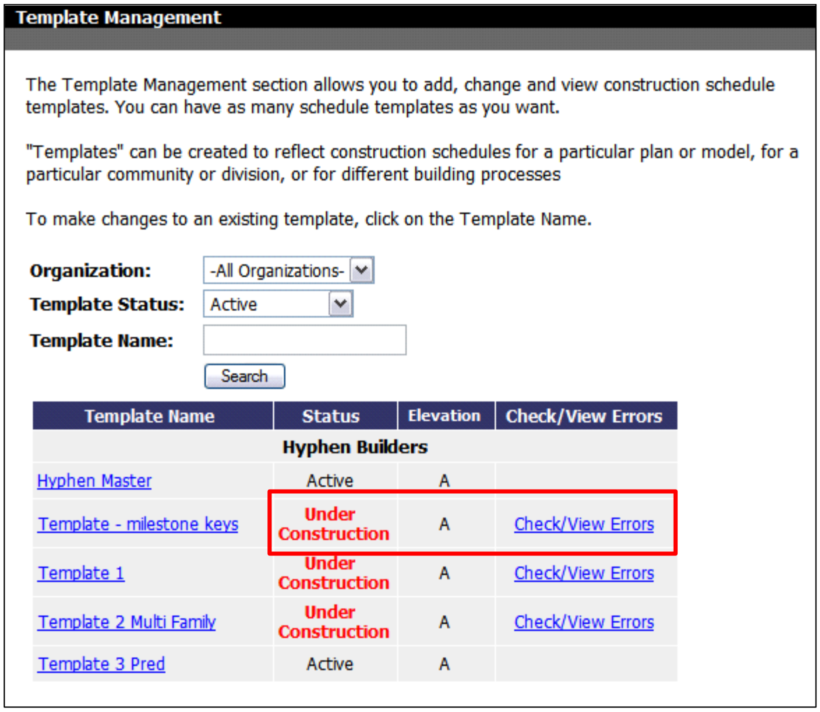



FIGURE 13. Template Management page

## Template Detail Page

When a user is going to make several changes to a template, he or she can change the template's status to Under Construction on the Template Detail page. While under construction, the template edit check is placed on hold until the user is ready to check for errors.

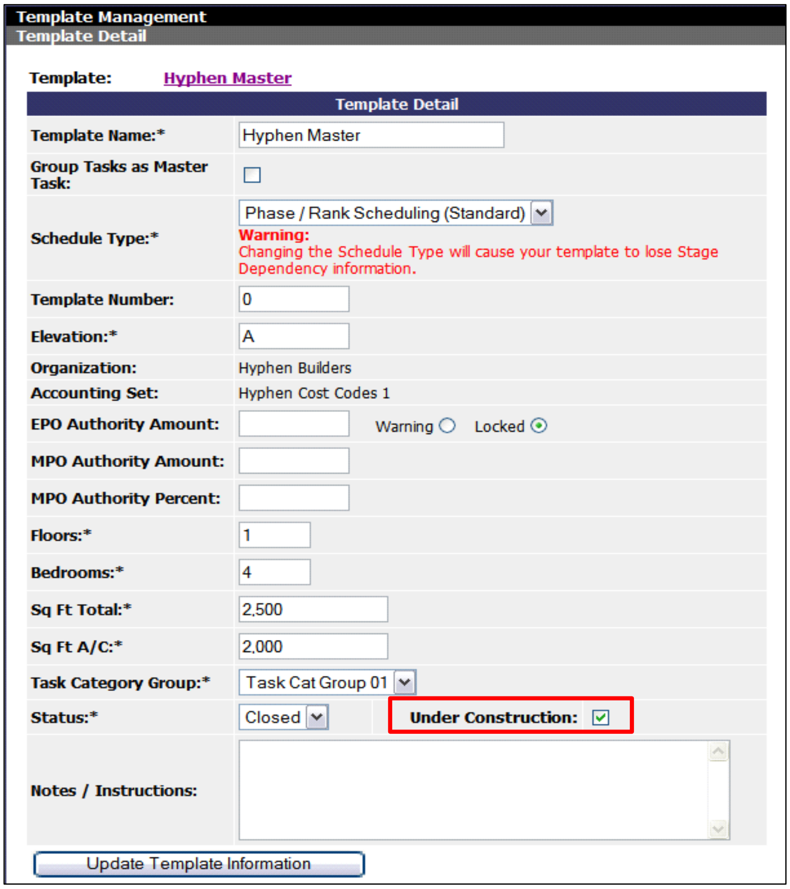



FIGURE 14. Template Detail page

## Template Edit Check Page

Any time a user updates a template update page and gets at least one error, the Template Edit Check page shows the errors. The user can view this page by clicking the Check/View Errors link on the Template Management page. The links on the Template Edit Check page allow the user to go to the appropriate page and correct the error.

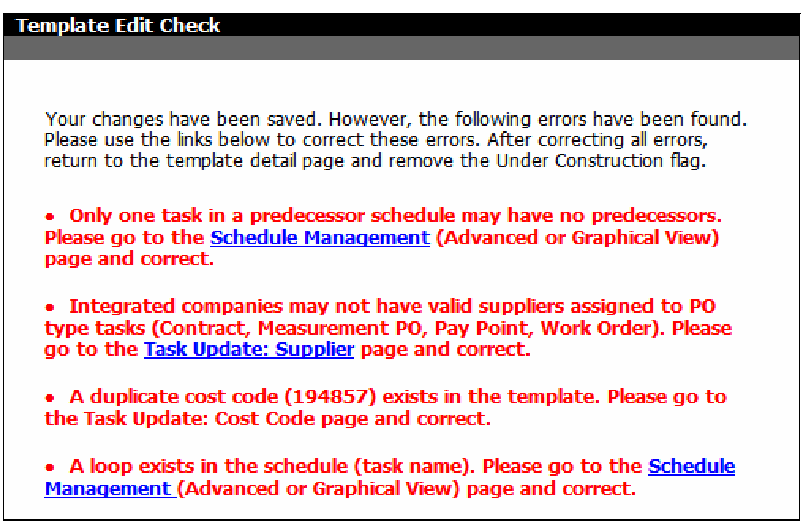



FIGURE 15. Template Edit Check page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## Template Actions

The Template Actions page displays links to the various functions you can perform on the current template, allowing you to manage or alter a schedule template. The selections you can see depend on your security role. This page is broken into sections of like actions to make it easier to find the action you need to perform.

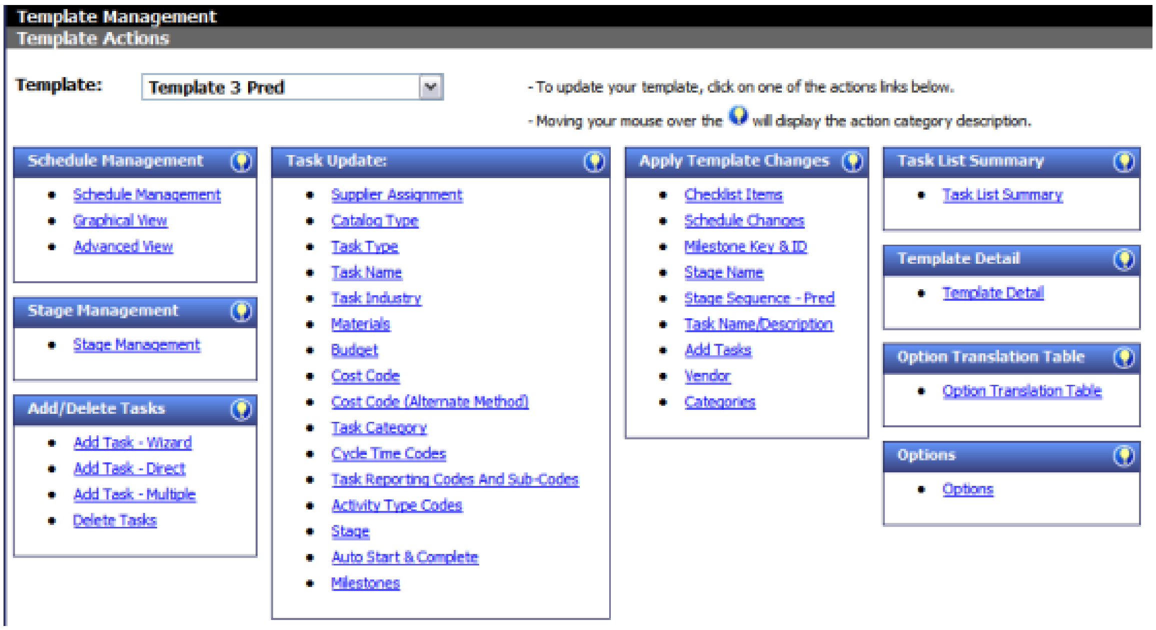


FIGURE 16. Template Actions page

### Template Action Page

The Template Actions page displays links to the various functions you can perform on the current template, allowing you to manage or alter a schedule template. The selections you can see depend on your security role.

- **Schedule Management** - Links to modify scheduling related information. Use these links when you need to modify lead times, durations, or predecessors for specific tasks.
- **Stage Management** - Use these links to modify the relationships between stages in each template. This page will look different depending on the template type (stage/rank or predecessor).
- **Add/Delete Tasks** - Use these links to add or delete tasks.
- **Task Update** - This section contains several options for updating multiple tasks across the entire template:
  - **Supplier Assignment** - Change the assigned supplier to each task.
  - **Catalog Type** - Change the catalog type for each task. There are 3 catalog types: Universal, Company and Supplier.
  - **Task Type** - Update the type of task. Task types include: Purchase Order, Work Order, Contract, Memo, Pay Point and Reminder.

**Note:** All task types function the same in BuildPro except the Memo and Reminder. A Memo task usually does not have PO information tied to it and can be used to communicate instructions to the supplier. A reminder task is not tied to a supplier and exists in the schedule to remind the construction manager to perform a certain task.

- **Task Name** - Update the name of the task.
- **Task Industry** - Update the industry used by a supplier of a task. The Industry Type is used for purchase or work orders.
- **Materials** - Add contract line items to multiple tasks. This action would typically be used in a stand-alone, turnkey or contract (non-PO) environment.
- **Budget** - Update the budget for multiple tasks at a time. The task budget can be set to an amount manually or can be set to equal the sum of all the line items associated with that task. Not normally used in integrated environments.
- **Cost Code** - Update the cost codes or accounting sets for multiple tasks.
- **Cost Code (Alternate Method)** - Update cost codes or accounting sets for multiple tasks.
- **Task Category** - Group similar tasks into categories.
- **Cycle Time Code** - Add or remove a cycle time code from a task. Ex. Add a start code and an end code, which flags the actual start and end date of construction so you can report on them.
- **Task Reporting Codes and Subcodes** - Add or remove a task reporting code from a task.
- **Activity Type Codes** - Add or remove an activity type code.
- **Stage** - Change the stage assignment for multiple tasks at a time.
- **Auto Start & Complete** - Set tasks to be automatically started and completed, when the job schedule is running.
- **Milestones** - Allows a user to quickly reference and update milestone information across multiple tasks within a template. Update the specified template with any changes made to the Milestone Task or Milestone Key fields.

• **Apply Template Change** - Use this section to make changes to a template that you want to immediately apply to jobs that were created from the template. See the **Apply Template Changes** section in this chapter for more information on applying template changes to jobs.

• **Task List Summary** - Use this link to view a list of all tasks in the template grouped by stage. From this page you may drill down into each task to view task details such as Checklist Items, parent and child tasks, and line items.

• **Template Detail** - Click into this link to modify details regarding the template.

• **Option Translation Table** - Use this table to define the options that affect the durations of specified tasks. The options are set up by cost code. The Options Translation Table shows existing options translations for the selected template. It is not used in all integrations. For more information, see the section titled Setting up the Option Translation Table.

• **Options** - This feature lets you add specific options to the template that would be a customized option, structural option, or a decorative. Only non-integrated users should enter options using this page. Integrated company's options will be populated to the job via integration.

## Setup the Options Translations Table

If you want options that are loaded into BuildPro to automatically affect the schedule, then you need to set up option translation tables, using the following procedure. If you take the original duration from the template and add/subtract the duration noted in the option translation table that becomes the new task duration.

This can be done by:

- Option
- Subdivision
- Vendor #
- Cost Code

**Example:** A bonus room is added to one job that affects three cost codes. In the option translation table each cost code was increased in duration by one day. Processing is accomplished by reading the individual records in the options file and processing them against the option translation table. The integration will process rows with specified subdivisions/vendors first, then process rows with “All.” This means that if a subdivision or vendor is specified, then it will override the “All” option translation and use the specified subdivision or vendor. The job schedule is re-calculated adding 3 days. Quantities sent in the F4311 record or the Option File will not affect the duration.

Later, the same option is deleted from the same job. Integration will re-calc the schedule and removes the 3 days from the schedule. If the task is scheduled or in progress, integration will update the duration. If the task is complete duration changes will be ignored.

**To add a new option:**

1. Click the **Template** tab.
2. Click the **Template Name** link in the subdivision to which you want to add an option. The Template Actions page opens.

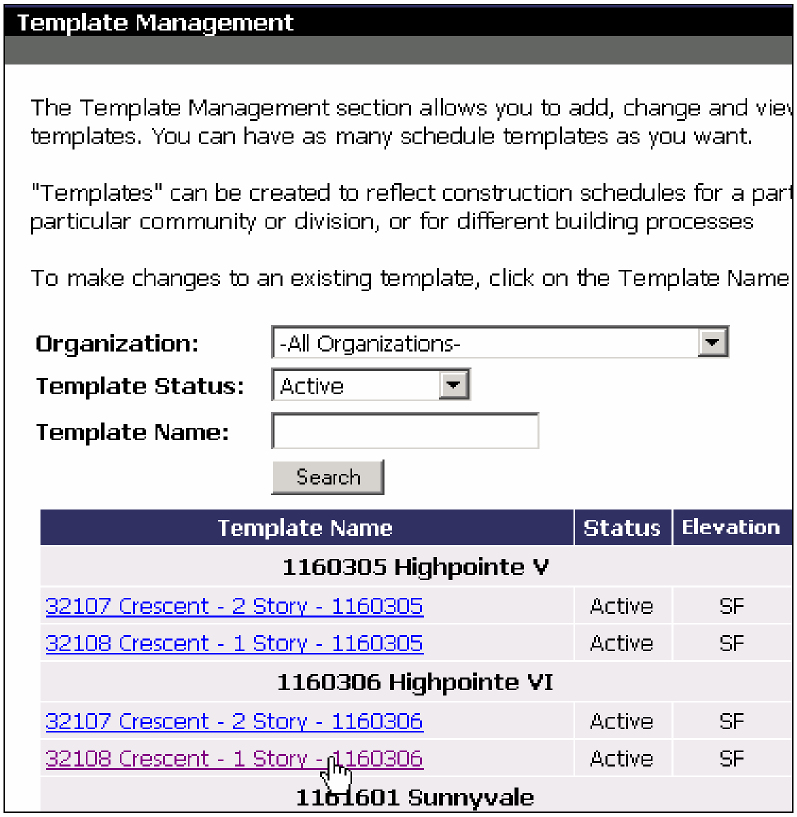


FIGURE 17. Templates tab

3. Click the **Options Translation Table** link at the bottom of the page.

4. Click the **Add New Option Translation** link. The Option Translation Table page opens.

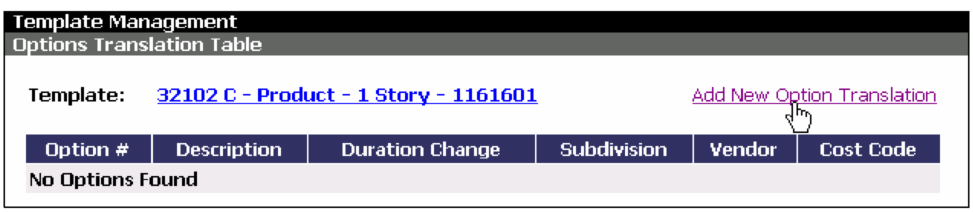


FIGURE 18. Option Translation Table page

5. Enter the necessary information into the translation table.
**Note:** See the next section for more information about each field in the table.

6. Click the **Add Translation** button.

## Option Translation Table Fields

- **Option Number** - This is the option number from the ERP System that is integrated with BuildPro.
- **Description** - Enter a brief description of the option.


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- **Duration Change** - This is the number of days to affect the task/cost code when a job is created from the template. This number could be positive or negative. Entering a “2” for example will add two days to the existing duration for that task in the template. If the task has 3 days duration in the template and this option was selected, the job would be created with 5 days for this task.
- **Subdivision** - Select the subdivision that you want this translation to be active for. “All Subdivisions” may be selected. Integration will process rows with subdivisions specified first, if found it will use the option information for the specified subdivision. If the specified subdivision is not found, then the integration process will default to the “All Subdivisions” record for that option.
- **Alt Vendor** - Enter the vendor number from the back end system that you want this translation to be active for. Leaving the Alt Vendor field blank (null) will apply “all vendors” to the selected translation. Integration will process rows with vendors specified first, if found it will use the option information for the specified vendor. If the specified vendor is not found, then the integration process will default to the “All Vendors” record for that option.
- **Cost Code** - This drop-down list box contains a list of your cost codes. Select the appropriate one to apply the translation information.

## Add/Change a Stage

You can set a template's stage structure (in what order each stage should occur), rename a stage, or to add a new stage to the template. You can also add stages, rename stages or delete stages.

**To add a new stage:**

1. Click the **Templates** tab.

| Template Name | Status | Elevation |
|---|---|---|
| **Hyphen Builders** | | |
| Hyphen Master | Active | A |
| Template - milestone keys | Active | A |
| Template 1 | Active | A |
| Template 2 Multi Family | Active | A |
| Template 3 Pred | Active | A |

FIGURE 19. Template list

2. Click on a **Template Name**. The Template Actions page opens.

3. Click the **Stage Management** link. The Stage Management page opens. Depending on the schedule type (stage/rank or predecessor) you will see a different page.

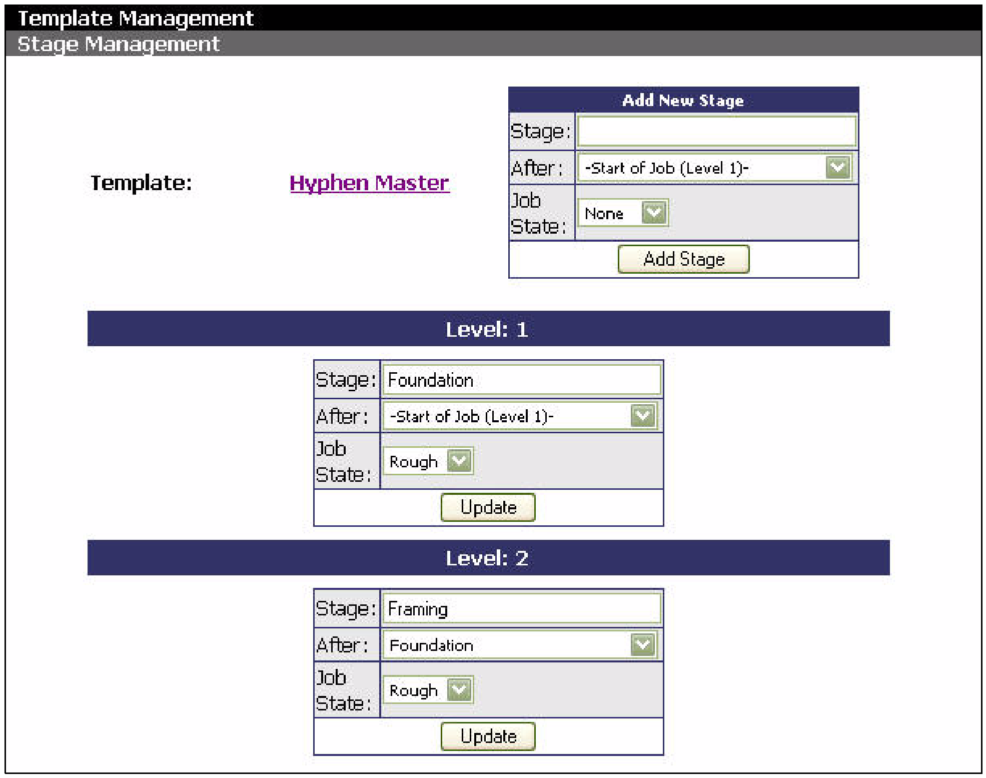


FIGURE 20. Stage Management page (stage/rank)

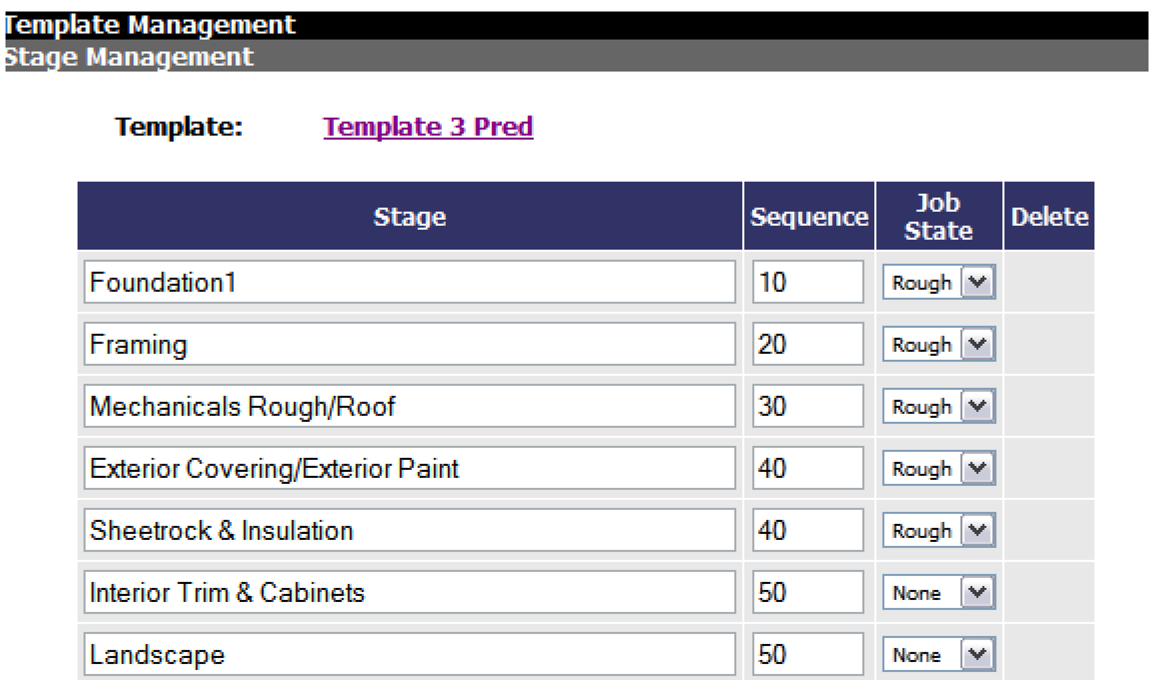


FIGURE 21. Stage Management (predecessor)

4. Enter a stage name in the **Stage** field of the **Add Stages** section at the bottom of the page.
5. Enter a stage **Sequence** number. The sequence number is used for ordering the stages in a template. For predecessor type schedules, the stage order does not affect the predecessor relationships and is simply a label.
6. Click the **Update Template** button. This will update any changes made to existing stage names in the top section and add any new stages entered in the bottom section.

## Task Predecessor Scheduling

The predecessor schedule user interface lets job schedules use a predecessor-scheduling engine. This means every task in a job schedule is assigned to follow one or more individual tasks, allowing you to have multiple schedule paths that can run concurrently without having to break it into multiple stages.

In Task Predecessor scheduling, all stages appear with the same start date, until you set predecessors. This type of scheduling uses the stages as category identifiers. To set your predecessors, click a stage name link. This will take you to the graphical view of Schedule Management where you can set your predecessors. The ID field is a system-generated number that is used to set which tasks are predecessors to other tasks. If you click the task name link, the Template Task page appears. From there you can see if there are any parent tasks or child tasks associated with this task. You can use the Task View to set predecessors and sequences.

**To view the job schedule:**

1. Click on the **Templates** tab. The template list is displayed.

| Template Name | Status | Elevation |
|---|---|---|
| **Hyphen Builders** | | |
| Hyphen Master | Active | A |
| Template - milestone keys | Active | A |
| Template 1 | Active | A |
| Template 2 Multi Family | Active | A |
| Template 3 Pred | Active | A |

FIGURE 22. Template list

2. Click on the **Template Name**. The Template Actions page opens.

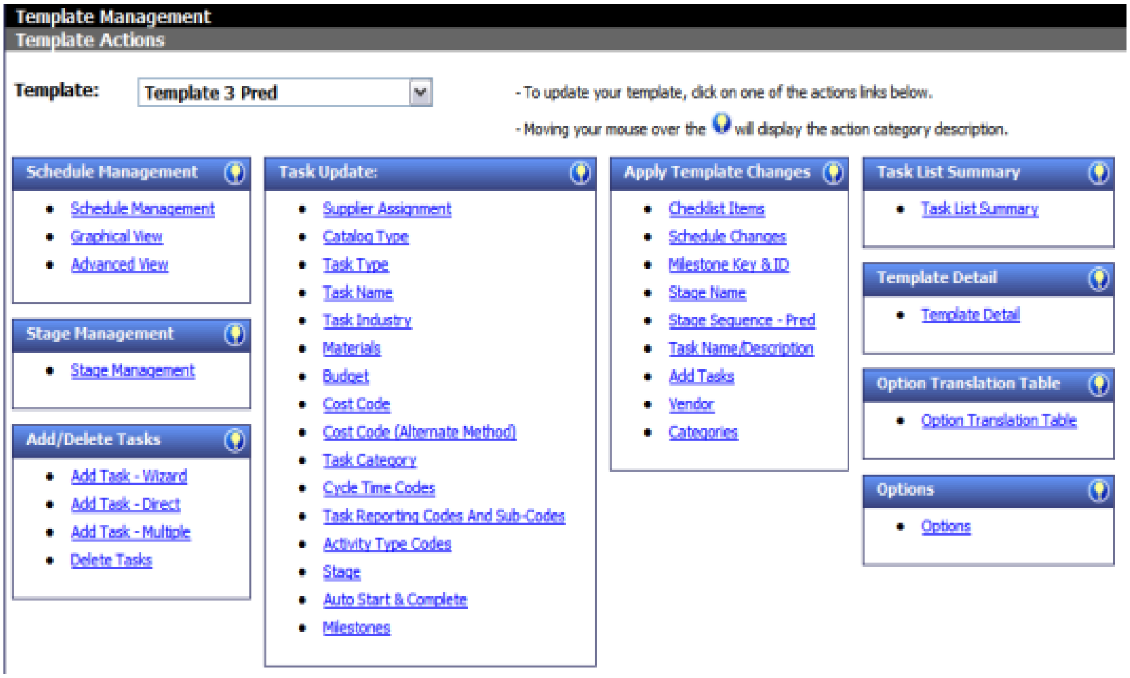


FIGURE 23. Template Actions page

3. Click on the **Advanced View** link in the **Schedule Management** section.

4. Use the **Predecessors** column to enter the ID of the task that will be the “parent” or predecessor task. If a task has multiple predecessors, enter each one and separate them by a comma.

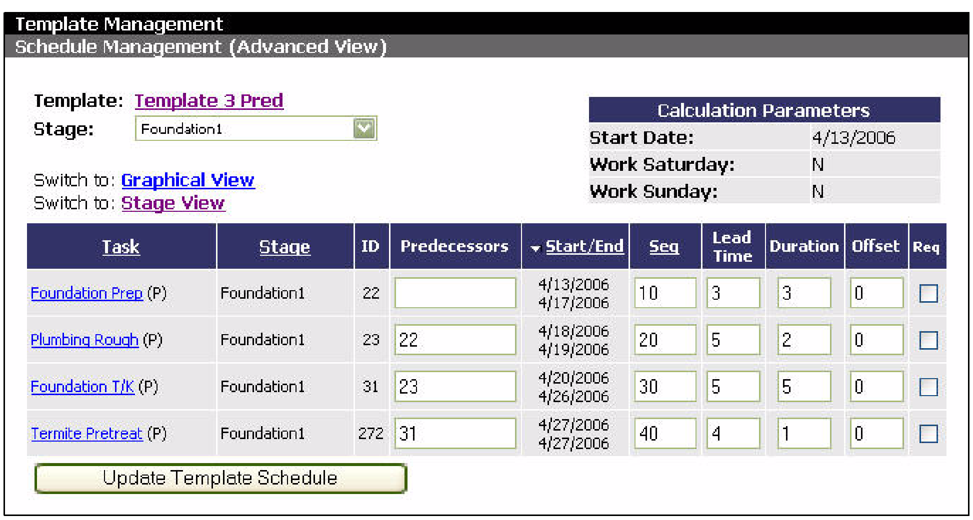


FIGURE 24. Schedule Management (Advanced View)

## Re-Sequence Tasks Button

The Re-Sequence Tasks button resets the sequence numbers automatically beginning with 5 and increasing by 5 for each task on each subsequent date. So, three tasks on the same date will all have the same sequence. The Re-Sequence button only appears on the page when -All Stages- is selected in the Stage drop-down at the top of the page.

**Note:** A module for NewStar companies re-sequences tasks according to restrictions in the NewStar software- sequence numbers may only be three digits and cannot be duplicated. When this module is on, the Re-Sequence Tasks button resets the sequence with the first sequence number starting at 3 and increasing by 3.

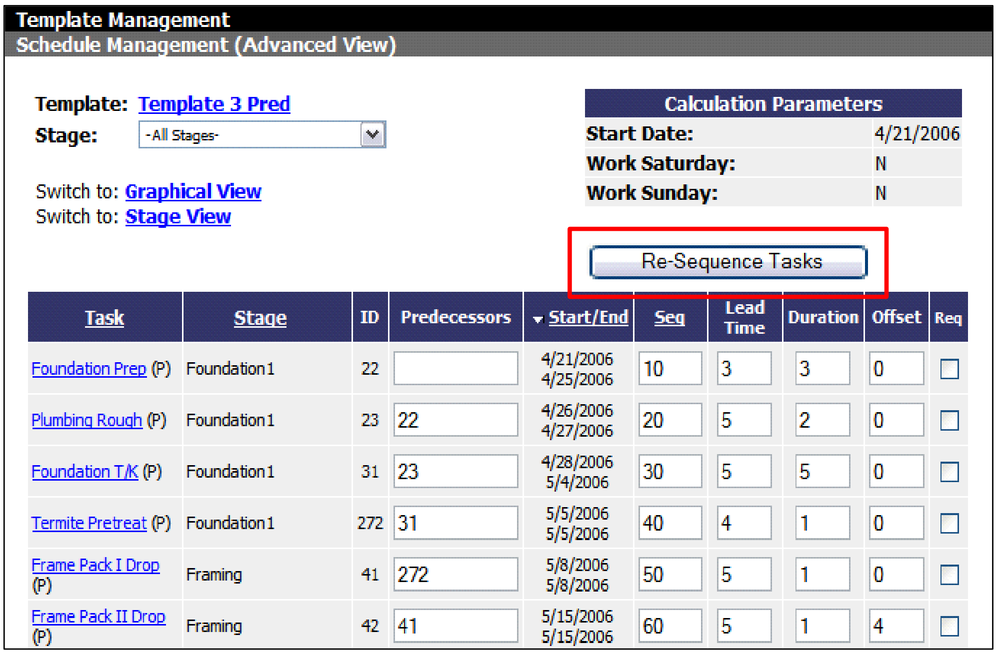


FIGURE 25. Schedule Management page - Advanced View

## Add Tasks

There are three ways to add tasks to templates:

- **Direct** - The direct method allows you to create a new task from scratch in one step
- **Wizard** - The wizard method is a step-by-step approach that copies information from existing tasks to create a new task.
- **Multiple** - The multiple method allows you to add up to 10 tasks at a time to a single stage. This is the recommended method to use with predecessor schedules.

### Add Task - Direct

**To add tasks using the direct method:**

1. Click on the **Templates** tab and click on a **Template Name**.
2. Click on the **Add Task - Direct** link in the **Add/Delete Tasks** section of the Template Actions page.

3. Enter information in the **Task Detail** form.
   **Note:** Fields with a star * are required fields.
4. Click the **Supplier Industry** field and choose the industry associated with the task you are creating. If integrated, set all POs to self supplied.
5. Select the **Milestone Task** check box, if you are integrating your schedule with an ERP System that uses milestones.
6. In the **Milestone Key** field, type the User-defined milestone keyword.
7. In the **Duration** field, type the duration.
   **Note:** Duration cannot be 0 (zero).
8. Click the **Quote Enabled** field to include this task in an RFQ, if you are using the BuildPro Request for Quote (RFQ) module.
9. Click the **Add New Task** button. BuildPro confirms your task was added.

### Add Task - Wizard

**To add tasks using the wizard method:**

1. Click on the **Templates** tab and click on a **Template Name**.
2. Click on the **Add Task - Wizard** link in the **Add/Delete Tasks** section of the Template Actions page.
3. Click on the **Stage** to which you want to add a task.
4. Click on a **Task** that has the same cost code as the task you want to add.
5. Edit the **Task Detail** to reflect the details of your new task.
6. Click the **Add Task** button. BuildPro confirms your task was added.

### Add Task - Multiple

BuildPro allows you to add up to 10 tasks at a time. If you are using the Template Builder tool, it is critical that these task IDs match-up exactly with the task IDs in the Excel Template Builder tool because Predecessor Task IDs and Offsets are based on these. To ensure this, you must copy and paste these tasks in the exact order they are listed in the Excel Template Builder tool after you have re-sorted by task ID.

**To add tasks using the multiple method:**

1. Click on the **Templates** tab and click on a **Template Name**.
2. Click on the **Add Task - Multiple** link in the **Add/Delete Tasks** section of the Template Actions page.
3. In the **Task** field, enter the task name.
4. In the following fields, enter the appropriate information:

- Rank
- Seq
- Lead Time
- Duration

5. Choose the **Task Type** for each task from the drop-down list.

6. Choose the **Account Code** (Cost Code) for each task from the drop-down list.

7. When selecting an Account Code, remember the following.
   - Memos and Reminders should be set to Root, in most integrated environments.
   - Purchase Orders (POs) should be set to the appropriate account code. If you are not sure, contact your ERP Administrator.

8. Click the **Add Tasks** button after you have entered the information for all the tasks you want to add to the selected stage.

9. Choose the next **Stage** from the drop-down list, and repeat steps 2 - 7 for the remaining stages in the schedule.

## Task Types

Order item details are added to the job task during the integration process. In a stand-alone environment, they can be added at the template level. For more information see the section titled, Adding task items.

### Payment Tasks

Any task that requires purchase orders or work orders must have labor and/or materials items attached to them. These items will be sent to the supplier when you submit the purchase order to the supplier. Payment task look and act the same in the system. They must have a product or service item selected, and they shouldn't be marked complete until the order has been received in full.

The Job Task Items page displays different information, links and buttons according to the task type. It looks the same for purchase, work, and contract orders. There is no Items page for Reminders, Inspections, or Memos.

- **Purchase Order** - This task places an order for a product.
- **Work Order** - This task places an order for a service.
- **Contract** - This task places an order for a product or service that has a fixed contract price already set by the building company.
- **Measurement** - Used for tasks where the quantity is estimated but could change depending on the needs of the job. Concrete for example is not always estimated exactly. The amount could change depending on the slope of the lot. Designating these types of POs as a Measurement PO will allow the construction manager to record the exact amount used when completing the task from BuildPro pages.
  **Note:** A popup window appears when an MPO is completed to remind the construction manager to enter the amount used.
- **Pay Point** - Functions the same as a Purchase Order.

### Non-payment Tasks

If you pay a supplier or sub-contractor for a task the task type should be purchase order, work order, or contract. Memos and Reminders do not involve payments and are not used for payment type tasks.

The Job Task Items page displays different information, links and buttons according to the task type. It looks the same for purchase, work, and contract orders. There is no Items page for Reminders, Inspections, or Memos.

- **Reminder** - This task simply prompts you to do something on the job. This task does not transmit any information to a supplier, and there is no product or service information attached to it.
- **Memo** - This task lets you send a note to the supplier. Similar to POs in that they send a notification to a supplier, but Memos do not have items and there is no money involved.

## Add Task Items

**Note:** The following information and steps are for non-integrated clients only. Integrated clients cannot change PO Items in BuildPro; it must be done in the ERP System.

The Task Items page appears when a task is created. The Task Items page allows you to add or change line items or products (labor and/or materials) to Purchase Order, Work Order, or Contract tasks.

Line items can be added by data entry, selecting items from a Favorites list, as Placeholders, copying from another template, or by searching a product catalog. Contact your Hyphen Solutions Consultant before adding task items as only stand-alone (non-integrated) customers use this function in the manner outlined here.

**To add task items:**

1. Click the **Templates** tab and click on a **Template Name**.

| Template Name | Status | Elevation |
|---|---|---|
| Hyphen Builders | | |
| Hyphen Master | Active | A |
| Template - milestone keys | Active | A |
| Template 1 | Active | A |
| Template 2 Multi Family | Active | A |
| Template 3 Pred | Active | A |

FIGURE 26. Template List

2. Click on the **Task List Summary** link.



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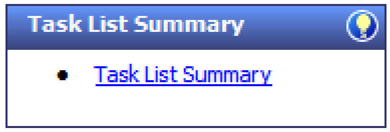


FIGURE 27. Task List Summary link

3. Click on a **task name**.

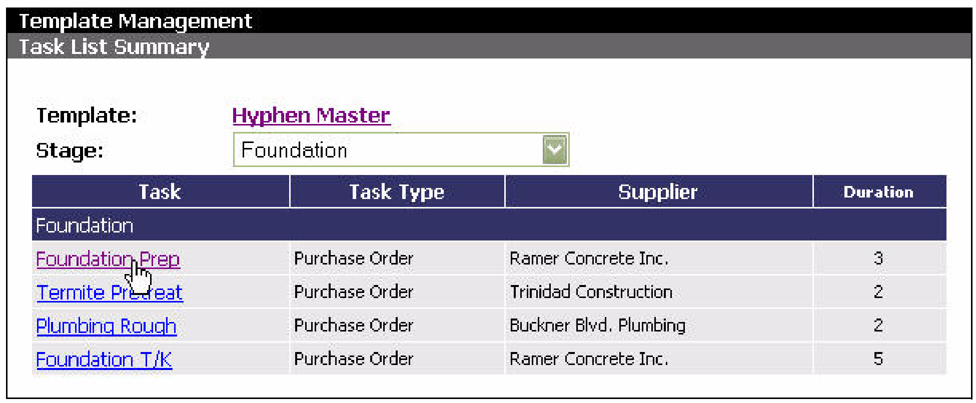


FIGURE 28. Task List Summary page

4. Click on the **Items** tab of the Template Task page.

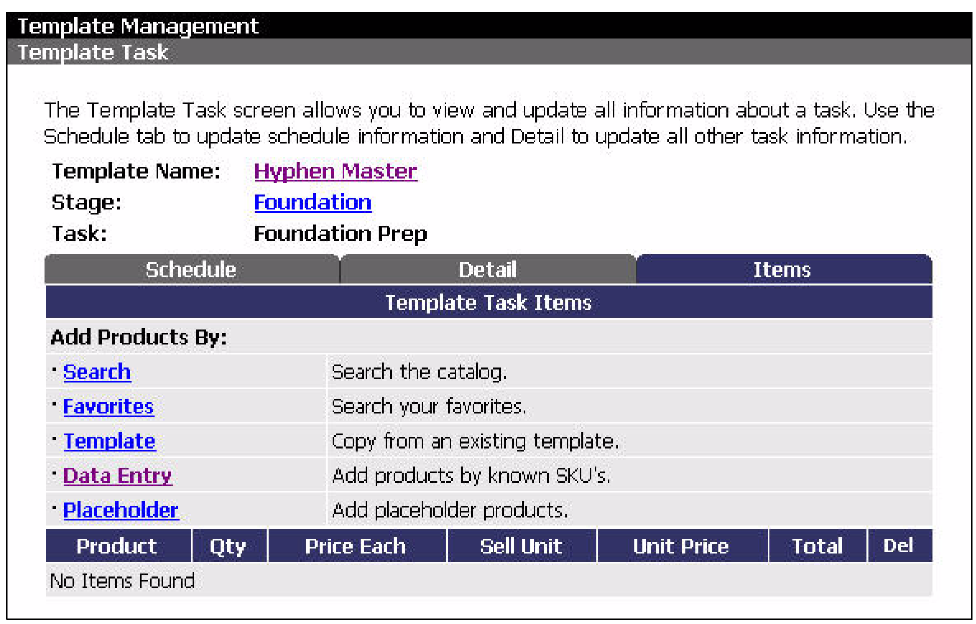


FIGURE 29. Template Task page - Items tab

5. Click on the **Add Products by: Data Entry** link.

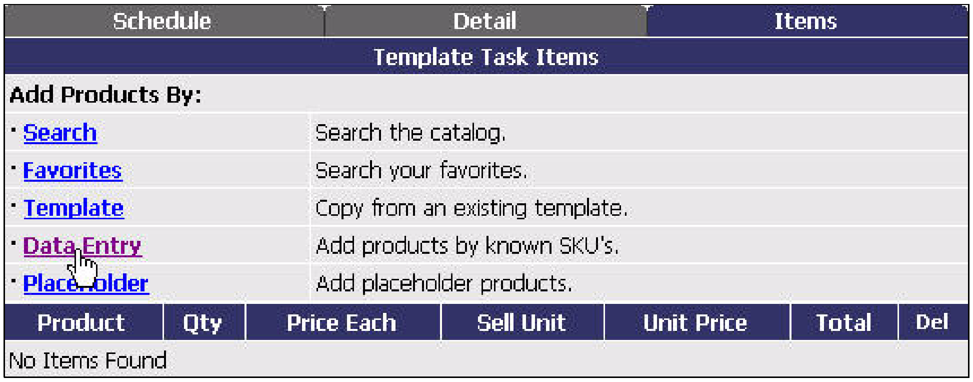


FIGURE 30. Data Entry link

6. Enter the **SKU** and **Quantity** for each item you want to add to the template task. **Note:** You can only enter an item by data entry if it is a valid product or service already contained in the supplier's catalog, with a SKU number and price assigned to it.

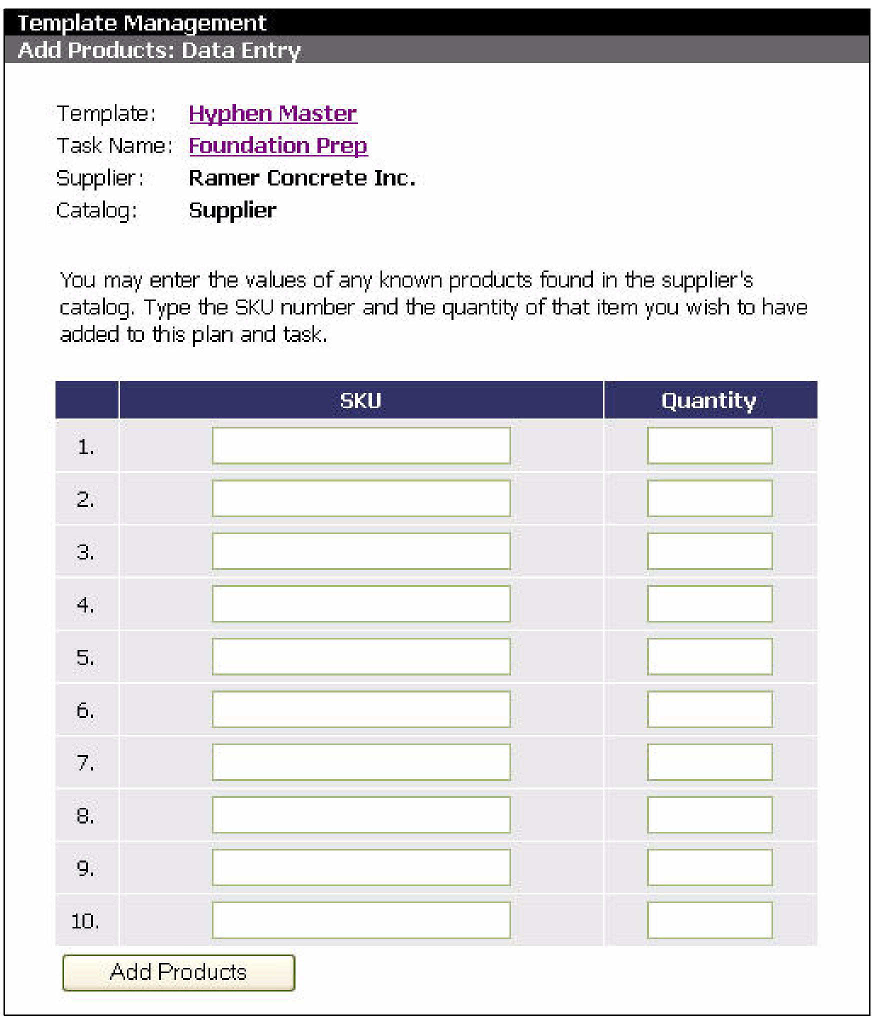


FIGURE 31. Add Products: Data Entry page

7. Click the **Add Products** button.

## Assign Tasks to Stages

When the task is created in the template, tasks are assigned to stages in order to group them together.

**To move a task to a different stage:**

1. Click the **Templates** tab.
2. Click the **Template Name** that contains the tasks you want to assign.
3. Click the **Stage** link under the **Task Update** section.

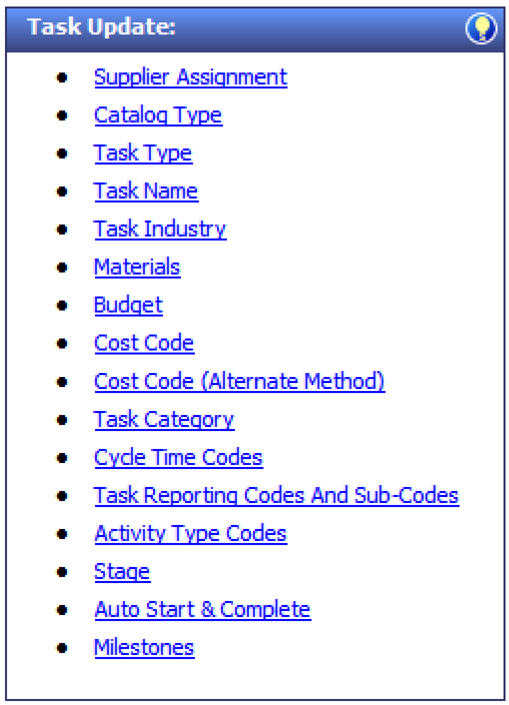


FIGURE 32. Stage link on the Template Actions page

4. Choose the **Stage** the task is in or choose **All Stages** from the drop-down list.

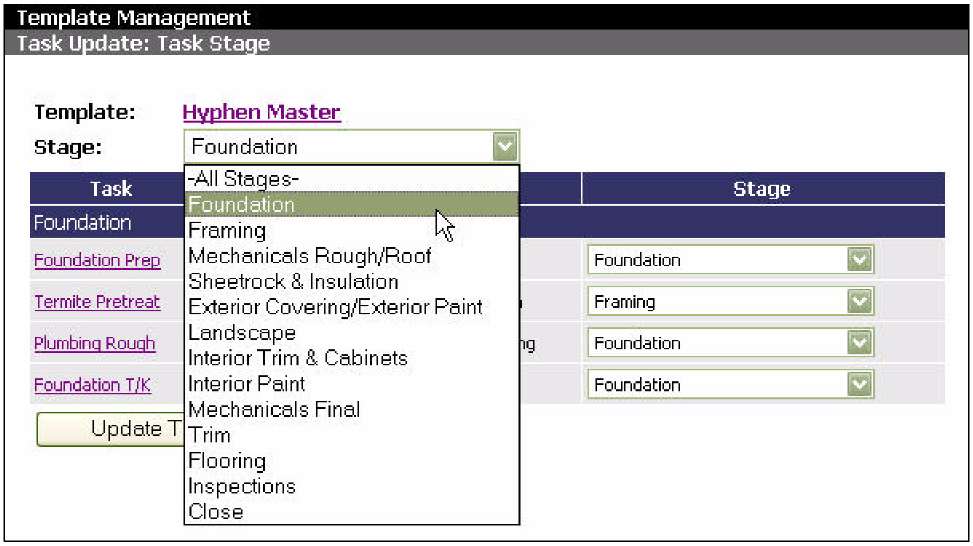


FIGURE 33. Task Update: Task Stage page

5. Under the **Stage** column, choose the appropriate stage for each task from the drop-down list.

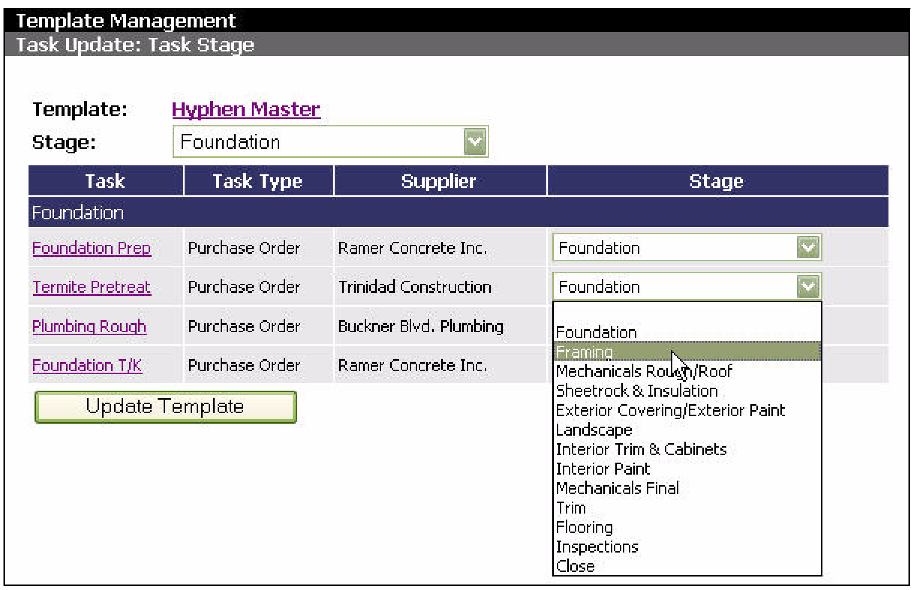


FIGURE 34. Stage column - stage drop-down list

6. Click the **Update Template** button.

## Update Milestone Information

The Task Update: Milestones page allows a user to quickly reference and update milestone information across multiple tasks within a template. This page is accessed from a link on the Template Actions page, under the "Task Update" section. When a user updates the Task Update: Milestones page and clicks the "Update Template" button, BuildPro will update the specified template with any changes made to the Milestone Task or Milestone Key fields. However, these changes won't be applied to jobs created from this template until the "Apply Template Changes to Jobs" functionality is used.

**To update a template's milestone information:**

1. Click the **Templates** tab. The Template Management page opens.
2. Click on the **Template Name** link of the template whose milestone information you want to update. The Template Actions page opens.

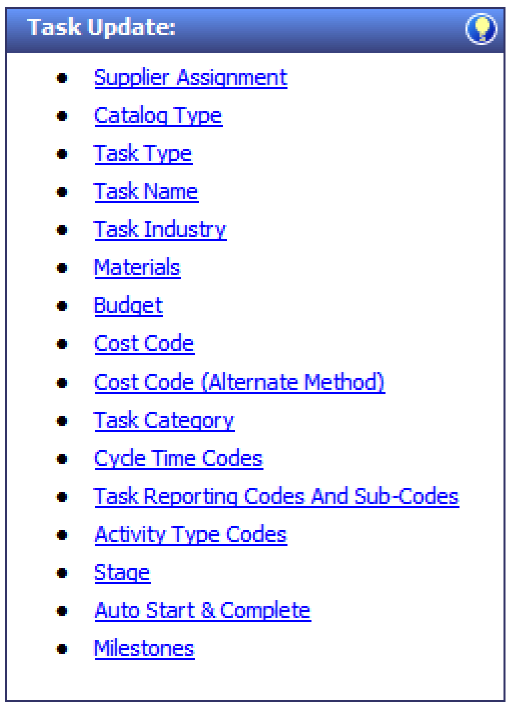


FIGURE 35. Template Actions page - Milestones link

3. Click the **Milestones** link under the **Task Update** section. The Task Update: Milestones page opens.

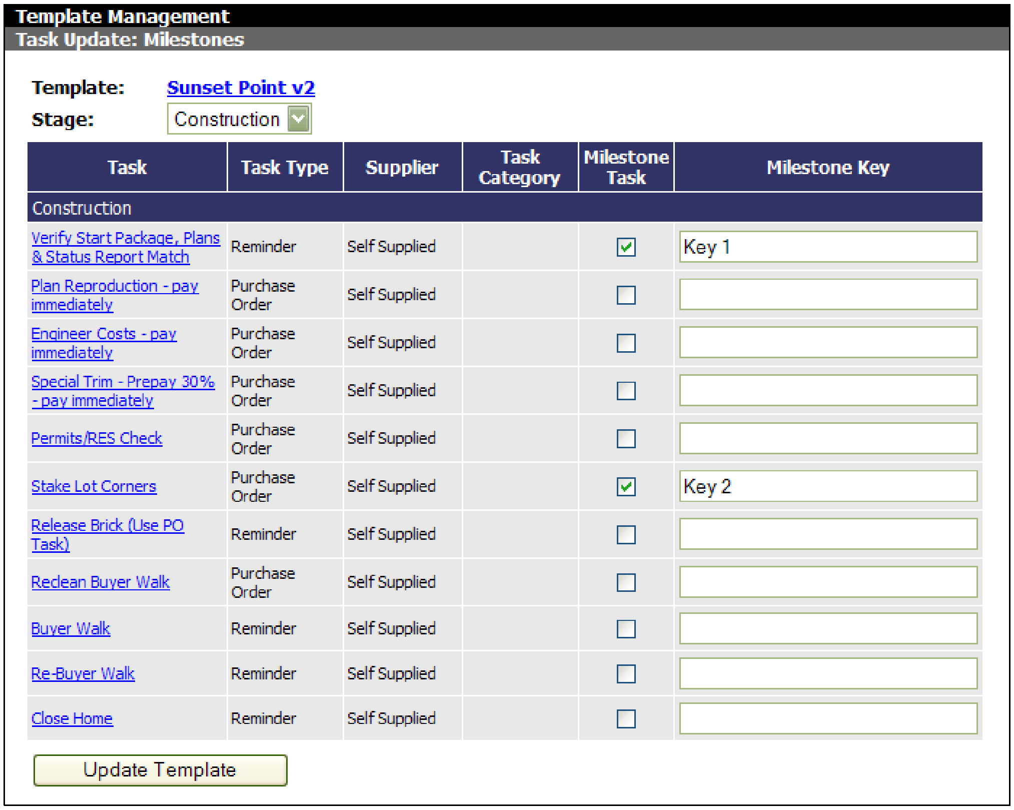


FIGURE 36. Task Update: Milestones page

4. Choose a **Stage** or **All Stages** from the drop-down list at the top of the page. The page defaults to show the first stage of the template.

5. Click the **Milestone Task** check box next to each task you want to assign as a milestone task. Click a checked **Milestone Task** check box to remove the check mark and un-assign the task as a milestone.

6. Next to each task you want to assign as milestone task, enter a **Milestone Key**. Or, edit the existing Milestone Key.

7. Click the **Update Template** button at the bottom of the page to save your changes. **Note:** The page will update the specified template with any changes made, but the changes will not be applied to the jobs until the Apply Template Changes to Jobs functionality is used.

8. Click the **Task Name** link to view the Template Task page.

## Apply Template Changes to Jobs

After you create a job from a template, you may need to make changes to the template. If you change the template, you can apply those template changes to the job(s) created from them.

Users can apply the following template changes to jobs:

- **Checklist Items** - check list items will only be applied to a task when the task status is Scheduled. If the task in the job has checklist items, the updated checklist items from the template will replace them. If the job task has no checklist items, the checklist items from the template will be added.
- **Schedule Changes** - will be applied only to tasks in Scheduled status.
- **Milestone Key and ID** - changes will be applied to all tasks regardless of status.
- **Stage Names** - changes to a stage name will be applied to their corresponding stage in the selected job(s).
- **Stage Sequence (Predecessor)** - will only be applied if there are no In Progress tasks in the job.
- **Stage Sequence (Ph/Rank)** - will only be applied if there are no In Progress tasks in the job.
- **Task Name/Description** - changes will only be applied to tasks in Scheduled status. The new task name will also be used as the Task Description. For integrated customers, the formatting applied to task names (inserting supplier number, PO number, etc) will be applied.
- **Add Tasks** - when inserting a new task, you must first select a stage and then select the task type. Task types are separated so not to add a PO task type to integrated jobs. POs should be added to jobs via the back office ERP. If PO Task Type is selected, the wizard will only return non-integrated jobs for which to add the new task. Memos and Reminders may be added to both integrated and non-integrated jobs.
- **Vendor** - integrated companies will only have the choice of vendor changes to Memo and Reminder task types. Vendor changes for PO task types must come from the back office. Non-integrated companies may make vendor changes to any task. Changes will be made to tasks in Scheduled status only.
- **Categories** - task category changes will only be made to tasks that are in Scheduled status.

To view all templates that have been changed and those changes applied to jobs, refer to the Template Changes report. (Your company must have the Template Changes report module turned on to see this report.)

**To apply template changes to jobs:**

1. Click on the **Templates** tab. Click on the **Template Name** link. The Template Actions page opens.
2. Select the template change you would like to make by clicking on one of the links in the **Apply Template Changes** section.

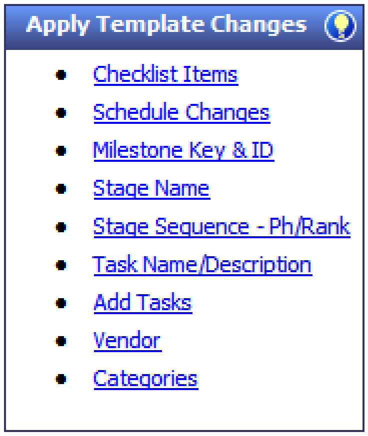


FIGURE 37. Apply Template Changes section

3. Each of these pages where template changes may be made resemble the original page where normal changes may be made, but with one exception: a check box will appear next to each row to indicate to apply that change to the jobs created from the template.

4. Clicking the “update” button on each page will open a wizard and allow you to choose all jobs or specific jobs for which to apply the changes.

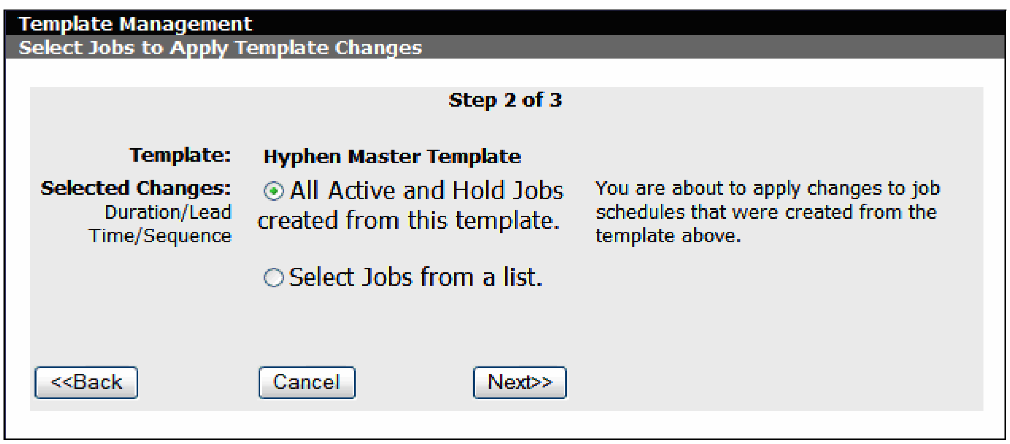


FIGURE 38. Apply Template Changes - Step 2

5. In **Step 2** of the wizard, you choose the jobs to which you want to apply the changes. Click the button next to **All Active and Hold Jobs created from this template** or **Select Jobs** from a list.

6. If you choose **Select Jobs**, the Select Jobs pop-up window opens. Click the check box next to each job to which you want to apply the changes. Click the **Continue>>** button. The pop-up window closes.



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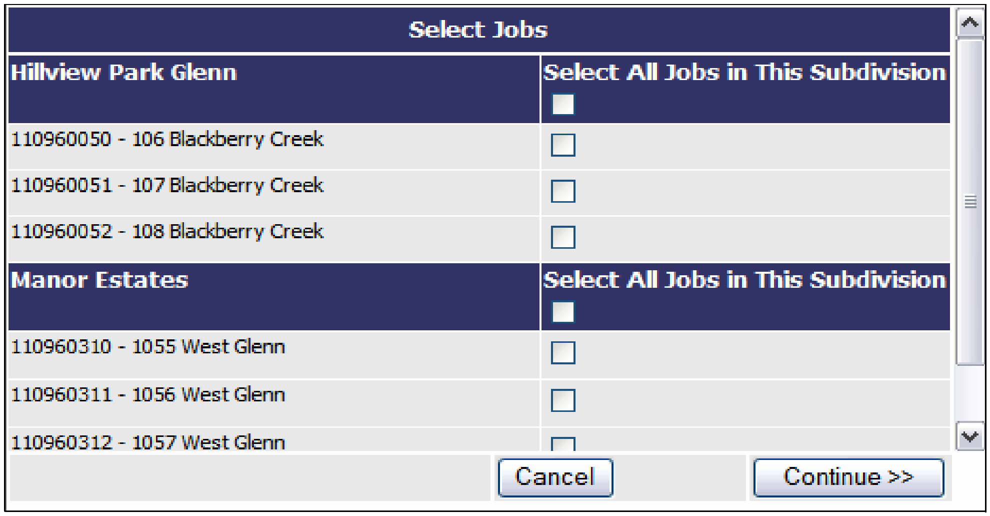


FIGURE 39. Select Jobs pop-up window

7. In **Step 2**, click the **Next>>** button to move to the next step. Step 3 of the wizard opens.

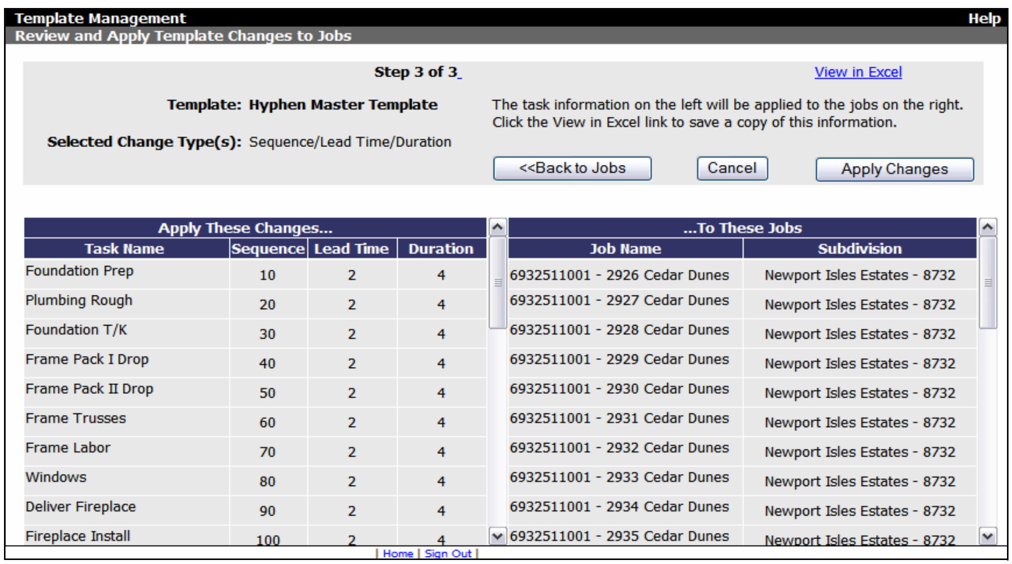


FIGURE 40. Apply Template Changes - Step 3

8. In **Step 3** of the wizard, you review the changes and jobs you have chosen. Click the **View in Excel** link in the top right corner of the page to view all of the information in an Excel worksheet.

9. If you want to make any changes in the wizard before you apply the changes, click the **<<Back to Jobs** button. This will take you back to Step 2.

10. If you want to change something in Step 1, click the **<<Back** button in Step 2.

11. If everything looks correct, click the **Apply Changes** button in **Step 3**. BuildPro confirms that the template changes have been applied.

## Task Categories

In an integrated environment you can see the task category page from the Job Setup tab of the Job Detail page. However, you cannot update the page. Task Categories are assigned when the job is created based on how the template is set up. In a stand-alone environment task categories can be set or changed at job level as long as the job was created by a template that has the category group selected.

**Note:** You will use Task Categories only if your company is using the Phase Management or Release Management functionalities in BuildPro.

Task Categories are a way of grouping like tasks by category and they are created from the Manager tab. Sets of categories are stored in groups. When creating a template to be used with task categories, the category group name is assigned to the template. The following basic steps and screenshots outline how to set up task categories.

- Create the task categories and category groups under the Manager tab.
- Assign the category group to a template.
- Assign each task in the template a task category using the option for Task Update/ Task Category.
- Jobs created with the template will have the task categories assigned as they are in the template.
- Work with tasks as defined by Release Management.

**To create task categories:**

1. Click on the **Manager** tab.
2. Click on the **Task Categories** link.

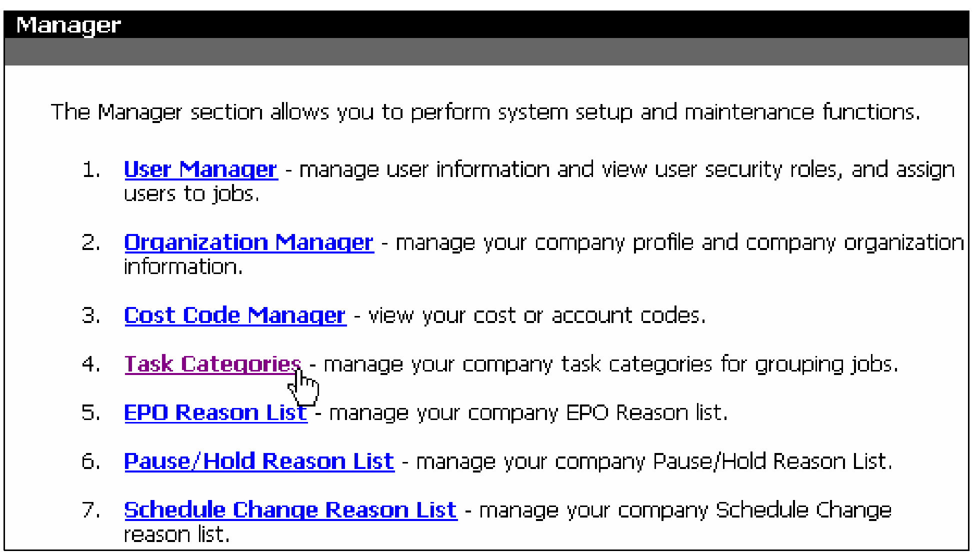


FIGURE 41. Manager tab - Task Categories link

3. Enter a task category group name in the **Task Category Group** column.


FIGURE 42. Task Category Group page

4. Click the **Update Task Category Groups** button. BuildPro confirms the category group has been added.

5. Click the 0 (zero) to the right of the task category group you just created.

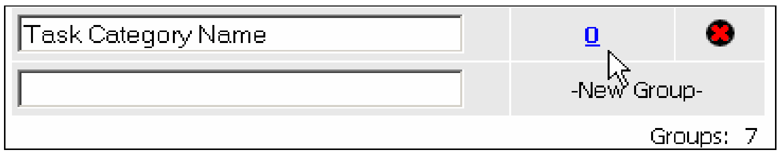


FIGURE 43. Task Category Name link

6. Click the **Add New Task Categories** link.

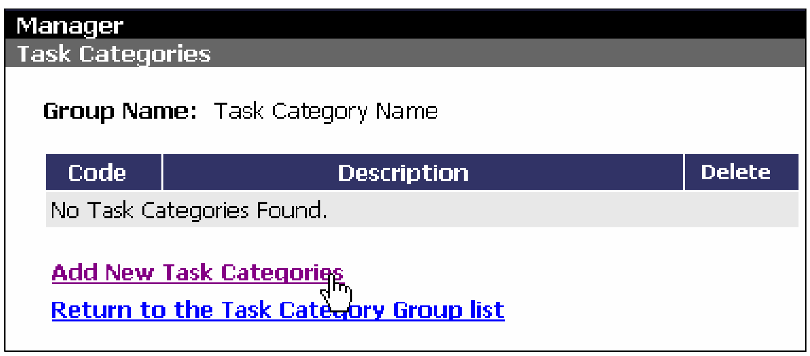


FIGURE 44. Add New Task Categories link

7. Enter a **Code** for each task.

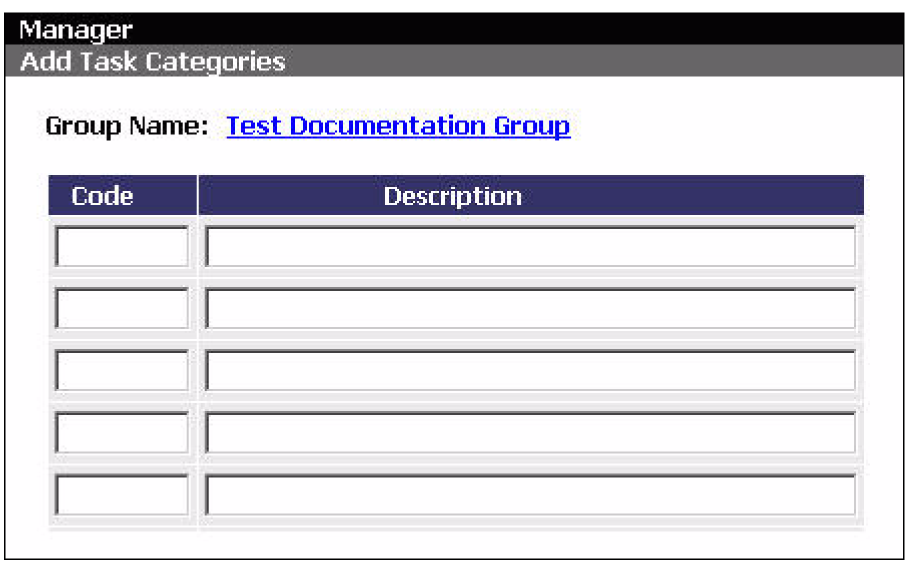

FIGURE 45. Add Task Categories page

8. Enter a **Description** for each task.
9. Click the **Add Categories** button. The next step involves assigning task categories to tasks in the template.

**To assign task categories to tasks in the template:**

1. Click on the **Templates** tab.
2. Click on the **Template Name**.
3. Click on the **Template Detail** link.


FIGURE 46. Template Actions page

4. Scroll down the page to the **Task Category Group** drop-down list, and select a category group for the template.

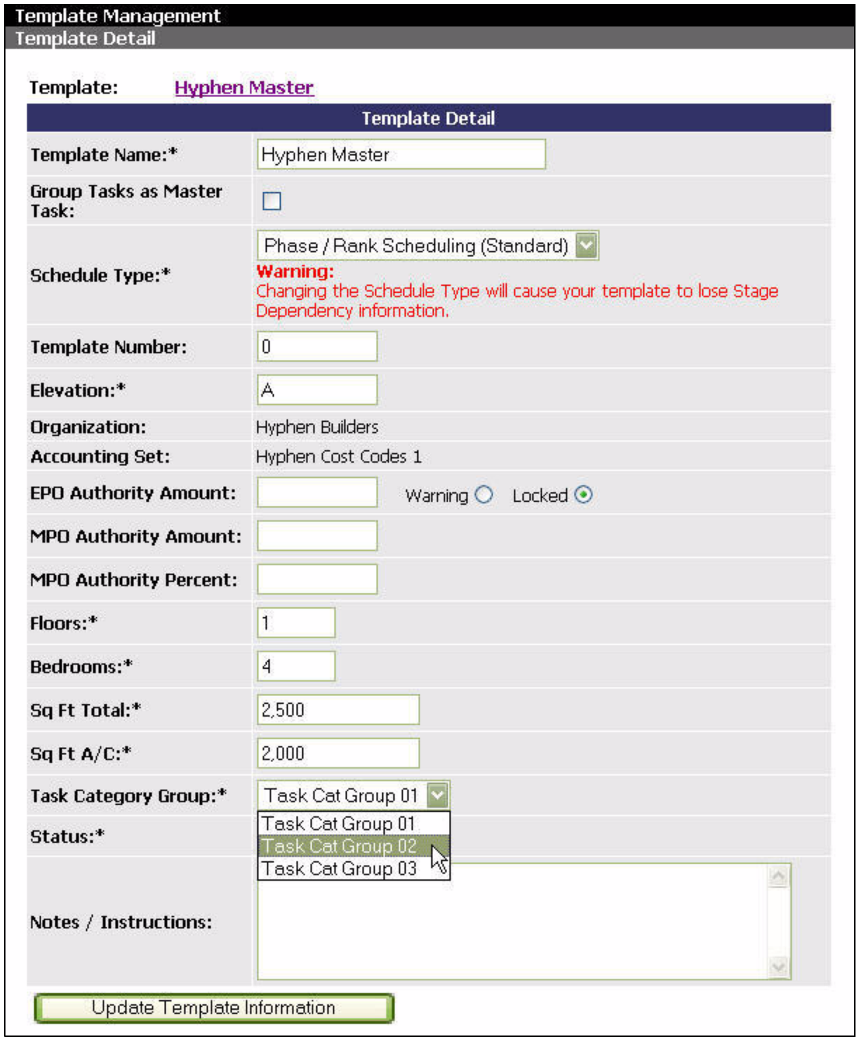


FIGURE 47. Template Detail page

5. Click the **Update Template Information** button. BuildPro returns to the Template Actions page.

6. Click the **Task Category** link. The Task Update: Task Category page opens.

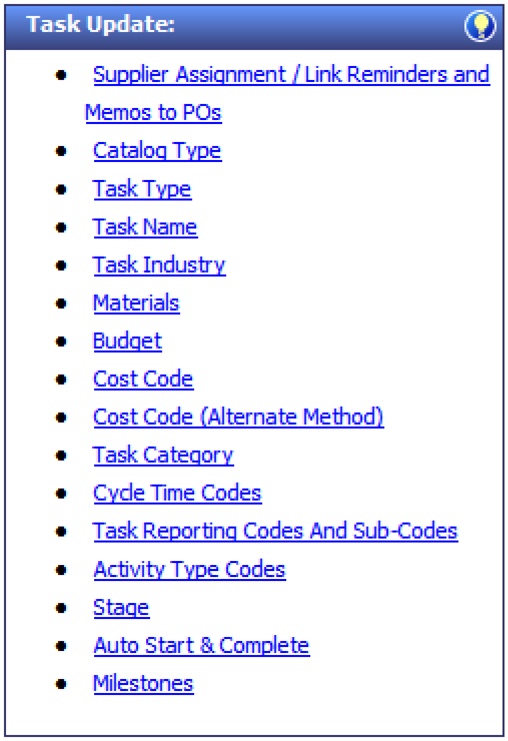


FIGURE 48. Template Actions page

7. Assign each task to a task category by choosing from the **Task Category** drop-down list next to each task.
8. Click the **Update Template** button.
9. Choose another stage from the **Stage** drop-down list to assign the rest of the tasks to task categories.
   **Note:** In an integrated environment you can see the task category page from the Job Setup tab of the Job Detail page. However, you cannot update the page. Task Categories are assigned when the job is created based on how the template is set up. In a stand-alone environment, task categories can be set or changed at job level as long as the job was created by a template that has the category group selected.

## Task Categories in Release Management

The Release Management functionality requires the Release Management module.

1. Click on the **Jobs** tab.
2. Click on the **Release Management** link on the Left Nav Bar.
3. Choose a subdivision from the **Subdivision/Phase** drop-down filter.


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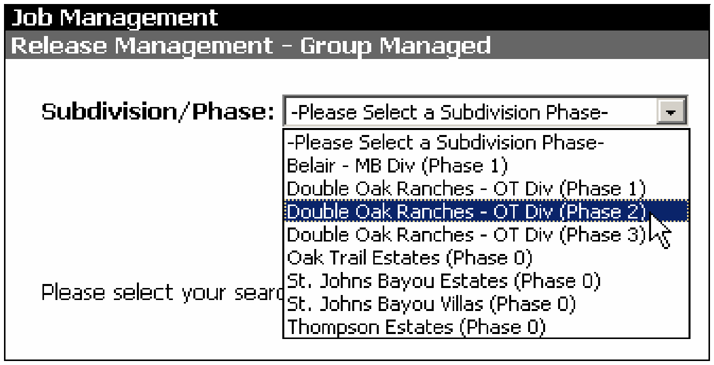


FIGURE 49. Release Management page

4. Choose a task category group from the **Task Category Group** drop-down filter.

5. Choose a task category from the **Task Category** drop-down filter.

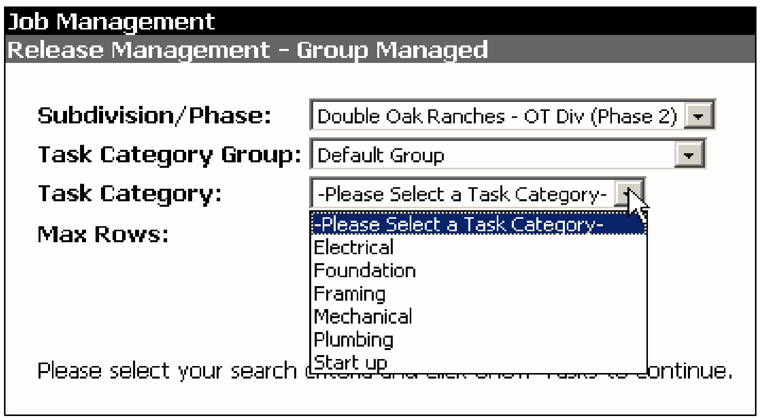


FIGURE 50. Task Category filter

6. Click the **Show Tasks** button. Tasks that you can release are displayed.

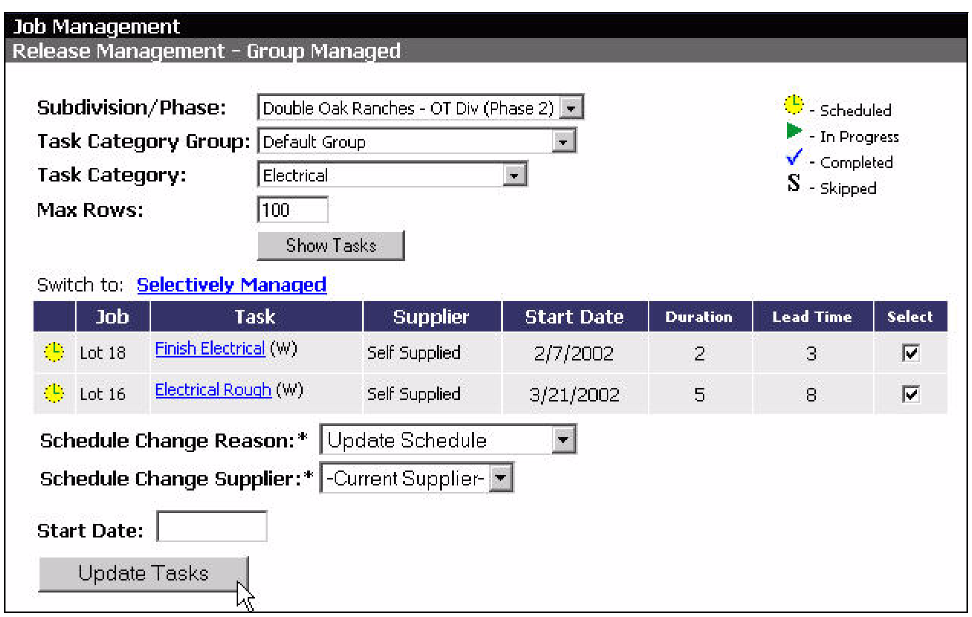

FIGURE 51. Release Management page

7. Click the **Selectively Managed** link to view the tasks individually.

Switch to: Group Managed

| | Job | Task | Supplier | Start Date | Duration | Lead Time | Start | Complete |
|---|---|---|---|---|---|---|---|---|
| | Lot 18 | Finish Electrical (W) | Self Supplied | 2/7/2002 | 2 | 3 | | |
| | Lot 16 | Electrical Rough (W) | Self Supplied | 3/21/2002 | 5 | 8 | | |

Schedule Change Reason:* Update Schedule

Schedule Change Supplier:* -Current Supplier-

Update Tasks

FIGURE 52. View tasks individually

8. Enter the start date for these tasks in the **Start Date** field.

9. Click the **Update Tasks** button. Repeat these steps until all the categories in this phase are updated.

## Assign Milestones to Tasks

Milestones are important tasks that mark the completion or other "milestone" of a job for reporting purposes. One task from each stage should be identified as a Milestone in order for that stage to be reported with a completion date; therefore, the Milestone Task should represent the task that signals the completion of that stage. Milestones are critical because they are often used to notify the ERP system of an end stage.

**To flag a task as a milestone:**

1. Click on the **Templates** tab and click on a **Template Name**.

| Template Name | Status | Elevation | Check/View Errors |
|---|---|---|---|
| 814 - DFW HERITAGE | | | |
| 611 & 612 - DFW Master Predecessor II | Active | A | |
| 611 & 612 - DFW Master Predecessor II | Active | A | |

FIGURE 53. Template List

2. Click on the Milestones link on the Template Action page.


FIGURE 54. Template Actions page

3. Choose the appropriate stage from the **Stage** drop-down list.

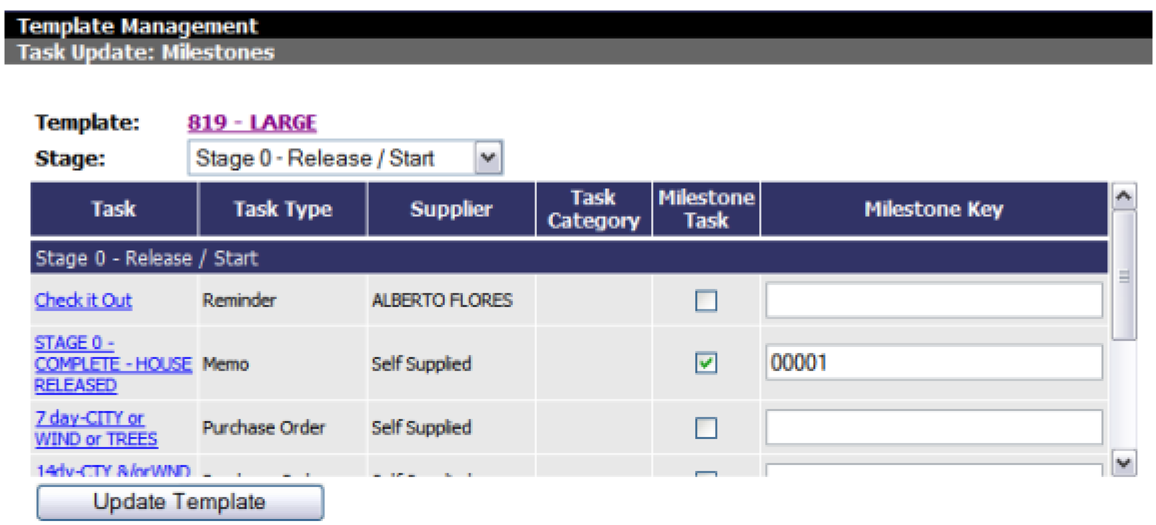


FIGURE 55. Task Update: Milestones

4. Enter the milestone key in the **Milestone Key** column and check the checkbox in the **Milestone Task** column. Click the **Update Template** button.

5. Repeat steps 1 - 4 for each task.

**Note:** Some reports in BuildPro use milestone information. For more information about milestones, ask your BuildPro Consultant.

## Assign Tasks to Industry IDs

Industry codes are used to group suppliers together by industry so that when a user wants to select a supplier for a task that has a TBD supplier, the list will be limited only to those suppliers that are categorized for that industry. The task must also be assigned to the same industry. For example, all painters are under the industry code for Paint and painting tasks.

**To assign industry IDs to tasks:**

1. Click on the **Templates** tab.
2. Click on the **Template Name**.
3. Click on the **Task Industry** link under the **Task Update** section of the Template Actions page.

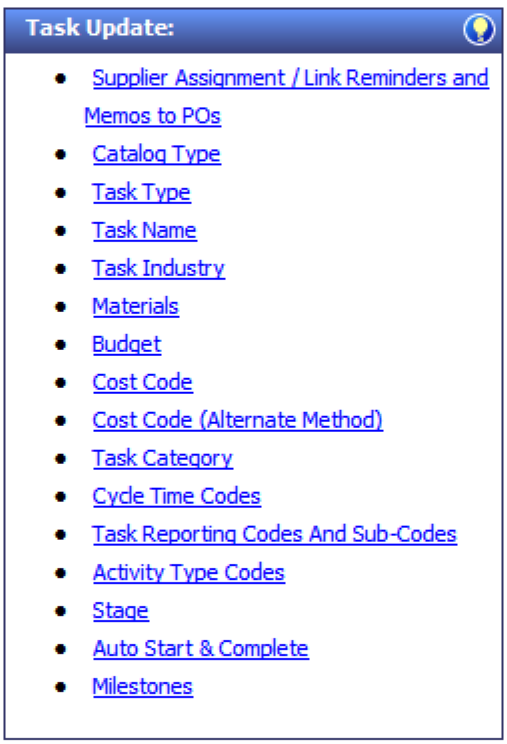


FIGURE 56. Template Actions page

4. Choose the appropriate stage from the **Stage** drop-down list. The page refreshes and displays all tasks in that stage.

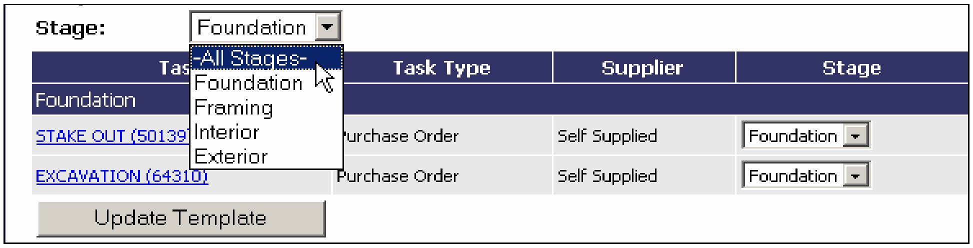


FIGURE 57. Stage drop-down filter

5. Choose the appropriate industry from the **Task Industry** drop-down list next to each task.

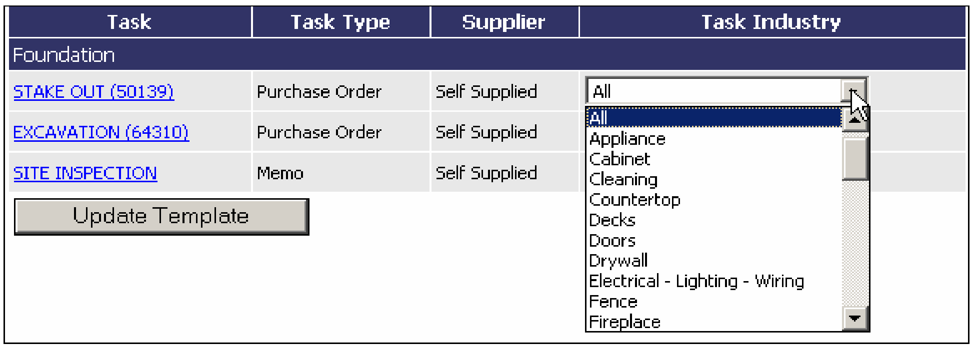


FIGURE 58. Task Industry drop-down list

6. Repeat for each task.

7. Click the **Update Template** button.
**Note:** To assign a supplier to an industry, search for the supplier by clicking the **Supplier List** link from the Supply tab. Click on the supplier name link and navigate to the bottom of the page. Click the **Add/Change Industry For Supplier** link. A supplier may belong to more than one Industry.

## Assign Suppliers to Tasks

### Integrated Environment

Some Memo tasks can be hard-coded to specific suppliers if that same supplier will be assigned to that task for every job loaded against that template.

### Non-Integrated Environment

Some PO and Memo Tasks can be hard-coded to specific suppliers if that same supplier will be assigned to that task for every job loaded against that template. If this is not the case, suppliers need to be assigned at the Job level.

> **Note:** Assigning a supplier at the template level means that supplier will always be assigned to that task in every job created from that template. If the supplier is not known or you use multiple suppliers, the task may be assigned a "TBD" vendor. For information on setting up a TBD vendor, see Chapter 5 - Managing Suppliers.

**To assign suppliers to tasks:**

1. Click on the **Templates** tab.

2. Click on the **Template Name**.

3. Click the **Supplier Assignment/Link Reminders and Memos to POs** link under the **Task Update** section of the Template Actions page.
   **Note:** For non-integrated companies, click the **Supplier Assignment** link.

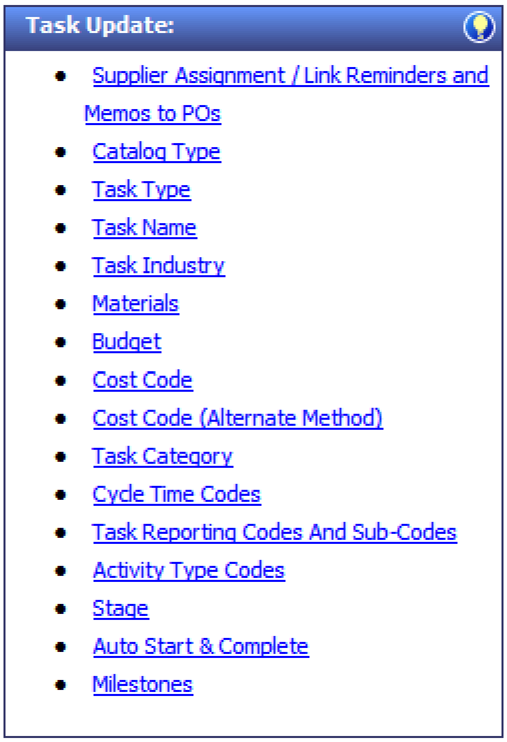


FIGURE 59. Template Actions page

4. Integrated companies will assign a supplier to a task by clicking the hyperlinked supplier name in the far right **Supplier** column. The link will turn into a drop down box and allow you to select a supplier.


FIGURE 60. Click the hyperlinked supplier name to choose a supplier

5. Choose the appropriate supplier from the drop-down list next to each task.

FIGURE 61. New Supplier drop-down list

6. Repeat for each task.
7. Click the **Update** button.
   **Note:** Non-integrated companies will be taken to a similar page. Select the supplier from the **New Supplier** column and click the **Update Template** button.

| Task | Task Type | Supplier | New Supplier |
|---|---|---|---|
| Foundation - 1 | | | |
| Foundation Prep [A] | Purchase Order | Ramer Concrete Inc. | Ramer Concrete Inc. |
| Termite Pretreat | Purchase Order | Trinidad Construction | Trinidad Construction |
| Termite Pretreat - 11/21/2008 | Purchase Order | Trinidad Construction | Trinidad Construction |
| Plumbing Rough | Purchase Order | Buckner Blvd. Plumbing | Buckner Blvd. Plumbing |
| Foundation T/K | Purchase Order | Ramer Concrete Inc. | Ramer Concrete Inc. |

## Test Templates

After creating a template in BuildPro, it is important to test it to make sure that it accurately reflects the home building process. The following section discusses:

- Creating a manual job and review your template.
- Reviewing your template after an integrated job process runs.

## Manually Create Jobs

Jobs can be created manually in BuildPro to test the template for basic job flow. For non-integrated clients, this is the same process to create all jobs in BuildPro. Minimum requirements for manually creating a job are:

- Subdivision or community must already exist
- Sample product type specs must be known

**To manually create a job:**

1. Click the **Jobs** tab. The Job Management page opens on the Job List tab.
2. Click the **Add a Job** link on the Left Nav Bar.

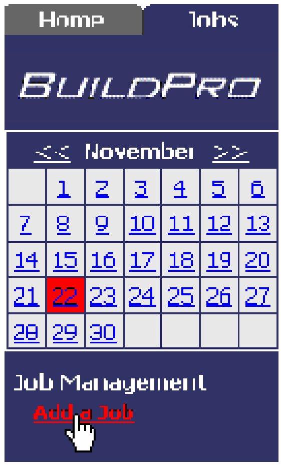


FIGURE 62. Add a Job link on the Left Nav Bar

3. Enter the **Job Detail Information** on the Job Detail page.

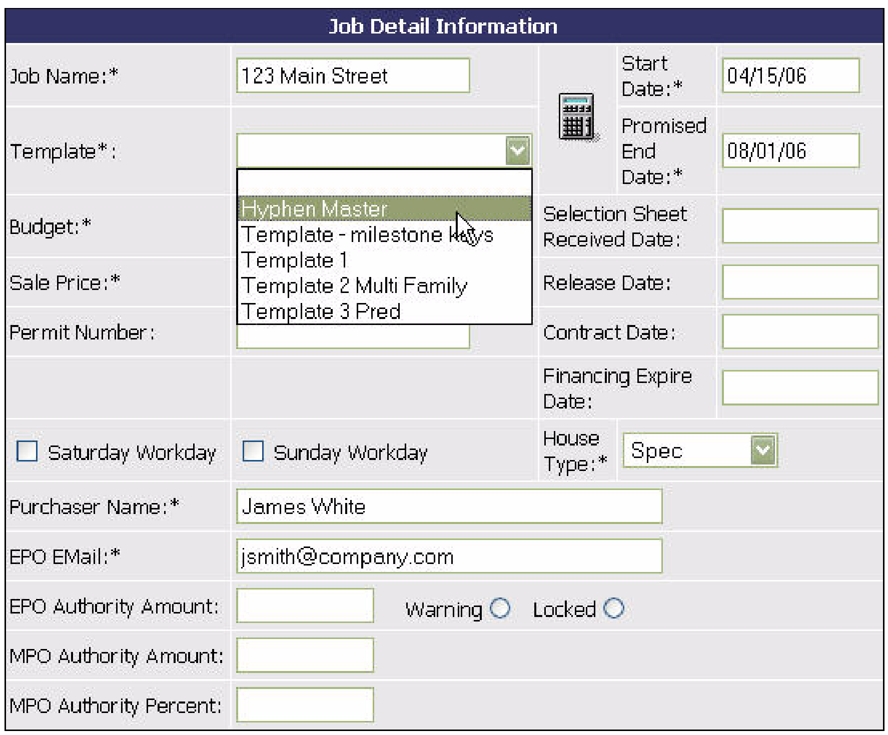


FIGURE 63. Job Detail page

4. Choose the template from the **Template** drop-down list.

5. Click the **Add Job** button at the bottom of the page.

## Set Up Integrated Jobs

Reviewing jobs that are brought over to BuildPro via integration is important for identifying any possible integration issues, as well as seeing the effects of actual jobs created in the back-office ERP System when matched against the template you created.



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The following checklist should be completed before testing integrated jobs in BuildPro.

- **BuildPro Production Manager tab, Organization List Link**
  In each community org (Summary tab), the community number should be listed along with the org name. Example: Rock Springs Ridge 662652.
  - *Reason:* This allows for easier identification (throughout the system) of communities by both name and number.
- **BuildPro Production Manager tab, Organization List Link**
  In each community org (Integration tab), the "Primary User" field must be populated.
  - *Reason:* User will get an error message when a task is started in a job with no Primary User assigned.
- **BuildPro Production Manager tab, Organization List Link**
  In each community org (Integration tab), the "EPO Email" field must be populated (even if EPOs are not used by that division).
  - *Reason:* In a job (Job Actions page, Job Setup tab, Job Detail link), this field is required if a schedule re-calculation is to be performed.
- **BuildPro Production Manager tab, Organization List Link**
  "Saturday Workday" and "Sunday Workday" typically should not be checked.
  - *Reason:* This will affect scheduling days in the job schedules.
- **BuildPro Production Manager tab, User Detail List Link**
  "Autopay Approval Required" box typically should not be checked. This box is checked by default and must be unchecked.
  - *Reason:* If box remains checked, completions of Autopay eligible tasks will be sent to the Autopay Approvals area. They will not export from BuildPro to the ERP System until action is taken to approve the tasks.
- **BuildPro Production Manager tab, User Detail List Link**
  Check that each user has the correct role(s).
  - *Reason:* Ensures the proper access to areas in BuildPro.

## Troubleshooting

Following are some common template errors and possible solutions.

### Missing Cost Codes

Often there are cost codes that are included in the job budget that are not identified by the Template Team during the template building process. If these cost codes are posted or included as part of the budget for the job, they will not be inserted into the job schedule, but will fall into the missing cost code stage for the template.

**To reconcile missing cost codes:**

1. Click on the **Templates** tab.

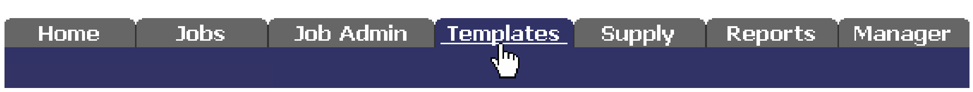


FIGURE 64. Templates tab

**2.** Click on the **Template Name** that you are reviewing.

| Template Name | Status | Elevation |
|---|---|---|
| Hyphen Builders | | |
| Hyphen Master | Active | A |
| Template - milestone keys | Active | A |
| Template 1 | Active | A |
| Template 2 Multi Family | Active | A |
| Template 3 Pred | Active | A |

FIGURE 65. Template list

**3.** Click on the **Schedule Management** link from the Template Actions page.


FIGURE 66. Template Actions page

**4.** Click on the **Missing Cost Codes** link.
**Note:** This will be listed as the first stage if you have any missing cost codes. If you do not see this link, then you do not have any missing cost codes to correct.

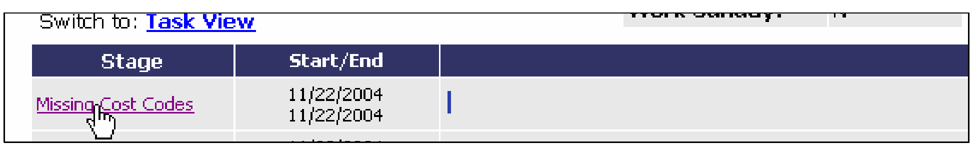


FIGURE 67. Missing Cost Codes stage

**5.** With help from the Template Team, determine if these cost codes should be included in the job template.

- **If YES:** Click the task link. Type the appropriate sequence, lead time, duration, *predecessors, *offsets, stage, task industry assignment, and task supplier assignment. Select the proper stage for the missing cost code here, to move the task from the missing cost code stage to the proper stage.
- **If NO:** If you determine that these cost codes should never be included in the job template, have your BuildPro Consultant remove the billable flag on the Cost Code Detail page. By changing this to a non-billable status, you are preventing this cost code from being inserted into the template for all new job loads. If you ever need to use this cost code in the job template in the future, the builder will need to notify you to go back in and change it back to "billable."

### Task Placement

If any of the tasks are not occurring on the days which they should, verify the predecessors, offsets, durations, and sequence numbers that were assigned to them in the Template Builder are correct.

1. Use the instructions in this chapter.
2. Modify the template where necessary.

### Missing Tasks

The Template Team can help identify missing tasks that were not originally included.

1. Use the instructions in this chapter.
2. Modify the template where necessary.

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# 7 Plan Translation Tables

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Managing Plan Translations

## Plan Translations Overview

The Plan Translation table links the plan number from the back office accounting system to the correct scheduling template in BuildPro. When a job is exported from an ERP System, it is exported with the plan number. Each Organization must have a Plan Translation for every plan that is being built in that organization. The Plan Translation table is sorted by organization name in alphabetical order, then by plan ID.

**Note:** Not every integration uses plan translation tables. Check with your BuildPro Consultant to see if you need to set up a Plan Translation table.

## Create a Plan Translation

When a job is exported from an ERP System it is exported with the plan number. The translation table is what properly links the ERP System plan number to the BuildPro template. Each Organization must have a Plan Translation for every plan that is being built.

Minimum requirements for creating a plan translations are:

- The Plan IDs used in the back-office ERP must be known.
- The community for which you are entering Plan IDs must be created.
- The template that will be used for the Plan IDs must be created in BuildPro.

**To create a plan translation:**

1. Click the **Templates** tab.

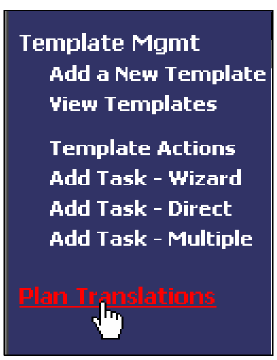


FIGURE 1. Left Nav Bar - Plan Translations link

2. Click the **Plan Translations** link on the Left Nav Bar. The Plan Translation page opens.


FIGURE 2. Plan Translation page


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3. Click the **Add New Plan Translation** link. The Plan Translation Detail page opens.

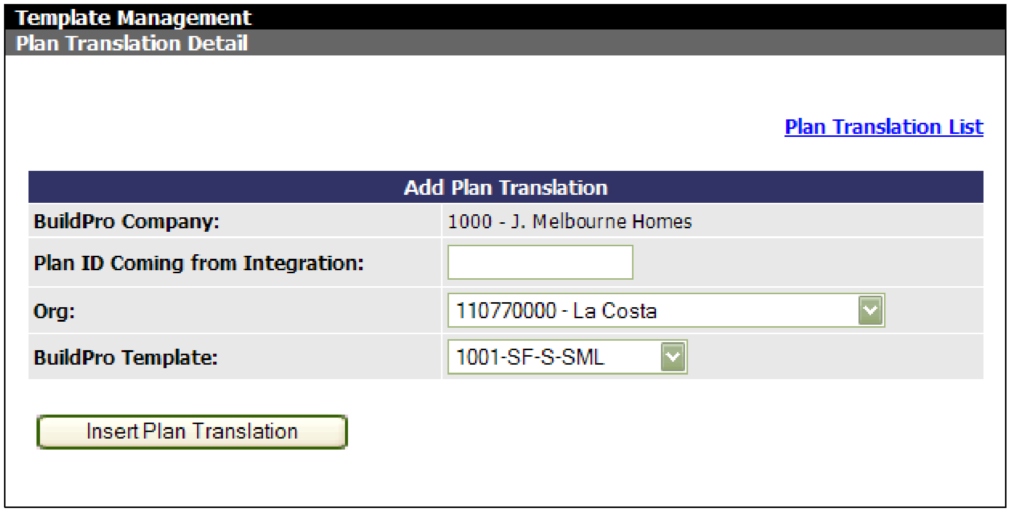


FIGURE 3. Plan Translation Detail page

4. In the **Plan ID Coming from Integration field**, type the ERP System Plan Number. **Note:** A plan ID can only be assigned to one BuildPro template per organization. However, a template can be used for more than one plan.
5. From the **Org** drop-down list, choose the correct organization.
6. From the **BuildPro Template** drop-down list, choose the template you want.
7. Click the **Insert Plan Translation** button.

## Delete a Plan Translation

**To delete a plan translation:**

1. Click the **Templates** tab.
2. Click the **Plan Translations** link on the Left Nav Bar. The Plan Translation page opens.
3. From the **Delete** column, click the to delete the translation.

| BuildPro Org | Plan ID Coming from Integration | Template Name | Delete |
|---|---|---|---|
| 5605 - Lexington SB-West | 2965 | ORH 1 Story (18 Wk) | |
| 5605 - Lexington SB-West | 3246 | ORH 2 Story (18 Wk) | |

FIGURE 4. Plan Translation page

## Edit a Plan Translation

**To edit a plan translation:**

1. Click the **Templates** tab.
2. Click the **Plan Translations** link on the Left Nav Bar. The Plan Translation page opens.

3. Click the **Template Name** link of the translation you want to edit. The Update Plan Template page opens.

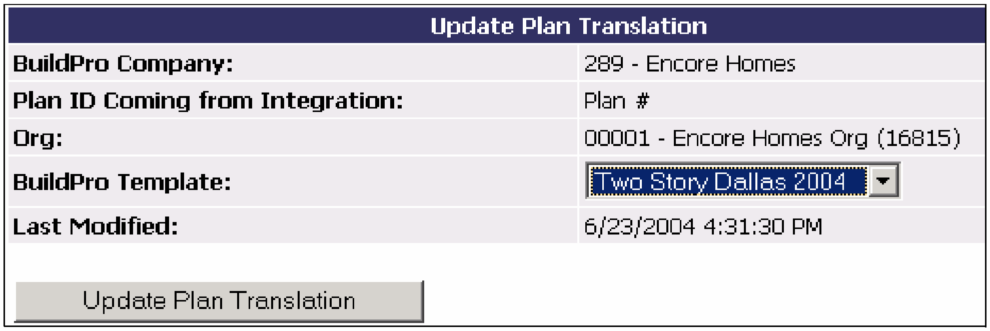


FIGURE 5. Update Plan Translation page

4. From the **BuildPro Template** drop-down list, choose the correct BuildPro Template for the ERP System.

5. Click the **Update Plan Translation** link.
   **Note:** It is very important that you make sure your translations tables are correct before you update them.

# 8 EPO, MPO, & Autopay

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Adding Org level authorizations
- Adding User level authorizations
- Adding Supplier level authorizations
- Adding Template level authorizations
- Adding Task level authorizations
- Adding Job level authorizations
- The EPO Reason List
- Using the Approval page
- Multiple EPO Approval Levels

## EPO, MPO, & Autopay Overview

EPOs (Extra Purchase Order) allow construction or project managers to order additional materials or labor from the field. BuildPro has several methods for creating EPOs. Refer to the Construction Manager Training Guide for details on how to create an EPO.

EPOs may be approved in BuildPro before they are exported to the back office accounting system for companies that integrate to BuildPro. Companies that are not integrated may use the approval functionality and then submit the EPO to the supplier/trade.

**Note:** EPOs in BuildPro are identified by this icon.

In BuildPro, administrators have the ability to enter dollar limits for which a user may create an EPO without approval. The EPO Authorization Amounts at All Levels module (#82) allows you to do this. These limits may be entered at different entities. When limits are set up in multiple entities, the EPO must be approved if it exceeds the lowest amount assigned to any entity. EPO and MPO Authorization Amounts may be set up at each of the following entities:

- **Organization** - The maximum dollar amount an EPO or MPO can be created without approval.
- **User** - The maximum dollar amount an EPO or MPO can be created without approval.
- **Supplier** - The maximum dollar amount an EPO or MPO can be created without approval.
- **Template** - The maximum dollar amount an EPO or MPO can be created without approval. This dollar amount is copied to any job created from the template.
- **Task** - The maximum dollar amount an EPO or MPO can be created without approval.
- **Job** - The maximum dollar amount an EPO or MPO can be created without approval.



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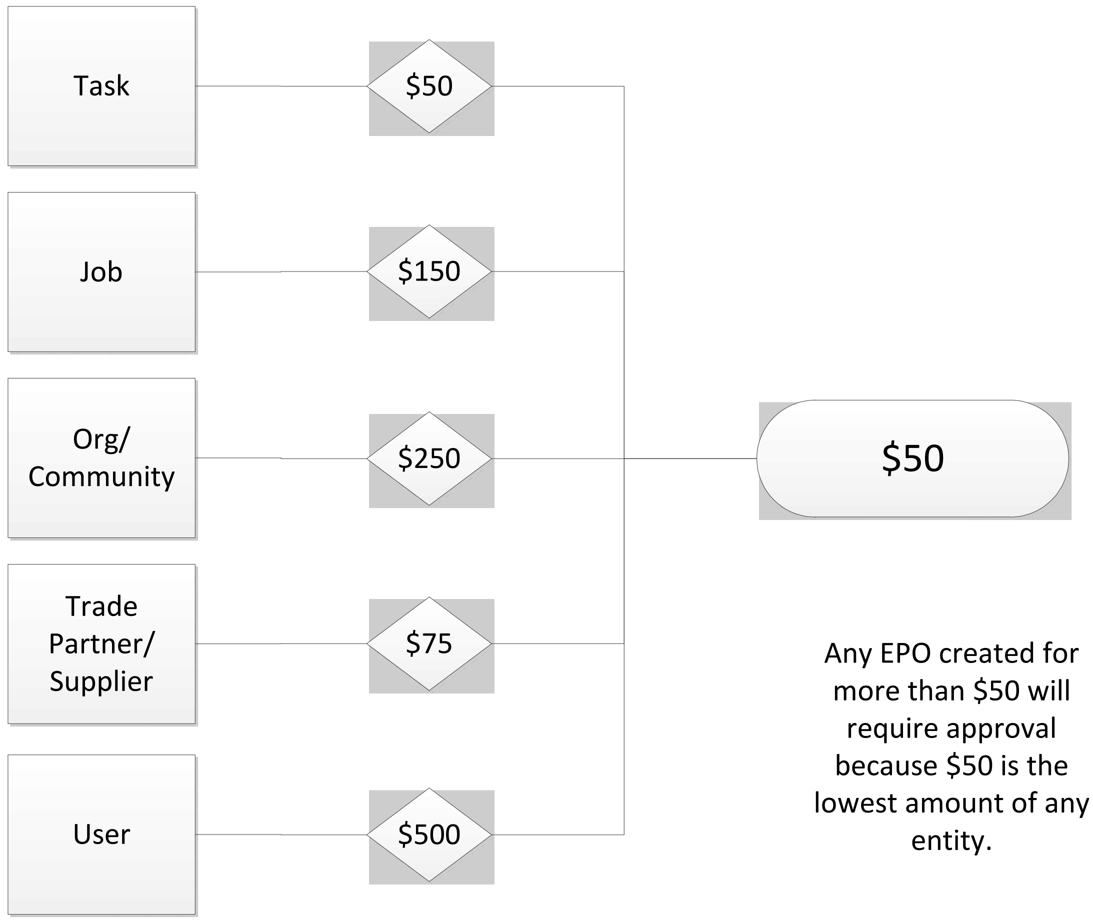


FIGURE 1. Example of the EPO/MPO process overview

**Note:** Entering $0.00 in the Authorization field will result in every EPO or MPO requiring approval. Leaving the field blank will result in no EPOs or MPOs requiring approval.

**Note:** Dollar amounts do not have to be entered for every entity. It may be easier to manage them at one entity (User for example).

**Note:** EPO approvals use the dollar amount. MPO approvals will use the lesser of the dollar amount or percent. The percent entered is used to determine the amount a user may go over the original dollar amount of the PO when entering quantities for an MPO. For example, let's say the original PO called for 10 items at $100 each for a total of $1000. If 5% was the limit and the user entered 11 items when the MPO was marked complete, it would need approval. 5% of $1000 is $50 dollars and the user (by entering 11 items) increased the PO amount by $100.


FIGURE 2. MPO Approval Process

**Note:** If both an MPO Authority Amount and Percent are entered, approval will be based on the lower of the two amounts.



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## Add Org-Level Authorizations

**To add EPO - MPO security authorization for an organization:**

1. From the **Manager** tab, click the **Organization List** link on the Left Nav Bar. The Organization List page opens.
2. Click the **Organization Name** of the organization where you will add your EPO-MPO security authorization. The Organization Detail page opens on the Summary tab.
3. Scroll to the bottom of the page, and look for the **Authorization Information** section.

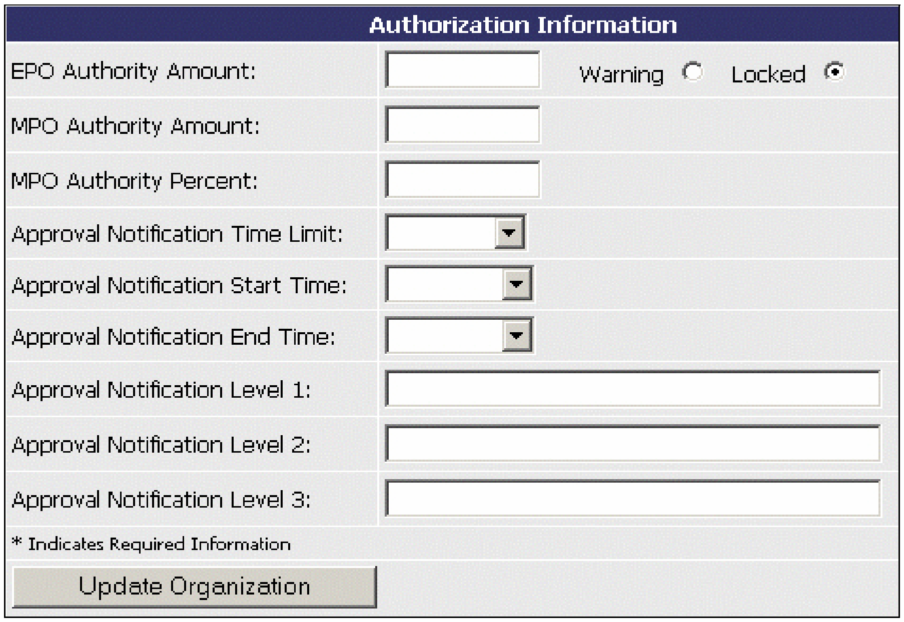


FIGURE 3. Organization Detail page - Authorization Information section

4. In the **EPO Authority Amount** field, type the maximum amount or limit for the organization's EPOs.
5. Click the button for **Warning** or **Locked**, as appropriate. The default is Locked.
   **Note:** Selecting Warning causes the user to get a warning when exceeding the limit of an EPO, and the EPO will be sent to the vendor without approval. Selecting Locked prohibits an EPO from being sent to the vendor, if it is over the approval amount.
6. In the **MPO Authority Amount** and/or the **MPO Authority Percent** fields, type the maximum value for these fields.
7. Choose the **Approval Notification Time Limit** from the drop-down list.
   **Note:** If an EPO needs additional approval, BuildPro will automatically notify the appropriate people. If it is not approved during the designated time frame, BuildPro will begin to escalate it to higher levels until it is approved.
8. Choose the **Approval Notification Start/End Time** from the drop-down list.
   **Note:** Approval Notification Start and End Time is the normal business hours that the approval notifications and process runs. For example, if an EPO is sent for approval at 4:30pm and the start and end times are set for 8:00am and 5:00pm, and the time limit is set

for 1 hour, the first notification is sent out immediately but the second would not be sent until 8:00am the next morning.

9. In the **Approval Notification Level** fields, type the appropriate **e-destination** for each level of notification.

10. Click the **Update Organization** button.

## Add User-Level Authorizations

The instructions below outline how to add EPO - MPO security authorization for every EPO and/or MPO that is created by the specified user.

**To add User Lever authorizations:**

1. From the **Manager** tab, click the **User Search** link on the Left Nav Bar.
2. Click the **Search** button.
3. Click the **User Name** you want to edit. The User Detail page opens.
4. In the **EPO Authority Amount** field, type the maximum amount or limit for this user's EPOs.
5. Click the **Warning** or **Locked** button, as appropriate. The default is Locked.
**Note:** Selecting Warning causes the user to get warning when exceeding the limit of an EPO and the EPO will be sent to the vendor without approval. Selecting Locked prohibits an EPO from being sent to the vendor, if it is over the approval amount.
6. In the **MPO Authority Amount** and/or the **MPO Authority Percent** fields, type the maximum value for these fields.
7. Click the **Update User** button.

## Add Supplier-Level Authorizations

**To add EPO - MPO security authorization to a specified supplier:**

1. From the **Supply** tab, click the **Supplier List** link. The Supplier List page opens.
2. Click the **Search** button.
3. From the list, click the **Supplier** you want to edit.
4. From the **Organization** column, click the **Division-Level Org**. The Organization/Supplier Relationship page opens.
5. In the **EPO Authority Amoun**t field, type the maximum amount for which an EPO can be created for the selected supplier.
6. Click the Warning or Locked button, as appropriate. The default is Locked.
**Note:** Selecting Warning causes the user to get warning when exceeding the limit of an EPO and the EPO will be sent to the vendor without approval. Selecting Locked prohibits an EPO from being sent to the vendor, if it is over the approval amount.


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7. In the **MPO Authority Amount** and/or the **MPO Authority Percent** fields, type the maximum value for these fields.
8. Click the **Update Relationship** button.

## Add Template-Level Authorizations

**To add EPO - MPO security authorization for a template:**

1. From the **Templates** tab, click the **Template Name** you want to edit. The Template Actions page opens.
2. Click the **2. Template Detail** link. The Template Detail page opens.
3. In the **EPO Authority Amount** field, type the maximum amount an EPO can be created for the template.
4. Click the **Warning** or **Locked** button, as appropriate. The default is Locked.
   **Note:** Selecting Warning causes the user to get warning when exceeding the limit of an EPO and the EPO will be sent to the vendor without approval. Selecting Locked prohibits an EPO from being sent to the vendor, if it is over the approval amount.
5. In the **MPO Authority Amount** and/or the **MPO Authority Percent** fields, type the maximum value for these fields.
6. Click the **Update Template** button.

## Add Task-Level Authorizations

**To add EPO - MPO security authorization for a task:**

1. From the **Templates** tab, click the **Template Name** you want to edit.
2. Click the **Task List Summary** link.
3. From the **Stage** drop-down list, choose the stage where the task is located.
4. Click the **Task Name** that you want to edit.
5. Click the **Detail** tab for the task.
6. In the **EPO Authority Amount** field, type the maximum amount an EPO can be created for the task.
7. Click the **Warning** or **Locked** button, as appropriate. The default is Locked.
   **Note:** Selecting Warning causes the user to get warning when exceeding the limit of an EPO and the EPO will be sent to the vendor without approval. Selecting Locked prohibits an EPO from being sent to the vendor, if it is over the approval amount.
8. In the **MPO Authority Amount** and/or the **MPO Authority Percent** fields, type the maximum value for these fields.
9. Click the **Update Task** button.

## Add Job-Level Authorization

**To add EPO - MPO security authorization for a job:**

1. From the **Jobs** tab, click the **Job Name** you want to edit.
2. Click the **Job Detail** link.
3. In the **EPO Authority Amount** field, type the maximum amount allowed for EPOs on this job.
4. Click the **Warning** or **Locked** button, as appropriate. The default is Locked.
   **Note:** Selecting Warning causes the user to get warning when exceeding the limit of an EPO and the EPO will be sent to the vendor without approval. Selecting Locked prohibits an EPO from being sent to the vendor, if it is over the approval amount.
5. In the **MPO Authority Amount** and/or the **MPO Authority Percent** fields, type the maximum value for these fields.
6. Click the **Update Job** button.

## EPO Reason Lists

If your company is going to be using Extra Purchase Orders (EPOs), you can also add a list of EPO reason codes. Extra Purchase Orders (EPOs) are used by Construction Managers to purchase additional materials in cases such as shortages, damaged materials, or theft.
**Note:** Before you start, you need to compile a list of reasons for the use of these extra purchase orders.

**To add EPO reasons:**

1. From the **Manager** tab, click the **EPO Reason List** link.

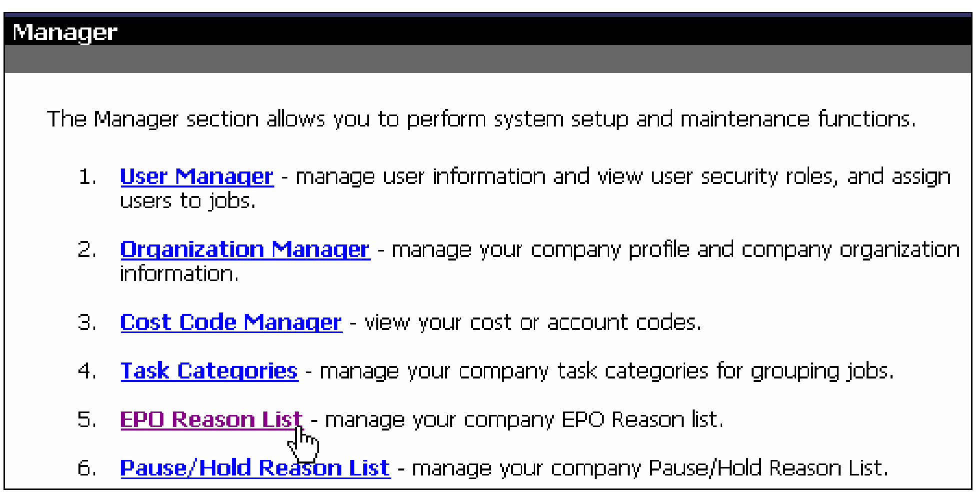


FIGURE 4. Manager tab

2. Click the **Add New EPO Reasons** link.


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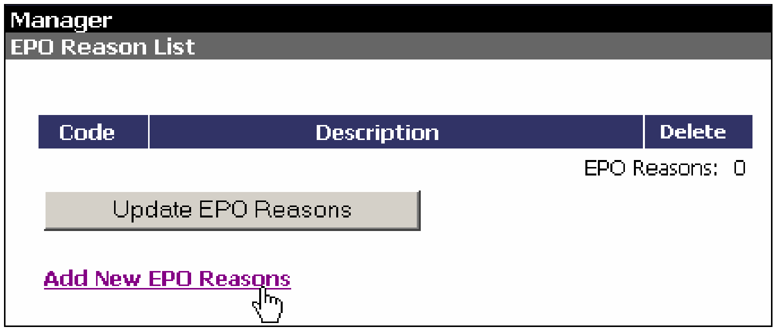


FIGURE 5. EPO Reason List page

3. In the **Code** field, type the code you created.

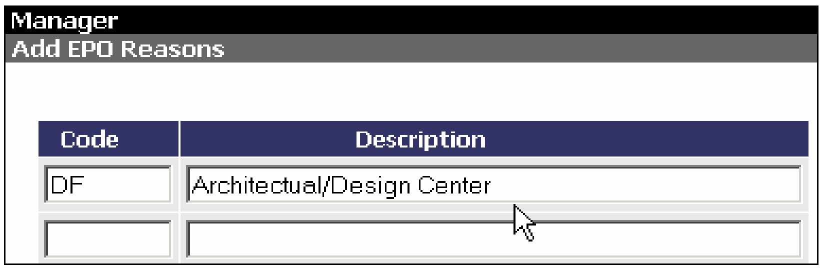


FIGURE 6. Add EPO Reasons page

4. In the **Description** field, type the 1st reason your company uses for extra purchase orders.
5. **Repeat steps 4 and 5** until you have created a code and description for all EPO reasons.
6. Click the **Add EPO Reasons** button at the bottom of the page. BuildPro confirms that the EPO reasons have been added.
7. Adding EPO reasons allows users to choose why the extra purchase order needs to be issued when creating an EPO.

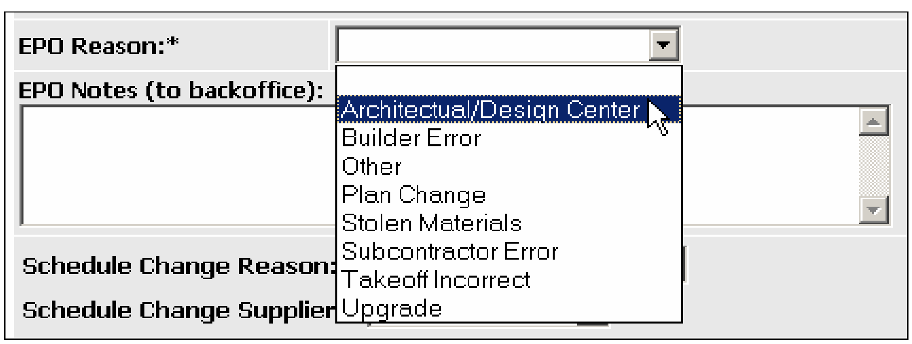


FIGURE 7. EPO Reason drop-down list

## Approve an EPO

If you approve an EPO, then it can be exported to the ERP System for current pricing. If you decline an EPO, an alert is sent to the Construction Manager (Primary User in BuildPro). The Construction Manager can mark the EPO not ready, make changes, and then mark the EPO ready again. Then, the EPO can be approved.

**To approve an EPO:**

1. From the **Job Admin** tab, click the **Approvals** link on the Left Nav Bar.


FIGURE 8. Approvals link on the Left Nav Bar

2. Confirm that the **EPO** tab is selected.
3. Choose the **filters** you want to use, and click the **Show Tasks** button.

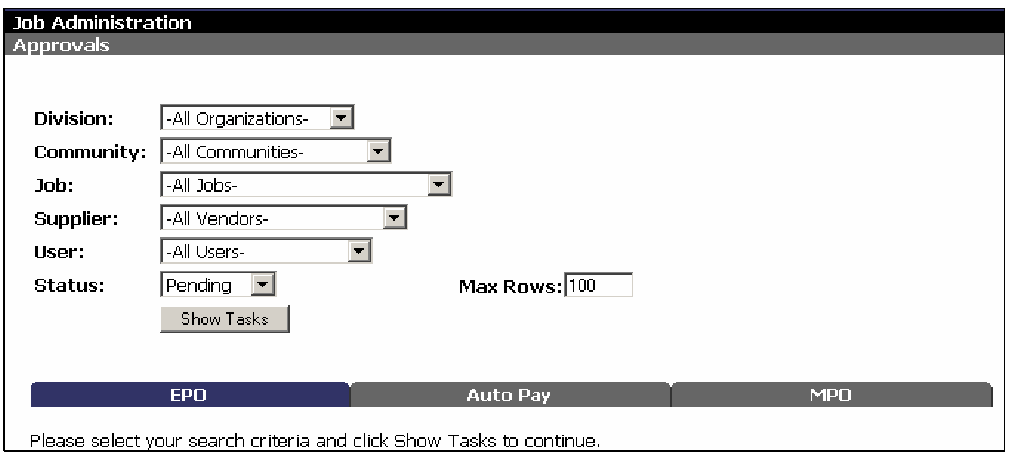


FIGURE 9. Approvals page

4. Click the **Approve** or **Decline** check box to the right of the EPO.
5. Click the **Submit** button.
**Note:** If you approve an EPO, then it can be exported to the ERP System for current pricing. If you decline an EPO, an alert is sent to the Construction Manager (Primary User in BuildPro). The Construction Manager can mark the EPO not ready, make changes, and then mark the EPO ready again. Then, the EPO can be approved.

## Use Autopay Approval

If the Autopay Approval Required box is checked when your System Administrator adds a user, all completed Autopay eligible tasks are sent to the Auto Pay tab. This is done when a second layer of approval is required before a Construction Manager can release payment for completed work.

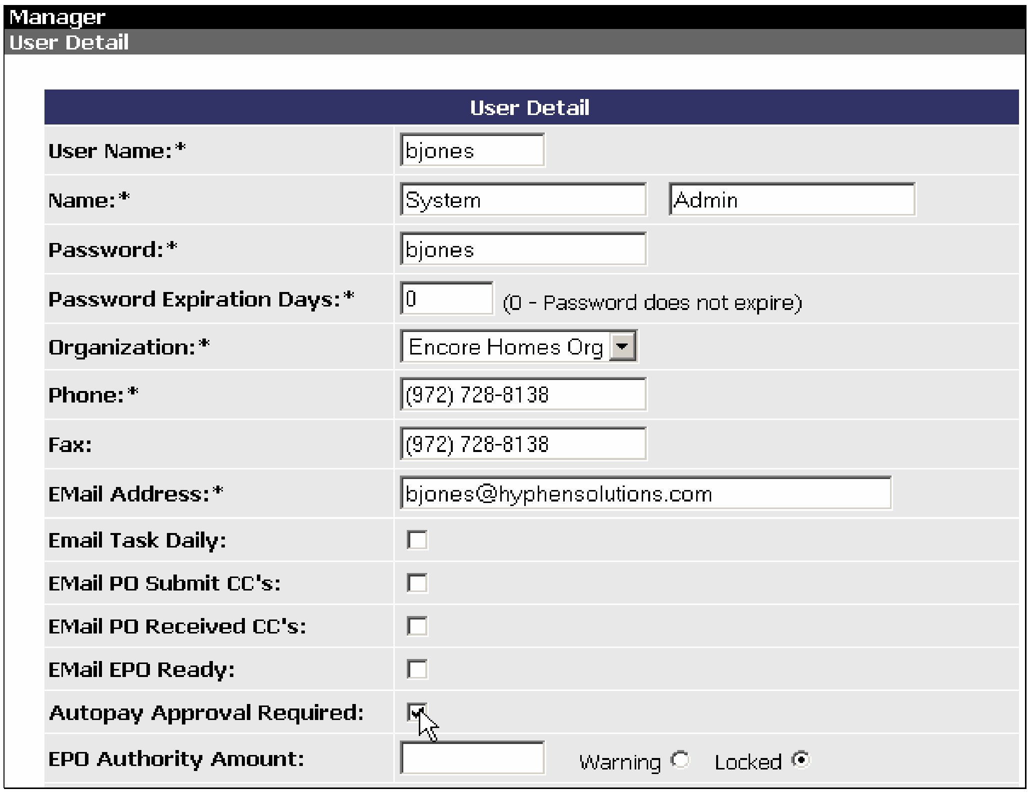


FIGURE 10. User Detail page - Autopay Approval Required

## Approve a PO with Autopay

**To approve a purchase order for payment:**

1. From the **Job Admin** tab, click the **Approvals** link.


FIGURE 11. Approvals link on the Left Nav Bar

2. Click the **Auto Pay** tab.


FIGURE 12. Auto Pay tab on the Approvals page

3. Choose the **filters** you want to use, and click the **Show Tasks** button.

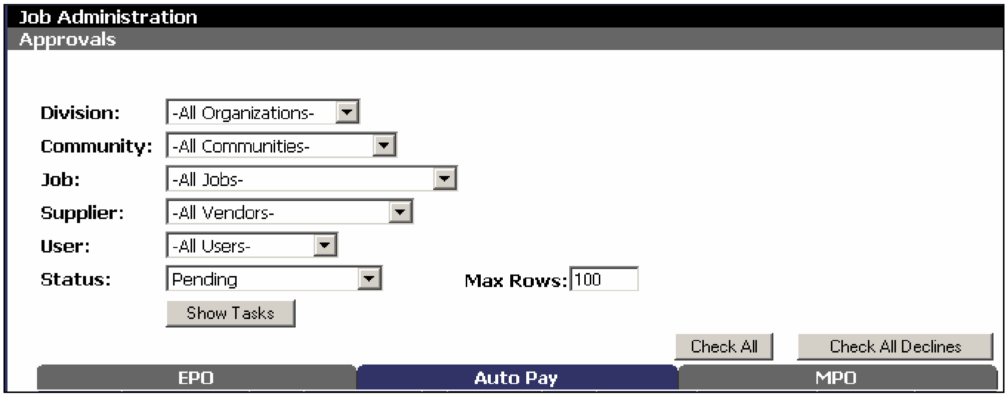


FIGURE 13. Approvals page

4. Click the **Approve** or **Decline** check box to the right of the PO.
   **Note:** If declining, set the pay condition to Manual or Do Not Pay. Approved tasks are exported for payment. Declined tasks are not exported for payment.

5. Click the **Submit** button.

## Approve an MPO

**To approve an MPO:**

1. From the **Job Admin** tab, click the **Approvals** link.


FIGURE 14. Approvals link on the Left Nav Bar

2. Click the **MPO** tab.

3. Choose the **filters** you want to use, and click the **Show Tasks** button.

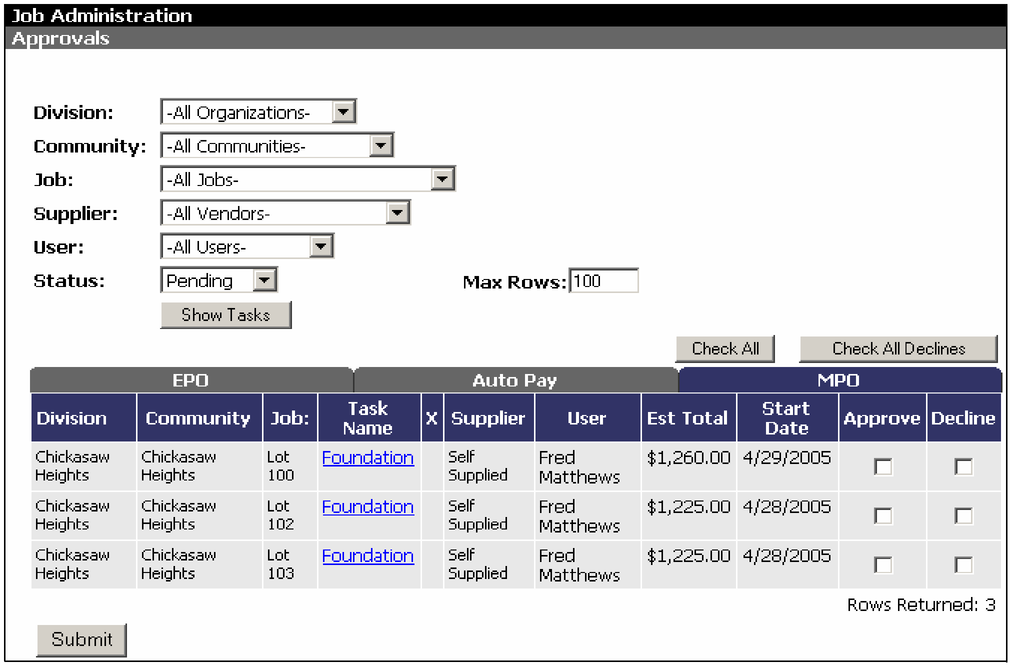


FIGURE 15. Approvals page - MPO tab

4. Click the **Approve** or **Decline** check box to the right of the MPO.
   **Note:** If declining, set the pay condition to Manual or Do Not Pay. Approved tasks are exported for payment. Declined tasks are not exported for payment.
5. Click the **Submit** button.

## Approve a Back Charge

There are two kinds of back charges: stand-alone back charges and back charges associated to an EPO. Approving or declining a back charge does not approve or decline the EPO. The back charge follows a separate approval path from the associated EPO. If the back charge is associated to an EPO, the user cannot approve or decline the back charge until the EPO task has been completed.
**Note:** This tab only appears if the Back Charge module and role are turned on.

**To approve a back charge:**

1. From the **Job Admin** tab, click on the **Approvals** link.


FIGURE 16. Approvals link on the Left Nav Bar

2. Click on the **Back Charges** tab.

3. Choose the filters you want to use, and click the **Show Tasks** button. The list of back charges waiting to be approved appears on the page.

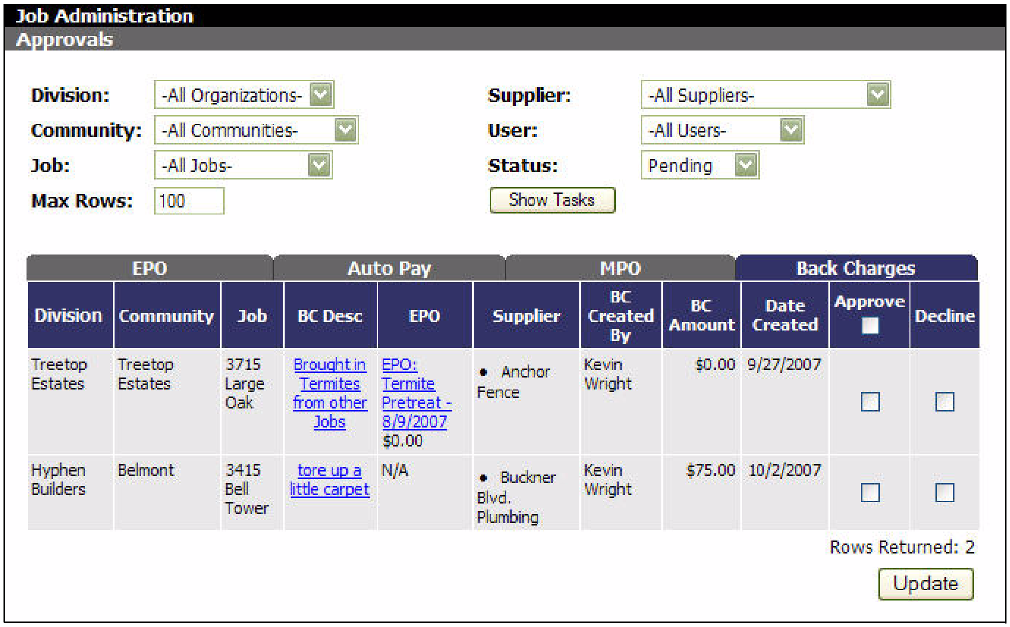


FIGURE 17. Approvals page - Back Charges tab

4. Click on the **Task Name** link to view more task details. The Job Task page opens.

5. On the Approvals page, click the **Approve** check box next to each item you want to approve.

6. Click the **Decline** check box next to each item you want to decline.
   **Note:** Each time you click the Decline check box, the Decline Notes pop-up window opens. You must enter Decline Notes to decline a back charge.

7. To quickly approve all items, click the check box at the top of the **Approve** column.

8. Click the **Update** button at the bottom of the page to approve or decline all checked items.


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## Multiple EPO Approval Levels

Another way to approve EPOs in BuildPro is to use the **Multiple EPO Approval Levels** module (module# 235). The EPO Authorization Amounts at All Levels and Multiple EPO Approval Levels modules may not be turned on at the same time. The Multiple EPO Approval Levels functionality allows you to setup approval levels at each Community and then assign approvers to each level. You may create as many levels as you wish.

To setup this functionality, you must first have the module turned on. Contact Customer Care to have it turned on. The standard **EPO Levels Admin** role must be assigned in order to setup and maintain approval levels.

**To add EPO Approval Levels:**

1. Click the EPO Approval Levels link on the home page of the Manager Tab.
2. Select a Division; then select a Community.

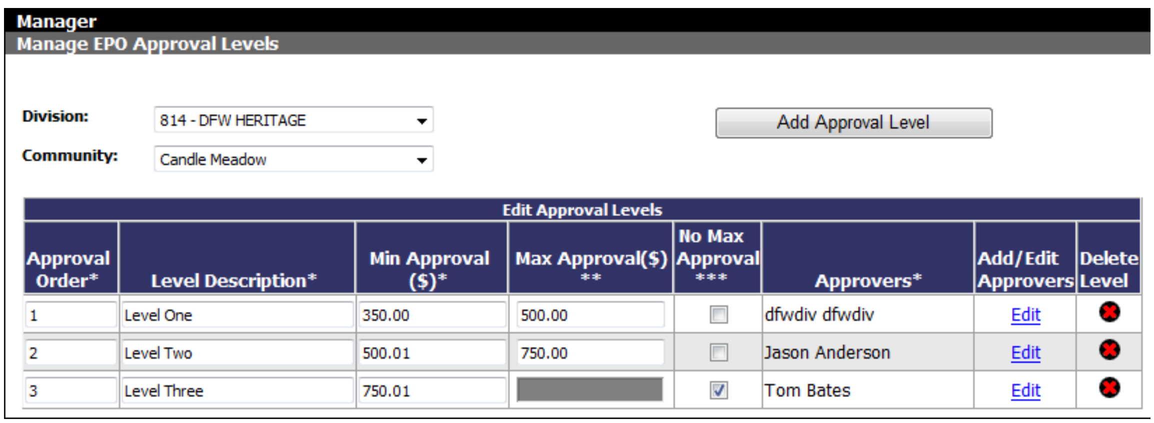


FIGURE 18. Add EPO Approval Level

3. Enter the **Approval Order**. This is the order in which the levels will approve an EPO. This number must be unique within the Community. Enter whole numbers only. The lowest number of any level will approve first; followed by the next lowest number, etc.
4. Enter a **Level Description** that describes the level.
5. Enter a **Min Approval** amount. This is the minimum dollar amount for which the level will approve an EPO.
6. Enter a **Max Approval** amount. This is the maximum dollar amount of an EPO for which the level must approve.
7. Check the **No Max Approval** if the level must approve all EPOs where the dollar amount is equal to or greater than the Min Approval amount (no Max Approval amount).
8. To assign **Approvers** click the Edit hyperlink. A popup window will appear with users from the Division chosen and up. Select Approvers by checking the check box next to them. Click the Update button in the popup window; then click the Close button. Any

number of approvers may be added. A user may not belong to more than one level within a Community. A user may belong to one approval level in any number of Communities.

9. Click the Update button at the bottom of the page.

**Note:** To add another Approval Level, click the **Add Approval Level** button at the top of the page.

**Note:** Approval levels must be setup in each Community. EPOs created for a given Job will then use the Approval Levels settings for the Community the Job belongs to.

**Note:** EPO Approval Levels may not be updated if there are EPOs pending approval. Fields will be grayed out and non editable.

| Edit Approval Levels | | | | | | | |
|---|---|---|---|---|---|---|---|
| Approval Order* | Level Description* | Min Approval ($)* | Max Approval($) ** | No Max Approval *** | Approvers* | Add/Edit Approvers | Delete Level |
| 1 | Level One | 500.00 | 999.99 | ☐ | System Admin, Jeni Anderson, Jason Anderson | Edit | |
| 2 | Level Two | 1000.00 | 1499.99 | ☐ | Clint Bryson, Grant Bynum | Edit | |
| 3 | Level Three | 1500.00 | | ☑ | John Asplin | Edit | |

FIGURE 19. EPO Approval Levels are not Editable When EPOs are Pending Approval

When an EPO requires approval by a level, only one approver needs to approve the EPO in order for the next level to be notified. Once all levels (that require approval) have approved, the EPO will be ready for export (integrated companies).

Notification to approve an EPO is sent via email. The email address used is the one from the user's Your Profile page. Users may turn these notifications on/off from this page.

A nightly batch email is sent to all Approvers of all levels of that community (regardless if that level has approved the EPO or not) as a reminder of EPOs that have not been approved.

## Approvals

A level must approve an EPO if: The EPO dollar amount is equal to or greater than the Min Approval amount and equal to or less than the Max Approval amount. If the No Max Approval check box is checked, the level must approve if the EPO dollar amount is equal to or greater than the Min Approval amount.

A level will not have to approve an EPO if: The EPO dollar amount is less than the Min Approval amount or greater than the Max Approval amount for that level. If the No Max Approval check box is checked, the level does not have to approve if the EPO dollar amount is less than the Min Approval amount.

When an EPO is created the lowest Approval Level that must approve will be notified via email. Approvers are notified using the email address found in BuildPro. Only one approver from the level needs to approve the EPO. After that level has approved, the next level that must approve will be notified. After all levels that must approve have approved the EPO, it will be marked "Approved" and ready for export if your company is integrated.



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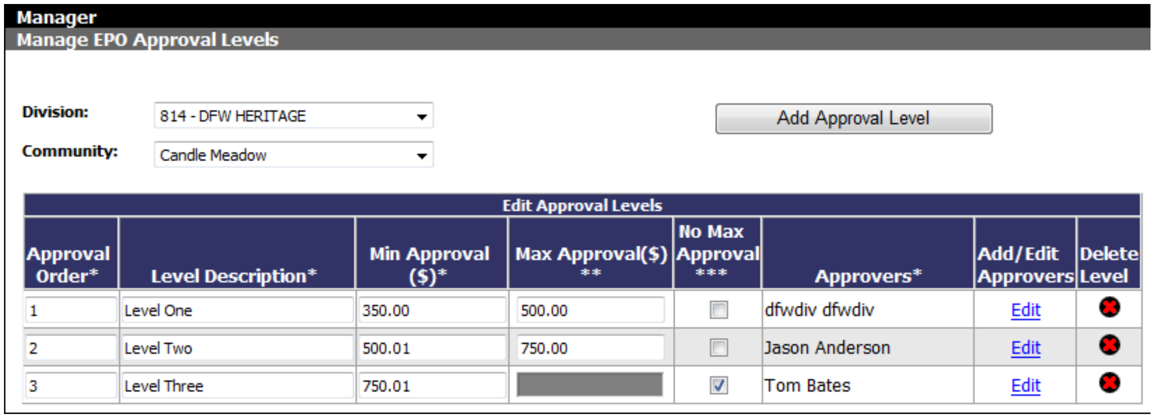
## Examples

In the example below, only one level will have to approve an EPO for $400.00 because it falls in between the Min and Max Approval amounts of Level One.

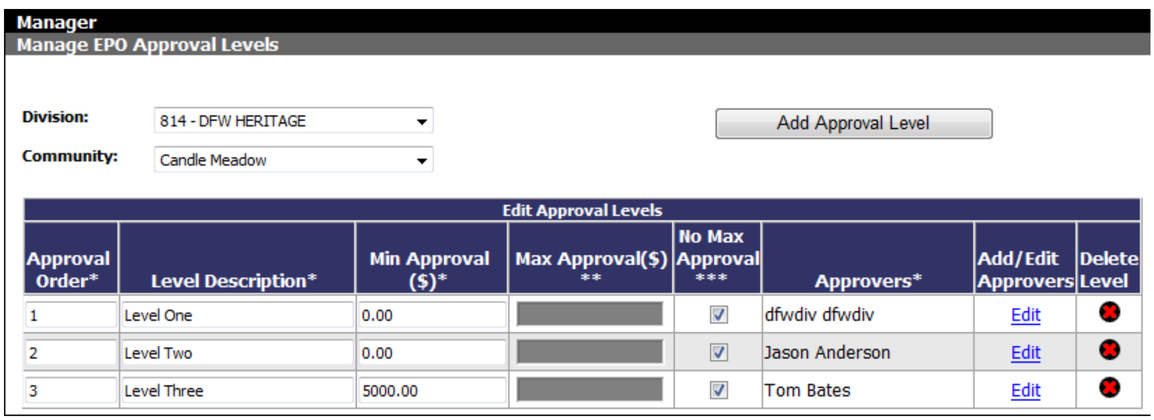

Manager
Manage EPO Approval Levels

Division: 814 - DFW HERITAGE
Community: Candle Meadow
Add Approval Level

Edit Approval Levels

| Approval Order* | Level Description* | Min Approval ($)* | Max Approval($) ** | No Max Approval *** | Approvers* | Add/Edit Approvers | Delete Level |
|---|---|---|---|---|---|---|---|
| 1 | Level One | 350.00 | 500.00 | ☐ | dfwdiv dfwdiv | Edit | |
| 2 | Level Two | 500.01 | 750.00 | ☐ | Jason Anderson | Edit | |
| 3 | Level Three | 750.01 | | ☑ | Tom Bates | Edit | |

In the second example, Level One and Two will have to approve every EPO regardless of the dollar amount. Level Three would only approve EPOs that are $5000.00 or higher.


Manager
Manage EPO Approval Levels

Division: 814 - DFW HERITAGE
Community: Candle Meadow
Add Approval Level

Edit Approval Levels

| Approval Order* | Level Description* | Min Approval ($)* | Max Approval($) ** | No Max Approval *** | Approvers* | Add/Edit Approvers | Delete Level |
|---|---|---|---|---|---|---|---|
| 1 | Level One | 0.00 | | ☑ | dfwdiv dfwdiv | Edit | |
| 2 | Level Two | 0.00 | | ☑ | Jason Anderson | Edit | |
| 3 | Level Three | 5000.00 | | ☑ | Tom Bates | Edit | |

## EPO Rejection Codes

When using the Multiple EPO Approval Levels module you must enter **EPO Rejection Codes**. From the Manager Tab home page click the **Add Rejection Codes** link under the **EPO Rejection Codes** section.

**Note:** EPO Rejection Codes are entered and stored at the company level. If you are not at the company level the hyperlinks to add and update rejection codes will be grayed out.

From the **Add EPO Rejection Codes** page, enter the **Code** and **Description**; then click the **Add Rejection Codes** button.

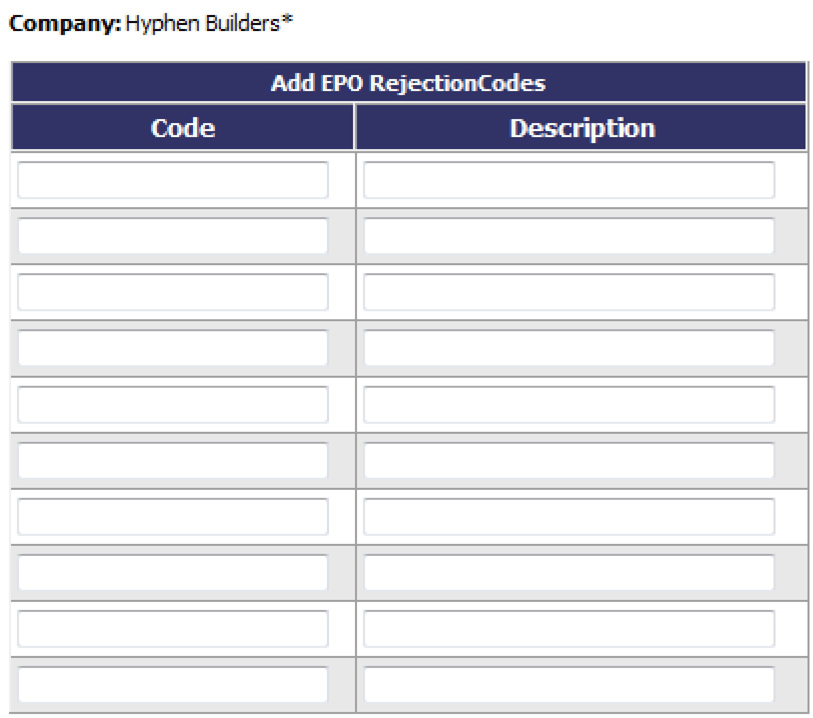



FIGURE 20. Add EPO Rejection Codes

Rejection codes entered here will be available from the **Pending EPOs and BCs** page (and **Approvals** page) when you reject an EPO.

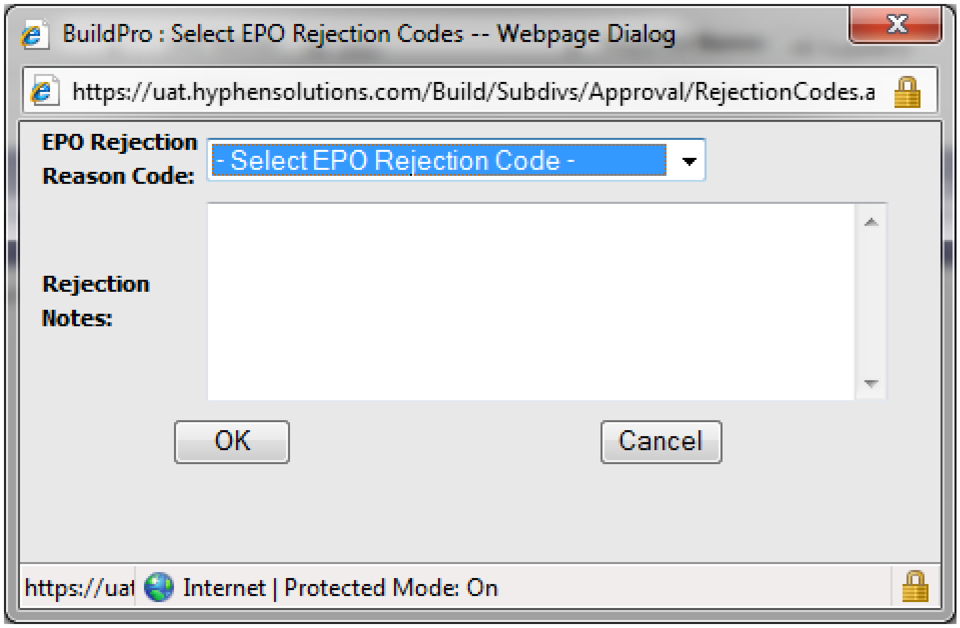
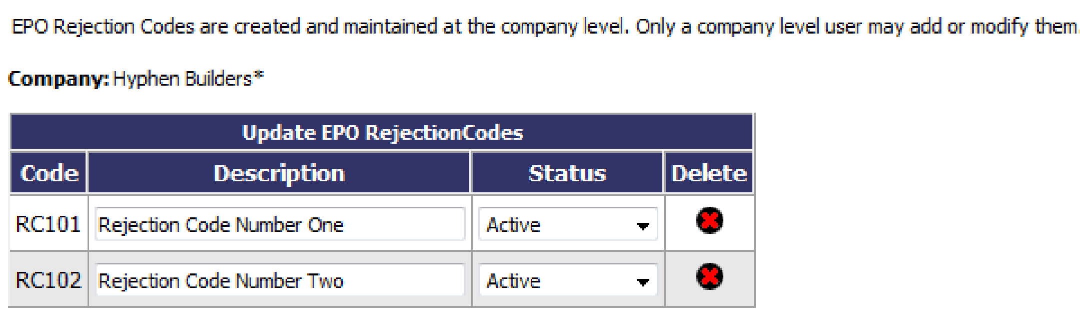



FIGURE 21. Select EPO Rejection Code

To update **EPO Rejection Codes** click the **Update Rejection Codes** link on the Manager Tab home page.



EPO Rejection Codes are created and maintained at the company level. Only a company level user may add or modify them.

**Company:** Hyphen Builders*

| Update EPO RejectionCodes | | | |
|---|---|---|---|
| **Code** | **Description** | **Status** | **Delete** |
| RC101 | Rejection Code Number One | Active | |
| RC102 | Rejection Code Number Two | Active | |

FIGURE 22. Update EPO Rejection Codes

### Approving EPOs

There are three ways an Approver is notified when an EPO requires approval:

1. Immediate Email. An email will be sent with details of the EPO.
2. EPO Approval alert. On the BuildPro Home page, there is an **EPO Approvals** section letting the Approver know if there are EPOs to approve.
3. Nightly Batch Email. This email gives you a summary of all EPOs requiring approval by Community and Job.

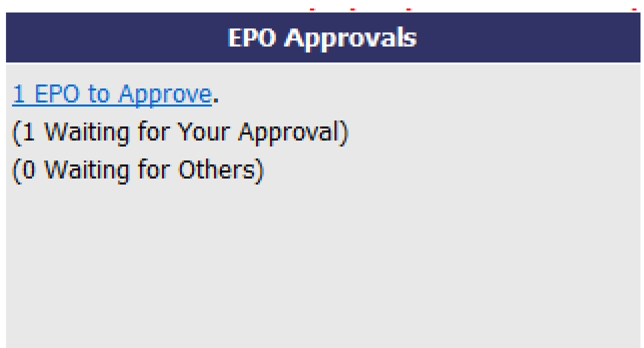
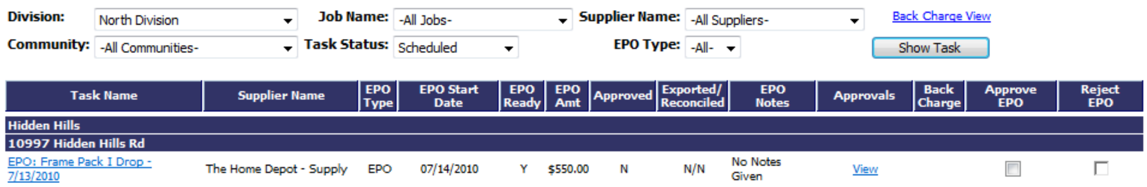



FIGURE 23. EPO Approval Alert

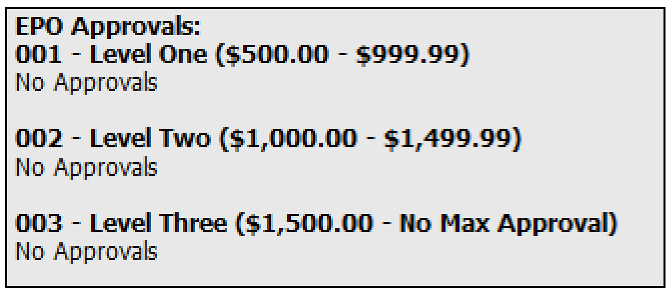
The hyperlink lets you know the total EPOs that must be approved. The numbers below the link break out EPOs that need your approval now (1 Waiting for Your Approval) and EPOs that require another level to approve before you or someone from your level may approve (0 Waiting for Others).

Clicking the hyperlink will take you to the Pending EPOs and BCs page where you may approve EPOs.

To approve the EPO, click the **Approve EPO** check box and click the Update button. To reject the EPO, click the **Reject EPO** check box, select an **EPO Rejection Reason Code** from the popup window, click the OK button, and click the Update button on the main page.




To view a history of approvals or rejections, click the **View** link under the **Approvals** column. This popup window also shows the Approval Level settings as well as the level for which you are an Approver.




**Note:** You may also approve EPOs from the Approvals page under the Job Admin tab.

If your BuildPro company is integrated, EPOs will be exported once they are approved; then reconciled once they are updated and returned to BuildPro. The export and reconcile process is not affected by which approval process you use.

### EPOs Created by Level Approvers

The **Multiple EPO Approval Levels** module (module# 235) requires an EPO be approved by a level if the dollar amount of the EPO falls within the Min or Max Approval of that level. If an EPO is created by an approver of that level, another approver must approve the EPO for that level. An approver cannot approver their own EPO for a level they are assigned.

Module# 269 (Multiple EPO Approval Levels - Approver EPOs) sets the status of the EPO to approved for a level if an approver of the level creates an EPO; assuming the dollar amount falls in the Min and Max Approval. The EPO is still subject to approval by other levels if the dollar amount of the EPO falls within their Min and Max Approval.

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# 9 Pausing & Holding Tasks

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Using the Pause and Hold functions

## Pausing & Holding Tasks Overview

To use the Pause/Hold function, you must create the Pause/Hold Reason List.
**Note:** TASKS can be paused. JOBS can be put on hold.

## Add Pause & Hold Reason Lists

The Pause/Hold reason list should contain all the reasons a job would typically be held (stopped) or paused.

**To add pause/hold reasons:**

1. From the **Manager** tab, click the **Pause/Hold Reason List** link.

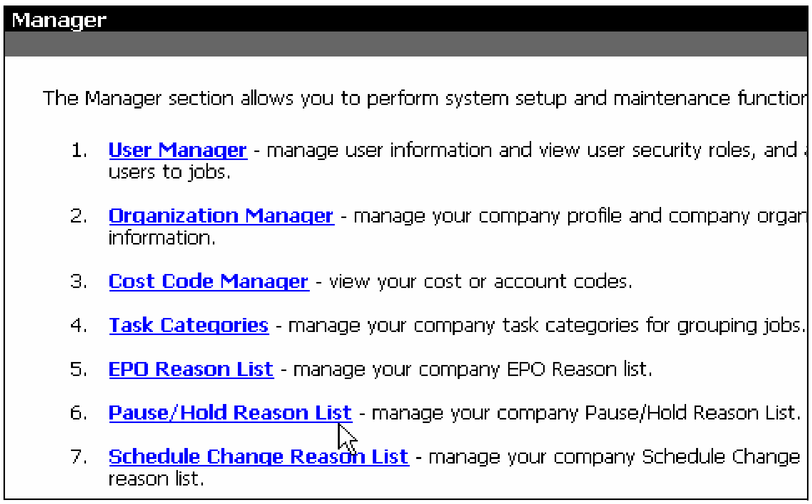



FIGURE 1. Manager tab

2. Enter the **Code** and **Description** for each pause/hold reason.


FIGURE 2. Add Pause/Hold Reasons page

3. Click the **Add Reasons** button. BuildPro confirms the pause/hold reasons have been added.


FIGURE 3. Add Reasons button

## Pause or Hold a Job

Within BuildPro, you can insert a pause task that holds the schedule with a note or a reason code attached or you can put a hold on a job.

You use a pause task when something has happened on the job that is beyond the control of the construction manager. Pause tasks are normally for short durations. The number of days a job is paused is subtracted from reports that calculate the time it took to build a house. Pause tasks are at the task level; you don't start them or complete them. A pause task is added into the schedule and the Administrator User determines whether or not to affect the schedule, based on where the task occurs.

Jobs that are on hold are mainly for winter starts. Jobs that are in a hold status cannot be updated, started, completed by the construction manager. To put jobs on hold, the Administrator User adds a start date (today or in the past) for the hold. This immediately changes the status of the job to Hold. Jobs that are on hold do not appear as active jobs on the Job Primary's job list and tasks will not appear on the To Do List. Only the Job Administrator can update tasks in a job that is on hold.

Only a Job Administrator can make modifications to jobs that are on hold or insert pause tasks.

## Put a Job on Hold

**To put a job on hold:**

1. From the **Job Admin** tab click the **Hold Jobs** link on the Left Nav Bar. The Hold Jobs page opens on the Add New Hold tab.


FIGURE 4. Hold Jobs link on the Left Nav Bar

2. Choose a **Subdivision** from the drop-down list, and click the **Show Jobs** button.
**Note:** Jobs that are in any status other than active cannot be put on hold.

3. To put a hold a Multi-Family job/building, choose **Multi-Family Jobs** from the drop-down list next to **Subdivision**.
**Note:** When a building is put on hold, all active jobs associated to that building are put on hold.


FIGURE 5. Hold Jobs page

4. In the **Hold Start Date** field, type today's date (or a past date).


FIGURE 6. Hold Start Date

5. In the **Re-Activate Date** field, type the proposed reactivation date for the job.

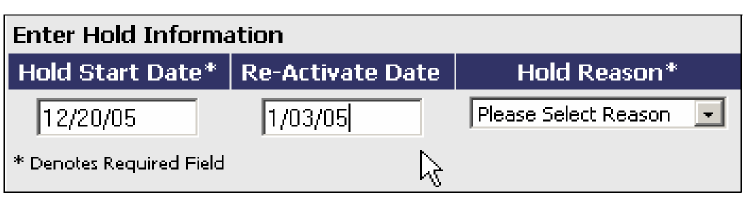



FIGURE 7. Re-Activate Date

6. From the **Hold Reason** drop-down list, choose the appropriate reason for placing the job on hold.

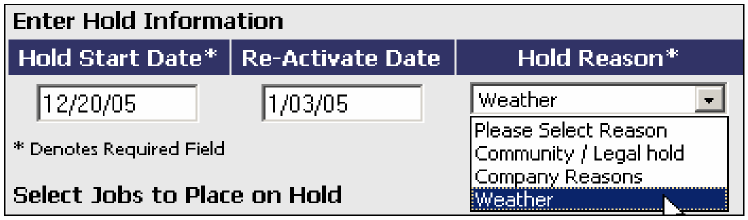



FIGURE 8. Hold Reason

7. If needed, click the **Re-Init Baseline** check box to reinitialize the baseline.

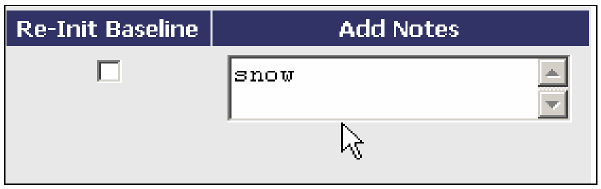



FIGURE 9. Re-Init Baseline, Add Notes

8. Enter **Notes**, if necessary.

9. In the **Sel** column, click the check box to the left of each job you want to put on hold.

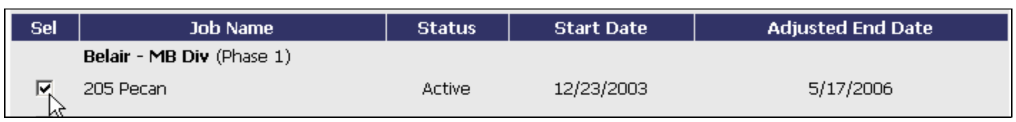



FIGURE 10. Click the Sel check box

10. Click the **Place Selected Jobs on Hold** button. BuildPro confirms that the job(s) has been put on hold.

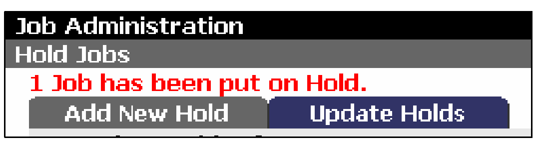



FIGURE 11. BuildPro confirms job has been put on hold

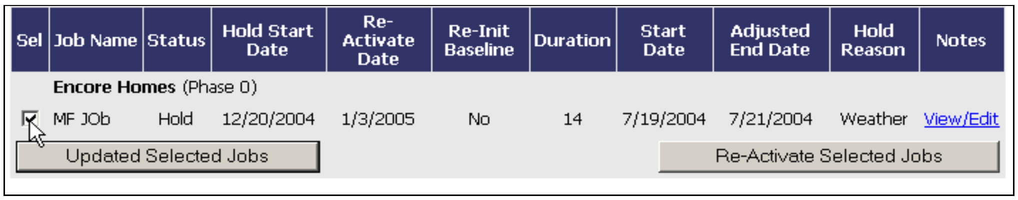
## Re-Activate a Hold Job (Manually)

**To re-activate a job (take off hold):**

1. From the **Job Admin** tab click the **Hold Jobs** link on the Left Nav Bar.
2. Choose a **Subdivision** from the drop-down list, and click the **Show Jobs** button. The Hold Jobs page opens on the Add New Hold tab.
3. Click the **Update Holds** tab.


FIGURE 12. Hold Jobs page - Update Holds tab

4. In the **Sel** column, click the check box next to each job you want to re-activate.



| Sel | Job Name | Status | Hold Start Date | Re-Activate Date | Re-Init Baseline | Duration | Start Date | Adjusted End Date | Hold Reason | Notes |
|---|---|---|---|---|---|---|---|---|---|---|
| | **Encore Homes** (Phase 0) | | | | | | | | | |
| ☑ | MF JOb | Hold | 12/20/2004 | 1/3/2005 | No | 14 | 7/19/2004 | 7/21/2004 | Weather | View/Edit |



FIGURE 13. Click the Sel check box

5. Click the **Re-Activate Selected Jobs** button. BuildPro confirms that the job is no longer on hold.


FIGURE 14. BuildPro confirms job hold has been updated

## Re-Activate a Hold Job (Automatically)

**To have BuildPro automatically change the status of a job from Hold to Active:**

1. The "Auto Reactivate Hold Jobs" module must be turned on for your company. Call Hyphen Solutions' support to confirm the module is on.
2. Once the re-activate date is known for a job, go to the Hold Jobs page and click the **Update Holds** tab.
3. Enter the date you want the job to be re-activated in the **Re-Activate Date** column. Select a **Hold Reason** and add notes if necessary.
4. Select the check box next to the job you want to re-activate and click the **Update Selected Jobs** button.
   **Note:** On a nightly basis, BuildPro looks for jobs where the re-activate date is today or prior. If the module is turned on and the re-activate date is today or prior, the job status will automatically change to Active.

## Add a Pause Task

Pause tasks are normally for short durations. The number of days a job is paused is subtracted from reports that calculate the time it took to build a house. Pause tasks are at the task level. You don't start them or complete them. A pause task is added into the schedule in Complete status.

When adding a pause task, the user determines whether or not to affect the schedule, or re-initialize the baseline.

**To pause a task:**

1. From the **Jobs** tab, click the **Job Name** you want to pause.

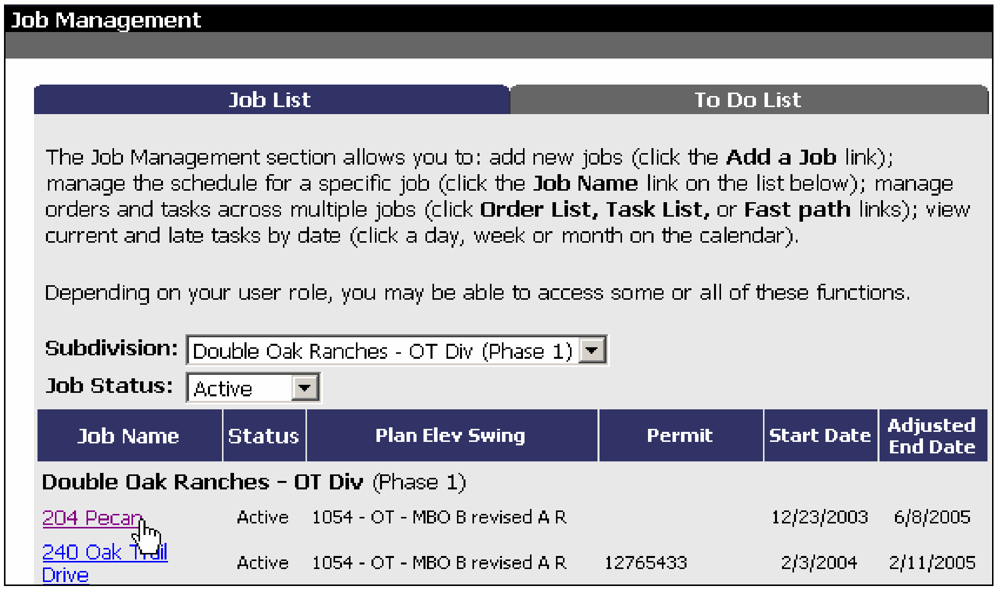



FIGURE 15. Job List page

2. From the **Job Setup** tab, click the **Schedule Management** link. The Job Schedule Overview page opens.

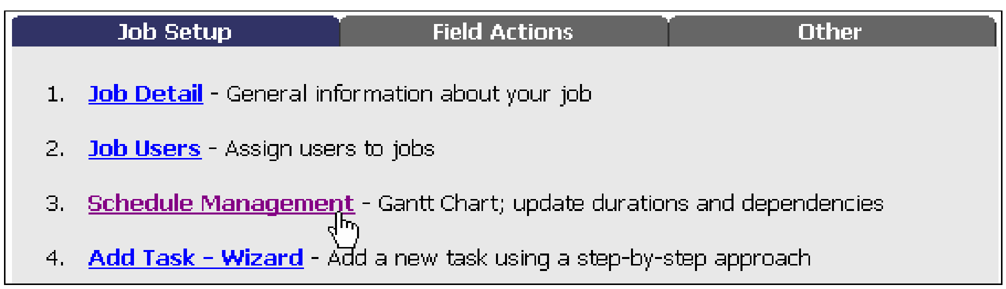



FIGURE 16. Job Actions page - Job Setup tab

3. Click the appropriate **Stage Name** link. The Job Schedule Management page opens.

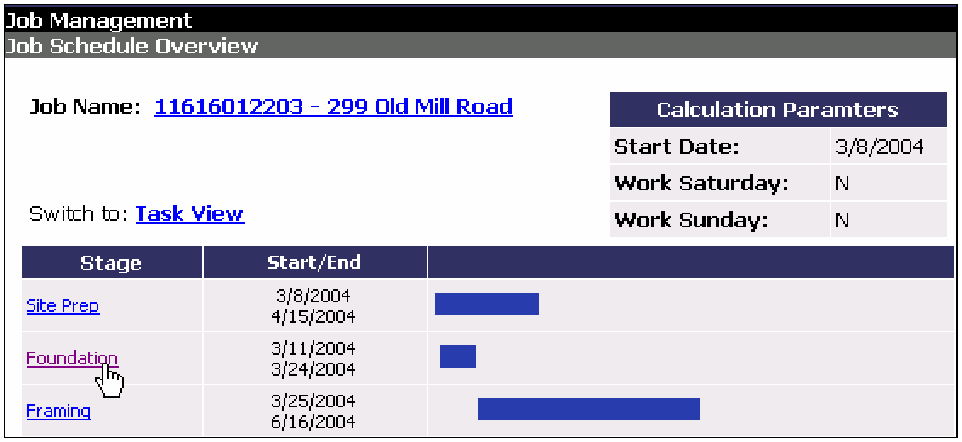



FIGURE 17. Job Schedule Overview page

4. Click the **Add Pause Task** link. The Pause Task Edit page opens.

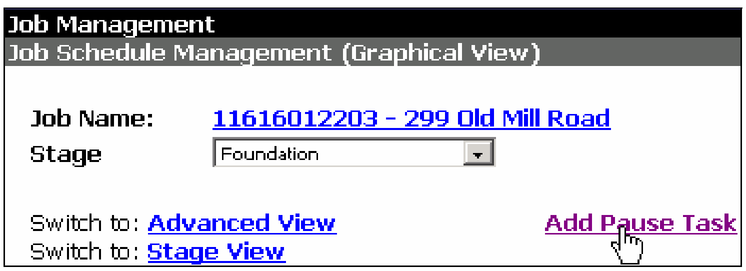



FIGURE 18. Add Pause Task link

5. Complete the fields in the **Pause Task Detail**.
   - Type the **Predecessor ID/Rank** of the dependent task
   - Type the **Sequence** number, which will place the Pause Task you are creating after the previous task's sequence.
   - In the **Duration** field, type the number of days it will take to complete the task.
   - If necessary, in the **Offset** field, type the number of days forward or backward for when this task could start.
   - Use the **Pause Reasons** drop-down list to add your company's reasons for placing a pause task on a job.
   - Type **Notes** to describe why a pause is needed. If you need to re-calculate your baseline, select the check box titled Re-calculate Baseline.



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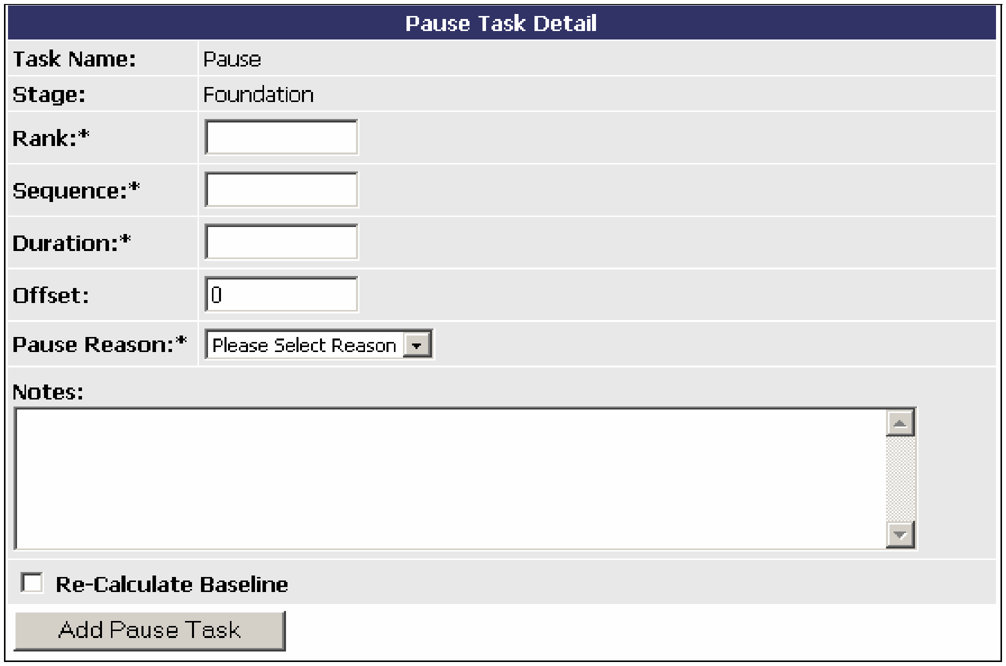


FIGURE 19. Pause Task Edit page - Pause Task Detail section

6. Click the **Re-Calculate Baseline** check box if you want to re-calculate the baseline. **Note:** The page uses the type of schedule re-calc that is selected on the Company Profile page

7. Click the **Add Pause Task** button. The pause task is added to the schedule in Complete status. Continue working your schedule as normal.

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# 10 Phase Management

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Managing phases and groups
- Setting up combined POs and combined schedule notifications
- Transmitting PO information for an entire phase

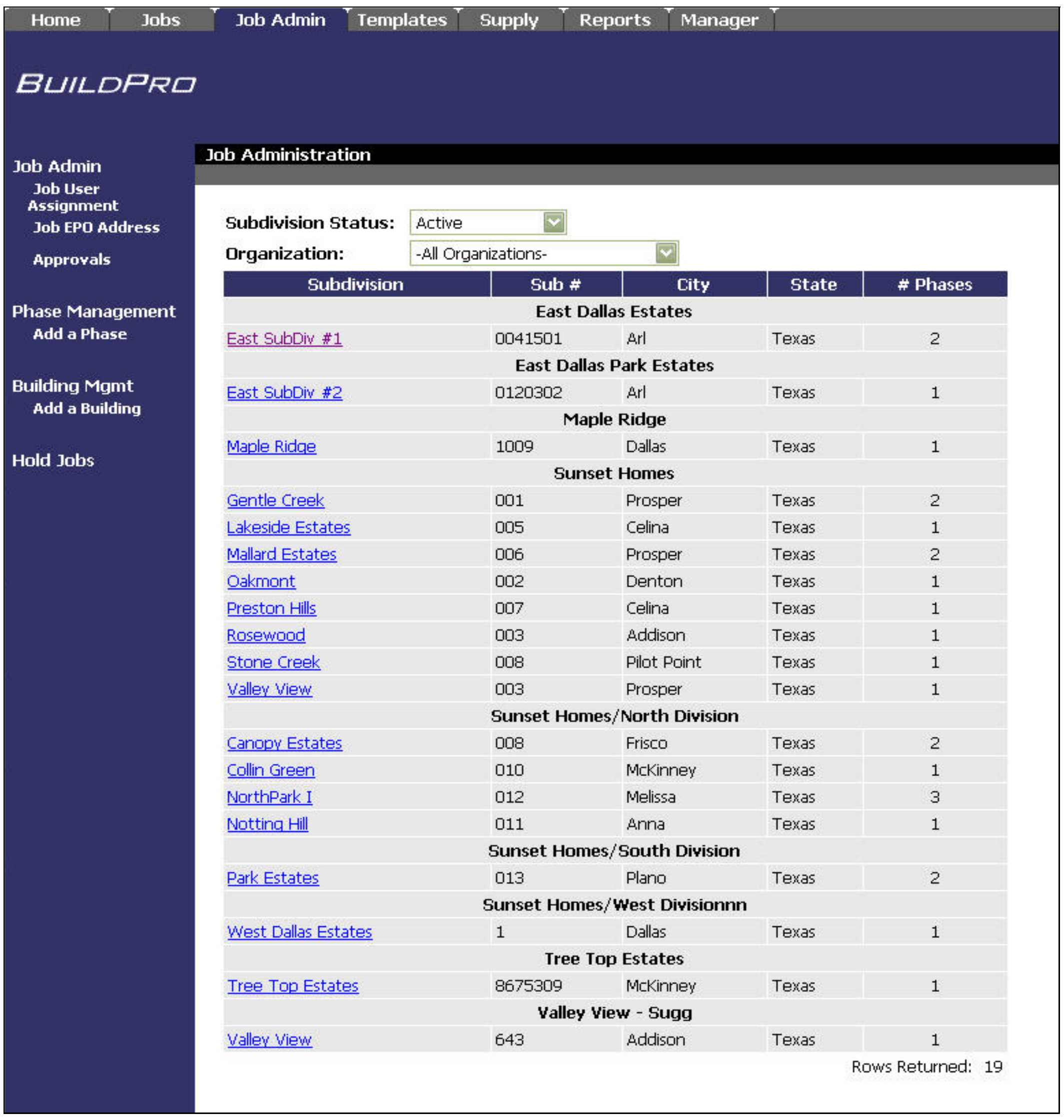
## Phase Management Overview

In Phase Management, with the appropriate roles, administrators can:

- Add or delete phases.
- Add or delete groups.
- Transmit PO information for an entire phase.
- Enable combined POs and combined schedule notifications.

## Subdivision List

When you click on the Job Admin tab, the Subdivision List opens. You can filter the subdivisions by status and organization. Click the **Job Admin** tab. The **Subdivision List** opens.




| Subdivision | Sub # | City | State | # Phases |
|---|---|---|---|---|
| **East Dallas Estates** | | | | |
| East SubDiv #1 | 0041501 | Arl | Texas | 2 |
| **East Dallas Park Estates** | | | | |
| East SubDiv #2 | 0120302 | Arl | Texas | 1 |
| **Maple Ridge** | | | | |
| Maple Ridge | 1009 | Dallas | Texas | 1 |
| **Sunset Homes** | | | | |
| Gentle Creek | 001 | Prosper | Texas | 2 |
| Lakeside Estates | 005 | Celina | Texas | 1 |
| Mallard Estates | 006 | Prosper | Texas | 2 |
| Oakmont | 002 | Denton | Texas | 1 |
| Preston Hills | 007 | Celina | Texas | 1 |
| Rosewood | 003 | Addison | Texas | 1 |
| Stone Creek | 008 | Pilot Point | Texas | 1 |
| Valley View | 003 | Prosper | Texas | 1 |
| **Sunset Homes/North Division** | | | | |
| Canopy Estates | 008 | Frisco | Texas | 2 |
| Collin Green | 010 | McKinney | Texas | 1 |
| NorthPark I | 012 | Melissa | Texas | 3 |
| Notting Hill | 011 | Anna | Texas | 1 |
| **Sunset Homes/South Division** | | | | |
| Park Estates | 013 | Plano | Texas | 2 |
| **Sunset Homes/West Divisionnn** | | | | |
| West Dallas Estates | 1 | Dallas | Texas | 1 |
| **Tree Top Estates** | | | | |
| Tree Top Estates | 8675309 | McKinney | Texas | 1 |
| **Valley View - Sugg** | | | | |
| Valley View | 643 | Addison | Texas | 1 |

FIGURE 1. Subdivision List page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## Subdivision Actions

On the Subdivision Actions page, you can:

- Choose a different subdivision by clicking on the subdivision name in the drop-down menu
- Go to the Add Phase page by clicking the Add a New Phase link
- Go to the Subdivision Detail page by clicking the Subdivision Detail link
- Go to the Phase Actions page by clicking on a phase name

**To open the Subdivision Actions page:**

1. Click the **Job Admin** tab. The Subdivision List opens.
2. Click on a **Subdivision Name**. The Subdivision Actions page opens.

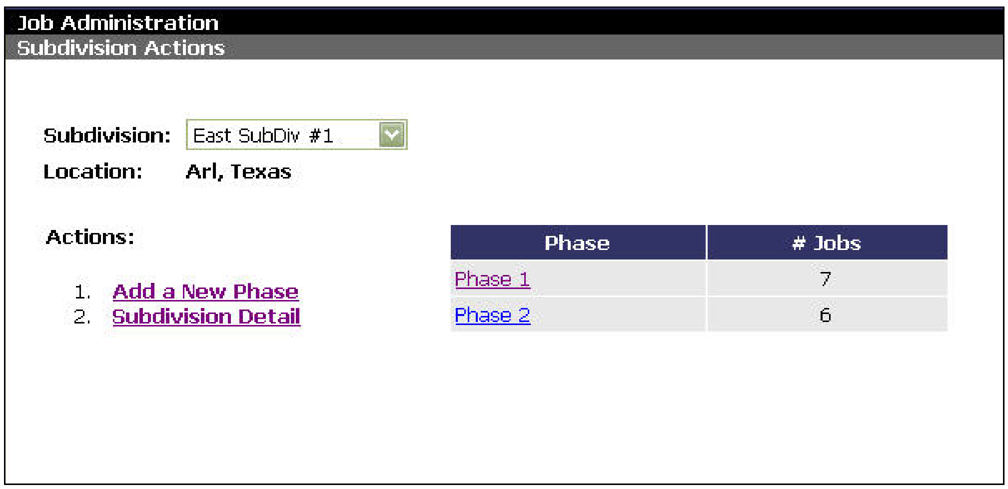


FIGURE 2. Subdivision Actions page

## Subdivision Detail

Click the Subdivision Detail link. The Subdivision Detail page opens. On this page, you can update information for a subdivision, like:

- Subdivision name
- Contact person
- Contact information

**To update a subdivision:**

1. Click the **Job Admin** tab. The Subdivision List opens.
2. Click on a **Subdivision Name**. The Subdivision Actions page opens.
3. Click the **Subdivision Detail** link. The Subdivision Detail page opens.

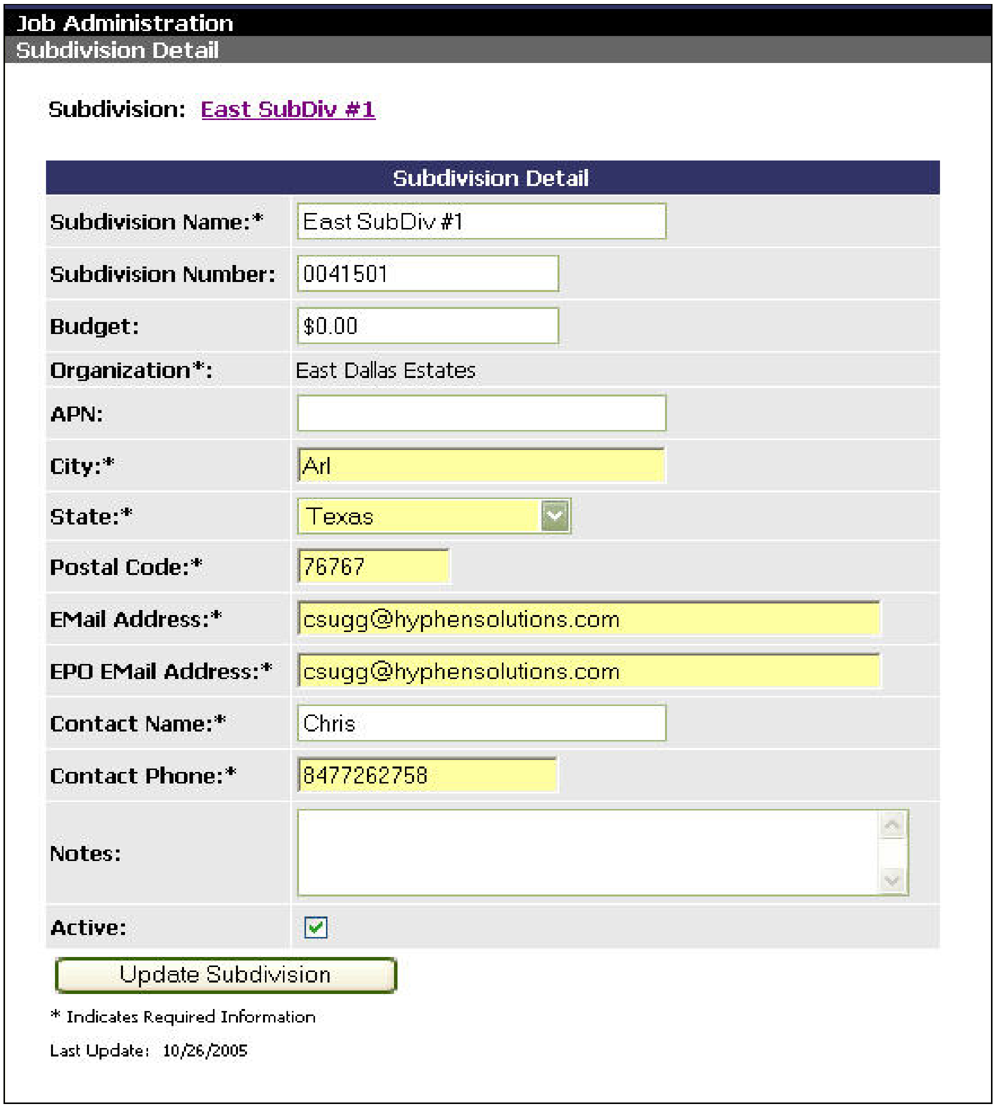


FIGURE 3. Subdivision Detail page

4. Make any necessary changes to the subdivision fields.
5. Make sure you have information in the cells with an asterisk*. The asterisk indicates required information.
6. Click the **Update Subdivision** button. Your subdivision has been added. BuildPro confirms that the subdivision has been updated.
7. You'll be taken back to the **Subdivision Actions** page.

## Add a New Phase

Sequence numbers are unique to a phase, so jobs in the same phase but different groups cannot have the same sequence number, unless the user has the “Jobs: Assign Duplicate Seq Numbers role.” When this role function is assigned to a user, the user will have the ability to assign duplicate sequence numbers within a phase on the Job Admin tab - Update Phase page. If a user does not have this role function, the page will not allow the user to enter duplicate sequence numbers. Two jobs can only have the same sequence number within a phase if the jobs are in two different groups. A group cannot contain jobs with duplicate sequence numbers.

**To add a new phase:**

1. Click the **Job Admin** tab. The Subdivision List opens.
2. Click on a **Subdivision Name**. The Subdivision Actions page opens.
3. Click the **Add a New Phase** link. The Add Phase page opens.

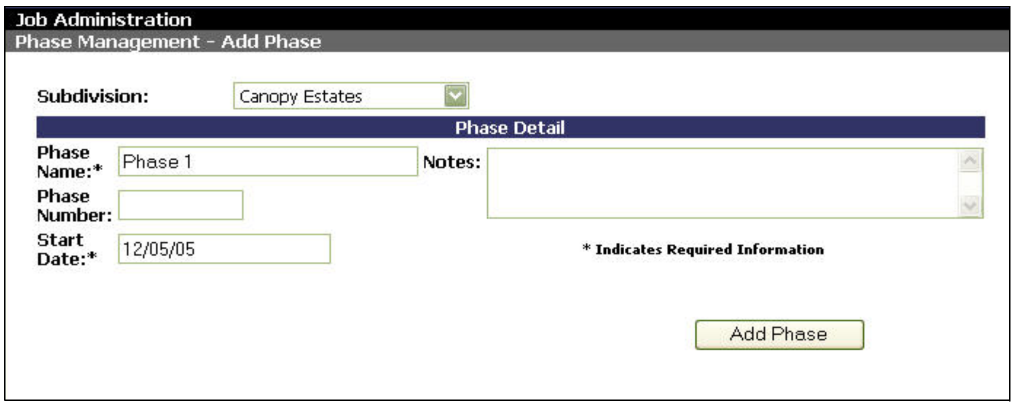


FIGURE 4. Add Phase page

4. Select a **Subdivision** from the drop-down list.
5. Enter a **Phase Name**.
   **Note:** When you choose a phase from the Box Schedule or Task View pages, you will see the phase name. The asterisk * indicates a required field.
6. Enter a **Start Date**.
   **Note:** The Start Date for that phase of the Subdivision represents the date construction began. The asterisk * indicates a required field.
7. Add an optional **Phase Number** or **Notes**.
8. Click the **Add Phase** button. Your new phase has been added. You'll be taken to the Update Phase page where you can make changes to your phase.

## Phase Actions

On the Phase Actions page, you can:

- View jobs in a selected phase.
- View a job's lot/block, sequence, and group.
- Transmit PO information for an entire phase (See next section for more detail).
- Choose a different phase by clicking on the phase name in the Phase drop-down list.

- Go to the Lot Actions page to view detail information about that job by clicking on a job name.
- Go to the Update Phase page by clicking the Phase Mgmt link.
- Go to the Manage Groups page by clicking the Manage Groups link.
- Return to the Subdivision Actions page by clicking on the Subdivision link.

**To open the Phase Actions page:**

1. Click the **Job Admin** tab. The Subdivision List opens.
2. Click on a **Subdivision Name**. The Subdivision Actions page opens.
3. Click on a **Phase Name**. The Phase Actions page opens.

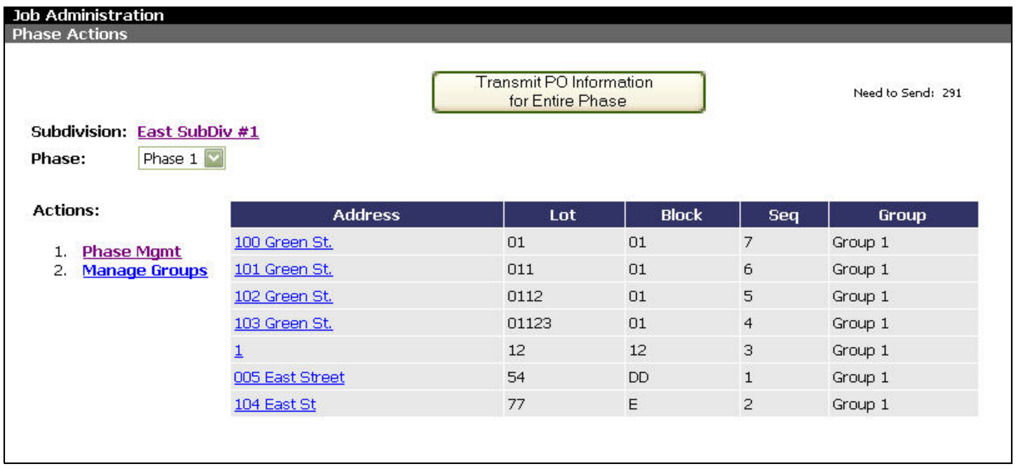


FIGURE 5. Phase Actions page

## Transmit PO Information for Entire Phase

When you transmit all the PO information for an entire phase, you're notifying your suppliers in advance of the task start date what materials and labor you'll need for each task. Once you transmit the PO information, this button is no longer usable and will be grayed out. If new tasks are added, the button will become active again so you can transmit the new PO information. The construction manager can also transmit the PO information from the Box Schedule or Task View pages.

The "Transmit PO Information for Entire Phase" button on the Update Phase page is controlled by a role function called "Jobs: Box Sch - Global POs." This role function controls the following functions:

- Displays the "Transmit PO Information for Entire Phase" button on the Phase Actions page.
- Displays the "Transmit PO Information" link on the Task View and Box Schedule pages.
- On the Task View page, highlights each task in yellow whose order has not yet been sent to the supplier, via the "Transmit PO Information for Entire Phase" button.

**To transmit PO information for an entire phase:**

1. Click the **Job Admin** tab. The Subdivision List opens.

2. Click on a **Subdivision Name**. The Subdivision Actions page opens.

3. Click on a **Phase Name**. The Phase Actions page opens.

4. Click the **Transmit PO Information for Entire Phase** button. You'll see the number of orders waiting to be sent to the right of the button.
   **Note:** This button only appears if the user has the "Box Sch - Global POs" role and if you check the box next to "Manage Jobs by Phase" on the Job Admin - Update Phase page.

5. A pop-up window will ask "Are you sure you want to send all PO information for the entire phase?" Click **OK**.
   **Note:** The "Transmit PO Information" button is no longer usable and will be grayed out. If new tasks are added, the button will become active again so you can transmit the new PO information. The construction manager can also transmit the PO information from the Box Schedule or Task View pages.

6. Click **Cancel** to close the pop-up window without sending the PO information. The button will remain active.

7. Read the diagram below to see how the "Transmit PO Information" process works.

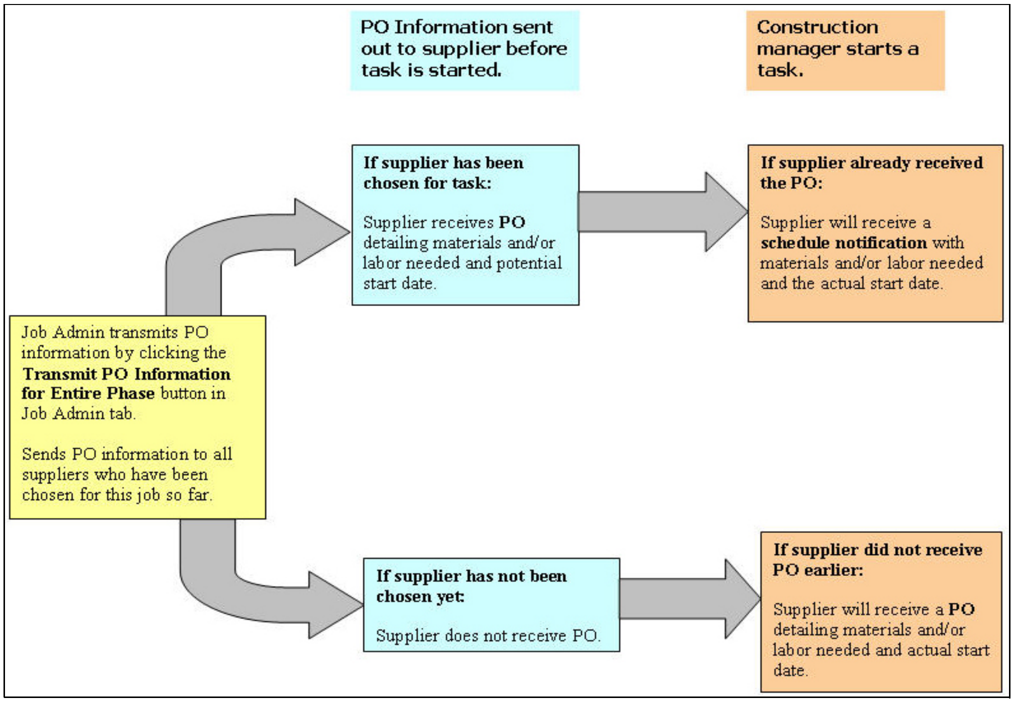


FIGURE 6. "Transmit PO Information" process diagram

## Update a Phase

On the Phase Actions page and the Manage Groups page, you can access the Phase Mgmt link, which will bring you to the Phase Management - Update Phase page.

On the Update Phase page, you can:

- View all the jobs in a subdivision phase
- Update phase information
- Assign jobs to a phase (can contain as many groups as you choose)

- Assign jobs to a group (max of 21 jobs in a group)
- Assign a sequence number to a job
- Enable Combined POs and Combined Schedule Notifications
- Change a job's sequence

Sequence numbers are unique to a phase, so jobs in the same phase but different groups cannot have the same sequence number, unless the user has the "Jobs: Assign Duplicate Seq Numbers role." When this role function is assigned to a user, the user will have the ability to assign duplicate sequence numbers within a phase on the Job Admin tab - Update Phase page. If a user does not have this role function, the page will not allow the user to enter duplicate sequence numbers. Two jobs can only have the same sequence number within a phase if the jobs are in two different groups. A group cannot contain jobs with duplicate sequence numbers.

**To update a phase:**

1. On the **Subdivision Actions** page, click on a **Phase Name**. The Phase Actions page opens.
2. Click on the **Phase Mgmt** link under Actions. The Phase Mgmt - Update Phase page opens.

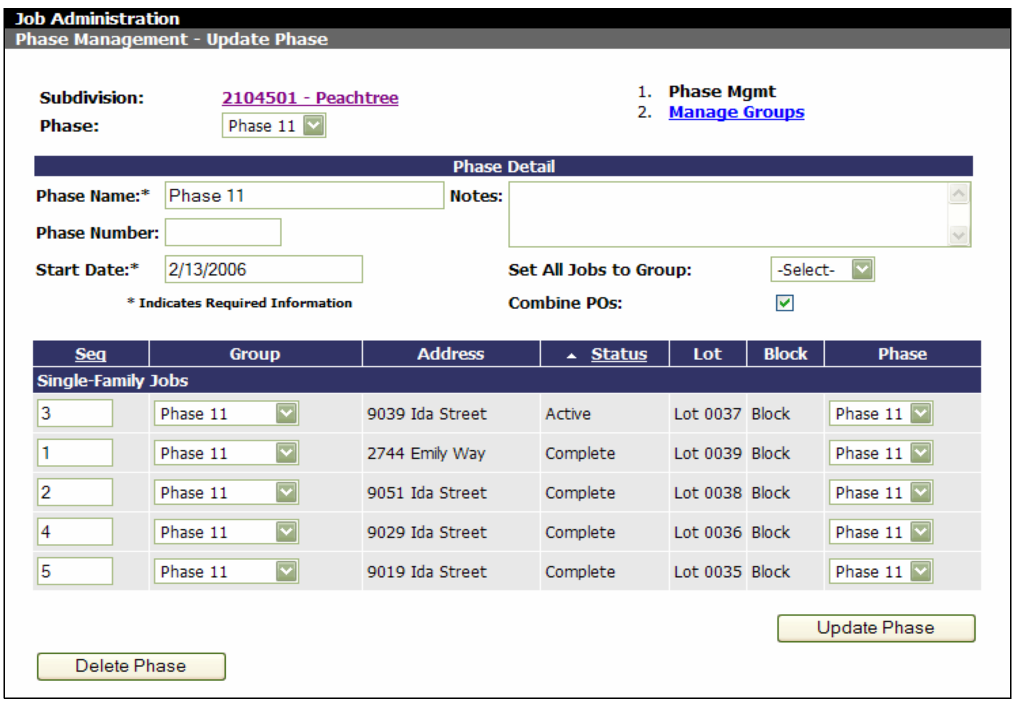


FIGURE 7. Update Phase page

3. Make any necessary changes to the **Phase Detail** section of the Update Phase page.
4. Click the **Status** column header to sort the jobs by status (Active, Complete, Hold, Cancelled)
5. Change a job's **Sequence Number**, if necessary.
6. Choose a different **Group** from the drop-down list for each job you want to move to another group.

**Note:** Each group can contain a maximum of 21 jobs.

7. Choose a different **Phase** from the drop-down list for each job you want to move to another phase.

8. Click the **Update Phase** button. BuildPro confirms that the phase was updated.

**To delete the entire phase:**

1. On the **Update Phase** page, click the **Delete Phase** button at the bottom of the page.

2. A pop-up window opens, asking you to confirm the deletion. Click **OK** to delete the entire phase. BuildPro confirms the deletion of the phase.
**Note:** This does not delete the jobs, just the phase and associated groups. The jobs will be set back to the default Phase 0, which you can then edit.

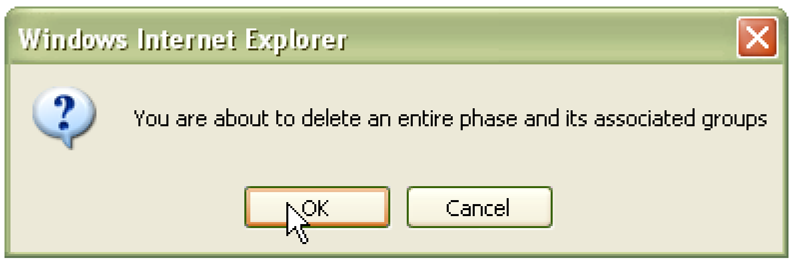


FIGURE 8. Confirm deletion of entire phase

3. Or, click **Cancel** to close the pop-up window without deleting the phase.

## Combined POs & Schedule Notifications

You can combine information for multiple POs into one email to the supplier. The Combined PO will be an HTML attachment in an email. If the Combine POs check box is checked on the Phase Management - Update Phase page, PO information will be combined. If the check box is not checked, PO information will be sent in separate emails.

Combined POs will only be sent when tasks are managed from the Task View and Box Schedule pages. PO information is not combined for self-supplied, TBD, or reminder tasks. This affects SupplyPro users and other suppliers only if the builder chooses to combine POs and if the supplier chooses to receive emails.

**To enable combined POs and combined schedule notifications:**

1. On the **Subdivision Actions** page, click on a **Phase Name**. The Phase Actions page opens.

2. Click on the **Phase Mgmt** link under Actions. The Phase Mgmt - Update Phase page opens.

3. Under the **Phase Detail** section, click the check box next to **Combine POs**. A checkmark will appear in the box.

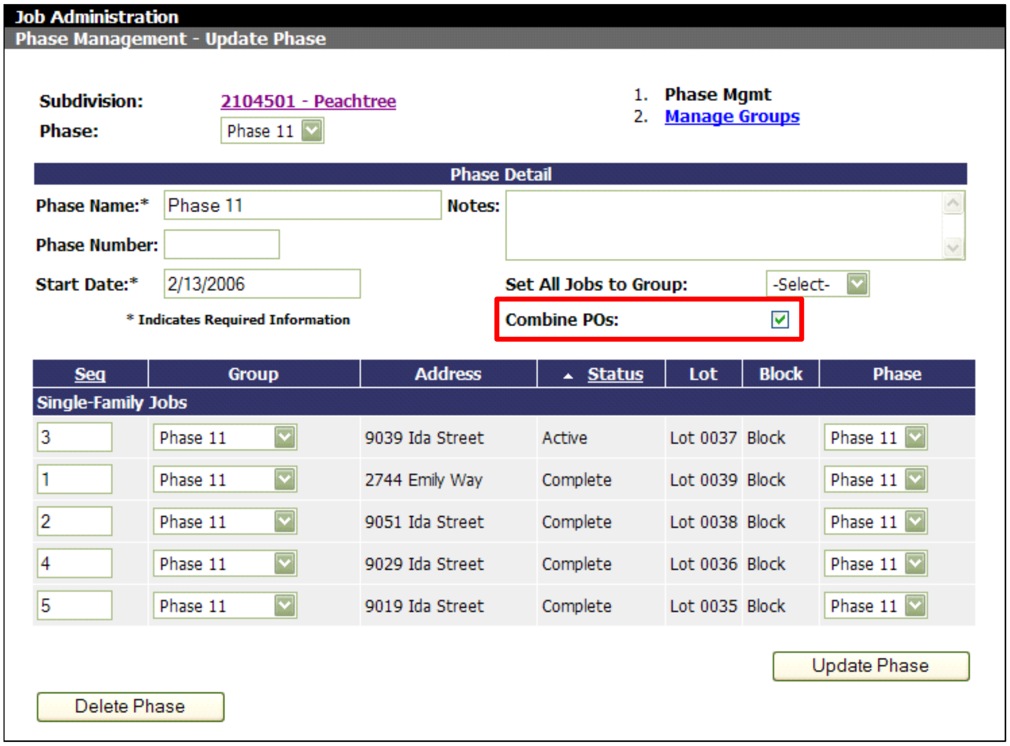


FIGURE 9. Update Phase page - Combine POs check box

4. Click the **Update Phase** button. POs will now be transmitted in a combined format.
   **Note:** This check box only controls the Combined PO function. The "Transmit PO Information for Entire Phase" button on the Phase Actions page is now controlled by the role function "Jobs: Box Sch - Global POs." See the "Transmit PO Entire Information for Entire Phase" section of this chapter for more details.

## Manage Groups

On the Phase Actions page and the Update Phase page, you can access the Manage Groups link, which will bring you to the Phase Management - Manage Groups page. Managing jobs in groups is necessary for using Box Scheduling. Each group can have a maximum of 21 jobs in it, but a phase can have as many groups as you choose.

On the Manage Groups page, you can:

- Add a group
- Delete a group
- Rename a group
- Do all three at the same time

**To add a group:**

1. On the **Subdivision Actions** page, click on a **Phase Name**. The Phase Actions page opens.
2. Click on the **Manage Groups** link. The Manage Groups page opens.



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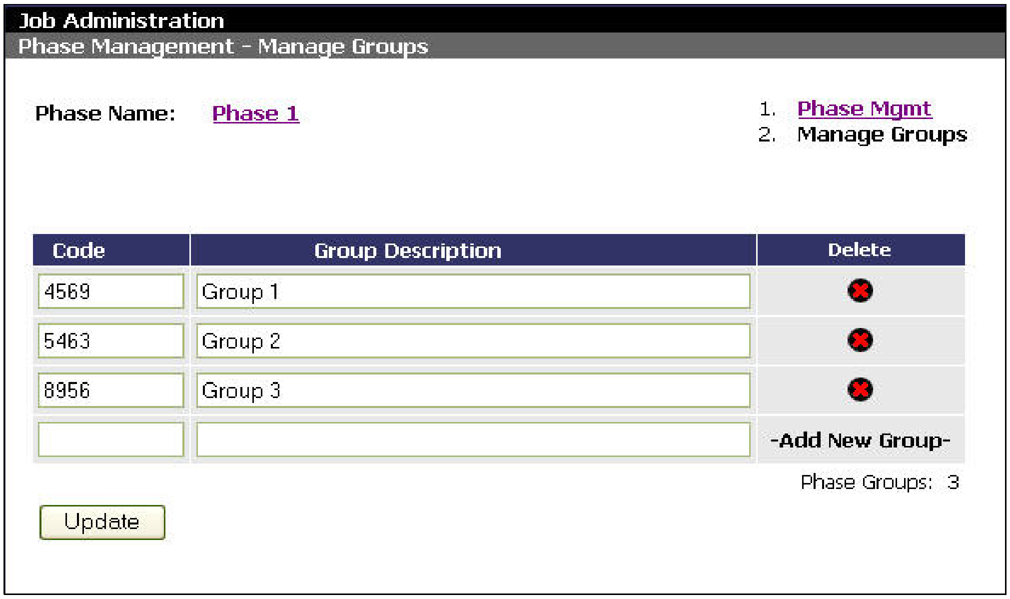


FIGURE 10. Manage Groups page

3. Enter a group name in the field under **Group Description**. (Required)
4. Enter a **Code**. (Required)
   **Note:** The code can be anything you choose, but it is a required field.
5. Click the **Update** button. BuildPro confirms the group has been added.

**To change the group's description or code:**

1. On the Manage Groups page, change the Code or Group Description.
2. Click the **Update** button. BuildPro confirms the group has been updated.

**To delete a group:**

1. On the Manage Groups page, click the next to the **Group Description**.
2. BuildPro confirms the group has been deleted.

## Lot Actions

On the Lot Actions page, you can view a summary of your job's details and view a Gantt chart showing the progression of your job schedule. To switch from the Summary tab to the Job Status tab, click on the name of the tab you want to open. Click on the phase name to return to the Phase Actions page. Click on the subdivision name to go to the Subdivision Actions page.

**To open the Lot Actions page:**

1. Click the **Job Admin** tab. The Subdivision List opens.
2. Click on a **Subdivision Name**. The Subdivision Actions page opens.

3. Click on a **Phase Name**. The Phase Actions page opens.

4. Click on a **Job Name**. The Lot Actions page opens on the Summary tab.

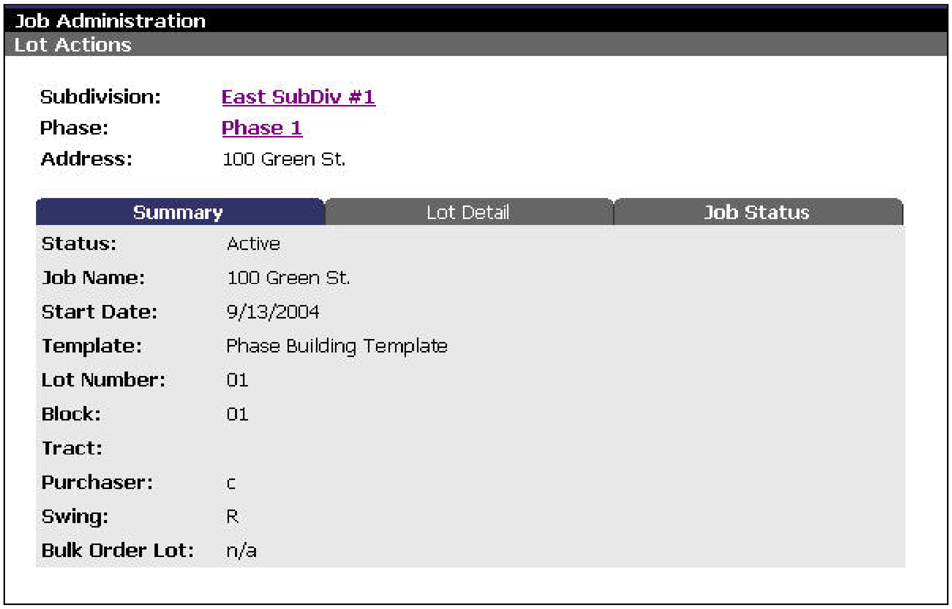


FIGURE 11. Lot Actions page - Summary tab

5. Click the different tabs to view different information about the job.
**Note:** Only the Summary tab and the Job Status tab are available for viewing.

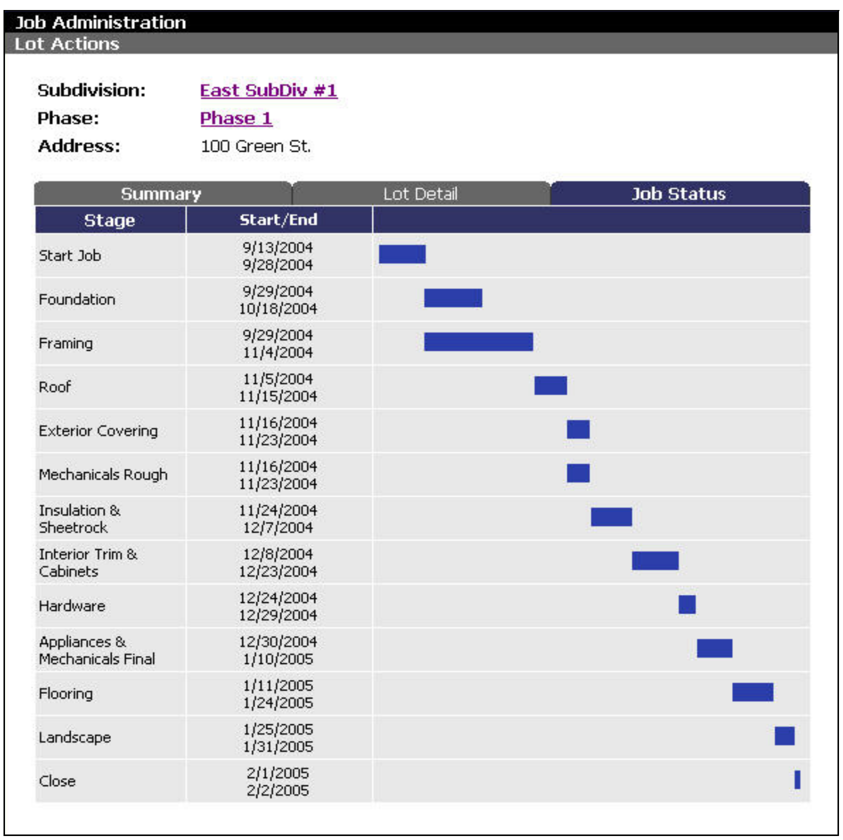


FIGURE 12. Lot Actions page - Job Status tab



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# 11 Multi-Family

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Modules and Roles
- Creating and Maintaining Projects
- Linking Templates
- Adding Jobs
- Creating and Maintaining Buildings
- Creating and Maintaining Floors
- Assigning Jobs to Buildings and Floors
- Managing the Project Schedule
- Copying a Project

## Multi-Family Overview

Multi-Family functionality in BuildPro allows you to set up a **Project** and group jobs into **Buildings** and **Floors**. Multi-Family functionality also has its own scheduling management page (**Multi-Family JME**) which is tailored specifically for the needs of construction managers of large apartment projects, town homes, or high rise buildings.

The information in this chapter is covered in the order in which a **Project** should be set up.

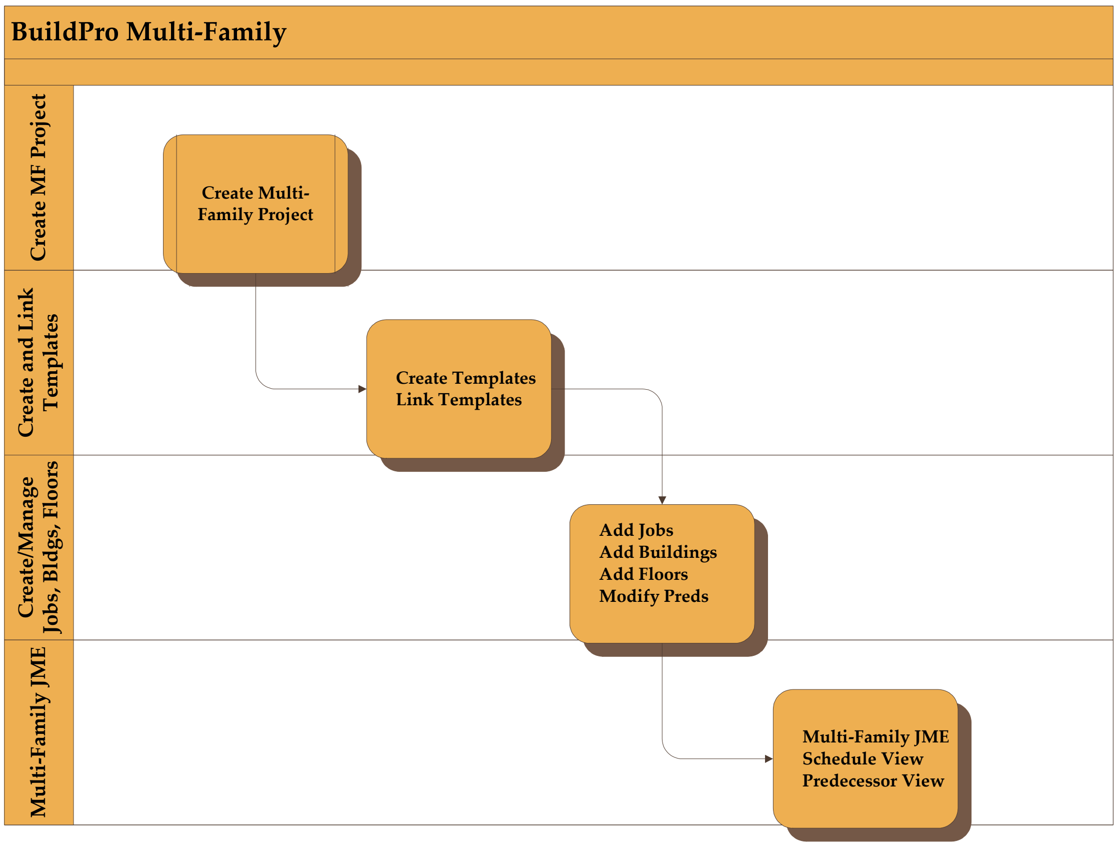



FIGURE 1. Multi-Family Project Setup

## Modules and Roles

Before any setup may begin, the correct modules and roles must be enabled. Contact Hyphen Solutions' Customer Care to have the module turned on for your company. For reference, the module name is **Multi-Family II** (module number 218).

There are three standard roles in BuildPro that enable users to access multi-family functionality:

1. **Multi-Family Project Manager** - this role is designed for the construction manager or on-site personnel responsible who manage the day to day scheduling of tasks/POs in BuildPro. This role gives the user access to the **Multi-Family JME** page; both the **Schedule View** and **Predecessor View** pages.
2. **Multi-Family Project Setup (Job Admin)** - this role is designed for the job administrator who will be responsible for creating jobs, buildings, and floors. This role also allows for assigning jobs to **Buildings** and **Floors**.
3. **Multi-Family Project Setup (Templates)** - this role is designed for the template administrator who is responsible for template building and modification. This role allows access to add or update a **Project**, build and link templates that will be used in the project, and copy a project to be used in a different community.

**Note:** Both roles and modules are necessary to access the multi-family functionality. Contact Hyphen Solution's Customer Care to have custom roles updated or created for multi-family functionality.

**Note:** The standard roles listed above may be assigned by a System Admin from the User Detail page.

## Creating and Maintaining Projects

The first step in managing multi-family jobs is setting up a **Project**. To add a new **Project**, click on the **Templates** tab. Three links will appear on the left nav bar regarding multi-family functionality.

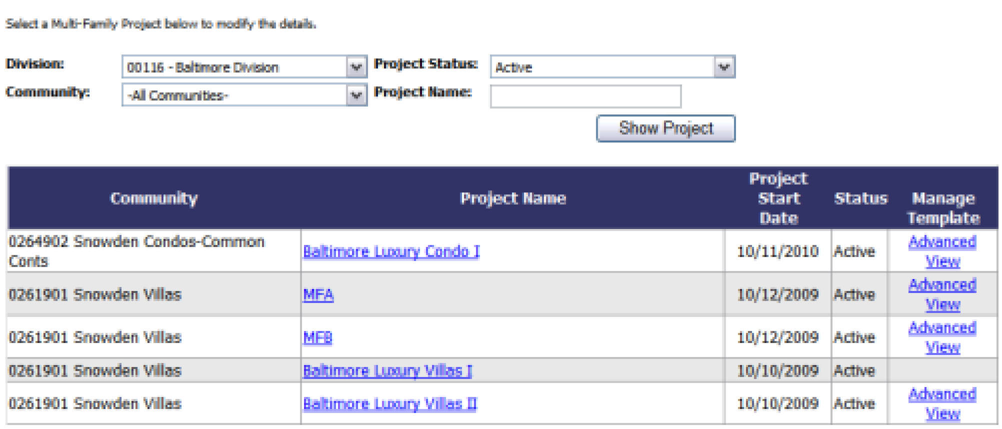

FIGURE 2. Templates Tab Left Nav

### Multi-Family Projects

Clicking this link will take you to a list of existing Multi-family projects. If you are at a division level, you will see your **Division** pre-selected in the **Division** filter. If you are at a company or region level, you must select a **Division** before viewing a list of **Projects**. You may additionally filter the list by **Community** or **Project Name**. Use the **Project Name** text field to search by **Project Name**. This is a "starts with" search. Click the **Show Project** button to return a list of **Projects**.

The **Multi-Family Project List Page** will display a list of projects for a division. Additional information on the page includes:

- **Community** - community or subdivision where the **Project** is located.
- **Project Name** - click this link to update project details (**Multi-Family Project Detail** page).
- **Project Start Date** - start date of the project. This date has no bearing on the job schedules in a project and is purely for informational purposes.
- **Status** - may be Active or Closed.
- **Manage Template** - clicking this link will take you to the **Multi-Family Schedule Management (Advanced View)** page where templates in the project may be updated.



Select a Multi-Family Project below to modify the details.

Division: 00116 - Baltimore Division Project Status: Active
Community: -All Communities- Project Name:
Show Project

| Community | Project Name | Project Start Date | Status | Manage Template |
|---|---|---|---|---|
| 0264902 Snowden Condos-Common Conts | Baltimore Luxury Condo I | 10/11/2010 | Active | Advanced View |
| 0261901 Snowden Villas | MFA | 10/12/2009 | Active | Advanced View |
| 0261901 Snowden Villas | MFB | 10/12/2009 | Active | Advanced View |
| 0261901 Snowden Villas | Baltimore Luxury Villas I | 10/10/2009 | Active | |
| 0261901 Snowden Villas | Baltimore Luxury Villas II | 10/10/2009 | Active | Advanced View |

FIGURE 3. Multi-Family Project List Page

### Add Project

Clicking this link will take you to the **Multi-Family Add Project** page.

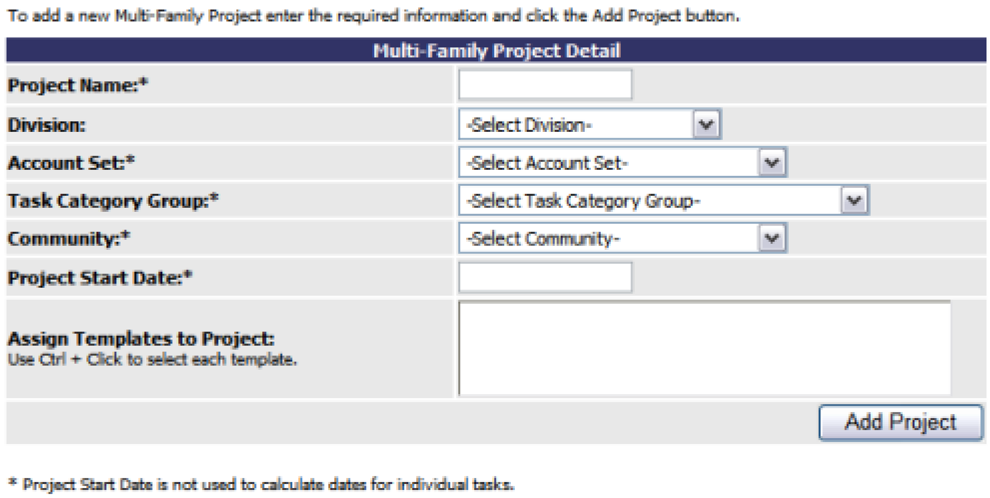



FIGURE 4. Multi-Family Add Project Page

**To add a project:**

1. Enter the **Project Name**.
2. Select the **Division**.
3. Select the **Account Set**. Account Sets in the drop down box are the account sets assigned to the **Division** selected. For integrated BuildPro companies, the only **Account Set** available will be the **Account Set** integration uses for the selected **Division**. For non-integrated companies, you must choose an **Account Set** if more than one exists.
4. Select a **Task Category Group**. Task Category Groups are used to group "like" tasks together. A filter for Task Category will appear on the Multi-Family JME page.

   **Note:** When templates are assigned to a Project, they will be pointed to the same Category Group chosen for the Project. If an existing template is added and that template points to a different Category Group than the Project, the template will be changed to point to the same Category Group as the Project. You will then have to re-map the Task Categories fore each task in the template. Use the **Task Update: Task Category** page to map Task Categories to template tasks.

5. Select the **Community** where the **Project** will be built.
6. Enter the **Project Start Date**. This date has no effect on the schedule of the Project or any jobs within it.
7. Optionally, you may **Assign Templates to Project**. It is not necessary to include templates when creating the Project. They may be added later. When adding templates to a project, hold the **Ctrl** button on the keyboard and use the mouse to select or un-select templates (multi-select box). Templates in this list will be Active templates assigned to the **Account Set** selected, have no single family jobs created from it, and not currently assigned to another **Project**.

8. Click the **Add Project** button.

## Update Project

**To Update a Project:**

1. From the **Multi-Family** Project List page, click the hyperlinked name of the **Project**.
2. Modify any necessary details.

   Note: If templates are assigned to the **Project**, some data may not be changed. Data that may not be changed will be "grayed out". You may remove the template(s) by un-selecting them. Changing the **Division**, **Account Set**, or **Task Category Group** may change the templates available for the project. Once jobs have been created from a template, the template may not be removed from the project.

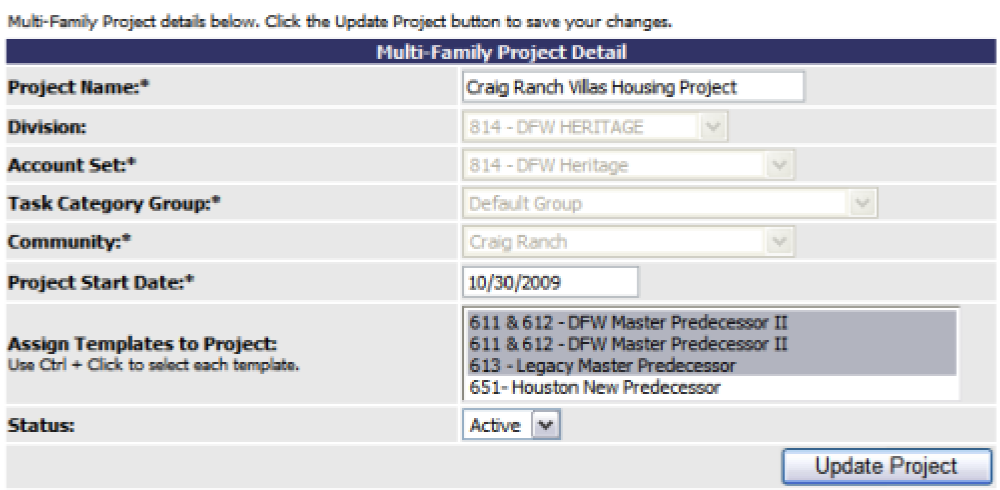



FIGURE 5. Project Detail Page

3. Click the **Update Project** button.

   Note: If the **Project Status** is changed to Closed, it will no longer appear in the Project List page (Templates or Job Admin tabs).

   Note: The Project may also be updated from the **Project Detail** page under the Job Admin tab.



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## Linking Templates

Multi-Family Projects in BuildPro allow the use of multiple templates. These templates may be linked together in order to link the jobs created from them.

Some basic business rules apply to linked templates:

**Template Setup Business Rules**

- Templates may only be linked to templates within the same project.
- Templates may only be linked once they are added to a project.
- Before removing a template from a project, all links to other templates must be removed.
- Changing the Task Category Group for the project will re-assign all templates (in the Project) to the new group and *all Task Categories will have to be re-mapped for each task in each template of the Project.*

### Jobs Created from Linked Templates Rules

In the example below, three templates were added to a Project, linked, and used to create four jobs. Task 1 in Template 2 and Template 3 were linked to Task 5 in Template 1 and Template 2.

- Both jobs created from Template 2 that include Task 1 will follow Task 5 from the job created from Template 1. The jobs created from Template 2 will not be linked to each other.
- The job created from Template 3 will be linked to both Job 2 and Job 3.

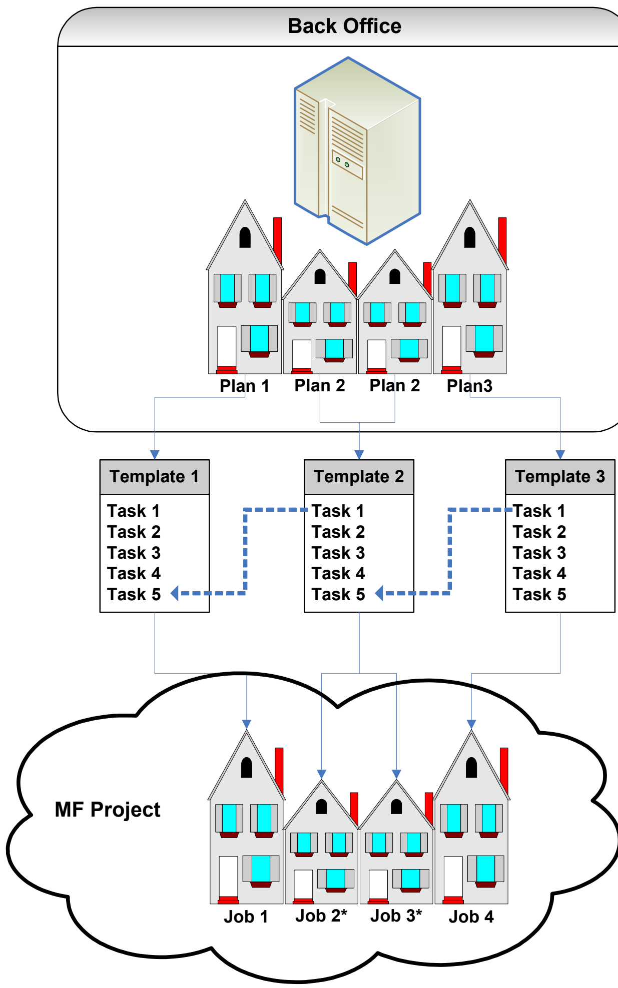


FIGURE 6. Example of Linked Templates



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### Building Using a Shell Template

In the example below, a “shell” template was used for foundation, exterior walls, and roofing. Individual units were created from Templates 1, 2, and 3 (to represent different plans).

Task 1 in each of the unit templates will follow Task 5 in the “shell” template.

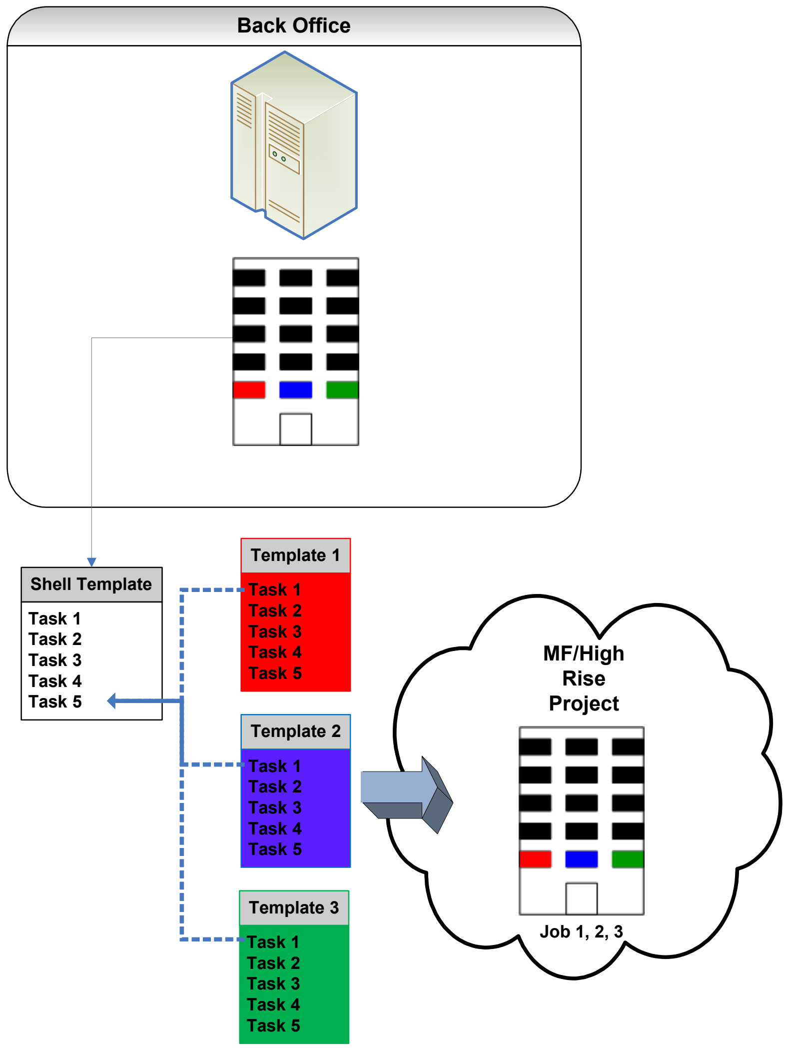


FIGURE 7. Example of Shell Template

**Note:** These are just a couple of ways templates may be linked. Keep in mind when linking templates: if jobs are to follow each other, they should come from different templates.

**Note:** Jobs may be created from the same template, then linked to each other using the **Multi-Family JME** page; **Predecessor View**. See Chapter 13 of the Construction Mgr Guide for details on linking jobs after they are in a building.

**To link templates:**

1. Begin by building templates as you would normally. See Chapter 5 Managing Templates for help on template building specifics.

   **Note:** Existing templates that have jobs created from them cannot be added to a multi-family project. Use the **Add a New Template** link on the left nav to copy the template, then add to the project.

   **Note:** Make sure all templates that will be assigned to the same project are pointed to the same Task Category Group. If not, *the Task Category Group will be re-assigned to the one designated by the Project. Task Category mappings will have to be changed for each task in each template that was not pointing to the same group.* Check the Template Detail page to confirm the Task Category Group the template is using.

2. Add the templates to the Project by clicking the **Multi-Family Projects** link on the left nav of the Templates tab. Click the **Project Name**. You should see the templates listed in the **Assign Templates to Project** list box. Hold the Ctrl key on your keyboard and click each template you want to add. Click the **Update Project** button. You will return to the **Multi-Family Project List** page.

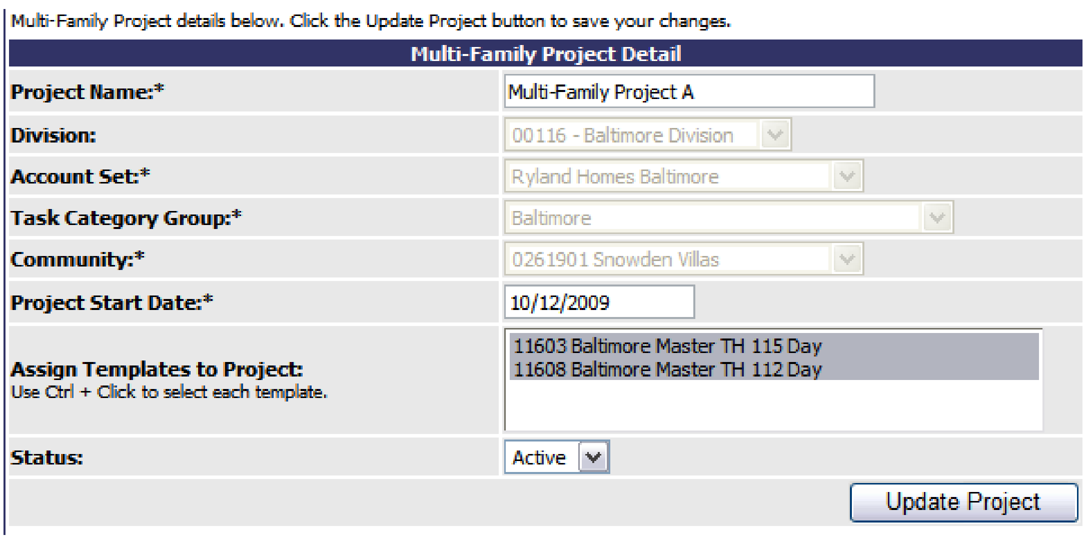


FIGURE 8. Multi-Family Project Detail

**Note:** Only Templates assigned to the same Project may be linked.

**Note:** The **Assign Templates to Project** list box is a “multi-select” box. Hold the Ctrl key down and click each template you wish to add to the Project. Templates that are already assigned will be highlighted. Make sure you do not un-select an existing template unless you want to remove that template. Templates that are linked, may not be removed from the project until the links are removed.

**Note:** Once a job is created from a template that belongs to a project, that template may not be removed from the Project.


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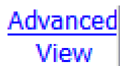
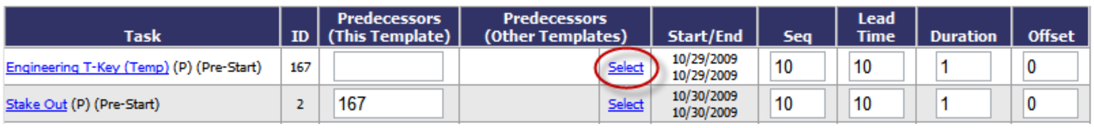
3. From the **Multi-Family Project List** page, use the appropriate filters and click the **Show Project** button.

4. Click the **Advanced View** link in the far right column next to the Project for which you will link templates. From the **Multi-Family Schedule Management (Advanced View)** page select the **Template** that contains the child task that will be linked. Click the **Show Tasks** button.




5. Click the **Select** link in the **Predecessors (Other Templates)** column to pick a parent task.



| Task | ID | Predecessors (This Template) | Predecessors (Other Templates) | Start/End | Seq | Lead Time | Duration | Offset |
|---|---|---|---|---|---|---|---|---|
| Engineering T-Key (Temp) (P) (Pre-Start) | 167 | | Select | 10/29/2009 10/29/2009 | 10 | 10 | 1 | 0 |
| Stake Out (P) (Pre-Start) | 2 | 167 | Select | 10/30/2009 10/30/2009 | 10 | 10 | 1 | 0 |

FIGURE 9. Multi-Family Schedule Management (Advanced View)

6. A popup window will appear. Select the **Template** that contains the parent task(s). The window will refresh with a list of tasks. Check the check box beside each task that will be a predecessor.

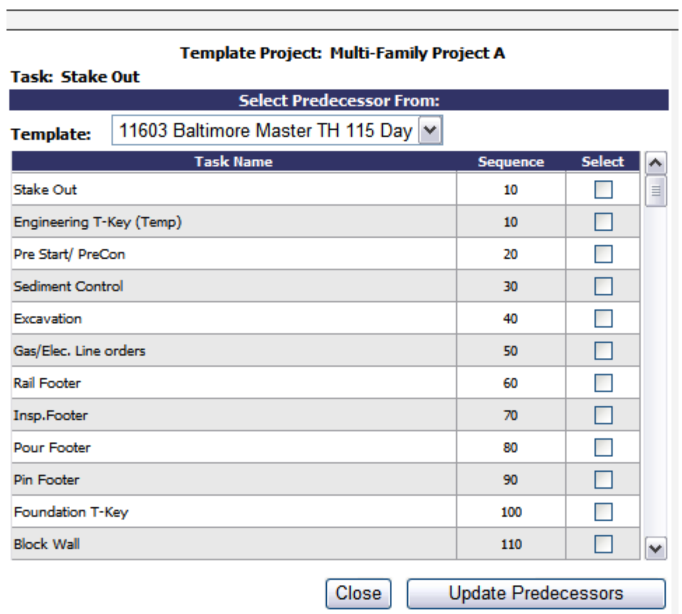



FIGURE 10. Select Predecessors from Other Templates

**Note:** The popup window will remain open to allow you to select parent tasks from other templates. Click the **Close** button when you are done.

**Note:** Use the **Predecessors (This Template)** column to select parent tasks within the same template.

Continue to link templates in the Project as necessary.

**Note:** You should mark parent tasks in other templates as “required”. This will ensure the parent task is included when the job is created. Go to the **Advanced View** page of the template that contains the parent task and check the **Req** flag next to that task.

| Task | Stage | ID | Predecessors | Start/End | Seq | Lead Time | Duration | Offset | Req |
|---|---|---|---|---|---|---|---|---|---|
| Drywall Labor (P) | Insulation / Drywall | 87 | | 11/3/2009 11/11/2009 | 10 | 10 | 7 | 0 | ☑ |

FIGURE 11. Mark Parent Tasks in Other Templates as Required

## Adding Multi-Family Jobs

Multi-Family jobs may be added manually or via integration.

### Adding Multi-Family Jobs Manually

**To add a multi-family job manually:**

1. From the Jobs tab, click the **Add a Job** link on the left nav.
2. Select the **Multi-Family Job** radio button. The page will refresh with a list of **Multi-Family Projects**. Select the appropriate project. The page will refresh with a list of **Templates** assigned to the Project.

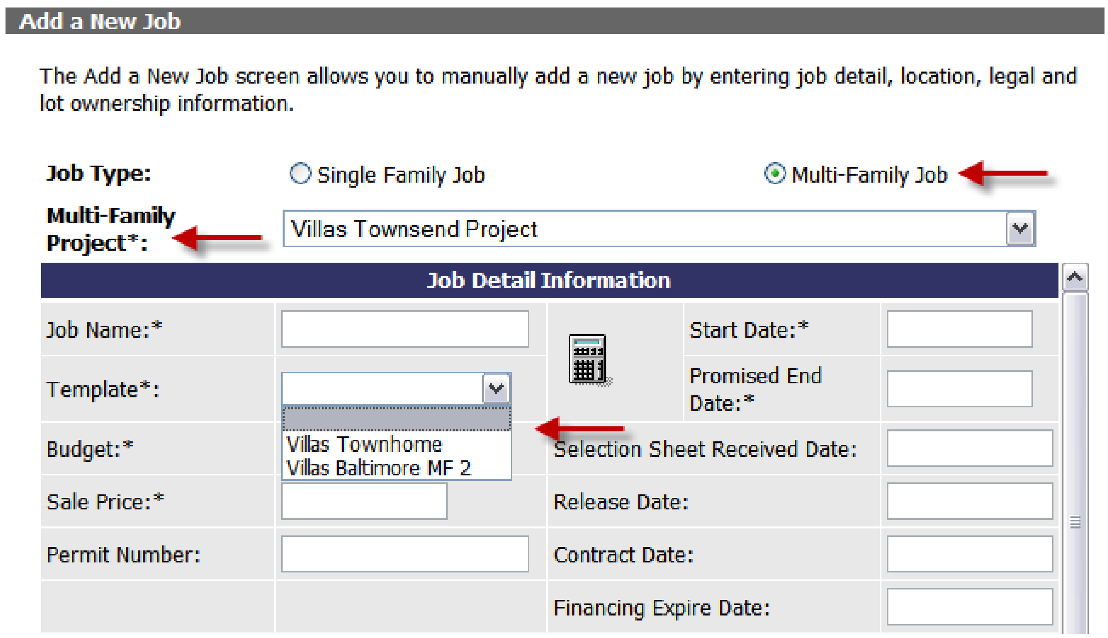



FIGURE 12. Add a New Job Page

3. Enter the required information (marked with an asterisk), select the template, and click the **Add Job** button.

   **Note:** You may add all jobs for one building or the entire project. The next step is to create buildings and floors; then assign jobs to them.

### Adding Multi-Family Jobs via Integration

Multi-Family jobs may be added via integration. No changes or modifications are needed to integration. Job files should be sent based on your current process. All setup for multi-family jobs is done on the BuildPro side.

> **Note:** In order for a job to be flagged as a multi-family job, the template used must be assigned to a Project first. If not, the job cannot be added to a building/floor.

Jobs created from a template that belong to a Project will automatically be linked to the Project. The next step is to create buildings and floors; then assign jobs to them.

## Integration Business Rules

Because the BuildPro UI will allow users to modify predecessor relationships at the job level, the following integration rules will be changed for new multi-family jobs:

**Job is not in a building:**

- When a new PO is added it will be inserted according to the template predecessor relationships, the entire job schedule will be rebuilt according to the template relationships, and the job schedule recalculated. Job baseline will be reset according to the setting in the company profile in Prep.
- When a PO is deleted the entire job schedule will be rebuilt according to the template relationships and the job schedule will be recalculated. Job baseline will be reset according to the setting in the company profile in Prep.
- Predecessors that are in other jobs will not be set at this time because it is not known what jobs will be in the building. Predecessors from other jobs will be set when the job is added to a building.

**Job has been added to a building:**

- When a new PO is added it will be inserted according to the template predecessor relationships and the job schedule will not be rebuilt according to the template relationships, the job schedule will be recalculated and baseline set according to the setting in the company profile in Prep.
- When a PO is deleted the job schedule will not be rebuilt according to the template relationships, the job schedule will be recalculated, and the baseline reset according to the setting in the company profile in Prep.
- If a new PO is added and the task's predecessor is in another job but is missing, integration will look up the chain for the next available parent. The job schedule will not be rebuilt according to the template relationships, the job schedule will be recalculated, and the baseline reset according to the setting in the company profile in Prep.
- If a new PO is added and the task's predecessor is in the same job but is missing, integration will look up the chain for the next available parent. The job schedule will not be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rebuilt according to the template relationships, the job schedule will be recalculated, and the baseline reset according to the setting in the company profile in Prep.

- If a new PO is added and the task has predecessors in another job and the same job and both are missing, integration will look up the chain (in both jobs) for the next available parent. This will be done for any number of missing parents in any number of jobs. The job schedules will not be rebuilt according to the template relationships, the job schedules will be recalculated, and the baselines reset according to the setting in the company profile in Prep.

  **Note:** Each time a PO/task is inserted or deleted from a job (that is in a Building), integration will re-evaluate for a better choice of parent tasks where parent tasks are missing.

  **Note:** If the real parent task is inserted into the job, integration will replace the temporary parent with the real one. It is possible for the user to change a temporary parent. If the real parent task is inserted into the job, but the user has changed the temporary parent, integration will leave the "user changed" parent and also assign the real parent task as a predecessor. If the real predecessor from the template should not be added back into the job, it should be removed from the template and the job.

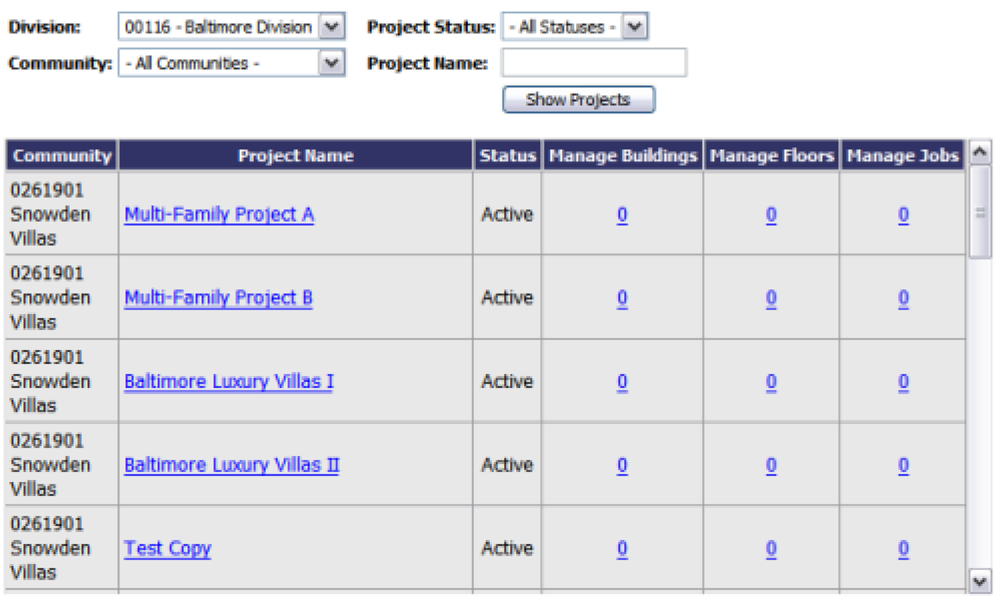
These business rules will ensure that the user's changes to predecessor relationships are not overridden.

## Adding and Updating Buildings

After jobs are added (manually or via integration) the next step is to create buildings.

**To create a building:**

1. From the **Job Admin** tab, click the **Multi-Family Projects** link on the left nav. Select the **Division**, and use the other filters as necessary. Click the **Show Projects** button.
2. A list of Projects will appear. The **Project Name** is hyperlinked and will take you to the Project Detail page where information regarding the project may be modified.
3. The **Manage Buildings** column displays a number. This hyperlinked number indicates how many buildings exist in the Project. Click this number to add, update, or delete buildings.




| Community | Project Name | Status | Manage Buildings | Manage Floors | Manage Jobs |
|---|---|---|---|---|---|
| 0261901 Snowden Villas | Multi-Family Project A | Active | 0 | 0 | 0 |
| 0261901 Snowden Villas | Multi-Family Project B | Active | 0 | 0 | 0 |
| 0261901 Snowden Villas | Baltimore Luxury Villas I | Active | 0 | 0 | 0 |
| 0261901 Snowden Villas | Baltimore Luxury Villas II | Active | 0 | 0 | 0 |
| 0261901 Snowden Villas | Test Copy | Active | 0 | 0 | 0 |

FIGURE 13. Multi-Family Project Management Page



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4. The **Multi-Family Building Management** page allows you add, update, or delete buildings. In the section labeled **Add Building**, enter the **Building Name** and **Building Number**; both are required. Then click the **Add Building** button. The building will appear in the section labeled **Manage Buildings**. Continue to add buildings by repeating this step.

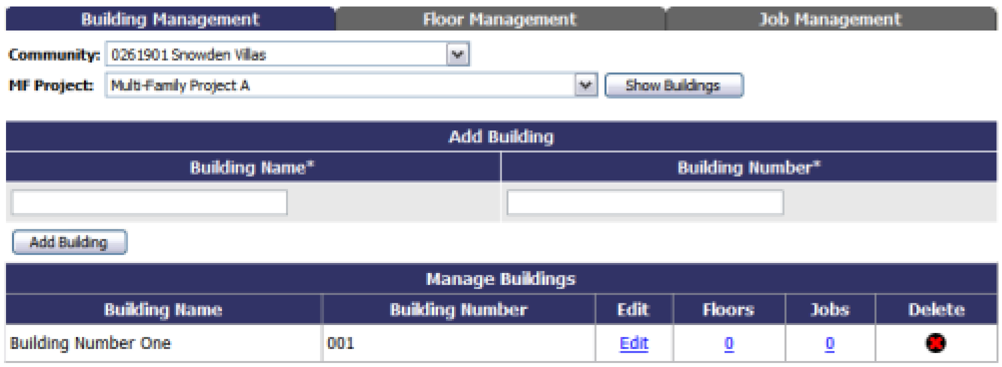



FIGURE 14. Multi-Family Building Management Page

**To modify a Building:**

1. Click the **Edit** link. This will transform the **Building Name** and **Building Number** into editable text boxes. Modify as necessary and click the **Update** link.

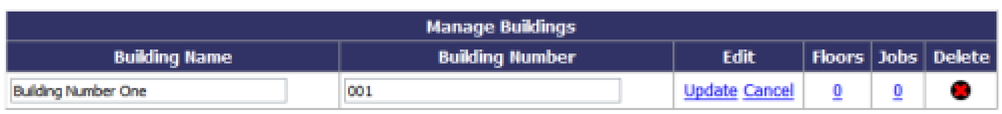



FIGURE 15. Modify Building Name/Number

2. To Delete the Building, click the delete button.

   **Note:** All **Floors** and **Jobs** must be removed before the building may be deleted. The Floor and Job counts are displayed next to the delete button. Click these links to go to the **Multi-Family Job Management** page and first remove jobs from the floor. Then go to the **Multi-Family Floor Management** page and delete floors from the building.

## Adding and Updating Floors

After adding **Buildings**, you must add **Floors**. From the **Multi-Family Building Management** page, click the hyperlinked **Floors** number beside the **Building** you wish to add floors. The **Multi-Family Floor Management** page allows you to add, update, and delete floors similar to the **Multi-Family Building Management** page.

> **Note:** You may also use the **Building Management**, **Floor Management**, or **Job Management** tabs for navigation to these pages. The names are hyperlinked.

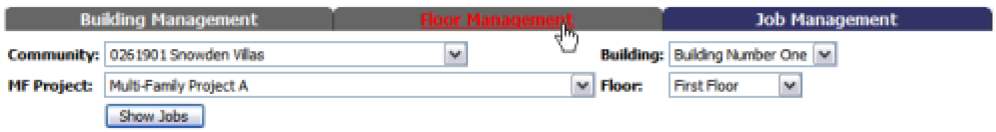



FIGURE 16. Building, Floor, and Job Management Tabs

**To add a Floor:**

1. Enter the **Floor Name** and **Floor Sequence** in the **Add Floor** section of the **Multi-Family Floor Management** page. Then click the **Add Floor** button.

   > **Note:** Floors are required in order to assign a job to a building.

Continue to add floors by repeating this step.

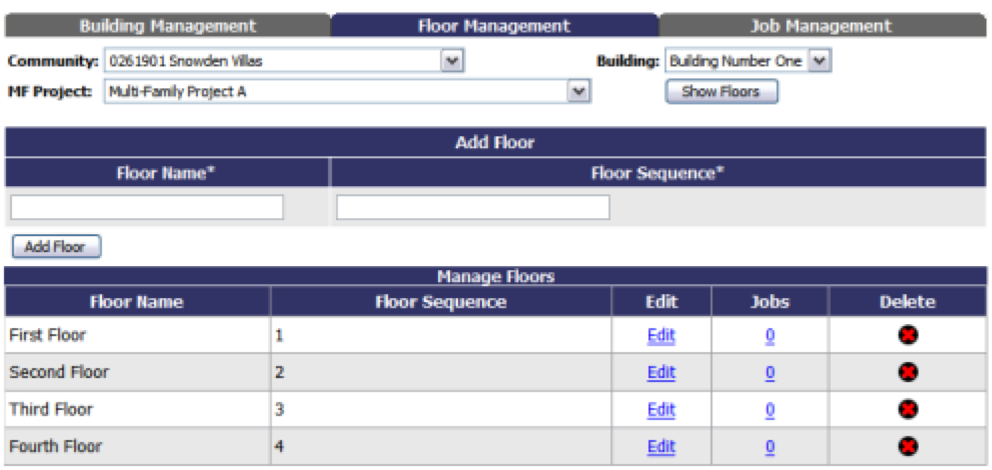



FIGURE 17. Multi-Family Floor Management Page

**Note:** **Floor Sequence** is used for display purposes (displaying the floors in order using the **Sequence Number**). This way you do not have to worry about naming the Floors so they appear in correct order when shown in a filter. The picture below shows Floors in order of Sequence. If they were ordered by Floor Name, Fourth Floor would be after First Floor.

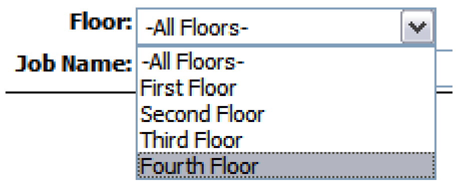



FIGURE 18. Floors Listed by Floor Sequence in a Filter

**To modify a Floor:**

1. Click the **Edit** link. This will transform the **Floor Name** and **Floor Sequence** into editable text boxes. Modify as necessary and click the **Update** link.

| Manage Floors | | | | |
|---|---|---|---|---|
| Floor Name | Floor Sequence | Edit | Jobs | Delete |
| First Floor | 1 | Update Cancel | 0 | |
| Second Floor | 2 | Edit | 0 | |
| Third Floor | 3 | Edit | 0 | |
| Fourth Floor | 4 | Edit | 0 | |

FIGURE 19. Edit Floor Name and Sequence

2. To delete a Floor, click the delete button.

   **Note:** All **Jobs** must be removed before the floor may be deleted. The Floor count is displayed next to the delete button. Click this link to go to the **Multi-Family Job Management** page and remove jobs from the floor.

## Assigning Jobs to a Building and Floor

After adding **Buildings** and **Floors** you must assign jobs to them. The **Multi-Family Job Management** page allows you to assign jobs to a specific Building and Floor.

**To assign Jobs to a Building and Floor:**

1. From the **Multi-Family Floor Management** page, click the hyperlinked **Jobs** number beside the **Floor** you wish to assign jobs.
2. Check the check-box beside the **Job Name** you wish to assign to the **Building** and **Floor** indicated by the filter selection in the top section. Click the **Update Jobs** button to apply the job assignments.

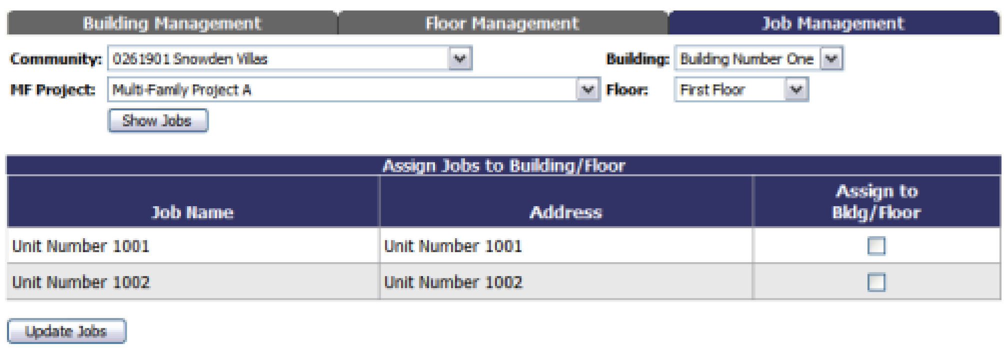



FIGURE 20. Multi-Family Job Management Page

**Note:** You may un-assign a job by un-checking the check-box and clicking the **Update Jobs** button. A job must be unassigned from a building/floor before reassigning to another.

**Note:** When a multi-family job is created, the status is set to Hold. This status is changed to Active when the job is assigned to a Building/Floor. The status is not changed back to Hold if the job is removed from a Building/Floor.

**Note:** When jobs are assigned to a Building/Floor, the job schedules are re-calculated and predecessors from other jobs in the Building will be assigned (based on the template relationships).

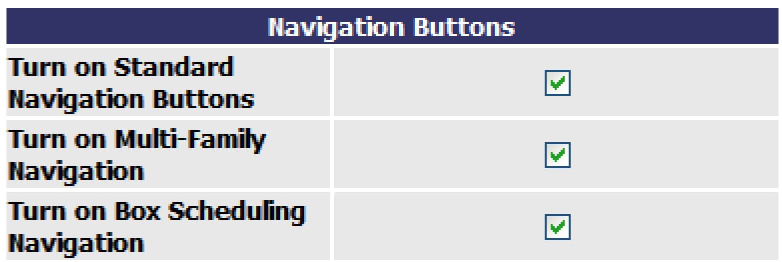
## Managing the Project Schedule

Multi-Family jobs have their own special page for managing the schedule. The Multi-Family JME page has the same basic functions as the JME and To Do List pages.

The **Multi-Family JME** page may be accessed in one of two ways:

1. Multi-Family Navigation Button - located in the top nav section of BuildPro. The multi-family module and two roles must be enabled to gain access to the Multi-Family JME page: **Jobs - Multi-Family Schedule View** and **Jobs - Multi-Family Predecessor**.

   **Note:** If you have the module on and the correct role and still do not see the Multi-Family JME Navigation Button, click on the **Your Profile** link from the **Home** tab and confirm the Navigation Buttons are turned on.



| Navigation Buttons | |
|---|---|
| Turn on Standard Navigation Buttons | ☑ |
| Turn on Multi-Family Navigation | ☑ |
| Turn on Box Scheduling Navigation | ☑ |

FIGURE 21. Your Profile - Navigation Buttons


FIGURE 22. Top Nav Buttons

2. **Multi-Family JME** link on the left nav. The same module and role must be enabled in order to see this link.

   **Note:** The **Multi-Family Mgmt** link takes you to the old Multi-Family page. Only old Multi-family jobs may be managed from this page.

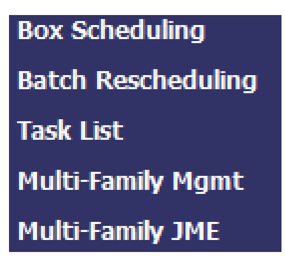



FIGURE 23. Left Nav

For a complete listing of functionalities of the Multi-Family JME page, see the Construction Mgr Training Guide (Chapter 13).

## Copying Projects

Because Templates assigned to a Project may only be used to create jobs within that Project, you must create new Templates for a new Project. This is made easier by using the **Copy Project** page.

**To copy a Project:**

1. Click the **Copy Project** link from the left nav of the Templates tab.
2. From the **Multi-Family Copy Project Step 1 of 3** page, select a **Division**. The page will refresh with a list of Communities from that Division.
3. Select a **Community**. The wizard will refresh with a list of Projects from that Community.
4. Select a **Project** to copy.
5. Select a **Community** where the Project will be copied.
6. Enter a **New Project Name**.
7. Enter a **Project Start Date**.
8. Click the **Next** button.

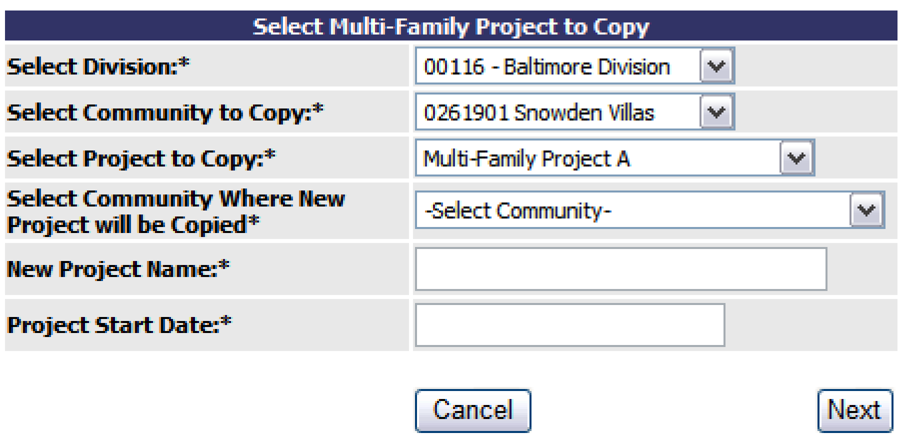



FIGURE 24. Copy Project Wizard Step 1 of 3

9. On Step 2 of 3, select the check box beside each Template you wish to copy to the new Project. As you select each check box re-name the Template and change the Template Number so they are unique within the Division.

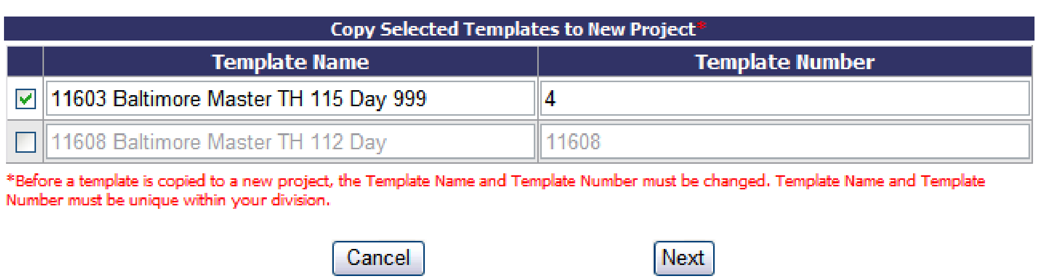
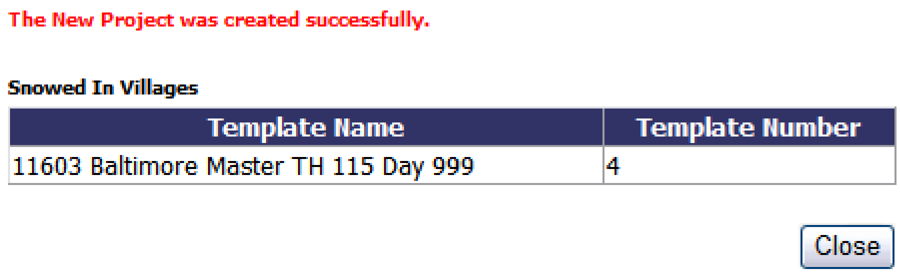



FIGURE 25. Copy Project Wizard Step 2 of 3

10. Click the **Next** button. The new Project is created and a confirmation message will appear at the top of the page. The new Project name will be displayed along with each Template copied and the Template Number.



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# 12 ReportConnect

*BuildPro System Admin User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Accessing reports
- Generating and viewing reports
- Printing and saving reports

## ReportConnect Overview

The ReportConnect tab in BuildPro contains reports you can run about BuildPro information. There are several types of reports available to all BuildPro users. You can use these reports to view information such as job production levels, status, task completion, user activity, and supplier workload.

You will only see a report or group of reports if those modules are turned on for your company and your security role has access to the ReportConnect tab. The reports are organized into several groups:

- Schedule Reports
- Activity Reports
- Vendor Load Reports
- Contact Information Reports
- Financial Reports
- Lien Reports
- Integration Reports

## Access the Reports

**To access the reports:**

1. Open and log into BuildPro.
2. Click on the **ReportConnect** tab. The existing BuildPro reports are listed in alphabetical order.
3. Click on a **Report Name** link. The report opens in a separate window.
4. Choose from any available filters.
   **Note:** If the report has required filters, indicated by a red star *, the Generate Report button is disabled until you choose those filters.
5. Choose a **Format** for the report from the toolbar:
   - HTML (Default)
   - Acrobat PDF
   - Excel
6. Click the **Generate Report** button. The report will open in the format you chose.
   **Note:** If you change the report format or any of the filters, the report will blank out. Click the Generate Report button to regenerate the report based on the new filters.
7. If the report contains hyperlinks, click on the link to drill down into the report. A detail page opens in a separate window. (Drill-downs are only available on the HTML format.)
   **Note:** Each drill-down opens in a separate window so you can view all of the reports at one time.


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## Install Microsoft ActiveX

To view and print the new reports more successfully, you will need install the Microsoft ActiveX Control. The first time you try to open a new report, you may get a security warning window like the example below.


FIGURE 1. Security warning

Or, if you have a pop-up window blocker on your computer, you may see the following warning at the top of the report window.

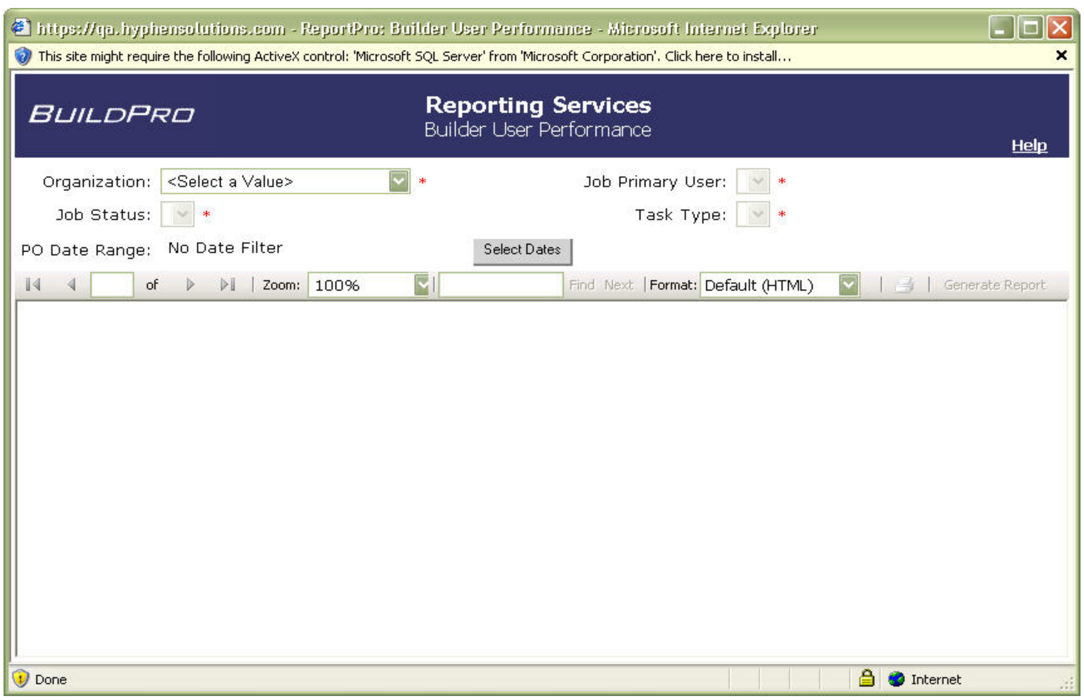


FIGURE 2. Security warning in pop-up window blocker

Just click Install to install the ActiveX--it only takes a minute or so. The ActiveX Control helps control more of the default printer settings, so your HTML reports print as desired.

## Report Toolbar

The report toolbar is at the top of every report, just under the filters. This toolbar provides the basic tools for viewing the reports. When you open each report, you will see this toolbar, but once you generate the report, you will only see this toolbar for HTML reports. The PDF and Excel formats have their own toolbars for printing and saving.


FIGURE 3. Report toolbar

**Use the report toolbar to:**

- Page through the report using the arrows or by entering the page number.
- Zoom to different page sizes.
- Search for a word or phrase.
- Change the viewing format of the report.
- Print the report.
- Generate the report.

## Dependent Filters

If the report has required filters, indicated by a red star *, the Generate Report button is disabled until you choose those filters. Some filters depend on other filters before they can be populated. For example, you must choose a division before choosing a community and then a job. For some reports, once the first required filter is chosen, the dependent filters automatically fill with default values.


FIGURE 4. Daily Exception report - dependent filters


FIGURE 5. Daily Exception report - dependent filters filled in

Sometimes a required filter does not actually depend on another filter, but it may not become available until the first filter is chosen.* For example, the Task Type filter in the Builder User Performance report does not require an Organization to populate the list. But, the Task Type filter does not become available until an organization is chosen.

***Issue Note:** This is due to a defect in the Microsoft Reporting Services software. As Microsoft continues to update their software, the dependent filter settings may change.


FIGURE 6. Builder User Performance report - dependent filters

After the first required filter is chosen, most reports automatically fill in the other required filters with defaults to save the user time and clicks.

## Multi-Select pop-up window

You will see this button next to all multi-select filters. Sometimes the multi-select filter is also a dependent filter, so you may not be able to choose options from this filter until you have chosen other filters. For example, on the Graphical Subdivision Overview report, you must choose a Subdivision and a Phase before you can choose a job. Then, you can click on the button to open the pop-up window.


FIGURE 7. Multi-select filter

Certain multi-select filters default to 'All.' When you click the multi-select filter button , the pop-up window opens showing the default value. Since this is a multi-select filter, the 'All' option does not automatically de-select when you choose another option from the option list. You need to clear the default option before you choose any other options. Click the **Clear All Selections** button to clear all filter options and ensure that your report filters only by what you choose.

Some multi-select pop-up windows have a large number of items. Each page of the pop-up window shows 20 items at a time. If more than 20 items appear in the pop-up window, you will see page links for the extra pages at the top and bottom of the filter list. You can see the total number of items in the pop-up window at the bottom of the pop-up window, just above the OK button.

**To choose options from the multi-select pop-up window:**

1. Click the Multi-Select button . The Multi-Select pop-up window open in a separate window.
2. Click the **Clear All Selections** button.
   **Note:** Some pop-up windows default to 'All.' If you don't want 'All,' you must click this button to clear all the selections from the pop-up window.

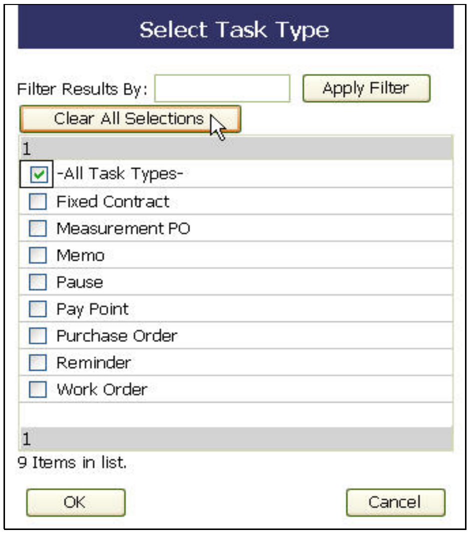


FIGURE 8. Multi-select filter that defaults to 'All'

3. Under the Clear All Selections button, click the **page link** you want to open. **Note:** If the pop-up window has less than 20 options, you will only see page 1.

4. Click the **check box** next to each option to choose it. You can choose options from multiple pages.

5. Click the 1 link to return to the first page.

6. Click **OK** to save your filter choices and close the pop-up window.

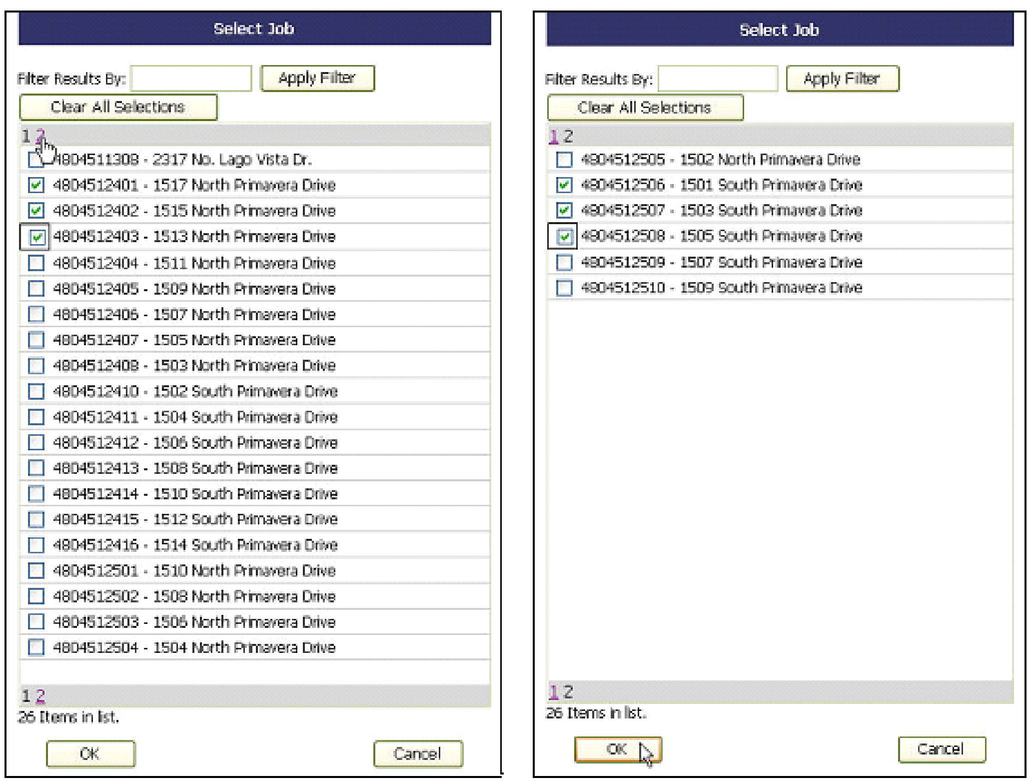


FIGURE 9. Multi-select pop-up window - Page 1 and 2

## Filter Multi-Select Options

If many pages of filter options come up, you can filter those options by entering criteria in the Filter Results By: box.

For example, if you enter 'south' in the box below and click Apply Filter, you will only see jobs that have the word 'south' in their job name. The filtered list shows the total number of items that meet the filter criteria at the bottom of the box. It also indicates that the list is Filtered. Click Clear Filter to take off the filter.

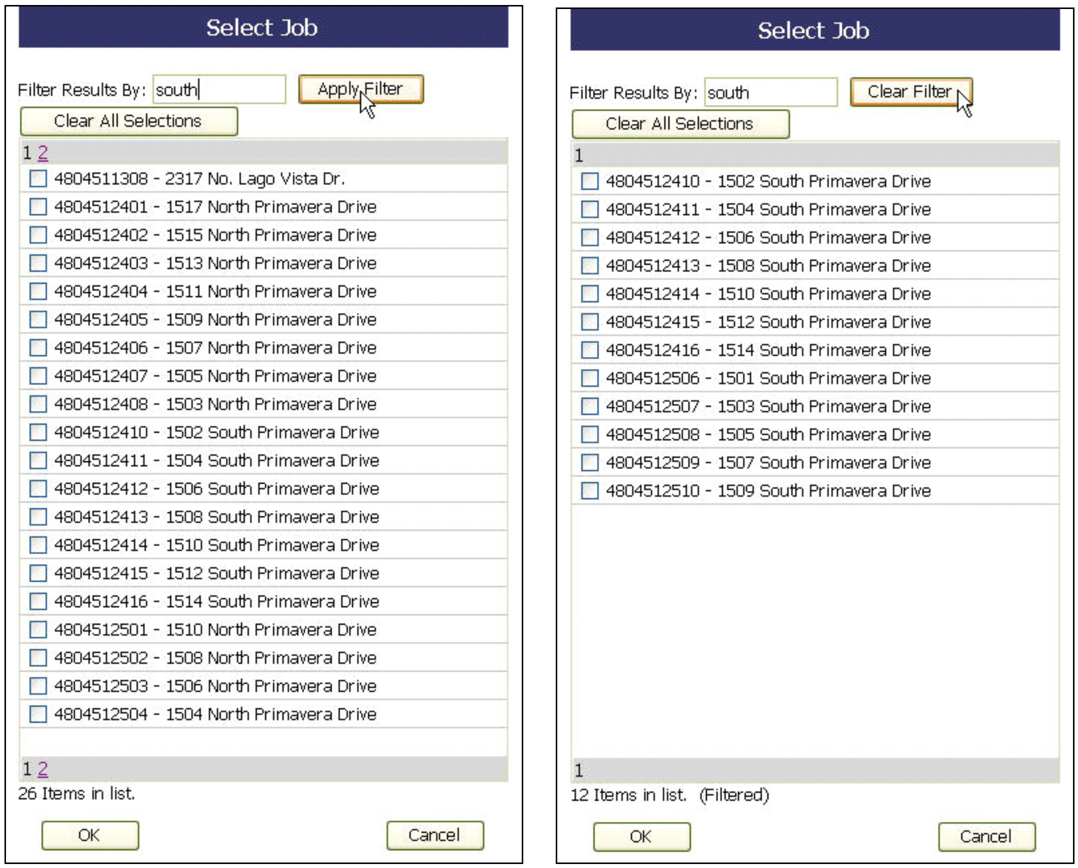


FIGURE 10. Multi-select pop-up window - filter applied

## Select Date Filter

On some reports, you will see this button Select Dates next to the date filter. Some date filters already have a default filter set, but this button allows you to change what type of date filter you want to use.

**Note:** Not all reports with the Select Dates filter have all the date options shown below.

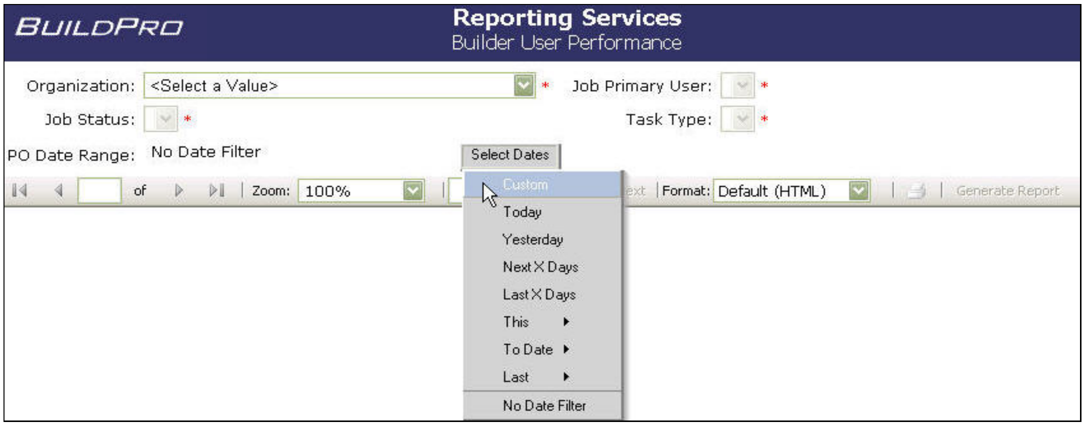


FIGURE 11. Select Date filter - Builder User Performance report

**Select Dates filter options:**

- **Custom** - Filter the report by a range of dates. Click on the arrow to choose dates from the date picker.
  Date Range: from to
- **Today** - Filter the report by today's date.
  Date Range: Today
- **Yesterday** - Filter the report by yesterday's date.
  Date Range: Yesterday
- **Next X Days** - Filter the report by dates that fall in the next X days, which includes today. Enter a number in the days box.
  Date Range: Next Days
- **Last X Days** - Filter the report by dates that fall in the last X days, which includes today. Enter a number in the days box.
  Date Range: Last Days
- **This Week/Month/Quarter** - Filter the report by dates for the current week, the current month, or the current quarter. This Week starts on the Sunday before today and goes through Saturday. This Month starts on the first day of the current month and goes to the last day of the month.
  Date Range: This Week
- **To Date Week/Month/Quarter** - Filter the report by dates for the week to date, the month to date, or the quarter to date. Week to Date starts on the Sunday before today and goes through today. Month to Date starts on the first day of the current month and goes through today. Quarter to Date starts on the first day of the current quarter and goes through today.
  Date Range: Week To Date
- **Last Week/Month/Quarter** - Filter the report by dates for last week, last month, or last quarter. Last Week is the previous Sunday through Saturday. Last Month is the first


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through last day of the previous month. Last Quarter is the first day through last day of the previous quarter.

Date Range: Last Week

- **No Date Filter** - Choose this option to have no date filter on your report.

  Date Range: No Date Filter

## Sort Capability

Columns on some reports have sorting capability, just like the old reports. When you see this sort icon next to the column name, that means the column can be sorted. Click on the sort icon once to sort in ascending order. Click on it again to sort the column in descending order. You can tell a column has a sort set on it by the ascending or descending icon next to the column name.


FIGURE 12. Column with sort capability

The Acrobat (PDF) and Excel software restrict two aspects of the report sorting capability:

- **The column sort is not saved if you change the report format.**
  For example, you sort the Adjusted Start Date column in ascending order in the HTML format. If you regenerate the report in Excel or PDF format, all the columns revert back to the default setting. So, when you view the report in Excel or PDF, the sort does not apply. You can use the Excel tools to sort the columns in Excel, but not in the PDF.
- **Acrobat does not allow sorting in the PDF format.**
  Once you generate a report in PDF format, you can no longer sort any of the columns. This is because when you create a PDF, you are taking a picture of the report that is frozen and can no longer be edited. You can change the filters and regenerate the report, but sorting is unavailable.

Due to recent changes in the Microsoft Reporting Services software, these two issues exist, but Hyphen developers are working to resolve these issues before all the reports are promoted to Production.

- **The sort capability only applies to one page at a time.**
  When you click the sort icon on the first page of the report, the column only sorts items on that page. It does not sort items on the succeeding pages. This is because the report is separated into individual HTML pages to make viewing and printing easier. The HTML sort capability can only apply to one HTML page at a time. So, make sure you view the other pages of the report to get all of the information you need.
- **The column sort is not saved if you click between pages.**
  For example, you sort the Adjusted Start Date column in ascending order on the first page of the report. Then, you click over to another page of the report and then click back to the first page. The sort on the Adjusted Start Date column is no longer there. The column reverts back to its default state.

## View & Print HTML Reports

For reports that you often run, you should check the printer settings for those to make sure everything is correct. The page orientation of your report should be correct, but depending on what size paper your printer contains, you may need to adjust the paper size. The printer settings are less reliable in the HTML format, because each browser handles printing differently. But, the HTML format is the only format that allows drilling down into detail pages, so you can print and generate as many reports as you like in this format.

Because of some restrictions in the Microsoft software, some HTML reports may print on an unexpected size of paper if the printer has multiple trays.* This only affects some large printers that have trays for different paper sizes, like letter-size paper (8.5" x 11") and legal-size paper (8.5" x 14"). Smaller printers with single trays print correctly.

***Issue Note:** This is due to a defect in the Microsoft Reporting Services software. As Microsoft continues to update their software, the HTML printer settings may change.

**To print a report in HTML format:**

1. Open the report, choose from the filters, and click the **Generate Report** button. The report will default generate in HTML.
2. Click the print icon on the report toolbar. The Print dialog box opens.
3. To verify or change printer settings, click the **Properties…** button to open the printer settings for your printer.
4. Check that the page orientation and paper size are correct, and change them if necessary.
5. Click **OK** to close the Properties box.
6. Click **OK** to print the report with the current printer settings.

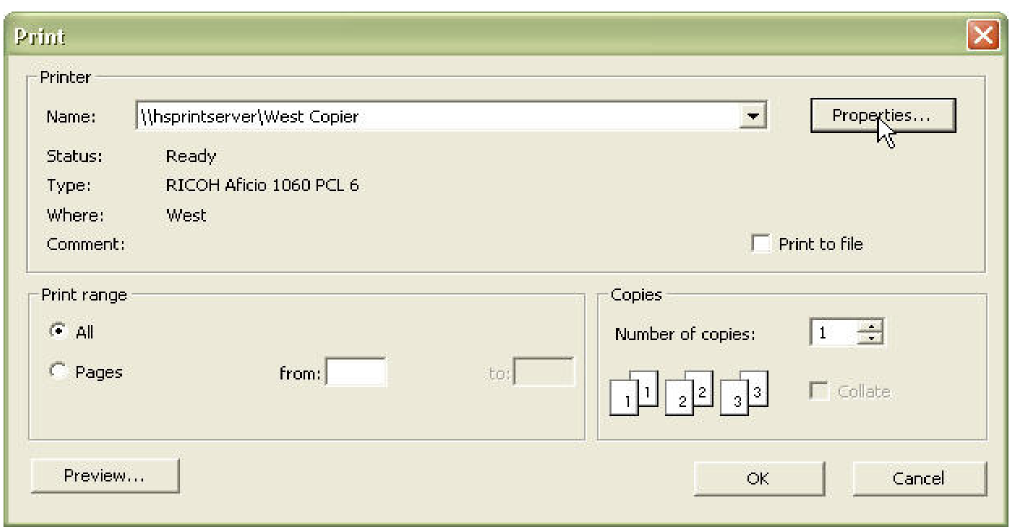


FIGURE 13. Print dialog box - HTML


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## View & Print PDF Reports

The PDF format provides a lot of advantages, especially in saving and printing. You can only save the reports in the PDF or Excel formats. You cannot sort or drill down to detail pages in a PDF, but it is the best way to print reports. Acrobat has more default printer settings, so you do not need to adjust them to print your report.

Remember, once you export your report to PDF, you cannot drill down into detail pages. If a report has drill-downs, you should open each drill-down before you generate the report in PDF format. You must generate the report in HTML to drill down into the detail pages.
**Note:** If your computer does not have Adobe Reader, you need to download it to view a PDF file. Download Adobe Reader for free at http://www.adobe.com/products/acrobat/readstep2.html.

**To view and print a report in PDF:**

1. Open the report.
2. On the report toolbar, choose the **Acrobat (PDF) file** option from the **Format** drop-down list.
3. Click the **Generate Report** button. The PDF report opens in the same window, displaying the Acrobat PDF toolbar. Use this toolbar to view, print, and save the PDF report.


FIGURE 14. PDF toolbar

4. Change the **Zoom** to zoom in or zoom out on the report.

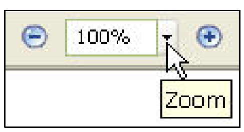


FIGURE 15. Zoom on the PDF toolbar

5. Click the save icon on the PDF toolbar to save the PDF file on your computer.
6. Click on the PDF print icon in the PDF toolbar. The Print dialog box opens.
7. Click **OK** to print the report.

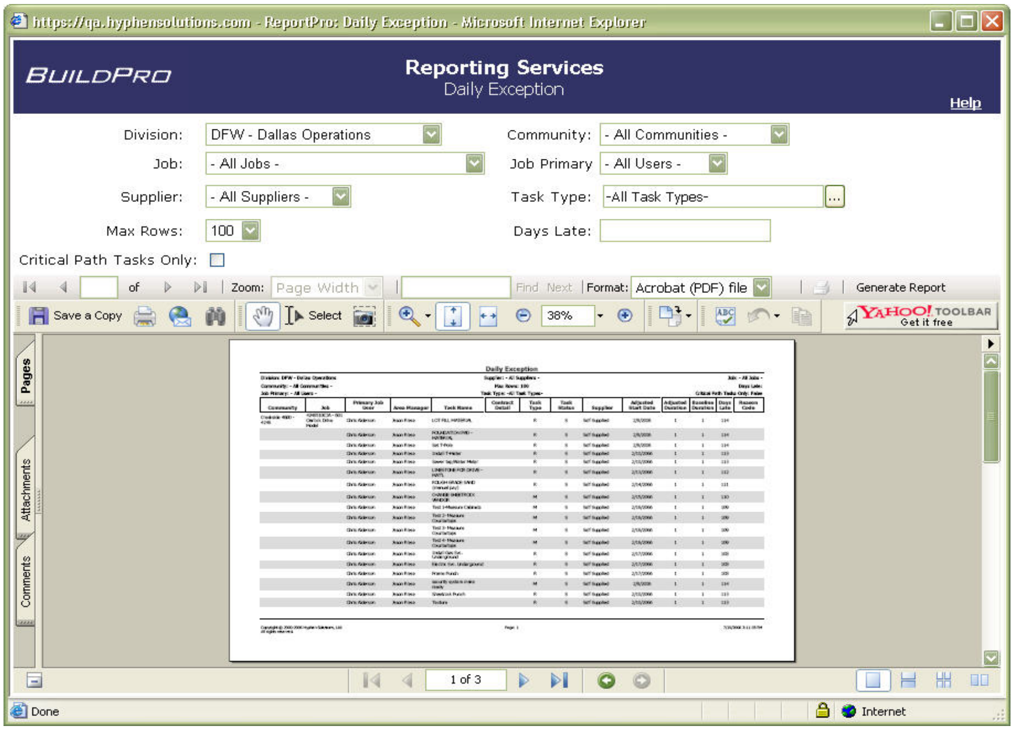


FIGURE 16. Daily Exception report in PDF format.

## View Excel Reports

When you export the report to Excel, a few things may need to be adjusted before you print your report. Remember, once you export your report to Excel, you cannot drill down into detail pages. If a report has drill-downs, you should open each drill-down before you generate the report in Excel.

You may encounter three main issues when you export a report to Excel:

- **Hidden text** - Rows may need to be expanded to show all of the text in that row.
- **Non-repeating column headers** - The Excel column headers do not automatically repeat on every page of the report.
- **Unfrozen column headers** - The Excel column headers are not frozen, so they move when you scroll through the report.

### Hidden Text

When a report is exported to Excel, the height of a row does not automatically expand for wrapped text if the first column does not contain wrapped text.*

***Issue Note:** This is due to a defect in the Microsoft Reporting Services software. As Microsoft continues to update their software, the wrapped text setting in Excel may change.

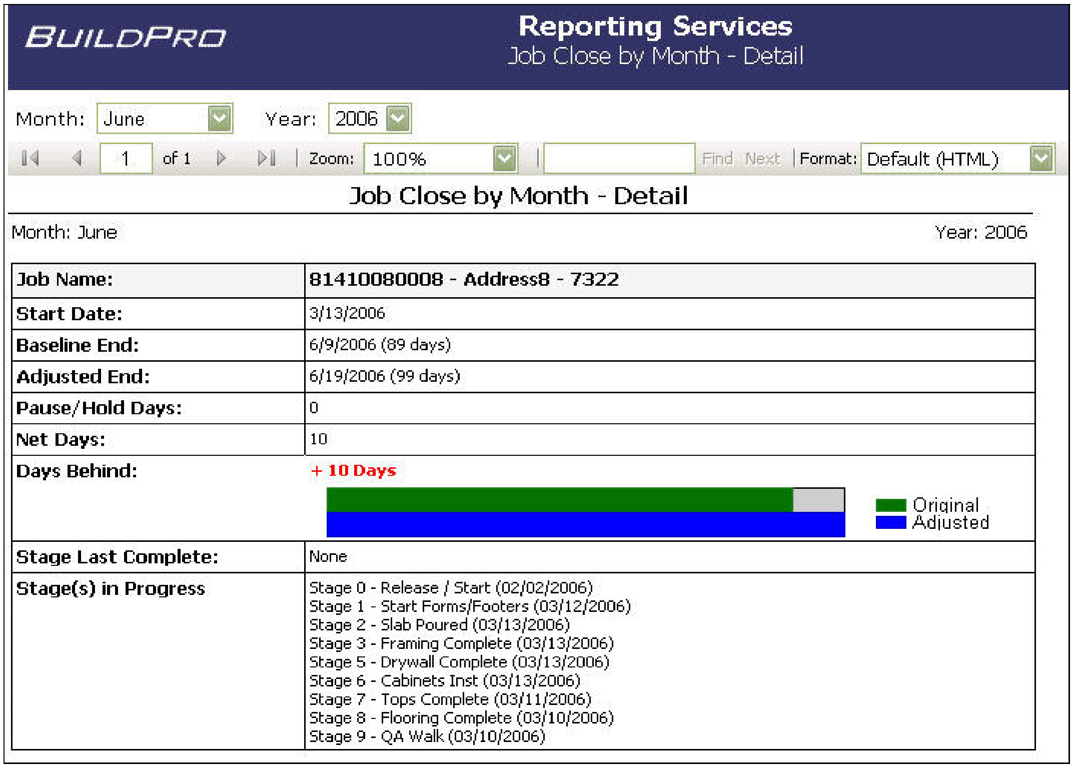


FIGURE 17. HTML report - Stage(s) in Progress row shows nine stages

On the Job Close by Month - Detail example above, the job has nine Stages in Progress showing. But when the report is exported to Excel, below, that job only shows one stage. That row needs to be expanded to show the rest of the stages.

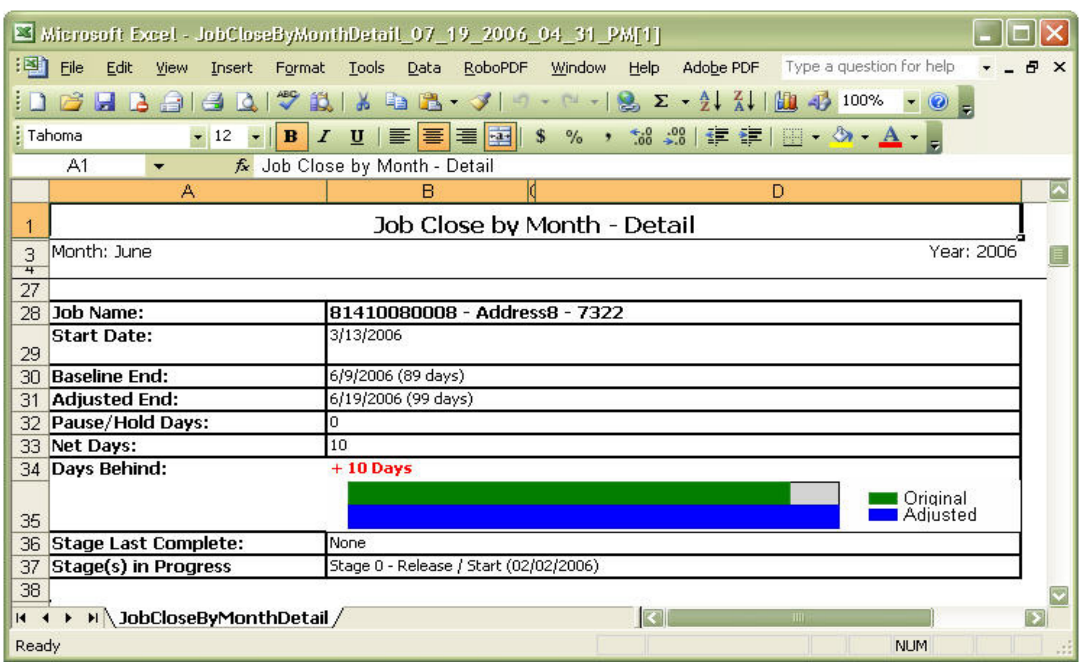


FIGURE 18. Excel report - Stage(s) in Progress rows shows one stage

**To expand the row:**

1. Click on the line under the row number you want to expand. The expand tool ‡ appears.


FIGURE 19. Expand row

2. Drag the expand tool down until all the text is showing.

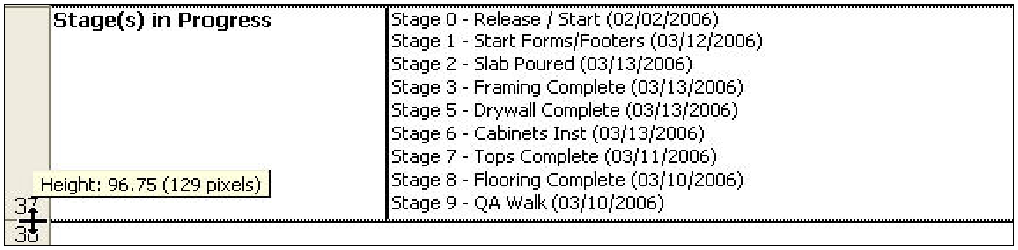


FIGURE 20. Stage(s) in Progress row expanded to show all nine stages

## Non-Repeating Column Headers

When a report is exported to Excel, the column headers are not included in the "Rows to repeat at the top" setting. Therefore, although the report title and filters print on all pages, the column headers only print on page one.*

***Issue Note:** This is due to a defect in the Microsoft Reporting Services software. As Microsoft continues to update their software, the repeat column headers setting in Excel may change.

**To repeat the column headers on every page:**

1. Generate the report in Excel.
2. In Excel, click on **File** in the menu bar, then **Page Setup…**. The Page Setup dialog box opens.

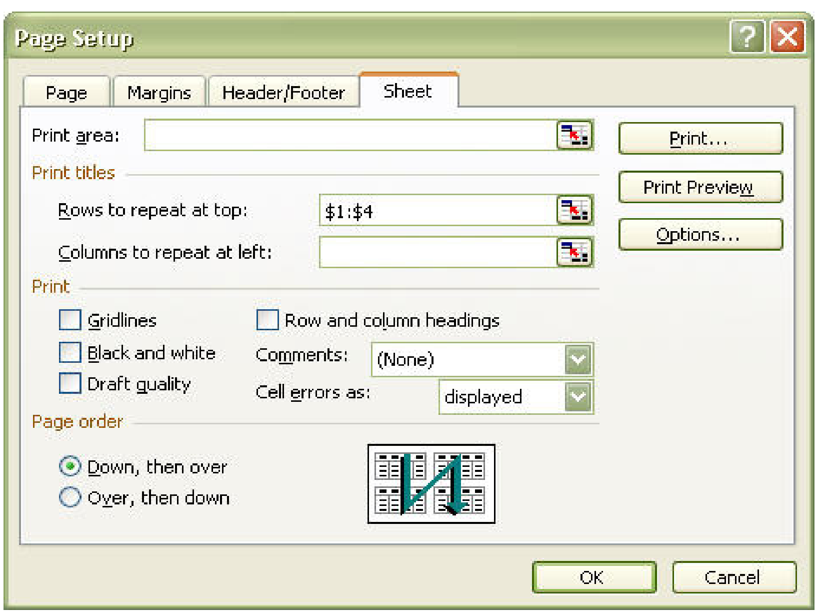


FIGURE 21. Page Setup dialog box

3. Click the **Sheet** tab.

4. In the **Rows to repeat at top** section, change the value $1:$4 to read **$1:$5**.
   **Note:** Adding one row corrects most reports, but you may need to add more depending on how many rows the filters take up.

5. Click **OK** to apply your settings and close the dialog box.

### Non-Frozen Column Headers

That same Microsoft defect also affects whether you can see the column headers when you scroll through the report. The column headers are not automatically frozen, so when you scroll through a report in Excel, you will not be able to see the column headers.*

***Issue Note:** This is due to a defect in the Microsoft Reporting Services software. As Microsoft continues to update their software, the freeze column headers settings in Excel may change.

**To freeze the column headers:**

1. Generate the report in Excel.

2. In Excel, click on **Window** in the menu bar, then **Unfreeze Panes**.

3. Click on **Window** again, then **Remove Split**.

4. Place the cursor in **Column A** under the first column header.

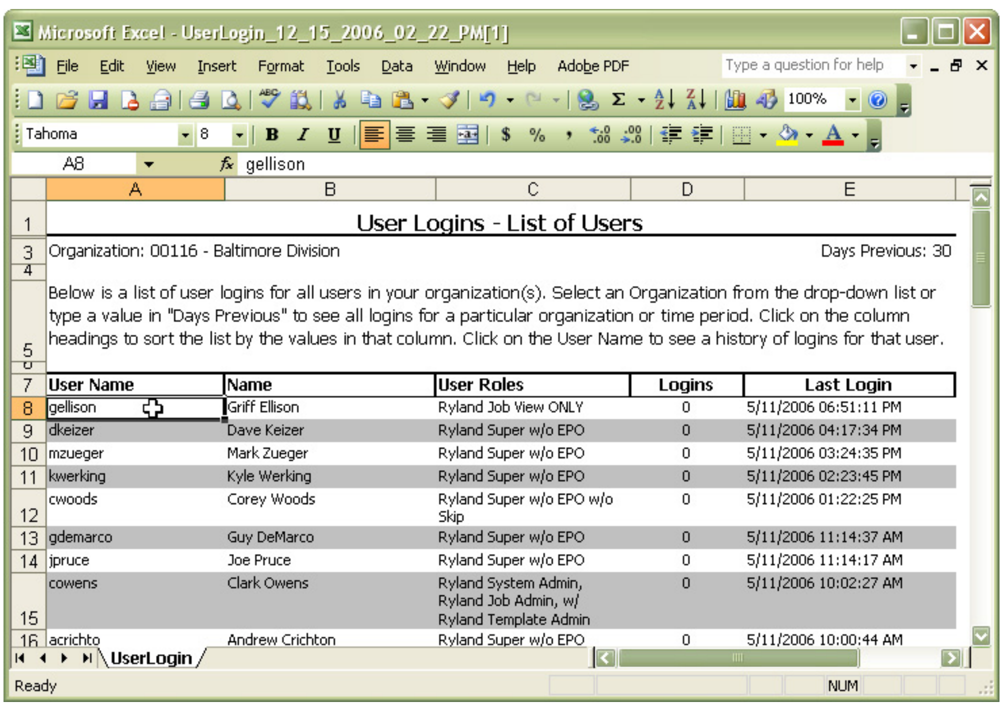


FIGURE 22. Excel report - click under the first column header

5. Click on **Window**, then **Freeze Panes**. This includes the column headers in the frozen rows.

## Print Excel Reports

**To print the report in Excel:**

1. Generate the report in Excel.
2. Before you print the whole report, test print the first page to see if your report prints as desired.
3. If necessary, adjust the Page Setup. Click **File**, then **Page Setup…**. The Page Setup dialog box opens.

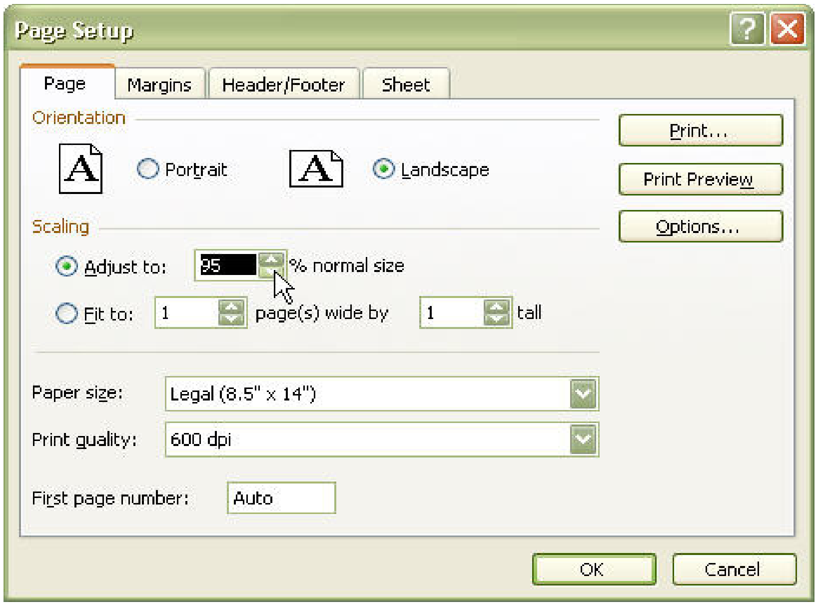


FIGURE 23. Page Setup dialog box

4. On the **Page** tab, change the **Scaling** by typing in **95** or by clicking the down arrow.
   **Note:** Changing the scaling to 90% or 95% will almost always adjust your report to the best size for printing, but you may need to adjust it further.
5. Click **OK** to apply your settings and close the dialog box.
6. Click the **Print** icon in Excel to print your report.

# 13 Back Charges

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Adding a Back Charge While Creating an EPO
- Adding a Back Charge to an Existing EPO
- Adding a Back Charge Not Associated to an EPO
- Editing a Back Charge
- Deleting a Back Charge

## Back Charges Overview

The Back Charge functionality allows the builder to back charge a supplier for defects that are the responsibility of the supplier. For example, if the plumber cracked some tile in the kitchen, you would order more tile by creating an EPO. You could then back charge the plumber for the cost of the extra tile.

In BuildPro, back charges can be added as part of an EPO or as a stand-alone back charge. A back charge is not inserted as a task in BuildPro, and it does not impact the schedule. If there is an EPO associated to the back charge, the EPO functions as it does when it is not associated to a back charge.

## Back Charge Module and Roles

To use the back charge functionality, the user needs to have:

- **One Module**
  - **Back Charge Functionality Module –** Enables the Back Charge functionality in BuildPro by allowing users to create a back charge for an EPO or stand-alone back charge. Also changes the Pending EPOs link on the Left Nav Bar to Pending EPOs and BCs and gives users a modified Pending EPOs page.
- **One of the Two Back Charge Roles**
  - **Jobs – Back Charge Create –** Allows user to add/modify a back charge.
  - **Jobs – Back Charge Approve –** Allows user to approve/decline a back charge.

## Back Charge Statuses

Before learning about how to create, edit, and delete back charges, it is important to understand how the status of a back charge will change as it goes through each step of the process. Each back charge has a Back Charge (BC) Status and a Back Charge (BC) Approval Status. This chart below describes how a back charge passes through each BC Status and BC Approval Status:

TABLE 1. Back Charge Status / Back Charge Approval Status

| BC Status | BC Approval Status | Description |
|---|---|---|
| **Pending** | **Pending** | The back charge has been created but has not been approved or declined. A Pending Back Charge Notification is sent to the assigned supplier via fax/email, and the supplier receives a Pending Back Charge alert in SupplyPro. If the back charge is associated to an EPO, the admin cannot approve or decline the back charge until the associated EPO task has been completed. |
| **Pending** | **Approved** | The back charge has been approved, but the Final Back Charge Notification has not been sent to the supplier. There is a set time delay between approving a back charge and sending the Final Back Charge Notification to the supplier. Once the time delay expires, the notification is sent to the supplier, and the status changes to Complete/Approved. |



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TABLE 1. Back Charge Status / Back Charge Approval Status

| BC Status | BC Approval Status | Description |
|---|---|---|
| **Pending** | **Declined** | The back charge has been declined by the admin. The construction manager receives a Back Charge Declined alert. The user can edit and re-submit the back charge for approval from the Alerts page. |
| **Cancelled** | **Pending / Declined** | The back charge has been deleted by the construction manager or the admin. A Cancelled Back Charge Notification is sent to the assigned supplier via fax/email, and the supplier receives a Cancelled Back Charge alert in SupplyPro. The BC Approval status remains whatever it was when the back charge was deleted (Pending or Declined). |
| **Complete** | **Approved** | The back charge has been approved, either by the admin or because the back charge amount falls below the user's EPO Approval limit. If the back charge amount is below the EPO Approval limit, the back charge is automatically approved and changed to a status of Complete. A Final Back Charge Notification is sent to the supplier via fax/email, and the supplier receives a Completed Back Charge alert in SupplyPro.<br>Note: Stand-alone back charges go into the approval process when they are created, but back charges added to an EPO do not go into the approval process until the EPO task is completed. |

## Back Charge Notifications

As a back charge goes through the back charge process, multiple back charge notifications are sent to the assigned supplier. Different types of notifications are sent out depending on the back charge status:

- **Pending Back Charge Notification** - Sent to the supplier when the back charge is first created.
- **Final Back Charge Notification** - Sent to the supplier after the back charge has been approved and the notification time delay has expired.
- **Cancelled Back Charge Notification** - Sent to the supplier when a back charge is deleted by the construction manager or job admin.

### Notification Time Delay

There is a time delay on the transmission of the Final Back Charge Notification for stand-alone back charges and back charges associated to an EPO.

For example, when the user adds a stand-alone back charge that does not need approval, a Pending Back Charge Notification is sent to the supplier. The BC Status remains as Pending, and the user can edit the back charge until the time delay expires. Editing the back charge resets the clock on the time delay. After the set time delay expires, the BC Status changes to Complete, and the Final Back Charge Notification is sent to the supplier.

The time delay options are 0, 6, 12, 24, 48, and 72 hours. The time delay is set in Hyphen Prep, which only Hyphen personnel can access. Please contact Hyphen Customer Care for assistance.

The following flow chart shows the back charge process. This example shows a back charge associated to an EPO, but stand-alone back charges will follow the process minus the EPO step.

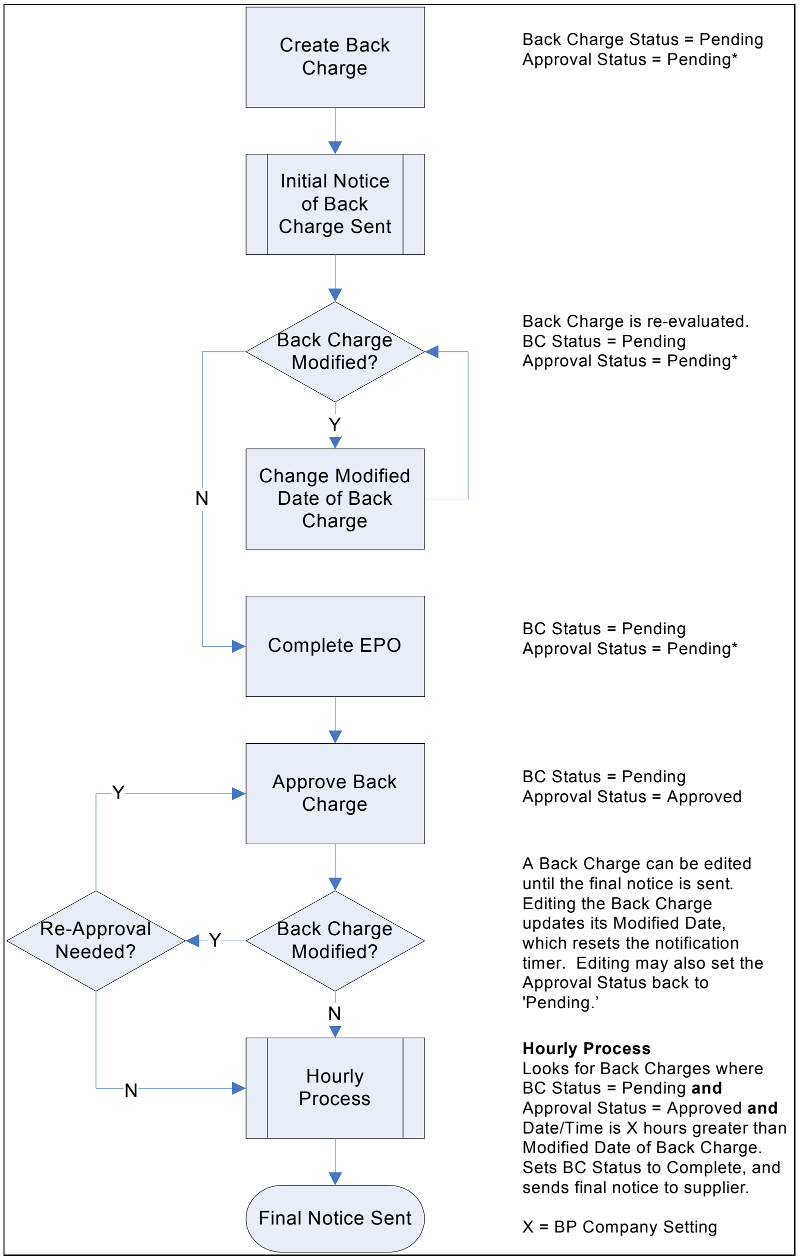


FIGURE 1. Back Charge process

## Create a Back Charge

You can add a back charge to an EPO in any status except Cancelled, and you can add a stand-alone back charge at any time. Users can create a back charge in one of three ways:

- **Add a back charge while creating an EPO** – The user creates an EPO using one of the four EPO methods and adds a back charge at the same time:
  - EPO Wizard – Details and Items page
  - EPO Direct page


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- EPO Free Form page
- EPO Not To Exceed page

- **Add a back charge to an existing EPO –** From the Job Task page, the user can add a back charge to an EPO in any status except Cancelled.
  - Job Task page (Summary tab)
- **Add a back charge without an EPO –** From the Job Actions page, the user can create a stand-alone back charge that is not associated to an EPO.
  - Back Charge with No EPO page

## Add a Back Charge While Creating an EPO

When you create an EPO using one of the four methods on the Job Actions page, you have the option of adding a back charge to the EPO or of adding the EPO to multiple jobs.
**Note:** Currently an EPO with a back charge cannot be added to multiple jobs.

The following flow chart gives you a quick overview of what the back charge process looks like when you add a back charge while creating an EPO.

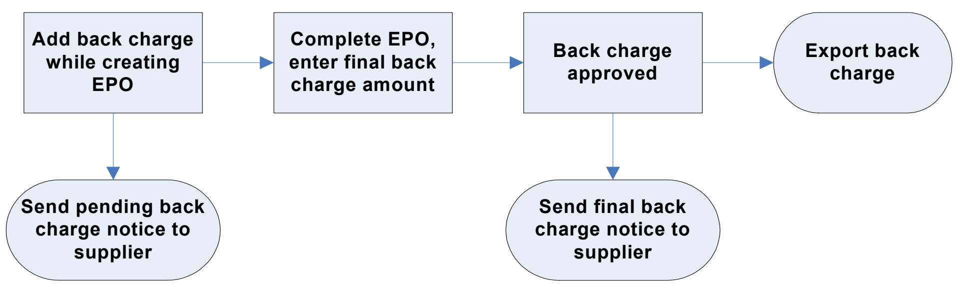


FIGURE 2. Flow chart - add back charge while creating an EPO

**To add a back charge to the EPO:**

1. On the **Job Actions** page (Field Actions tab), click on one of the four **Extra PO (EPO)** links: Wizard, Direct, Free Form, or Not To Exceed.
2. Enter all of the necessary **EPO Details**.
3. Before you click the **Create EPO** button at the bottom of the page, look for the **Add Back Charge to EPO** check box under the **EPO Items** section.
   **Note:** This example shows the Create EPO page for NTE EPOs, but all Create EPO pages will show the Add Back Charge to EPO check box.

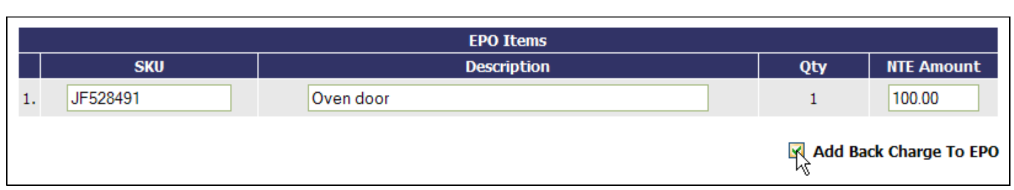


FIGURE 3. Add Back Charge to EPO check box

4. Click on the **Add Back Charge to EPO** check box. The Back Charge Information section appears on the page.

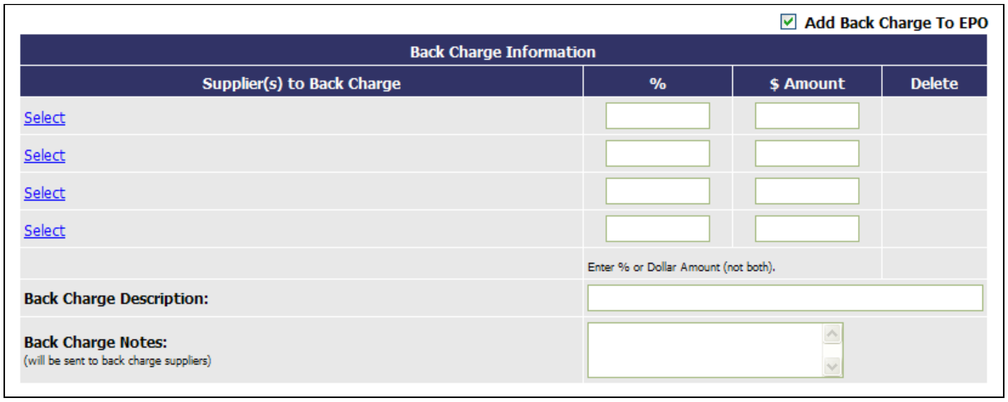


FIGURE 4. Back Charge Information

5. Click the **Select** link in the **Supplier(s) to Back Charge** column. The link turns into a drop-down list.
   **Note:** This list may show all suppliers/trades or only Active suppliers/trades if module# 232 Back Charge Suppress Inactive Suppliers in turned on for your company.

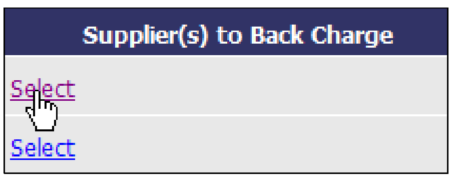


FIGURE 5. Click the Select link to choose a supplier

6. Choose a **Supplier** from the drop-down list.
   **Note:** Choose a supplier from multiple Select links to back charge multiple suppliers.

7. Enter a **% Percentage** or **$ Dollar Amount**. This is the percentage or dollar amount that the selected supplier will be back charged. The back charge amount cannot exceed the EPO amount.
   **Note:** Usually, it's best to enter a percentage, like 100%. This way, if the EPO amount changes, the back charge amount will be automatically updated.

8. If the EPO is ready to be submitted for approval, click the **EPO Ready** check box in the bottom left of the page.

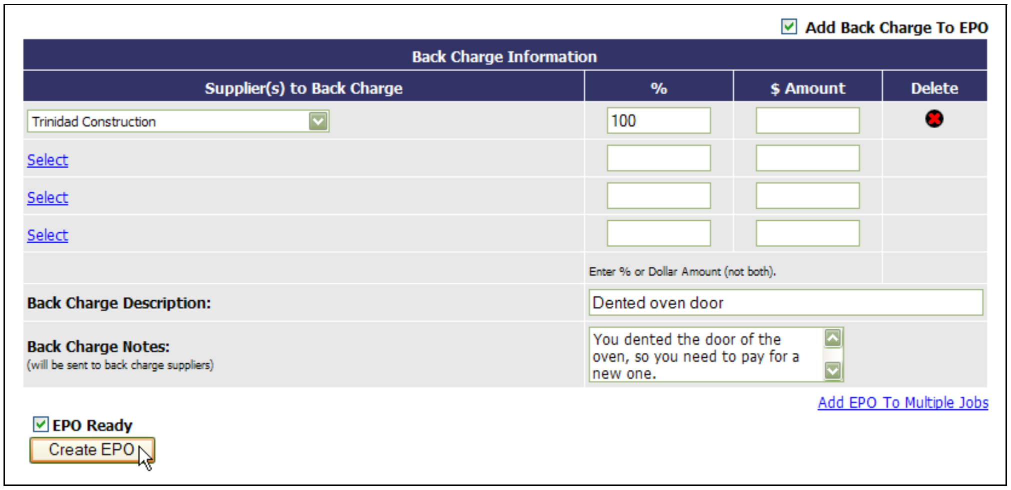


FIGURE 6. Back Charge Information

9. Click the **Create EPO** button. The new EPO task is added and the Job Task page appears. **Note:** If you click the link to Add EPO to Multiple Jobs, the back charge information is hidden and will not be applied to this EPO. You cannot add an EPO to multiple jobs that has a back charge associated to it.

## Add a Back Charge to an Existing EPO

You can add a back charge to an EPO in any task status except cancelled. So, whether the EPO is still pending or if it has already been completed, you can add a back charge to it from the Job Task page.

The following flow chart gives you a quick overview of what the back charge process looks like when you add a back charge an existing EPO.

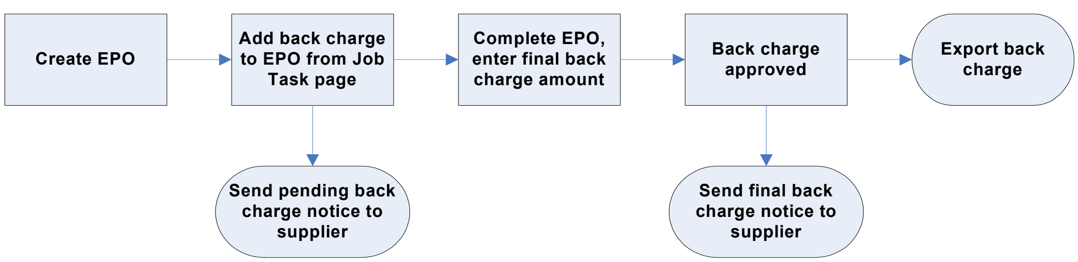


FIGURE 7. Flow chart - add back charge to an existing EPO

**To add a back charge to an existing EPO:**

1. On the **To Do List**, **JME**, or **Multi-Family** pages, click on the **Task Name** link of an EPO. The Job Task page opens.

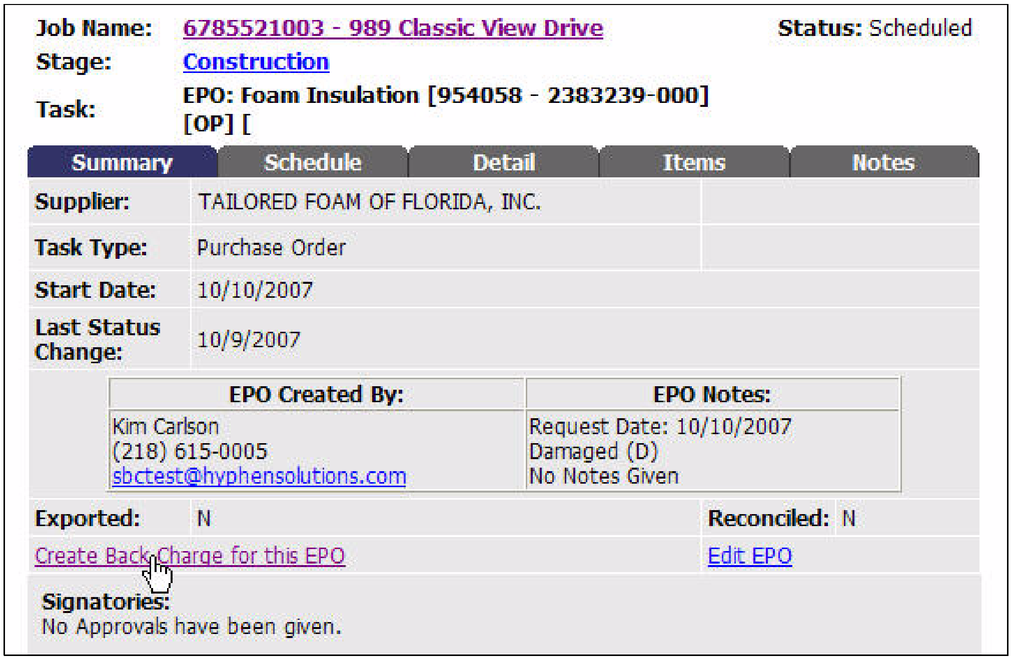


FIGURE 8. Job Task page - Create Back Charge for this EPO link

2. Under the **EPO Created By** box, click on the **Create Back Charge for this EPO** link. The Back Charge pop-up window opens.
**Note:** This link appears for EPO tasks in all statuses except cancelled.

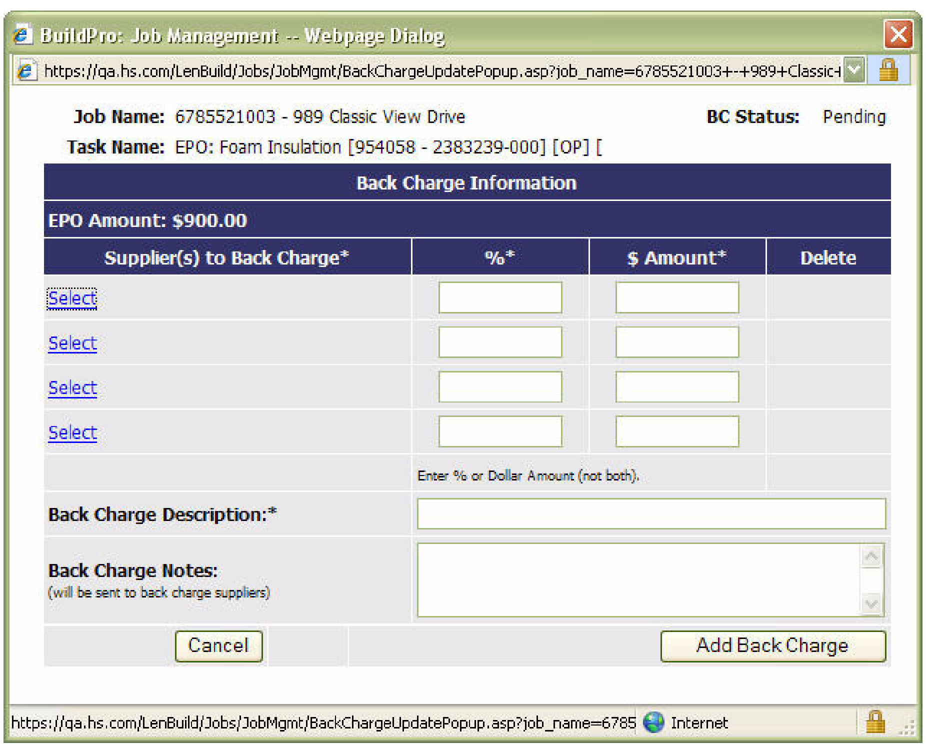


FIGURE 9. Back Charge pop-up window

3. Click on the **Select** link in the **Supplier(s) to Back Charge** column. The link turns into a drop-down list.

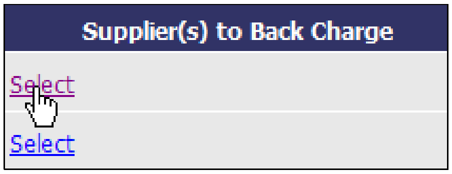


FIGURE 10. Click the Select link to choose a supplier

4. Choose a **Supplier** from the drop-down list.
**Note:** Choose a supplier from multiple Select links to back charge multiple suppliers.
**Note:** This list may show all suppliers/trades or only Active suppliers/trades if module# 232 Back Charge Suppress Inactive Suppliers in turned on for your company.

5. Enter a **% Percentage** or **$ Dollar Amount**. This is the percentage or dollar amount that the selected supplier will be back charged. The back charge amount cannot exceed the EPO amount.
**Note:** Usually, it is best to enter a percentage, like 100%, which would charge the supplier for 100% of the EPO amount. This way, if the EPO amount changes, the back charge amount will be automatically updated.

6. Enter a **Back Charge Description**.

7. Enter **Back Charge Notes**, which will be sent to the back charge supplier.

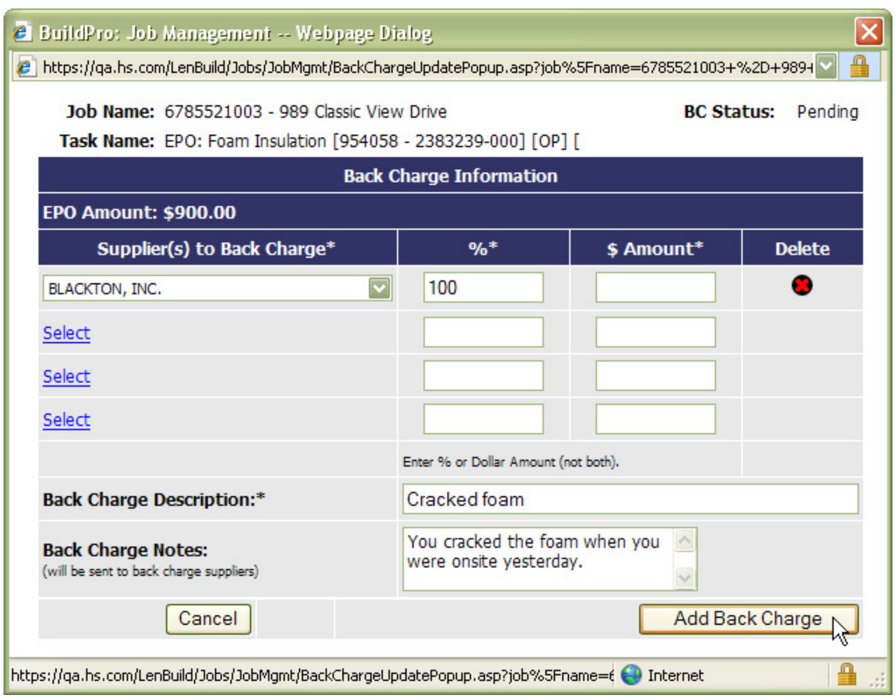


FIGURE 11. Add Back Charge pop-up window

8. Click the **Add Back Charge** button. The pop-up window closes. A Pending Back Charge Notification is sent to the assigned supplier by fax/email. Also, a Pending Back Charge Alert is generated in SupplyPro.

## Add a Back Charge Without an EPO

A users can also create a back charge that is not associated with an EPO. The user chooses a cost code for the back charge and enters the back charge information, including the back charge supplier. The user can edit the stand-alone back charge from the Back Charges page, which is described in more detail later in this chapter.

The following flow chart gives you a quick overview of what the back charge process looks like when you add a stand-alone back charge, which is not associated to an EPO.

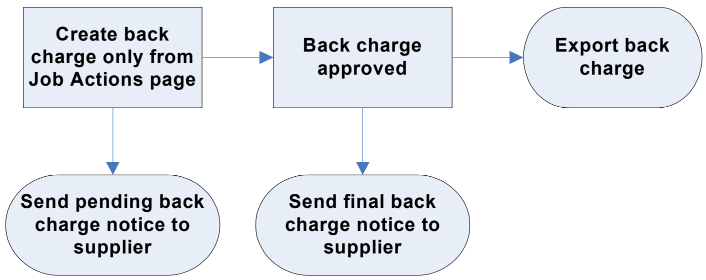


FIGURE 12. Flow chart - add back charge without an EPO

**To create a back charge without an EPO:**

1. Click on the **Jobs** tab. The Job Management page opens.
2. Click on a **Job Name** link. The Job Actions page opens on the Field Actions tab.

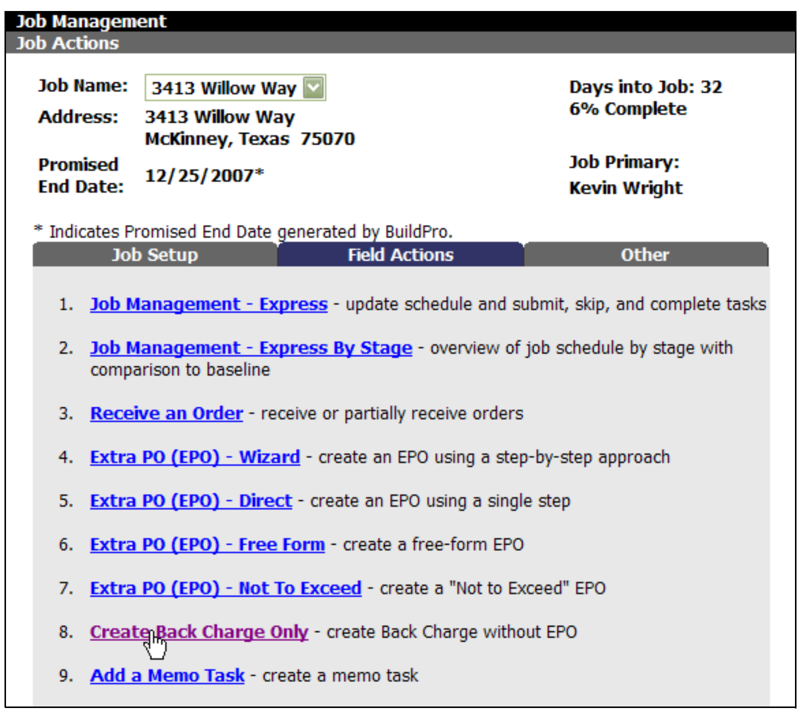


FIGURE 13. Job Actions page

3. Click on the **Create Back Charge Only** link. The Back Charge with No EPO page opens.


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**Note:** This link only appears if the Back Charge Functionality module and role are turned on.

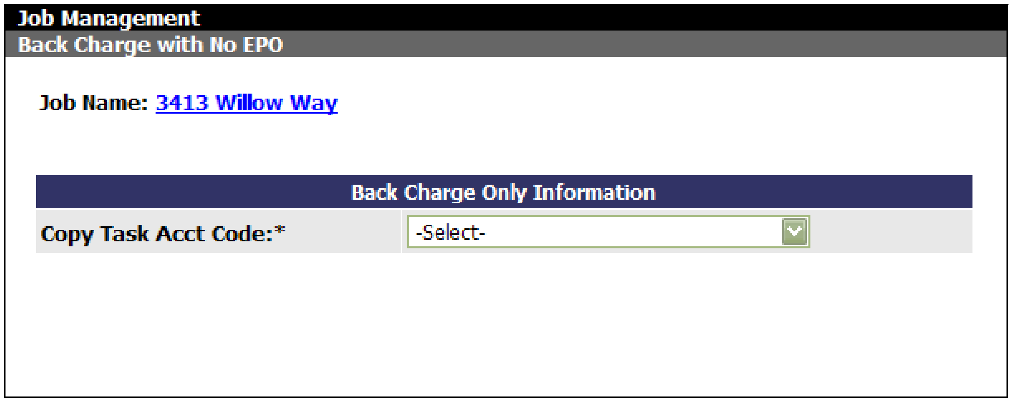



FIGURE 14. Back Charge with No EPO page

4. Choose an account code from the **Copy Task Acct Code** drop-down list. The Back Charge Information box appears on the page.

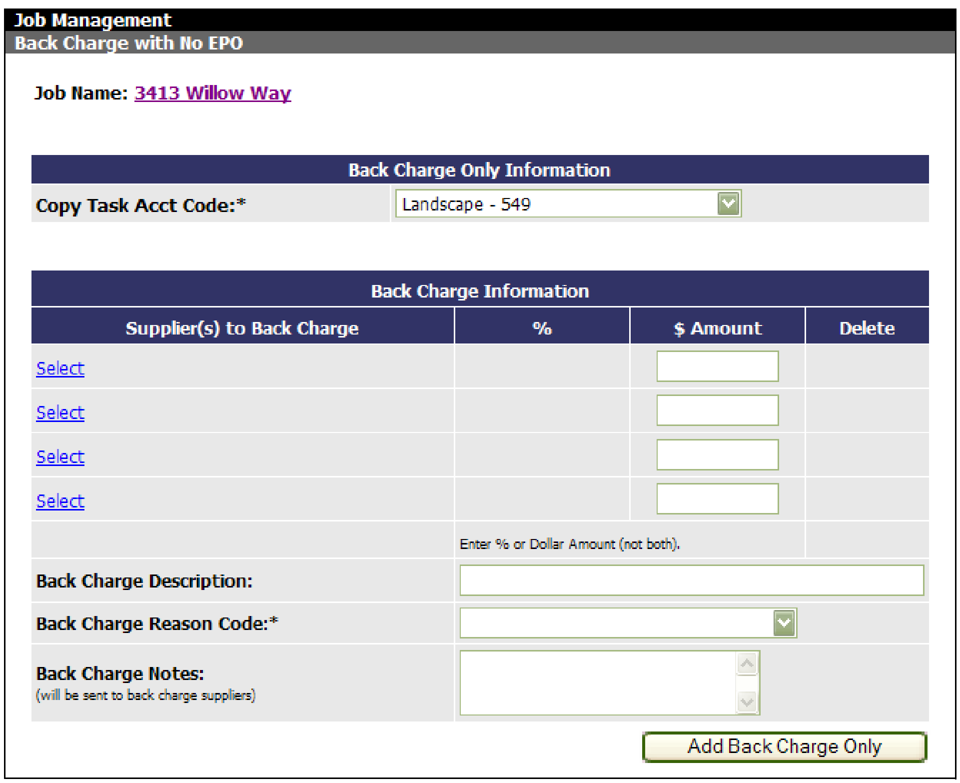



FIGURE 15. Back Charge with No EPO page

5. Click on the **Select** link in the **Supplier(s) to Back Charge** column. The link turns into a drop-down list.

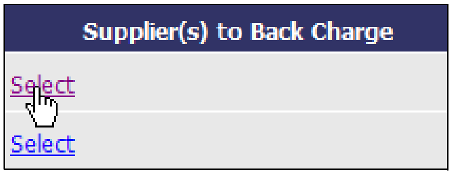



FIGURE 16. Click the Select link to choose a supplier

6. Choose a **Supplier** from the list.
   **Note:** Choose a supplier from multiple Select links to back charge multiple suppliers.
   **Note:** This list may show all suppliers/trades or only Active suppliers/trades if module# 232 Back Charge Suppress Inactive Suppliers in turned on for your company.

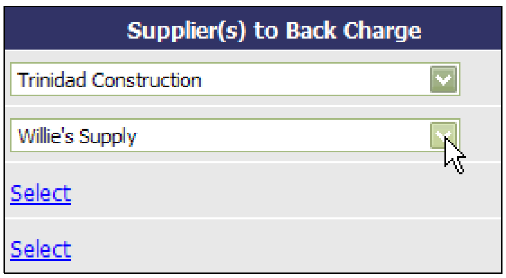



FIGURE 17. Choose to back charge one or more suppliers

7. Enter a **$ Dollar Amount**. This is the dollar amount that the selected supplier will be back charged.
   **Note:** You cannot enter a percentage here, because there is no EPO from which to calculate the percentage.
8. Choose a **Back Charge Reason Code** from the drop-down list. This list is populated by the list of EPO reason codes. (Required)
9. Enter a **Back Charge Description**, which is the title of the back charge or **Back Charge Notes**, which will be sent to the supplier(s) being back charged. (Optional)

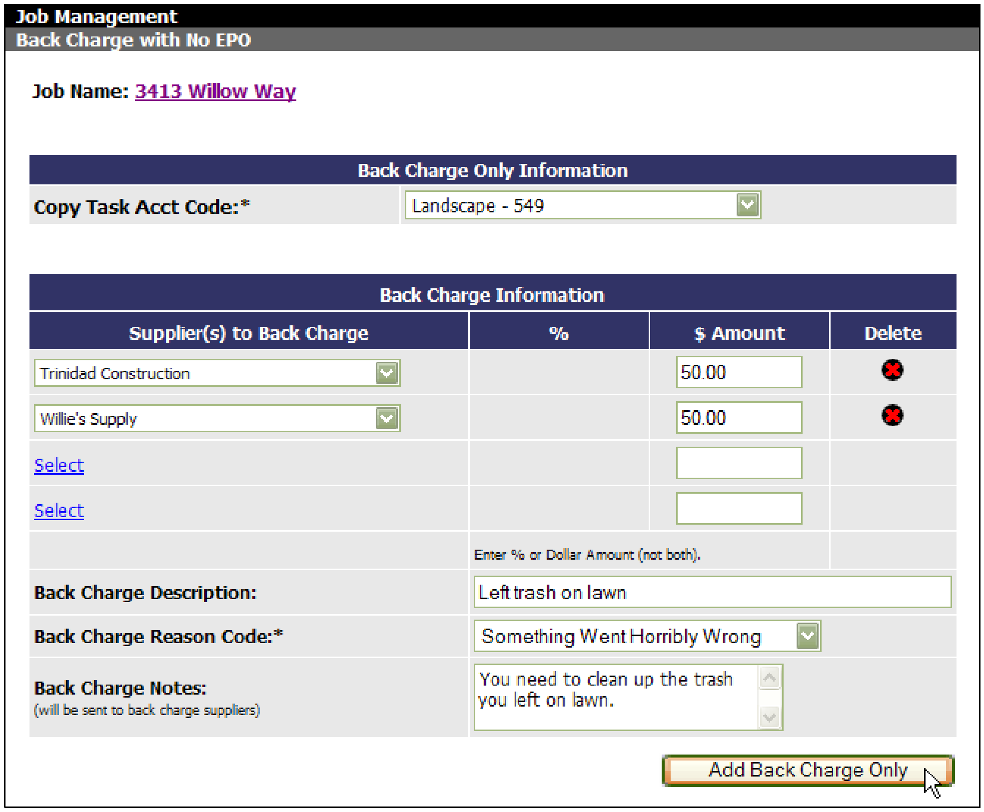



FIGURE 18. Back Charge with No EPO page

10. Click the **Add Back Charge** button. A Pending Back Charge Notification is sent to the assigned supplier by fax/email. Also, a Pending Back Charge Alert is generated in SupplyPro.
**Note:** On a stand-alone back charge, if the back charge amount is less than the user’s EPO approval limit, the back charge is automatically approved and set to a status of Complete. Otherwise, the back charge goes to the admin for approval.

## Edit or Delete a Back Charge

Once you create a back charge, you can edit it from several pages. You can edit or delete a back charge until it has been approved, which changes the back charge status to Complete.

If you delete the back charge, the back charge status changes to Cancelled. A Cancelled Back Charge Notification is sent to the assigned supplier via fax/email, and the supplier receives a Cancelled Back Charge alert in SupplyPro.

A user can edit or delete a back charge from the following pages:

- **Job Task page** - Click on the **Edit Back Charge for this EPO** link under the EPO Created by box. The pop-up window opens. Edit the back charge as necessary, and click the Update Back Charge button. Or, click the Delete Back Charge button to delete the back charge.

- **Pending EPOs page** - Click on the **Back Charge** link to open the Back Charge pop-up window. Edit the back charge as necessary, and click the Update Back Charge button. Or, click the Delete Back Charge button to delete the back charge.
- **Back Charges page** - Click on the **Back Charge** link to open the Back Charge pop-up window. Edit the back charge as necessary, and click the Update Back Charge button. Or, click the Delete Back Charge button to delete the back charge.
- **Alerts - Back Charge Declined page** - Click on the **Edit** link under the Edit/Resubmit column. The Back Charge pop-up window opens. Edit the back charge as necessary. Click the Update Back Charge window to save your changes and clear the alert. Or, click the Delete Back Charge button to delete the back charge.

## Edit Back Charge on Job Task Page

If the back charge is associated to an EPO, you can edit the back charge from the EPO's Job Task page. Access the Job Task page by clicking on an EPO Task Name link on the JME, To Do List, or Multi-Family pages.

**To edit a back charge from the Job Task page:**

1. On the **To Do List**, **JME**, or **Multi-Family** pages, click on the **Task Name** link of an EPO. The Job Task page opens.

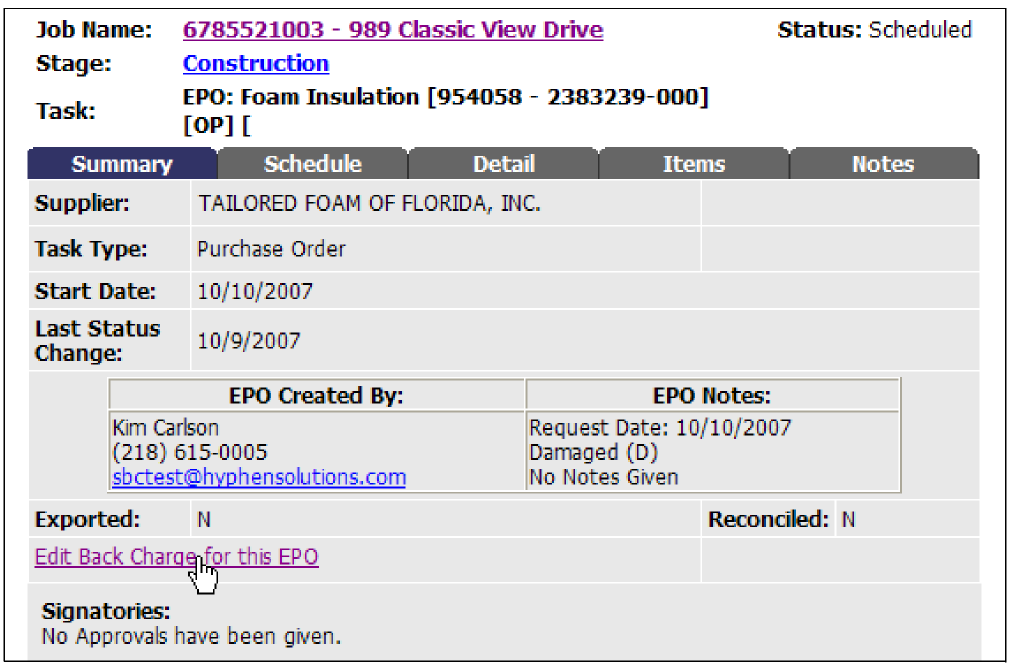



FIGURE 19. Job Task page - Edit Back Charge for this EPO link

2. Under the **EPO Created By** box, click on the **Edit Back Charge for this EPO** link. The Back Charge pop-up window opens.
   **Note:** The Back Charge Reason Code drop-down list is not available for editing on back charges associated to an EPO. Those back charges inherit the EPO's reason code.

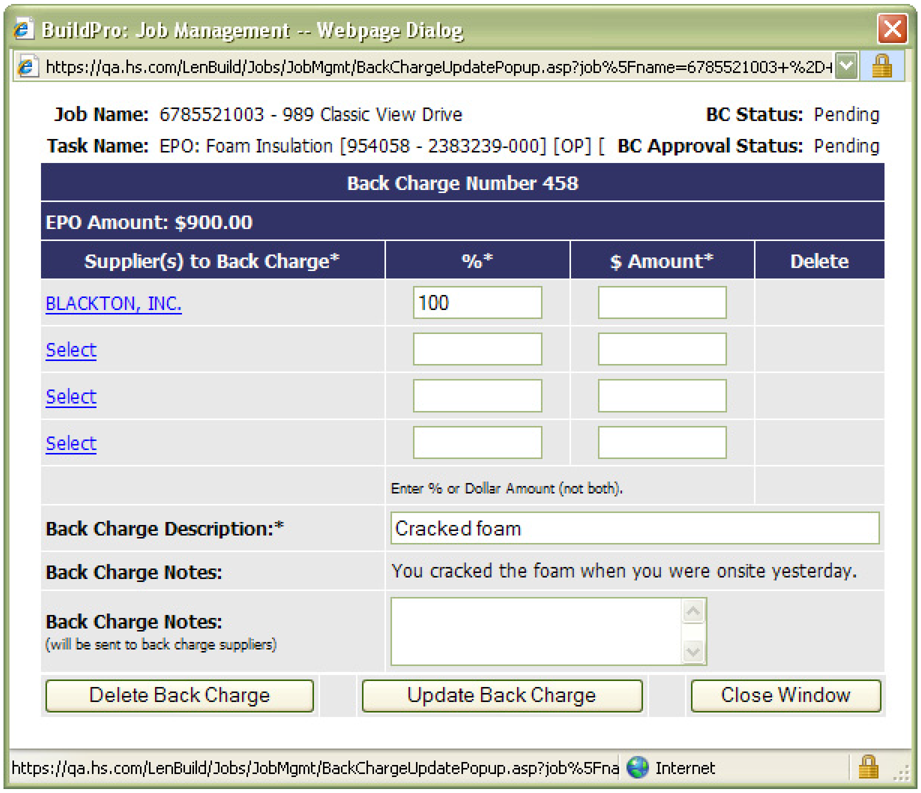



FIGURE 20. Back Charge pop-up window

3. Edit the **Back Charge Information** as necessary.
4. Add additional **Back Charge Notes** to be sent to the back charge supplier.
5. Click the **Update Back Charge** button to save your changes.
6. Or, click on the **Delete Back Charge** button to delete the back charge. A Cancelled Back Charge Notification is sent to the assigned supplier via fax/email, and the supplier receives a Cancelled Back Charge alert in SupplyPro.
7. Or, click the **Close Window** button to close the pop-up window without clearing the alert.

## View Pending EPOs with Back Charges

When the Back Charge module is turned on and the user has a Back Charge role, the user will see an altered Pending EPOs page. This page is different from the Pending EPOs page available to users who are not using the Back Charge functionality. This page displays a list of pending EPOs and shows whether each EPO has a back charge. Pending EPOs are EPOs that have not been completed. This page also allows the user to view the list of back charges by clicking the Back Charge View link in the top right of the page.

**To view pending EPOs:**

1. Click on the **Jobs** tab. The Job Management page opens.

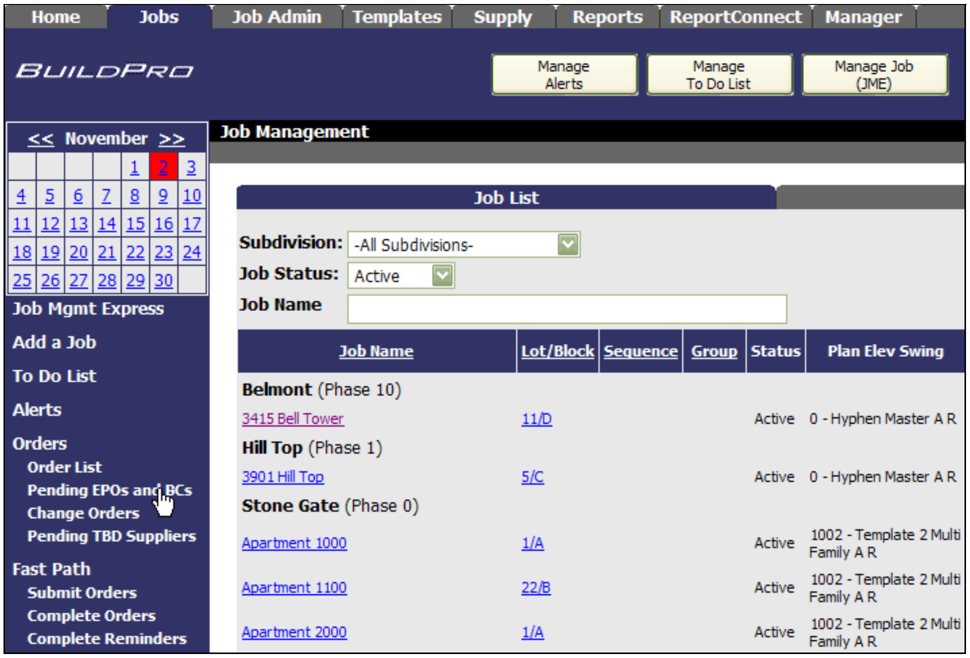



FIGURE 21. Job Management page - Pending EPOs and BCs link on Left Nav Bar

2. Click on the **Pending EPOs and BCs** link on the Left Nav Bar. The Pending EPOs page opens.

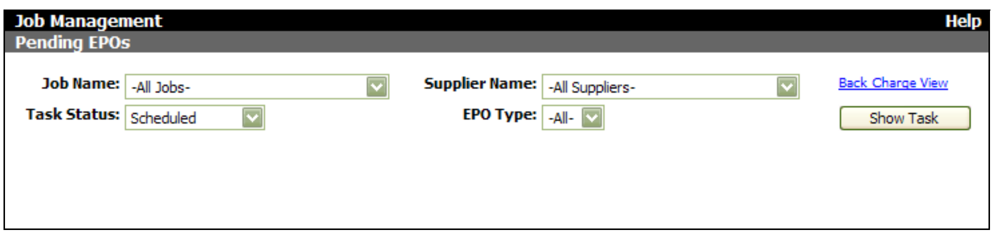
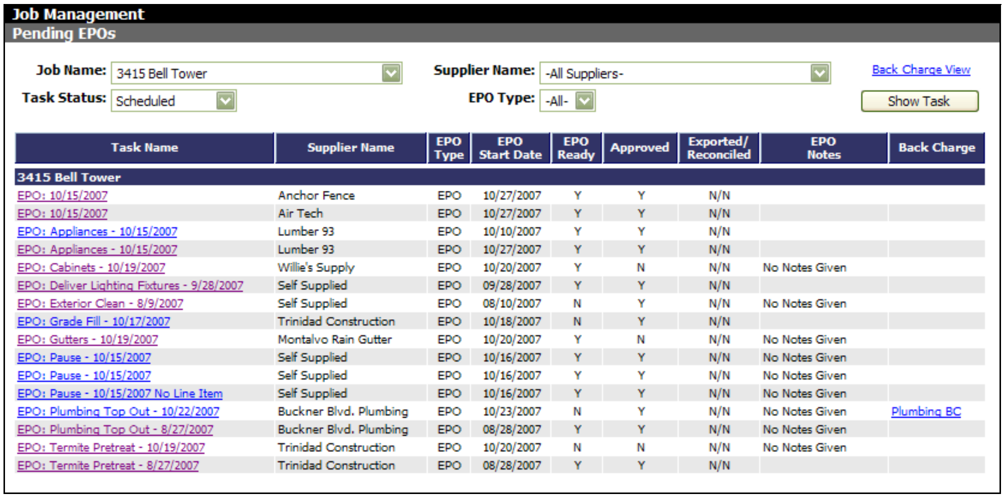



FIGURE 22. Pending EPOs page

3. Choose from the filters, and click the **Show Tasks** button. The list of pending EPOs appears based on the filters.
**Note:** To view only NTE EPOs, choose NTE from the EPO Type filter.




| Task Name | Supplier Name | EPO Type | EPO Start Date | EPO Ready | Approved | Exported/ Reconciled | EPO Notes | Back Charge |
|---|---|---|---|---|---|---|---|---|
| 3415 Bell Tower | | | | | | | | |
| EPO: 10/15/2007 | Anchor Fence | EPO | 10/27/2007 | Y | Y | N/N | | |
| EPO: 10/15/2007 | Air Tech | EPO | 10/27/2007 | Y | Y | N/N | | |
| EPO: Appliances - 10/15/2007 | Lumber 93 | EPO | 10/10/2007 | Y | Y | N/N | | |
| EPO: Appliances - 10/15/2007 | Lumber 93 | EPO | 10/27/2007 | Y | Y | N/N | | |
| EPO: Cabinets - 10/19/2007 | Willie's Supply | EPO | 10/20/2007 | Y | N | N/N | No Notes Given | |
| EPO: Deliver Lighting Fixtures - 9/28/2007 | Self Supplied | EPO | 09/28/2007 | Y | Y | N/N | | |
| EPO: Exterior Clean - 8/9/2007 | Self Supplied | EPO | 08/10/2007 | N | Y | N/N | No Notes Given | |
| EPO: Grade Fill - 10/17/2007 | Trinidad Construction | EPO | 10/18/2007 | N | Y | N/N | | |
| EPO: Gutters - 10/19/2007 | Montalvo Rain Gutter | EPO | 10/20/2007 | Y | N | N/N | No Notes Given | |
| EPO: Pause - 10/15/2007 | Self Supplied | EPO | 10/16/2007 | Y | Y | N/N | No Notes Given | |
| EPO: Pause - 10/15/2007 | Self Supplied | EPO | 10/16/2007 | Y | Y | N/N | No Notes Given | |
| EPO: Pause - 10/15/2007 No Line Item | Self Supplied | EPO | 10/16/2007 | Y | Y | N/N | No Notes Given | |
| EPO: Plumbing Top Out - 10/22/2007 | Buckner Blvd. Plumbing | EPO | 10/23/2007 | N | Y | N/N | No Notes Given | Plumbing BC |
| EPO: Plumbing Top Out - 8/27/2007 | Buckner Blvd. Plumbing | EPO | 08/28/2007 | Y | Y | N/N | No Notes Given | |
| EPO: Termite Pretreat - 10/19/2007 | Trinidad Construction | EPO | 10/20/2007 | N | N | N/N | No Notes Given | |
| EPO: Termite Pretreat - 8/27/2007 | Trinidad Construction | EPO | 08/28/2007 | Y | Y | N/N | | |

FIGURE 23. Pending EPOs page

4. Click on the **Task Name** link to open the Job Task page.

5. On the Pending EPOs page, if a back charge is associated to the EPO, the back charge description appears in the **Back Charge** column.


FIGURE 24. Back Charge link

6. Click on the **Back Charge** link to open the Back Charge pop-up window.
**Note:** The Back Charge Reason Code drop-down list is not available for editing on back charges associated to an EPO. Those back charges inherit the EPO's reason code.

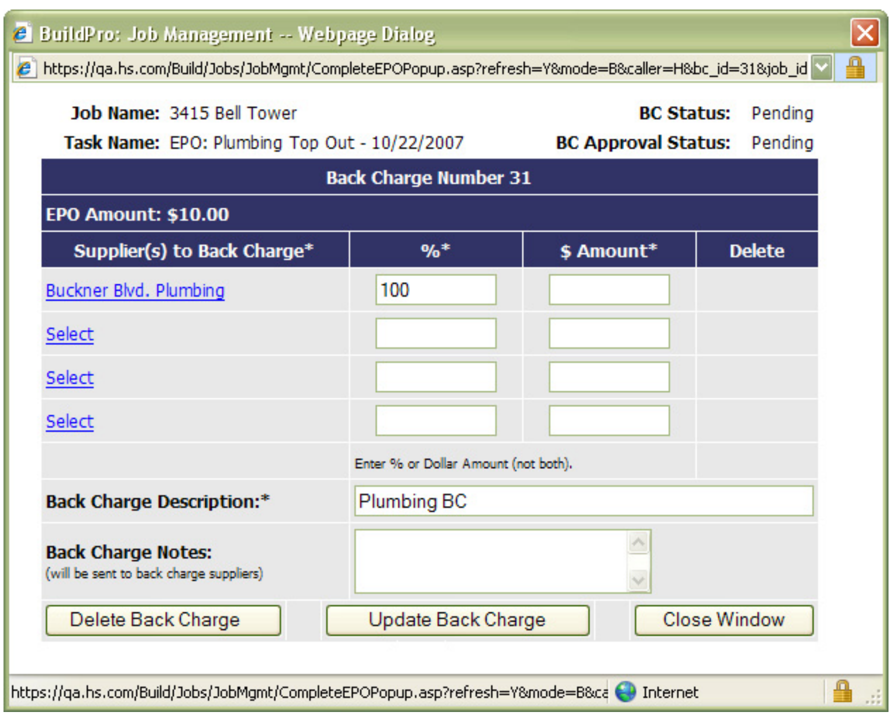



FIGURE 25. Back Charge pop-up window

7. Edit the **Back Charge Information** as necessary.

8. Enter **Back Charge Notes**, if necessary. These notes will go to the supplier being back charged.

9. Click the **Update Back Charge** button to save your changes and close the pop-up window. If you didn't make any changes, click on the ☒ to close the pop-up window.

10. Click the **Delete Back Charge** button to delete the back charge. If it is associated with an EPO, the EPO remains unaffected. A Cancelled Back Charge Notification is sent to the assigned supplier via fax/email, and the supplier receives a Cancelled Back Charge alert in SupplyPro.

11. Or, click the **Close Window** button to close the pop-up window without clearing the alert.

## View the List of Back Charges

**To view the list of back charges:**

1. Click on the **Jobs** tab. The Job Management page opens.

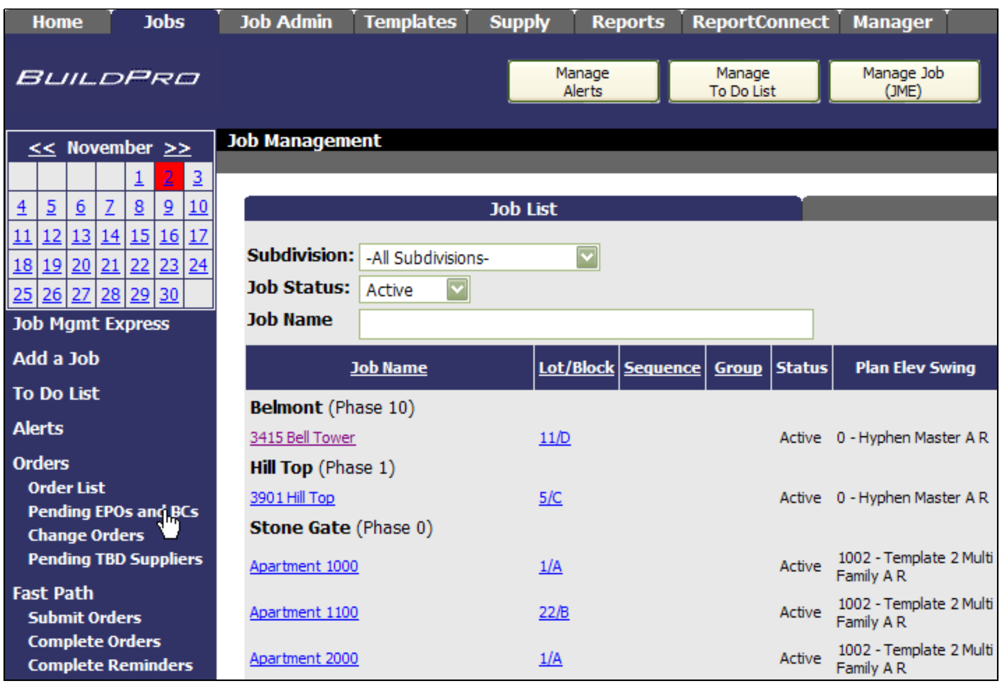



FIGURE 26. Pending EPOs page

2. Click on the **Pending EPOs and BCs** link on the Left Nav Bar. The Pending EPOs page opens.


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FIGURE 27.

3. Click on the **Back Charge View** link in the top right of the page. The Back Charges page opens.

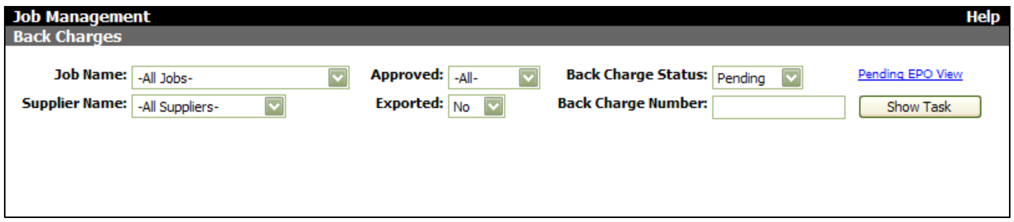


FIGURE 28. Back Charges page

4. Choose from the filters, and click the **Show Tasks** button. The list of back charges appears on the page.
**Note:** The page defaults to show back charges with a BC Status of Pending, but you can use the filters to view back charges in any BC Status.

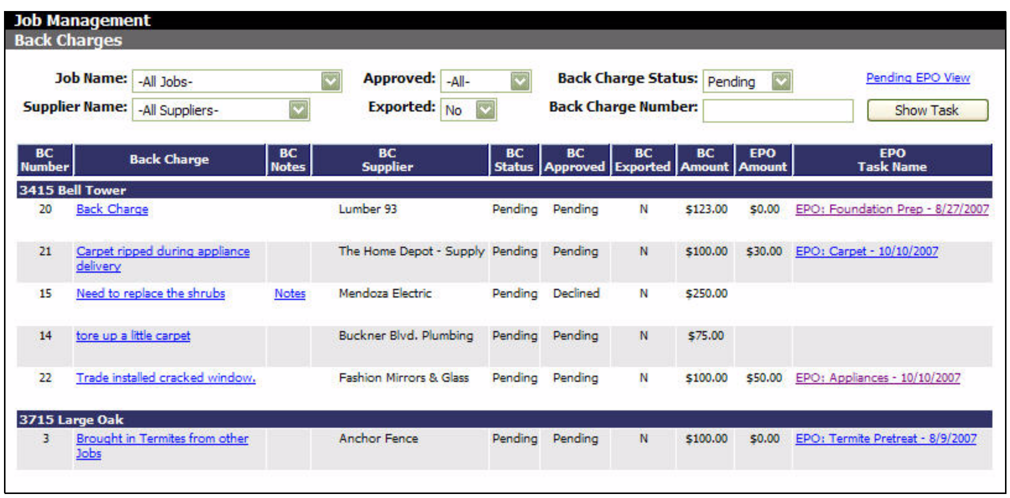


FIGURE 29. Back Charges page

5. Click on a hyperlink in the **Back Charge** column. The Back Charge pop-up window opens.
**Note:** The Back Charge Reason Code drop-down list is not available for editing on back charges associated to an EPO. Those back charges inherit the EPO's reason code.

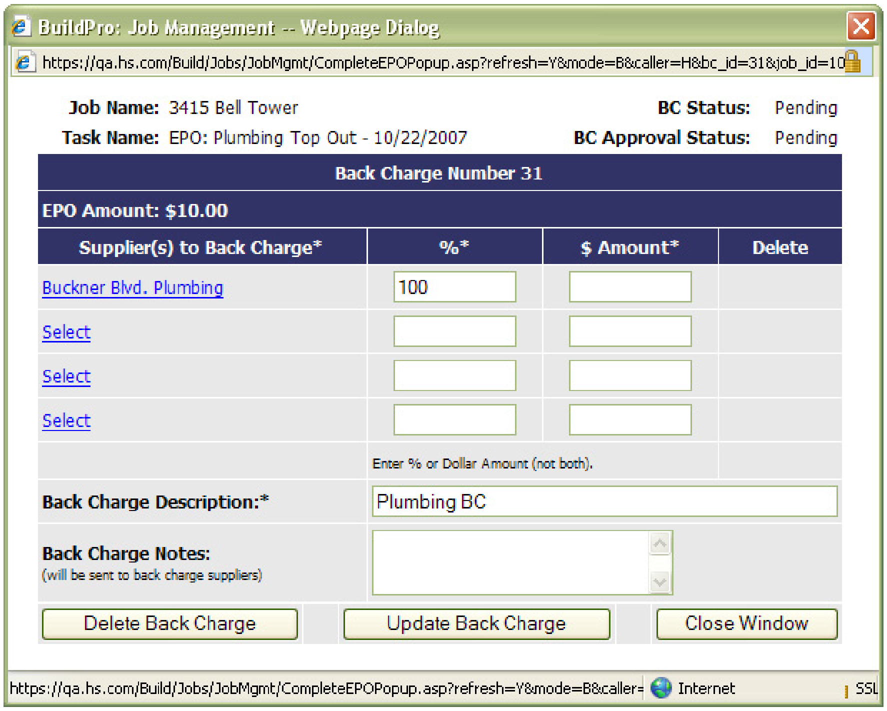


FIGURE 30. Back Charge pop-up window

6. Edit the **Back Charge Information**, if necessary.
7. Enter **Back Charge Notes**, if necessary. These notes will go to the supplier being back charged.
8. Click on the **Update the Back Charge** button to save your changes.
9. Or, click on the **Delete Back Charge** button to delete the back charge. A Cancelled Back Charge Notification is sent to the assigned supplier via fax/email, and the supplier receives a Cancelled Back Charge alert in SupplyPro.
10. Or, click the **Close Window** button to close the pop-up window without clearing the alert.

## Alerts - Back Charge Declined

All back charges go through an approval process. If the back charge dollar amount is less than the user's EPO Approval limit, the back charge is automatically approved. If the back charge amount is greater than the user's EPO Approval limit, the back charge must be approved by the admin.
**Note:** For a back charge associated to an EPO, the approval process does not start until the EPO task is completed.
If the admin declines the back charge, the user receives a Back Charge Declined alert in BuildPro. From the Alerts page, the user can edit and re-submit the back charge.

**To clear the alert:**

1. Open the **Alerts** page.


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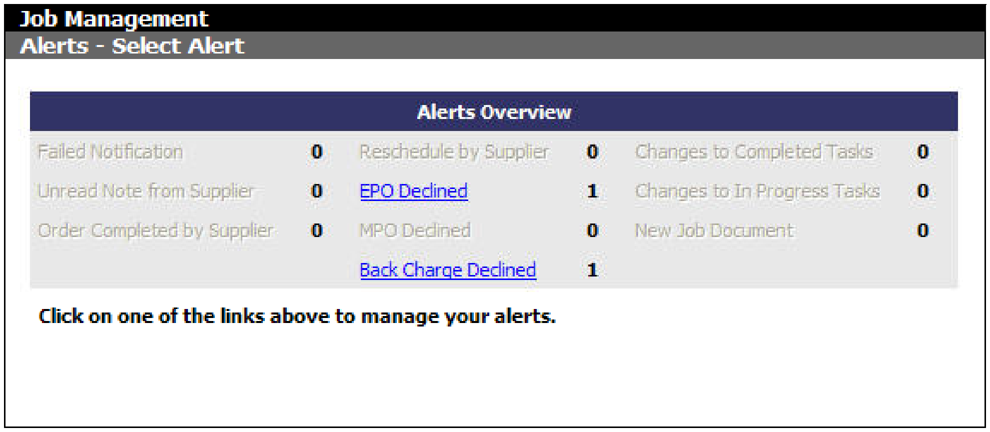


FIGURE 31. Alerts page

2. Click on the **Back Charge Declined** link. The list of declined back charges appears on the page.

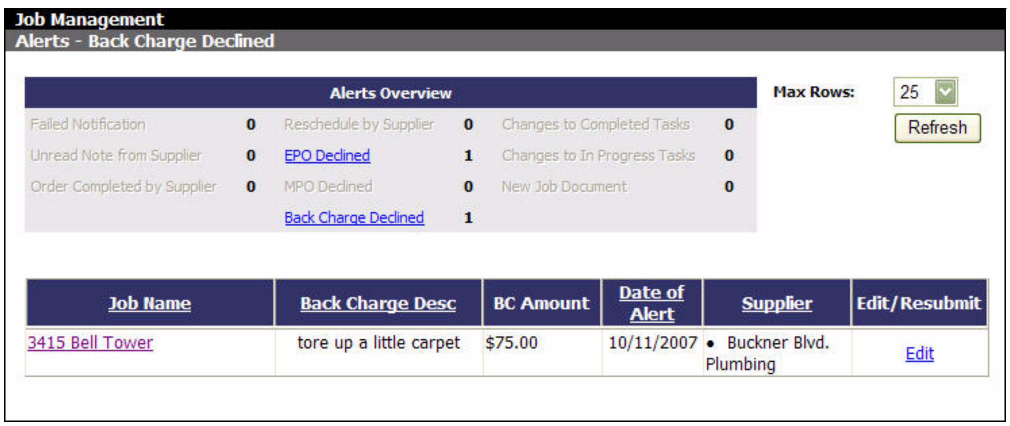


FIGURE 32. Alert - Back Charge Declined

3. Click the **Edit** link in the **Edit/Resubmit** column. The Back Charge pop-up window opens.
**Note:** The Back Charge Reason Code drop-down list is not available for editing on back charges associated to an EPO. Those back charges inherit the EPO's reason code.

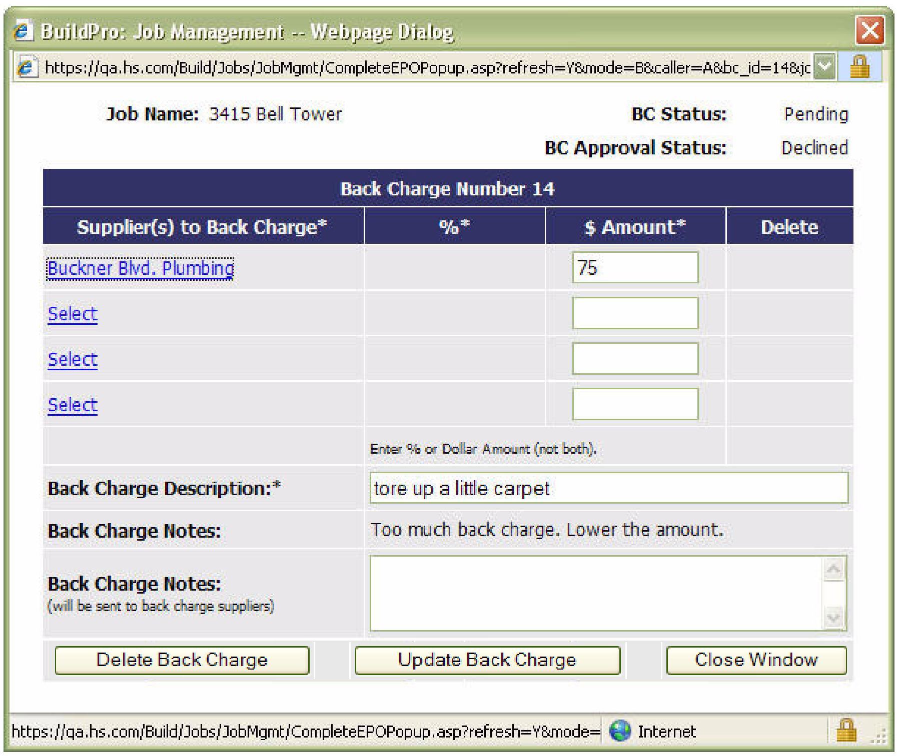


FIGURE 33. Back Charge pop-up window

4. Edit the **Supplier**, **Amount**, or **Description**.
5. Enter additional **Back Charge Notes**, if necessary. These go to the back charge supplier.
6. Click the **Update Back Charge** button to re-submit the back charge. The pop-up window closes and the alert clears from the Alerts page.
7. Or, click the **Close Window** button to close the pop-up window without clearing the alert.
8. Or, click the **Delete Back Charge** to cancel the back charge. The pop-up window closes and the alert clears from the Alerts page. A Cancelled Back Charge Notification is sent to the assigned supplier via fax/email, and the supplier receives a Cancelled Back Charge alert in SupplyPro.

# 14 Centralized Scheduling

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- Creating Centralized Scheduling Groups
- Assigning Communities to Centralized Scheduling Groups
- Managing Centralized Scheduling Jobs

## Centralized Scheduling Overview

The Centralized Scheduling functionality allows users to create Groups within a Division. Communities may then be assigned to a Group. A Community may only belong to one Group. All Jobs in the Community will belong to the Group. Then, from the Manage Centralized Scheduling Jobs page, you may assign a Start Sequence to each Job and modify the Start Dates based on a key milestone task.

**Note:** In order to use the Centralized Scheduling functionality, your company must have Module# 222 turned on. There are two roles that must be assigned, also. The **Centralized Scheduling Admin** role allows access to the setup pages under the Job Admin tab. And the **Centralized Scheduling Manager** role allows the construction manager to filter the Box Scheduling page by Centralized Scheduling Groups. Contact Customer Care to have this module enabled.

## Creating Centralized Scheduling Groups

From BuildPro, click the Job Admin tab. Click the **Centralized Sched** link on the left nav. The **Centralized Scheduling** page will appear.

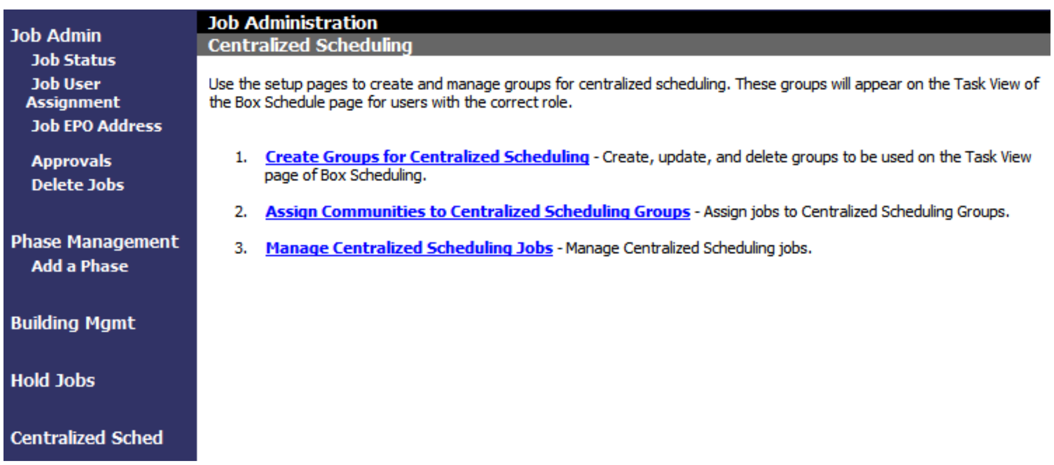


FIGURE 1. Centralized Scheduling Setup

**To create Centralized Scheduling Groups:**

1. Click the 1st link (Create Groups for Centralized Scheduling).
2. From the **Create and Manage Centralized Scheduling Groups** page, select a **Division** and click the **Show Groups** button.


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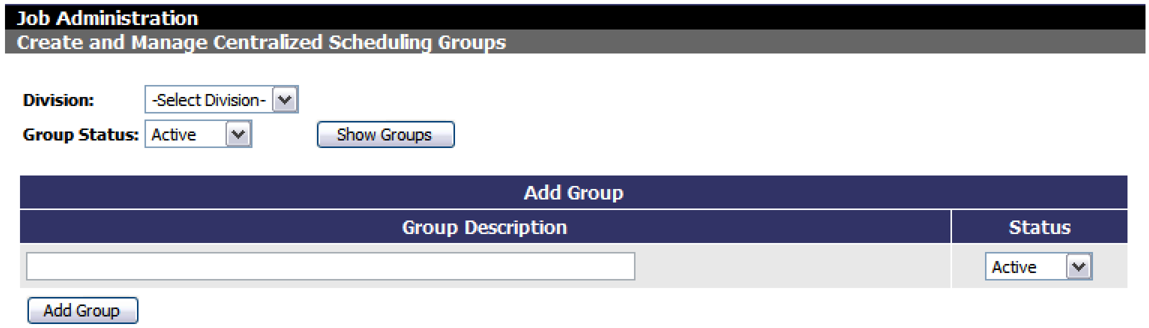


FIGURE 2. Create and Manage Centralized Scheduling Groups page

3. Under the **Add Group** section, enter the **Group Description** and click the **Add Group** button. The **Group** will appear below the **Add Group** section. The default **Status** for the Group will be **Active**.

To modify a **Group**, change the **Group Description** or **Status** and click the **Update** button. To **Delete** a Group, click the **Delete** icon.

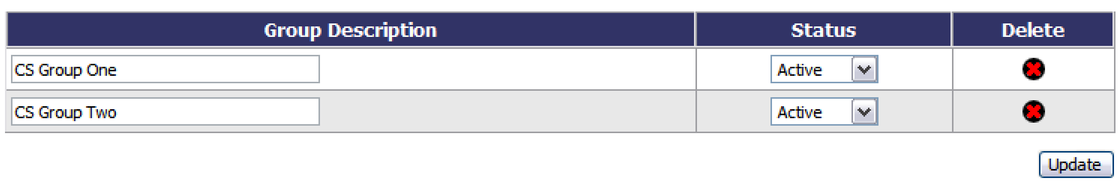


FIGURE 3. Update Group

## Assign Communities to Centralized Scheduling Groups

After Groups have been created within the Division, you must assign Communities to the Groups.

**To assign Communities to a Group:**

1. From the **Centralized Scheduling** page, click the 2nd link (Assign Communities to Centralized Scheduling Groups).
2. Choose a **Division**.
3. Choose a **Group**.
4. Click the **Show Communities** button.
5. Check the box next to the **Community** or Communities you wish to add to the **Group**.
6. Click the **Update** button.

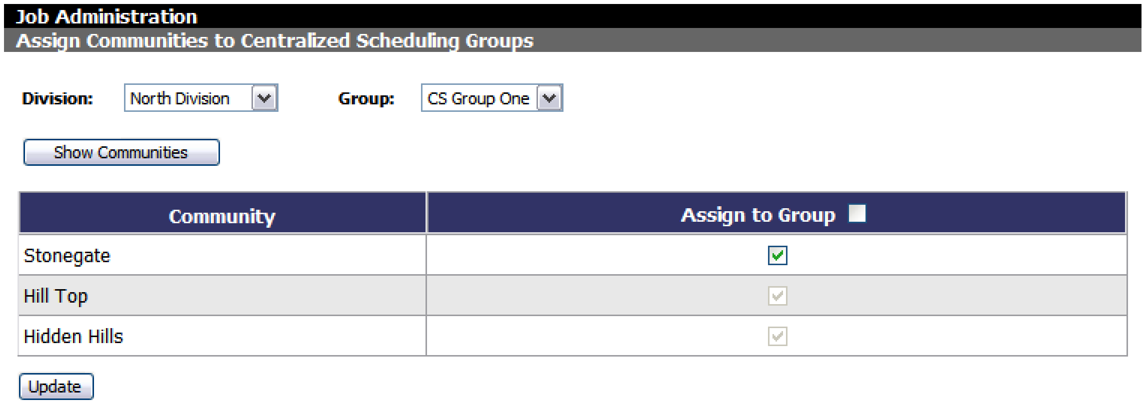


FIGURE 4. Assign Communities to Centralized Scheduling Groups page

**Note:** Disabled check boxes indicate a Community that is assigned to another **Group**. To change a Community from one Group to another, unassign the Community from its current Group, then assign to the new Group.

## Manage Centralized Scheduling Jobs

Once Groups are created and Communities are assigned to Groups, the next step is to order Jobs within a Group. The **Start Sequence** determines the order in which Jobs will be built.

**To order Jobs within a Group:**

1. From the **Centralized Scheduling** page, click the 3rd link (Manage Centralized Scheduling Jobs).
2. Select a **Division**.
3. Select a **Group**.
4. Enter a **Milestone Key**.
5. Click the **Show Jobs** button.

A list of Jobs from the Community or Communities that belong to the Group will be displayed. The Task in each Job that matches the **Milestone Key** entered will be displayed in the **Milestone Key Task** Column. If more than one Milestone Key is found for a Job, each will be displayed, but only one line may be edited (Start Sequence entered). If you have a Milestone Key assigned to more than one Task, you may want to correct this if it is in error.

**Note:** The Milestone Key entered should correspond with the Task in each Job for which you will stagger the dates. Once the Jobs are in order (Start Sequence) modify the Start Date of each Task to correspond with the Start Sequence.


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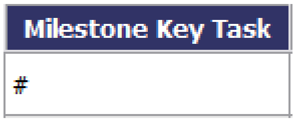
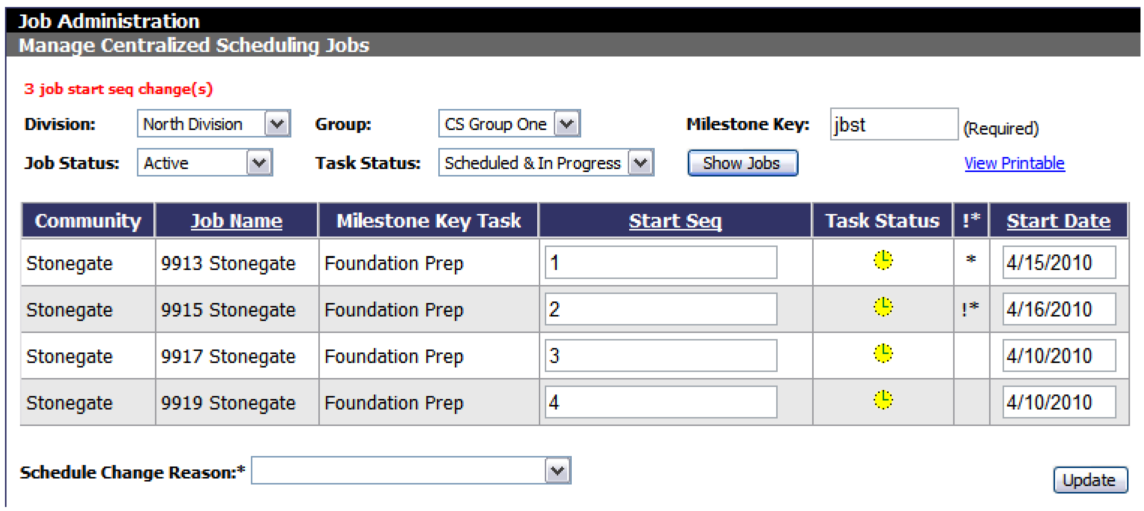
**Note:** If the Milestone Key is not found in a Task for a Job that belongs to the Community/Group, the # sign will be displayed.


| Milestone Key Task |
|---|
| # |

Enter the **Start Sequence** for each Job. This will be the order in which the Jobs will be built. Then click the **Update** button.



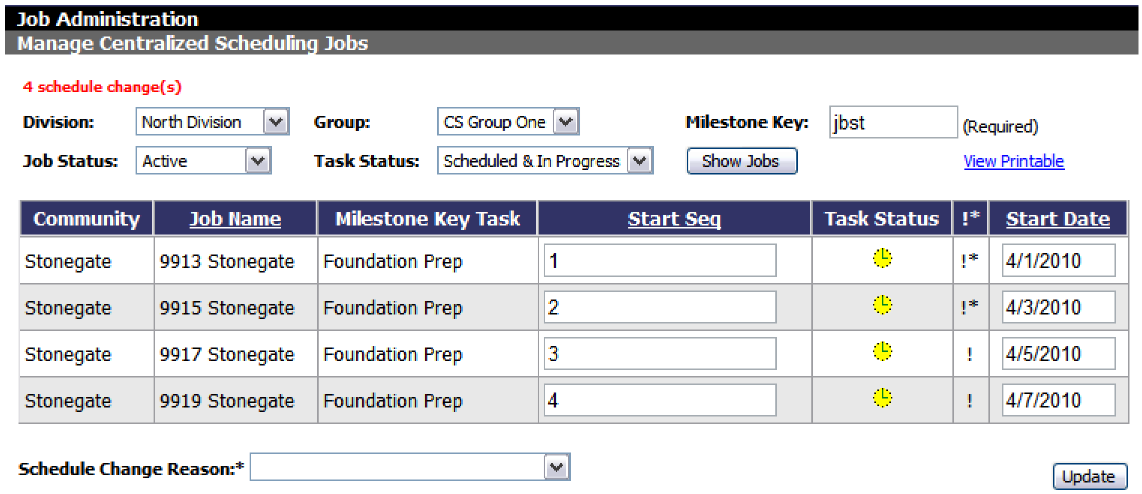

| Community | Job Name | Milestone Key Task | Start Seq | Task Status | !* | Start Date |
|---|---|---|---|---|---|---|
| Stonegate | 9913 Stonegate | Foundation Prep | 1 | | * | 4/15/2010 |
| Stonegate | 9915 Stonegate | Foundation Prep | 2 | | !* | 4/16/2010 |
| Stonegate | 9917 Stonegate | Foundation Prep | 3 | | | 4/10/2010 |
| Stonegate | 9919 Stonegate | Foundation Prep | 4 | | | 4/10/2010 |



FIGURE 5. Jobs Ordered by Start Sequence

Now the Jobs are in the order they will be built. The next step is to stagger the Start Dates of each Milestone Key Task. These are the dates the trade/supplier will appear on the Job. Modify the Start Dates as necessary and click the **Update** button.

**Note:** Enter a Schedule Change Reason if required.




After Jobs have been ordered and their Milestone Key Task's Start Dates staggered, you should notify the Construction Managers to begin managing the schedules.

Construction Managers with the Centralized Scheduling Manager role using the Box Schedule page will see a new filter for Centralized Scheduling Group. Refer to the Construction Manager User Guide for more information on Box Scheduling.

# 15 JIO (Job Initiation Order)

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- What is a JIO (and COs)
- Approval (or rejection) of JIOs and COs
- Viewing the history of JIOs and COs

## JIO Overview

A JIO or Job Initiation Order contains option, homeowner, and financing information regarding a new home that will be built. A JIO must be approved by 3 levels before construction may begin:

1. Construction
2. Sales
3. Executive

Construction is the first level that must approve. The JIO will be approved by the construction manager in BuildPro. The approval (or rejection) will be returned to the ERP system via integration. Sales and Executive levels do not use BuildPro to approve or reject JIOs and/or COs. Their approvals/rejections will be sent from the ERP system. If a JIO is rejected, a Rejection Reason Code must be selected.

Any changes to a JIO results in a CO or Change Order. Change Orders must also be approved by the same three levels. There are three types of COs:

1. Type 1 - Home; which results from changes to plan, elevation, options, or price.
2. Type 2 - Buyer; which results from changes to buyer details.
3. Type 3 - Finance; which results from changes to the home loan.

Only the original JIO and Type 1 COs will require an approval from the BuildPro CM. JIO approvals (or rejections) from Sales and Executive and Type 2 and Type 3 CO approvals (or rejections) will be sent via integration from the ERP system and stored in BuildPro for the CM to view.

The Construction Admin (or any user) may receive email notifications containing details of the JIO and/or CO for review. The Construction Admin (CA) will receive an email for the JIO and all types of COs (1, 2, and 3). For more information on setting up email notifications, see the **Manage Email Notifications** section later in this chapter.

JIOs and COs are created in the ERP (or ERP related) system. A JIO for a job will be created after a lot is release for sale in the ERP system. This may be before or after the Lot Start process. After the JIO, Pre-Start, and Lot Start processes, the Commitment Generation process will occur and POs sent to BuildPro. The Community for which a JIO (and COs) will be sent must exist in BuildPro prior to sending the initial JIO. JIOs are assigned to a user via the **JIO/CO Construction Manager Assignments** page discussed later in this chapter.

New JIOs and COs to be approved, as well as approvals and rejections from Sales and Executive, will appear on the **Alerts** page for the Construction Manager in BuildPro once they are received and processed via integration. Approved and rejected JIOs and/or COs will be exported to the ERP system. Rejected JIOs and/or COs will require a rejection reason code. JIOs and COs utilize the same rejection reason codes. Rejection codes may be setup and managed via the **Add JIO/CO Rejection Codes** or **Update JIO/CO Rejection Codes** pages. More information may be found regarding these pages later in this chapter.

To view information regarding the history of a JIO or CO, use the **JIO/CO History** page. This page includes a history of approvals and rejections by user and option changes as well as buyer and financing changes.



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## Integration Information

In order to begin using the JIO/CO functionality in BuildPro your company must send the data via integration. For more information regarding integration and the JIO functionality contact Hyphen Solutions' Integration Support.

**Note:** JIO and/or CO files processed via integration may be viewed in the Integration Status Report (ISR).

## JIO Setup

### Module Information

Before using the JIO/CO functionality, the **JIO/CO Process** module (# 233) must be turned on for your BuildPro company. Contact Hyphen Solutions' Customer Care to have this module turned on.

### Role Information

There are two standard BuildPro roles that must be assigned in order to utilize the JIO/CO functionality:

1. JIO/CO Admin - This role allows the user access to the setup pages from the **Manager** tab home page. After this role has been assigned, the user will see links to five new pages on the **Manage** home tab. These pages are used for the setup of JIOs and COs.

   **Note:** In order to Add or Update Rejection codes, the user must be assigned to the top level company organization in BuildPro. **Rejection Codes** are managed at the company level and division users will not have access to add or modify them. The links to the **Add Rejection Codes** and **Update Rejection Codes** pages will be grayed out for divisional users.

2. JIO/CO Viewer - This role allows the user to view details of a JIO or CO. Users with this role will see the **JIO/CO History** link on the left nav of BuildPro.

   **Note:** In addition to the **JIO/CO Viewer** role, a user must also be assigned to a JIO to view details of the JIO (or COs). Assignment may be made from the **JIO/CO Construction Manager Assignments** page.

## Add Rejection Codes

After the module has been turned on and roles assigned, the next step is to add Rejection Codes. This is accomplished by clicking the **Add Rejection Codes** link on the **Manager** tab home page. JIO/CO Rejection Codes are managed at the company level. Only users at the top level company organization may add or update them.

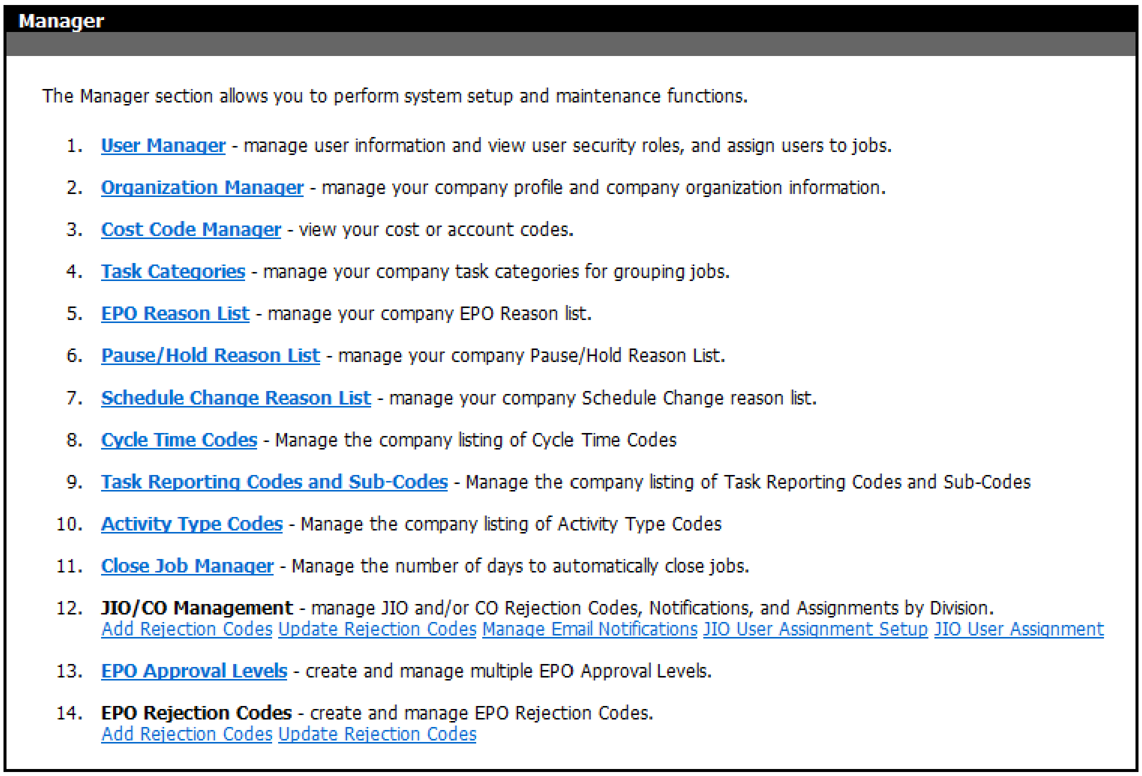


FIGURE 1. Manager Tab Home Page


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**To add JIO/CO Rejection Codes**

1. Enter a **Code**. This is the Code that will be used when a rejected JIO or CO is exported to the ERP system.
2. Enter a **Description**. This is a brief description of the Rejection Code.
3. Click the **Add Rejection Codes** button.

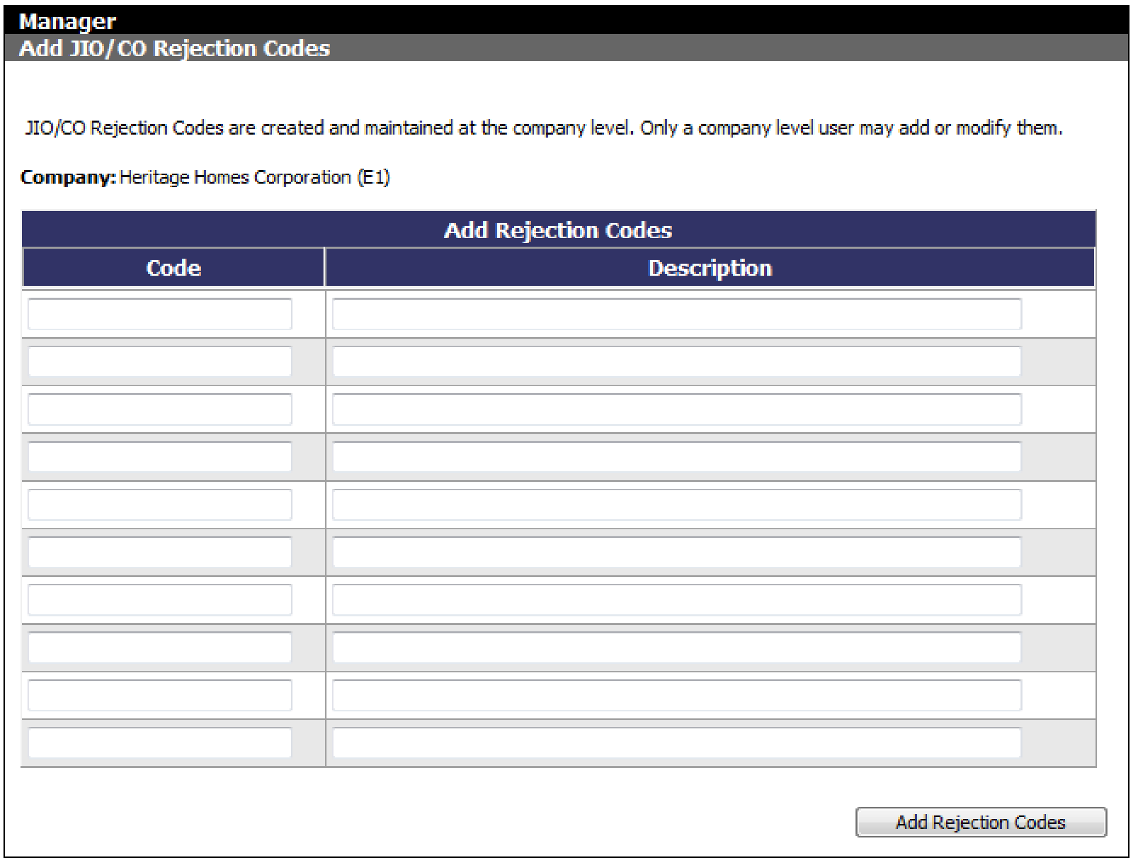


FIGURE 2. Add JIO/CO Rejection Codes Page

## Update Rejection Codes

### To update Rejection Codes

1. From the **Manager** tab home page, click the **Update Rejection Codes** link.
2. Modify the **Description**, change the **Status**, or click the **Delete** button.
3. Click the **Update Rejection Codes** button.

   **Note:** The Rejection **Code** may not be changed. You may change the **Status** of a Rejection Code and then add a new one with the new Code. Rejection Codes can not be deleted if they were used when a JIO or CO was rejected.

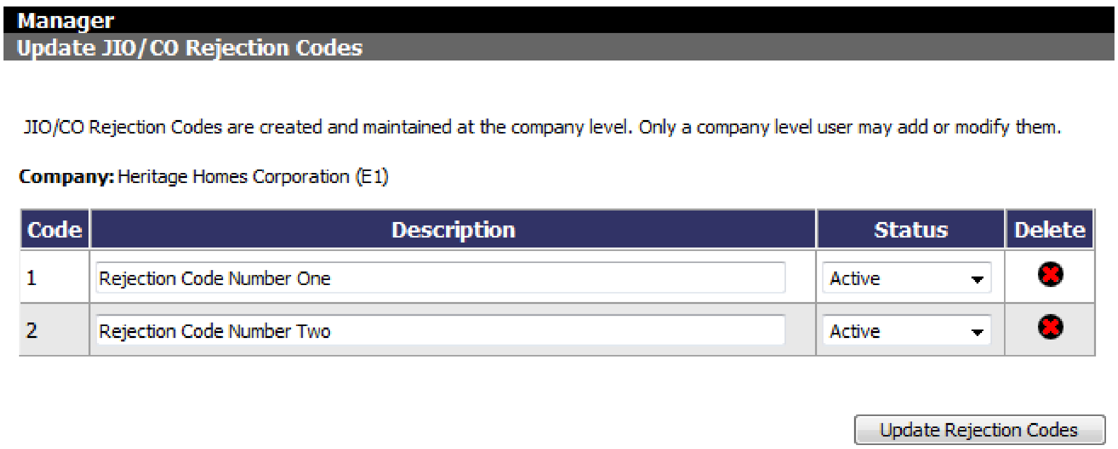


FIGURE 3. Update JIO/CO Rejection Codes Page



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## Manage Email Notifications

Users who wish to receive updates when JIOs and/or COs are processed via integration may do so. This is accomplished by assigning the user to a Community. When any import or export file is processed, an email notification will be sent to users assigned to the Community for which the JIO belongs. BuildPro will use the email address from the user's **Your Profile** page.

**To assign a user to a Community and receive email updates for JIOs and COs**

1. From the **Manager** tab home page, click the **Manage Email Notifications** link.
2. Choose a **Division**, **Community**, and click the **Show User** button.
3. Select the check box beside each user that will receive email notifications for all JIOs and COs in the chosen **Community**.
4. Click the **Update** button.

   **Note:** Click the **User** or **Status** column headings to sort by information in that column.

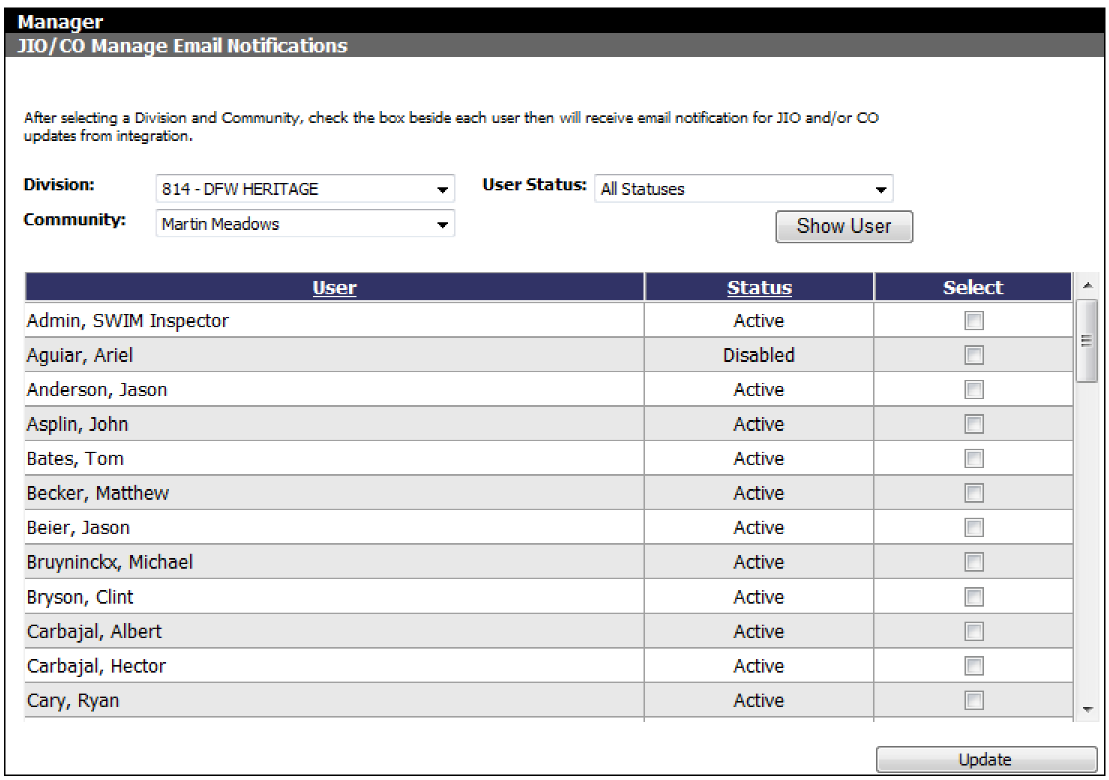


FIGURE 4. JIO/CO Manage Email Notifications Page

## JIO User Assignment

Similar to Job assignments in BuildPro, users must be assigned to a JIO in order to view details or approve/reject. Like Job assignments, JIO assignments have a **Primary**. The JIO Primary is the only user that may approve or reject a JIO or its Change Orders. **Other Users** may only view details of the JIO or its COs.

There are two pages that are used when assigning users to JIOs:

1. **JIO/CO Default Construction Manager Assignments** - Use this page to choose a default Primary and default Other Users. The users chosen here will be assigned as the Primary (and Other Users) when a new JIO is created.
2. **JIO/CO Construction Manager Assignments** - Use this page to reassign the JIO Primary or add/remove Other Users.

**To choose a default JIO Primary (and Other Users)**

1. From the **Manager** tab home page, click the **JIO User Assignment Setup** link.
2. Choose a **Division**.
3. In the **Assign User as CM (Primary)** column, select the user that will be assigned to each JIO in the **Community** as the Primary.
4. In the **Edit Other User** column, click the **Add/Edit** link and choose all users that will be assigned as an Other User for each JIO in the Community. Users in red have a Disabled User Status. Click the **Update Other Users** button.
5. Click the **Update** button.

   **Note:** The users chosen here are the default assignments that will be made when new JIOs are added to BuildPro. The actual assignments may be changed from the **JIO/CO Construction Manager Assignments** page.

**To change the Primary or Other Users assigned to a JIO**

1. From the **Manager** tab home page, click the **JIO User Assignment** link.
2. Choose a **Division**, and **Community**.
3. Use the **Assign User as CM (Primary)** column to reassign the Primary.
4. In the **Edit Other User** column, click the **Add/Edit** link and select/un-select users that will be assigned/unassigned as an Other User for each JIO in the Community. Users in red have a Disabled User Status. Click the **Update Other Users** button.
5. Click the **Update** button.



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## Approving or Rejecting a JIO or CO

Only the Primary user assigned to a JIO may approve or reject it. The same goes for a Change Order for the JIO.

There are two conditions for which a JIO or CO must be approved or rejected by the Construction Manager (Primary):

1. New JIO - Newly received JIO has been added to BuildPro.
2. Type 1 CO - Type 1 COs are Change Orders that are construction related.

When a new JIO or Type 1 CO has been added to BuildPro an alert will appear on the **Alerts** page. The Alerts page may be used to approve or reject the JIO or CO.

**To approve or reject a JIO or CO Type 1**

1. Click the **Alerts** link or **Manage Alerts** navigation button from the Home or Jobs tab.
2. Click the **New JIO** or **Type 1 CO** Alert Type link.
3. Click the **View** link in the Details column and review the JIO or CO details.
4. Select the check box in either the **Approve** or **Reject** column. Choose a **Rejection Reason Code** if you are rejecting the JIO or CO. Enter **Rejection Notes** if necessary.
5. Click the **Update** button.

   **Note:** The approval or rejection information will be exported to the ERP system.

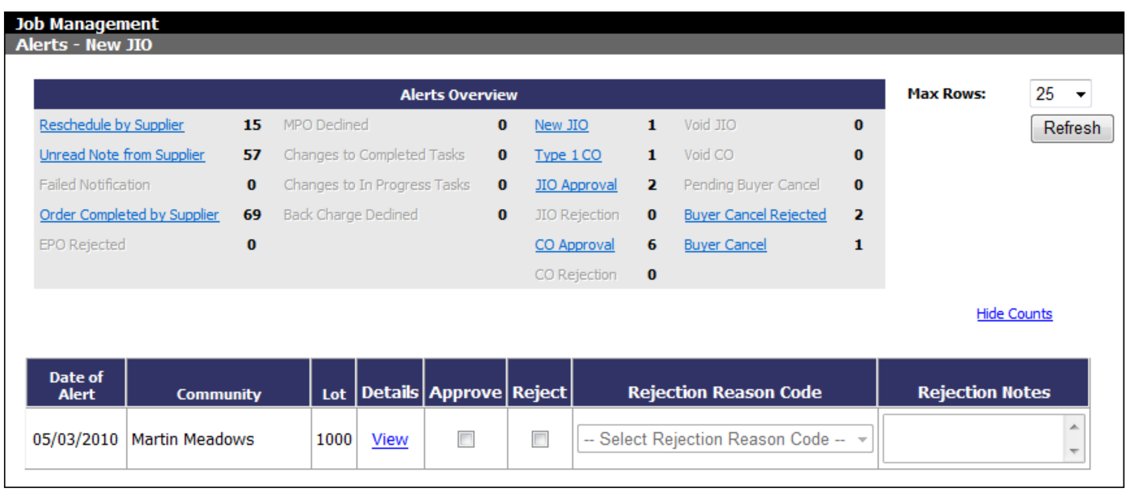


FIGURE 5. New JIO Alert

### Other JIO Alerts

In addition to the two types of Alerts that require an approval or rejection, there are 9 other Alert Types associated to JIOs and COs:

1. **JIO Approval** - These are Alerts that Sales or Executive levels have approved a JIO. For this type of Alert users may only clear the Alert.
2. **JIO Rejection** - These are Alerts that Sales or Executive levels have rejected a JIO. For this type of Alert users may only clear the Alert.
3. **CO Approval** - These are Alerts that Sales or Executive levels have approved a CO. For this type of Alert users may only clear the Alert.
4. **CO Rejection** - These are Alerts that Sales or Executive levels have rejected a CO. For this type of Alert users may only clear the Alert.
5. **Void JIO** - These are Alerts that a previous JIO has been voided. For this type of Alert users may only clear the Alert. When the Alert is cleared, the JIO and all COs will be removed from BuildPro with no history remaining.
6. **Void CO** - This is a retraction of a specific CO. The original CO will remain in BuildPro for tracking purposes with the text “Voided” in the name of the CO. For this type of Alert users may only clear the Alert.
7. **Pending Buyer Cancel** - A Buyer Cancel is different from a Void. A Cancel occurs when the home buyer backs out of the contract. This is only a “pending” notice of cancellation. A Buyer Cancel will be processed in BuildPro once the Buyer Cancel has been approved. If the Buyer Cancel is rejected a Buyer Cancel Rejected Alert will be created. For this type of Alert users may only clear the Alert.
8. **Buyer Cancel Rejected** - This alert is created if the Pending Buyer Cancel has been rejected. For this type of Alert users may only clear the Alert.
9. **Buyer Cancel** - This alert is created if the Pending Buyer Cancel has been approved. For this type of Alert users may only clear the Alert.


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## JIO/CO History

**To view a history of a JIO or its Change Orders**

1. Click the **JIO/CO History** link on the left nav of the Jobs tab.


FIGURE 6. JIO/CO History Link on the Left Nav

2. Choose a **Community** and **Lot**.
3. Click the JIO or CO in the **Document** column. A formatted image of the JIO/CO will appear. This is the JIO or CO as it was processed in BuildPro showing the additions and/ or subtractions. Click the **View Summary** link at the top of the page to view the current configuration of the home.

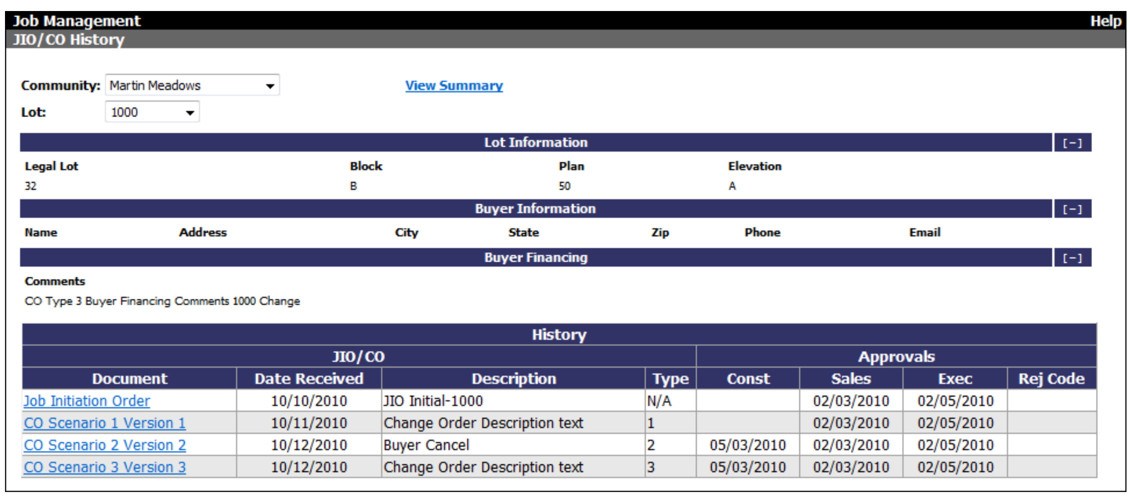


FIGURE 7. JIO/CO History Page

This page may also be used to view the current status of approvals or rejections. The **Approvals** column displays the dates all three levels have approved or rejected a specific JIO or CO. If the JIO or CO was rejected by any level, the date in that column would be displayed in red text (and a Rejection Code would be shown.

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# Trade Partner Survey

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter, you should have a basic understanding of:

- What is a Trade Partner Survey
- How to add questions to the survey
- How questions are answered
- Trade Partner Survey Report

## Trade Partner Survey Overview

This functionality allows BuildPro administrators to create questions for the purpose of feedback from field personnel regarding Trade Partners. Questions are assigned to Account Codes and when that Account Code (Task) is completed in BuildPro the user completing the Task must answer the questions (survey). A report is available to view survey questions answered.

## Trade Partner Survey Setup

### Module Information

Before using the Trade Partner Survey functionality, the **Trade Partner Survey** module (# 236) must be turned on for your BuildPro company. Contact Hyphen Solutions' Customer Care to have this module turned on.

### Role Information

There is only one role applicable to the Trade Partner Survey functionality. The **Trade Partner Survey Admin** role enables the user to add/manage Questions by Account Code. There is no role for answering Questions when a Task is marked complete. **Any user that completes a task** must complete the survey (answer the questions).


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### Add Trade Partner Survey Questions

Setup is accomplished by first adding Questions to Account Codes.

**To add Questions to an Account Code**

1. From the **Manager** home tab click the **Add Company Questions** link.

   **Note:** Survey Questions are managed at the company level. You must be assigned to the top level company organization in BuildPro to add or update Questions. If you are not at the top level company organization the links to add and update Questions will be grayed out.

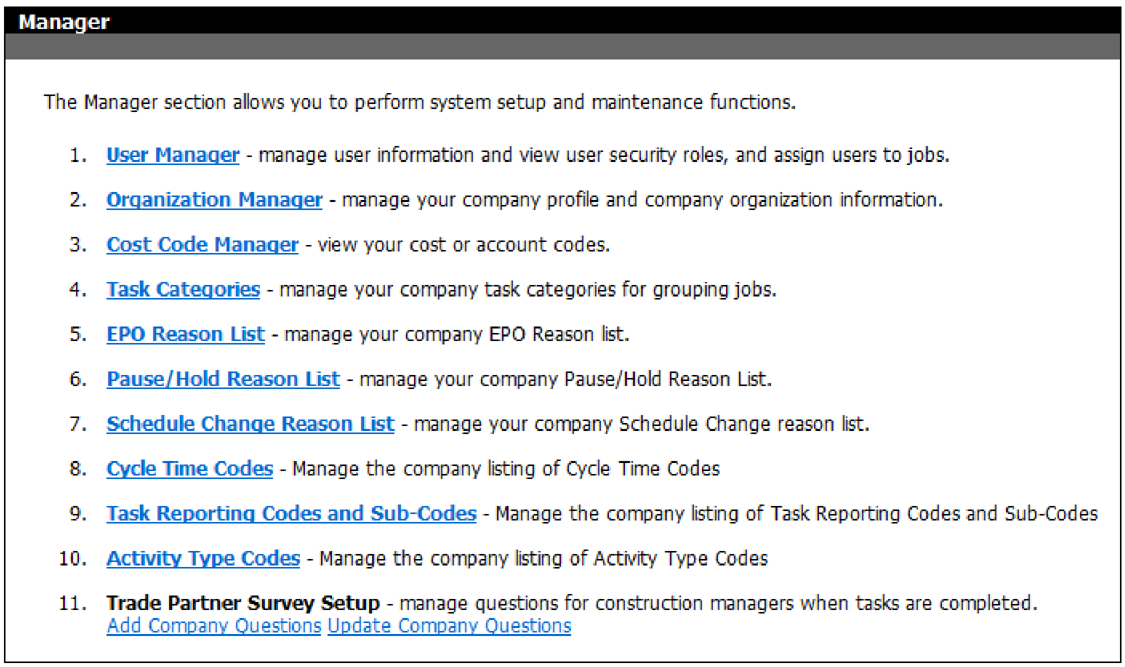


FIGURE 1. Manager Home Tab

2. Select an **Account Code**.
3. Enter the **Sequence Number**. This is the order the Question will appear in the survey.
4. Enter the Question.

   **Note:** Questions should be phrased so they may be answered with Yes or No; no being the positive answer. For example “Did the trade show up on time?”

5. Click the **Add Questions** button.

   **Note:** There are 10 lines for which you may enter Questions. Once you have entered 10 Questions, click the Add Questions button. You will remain on this page and may continue to add Questions if needed. There is no limit to the number of Questions you may enter.

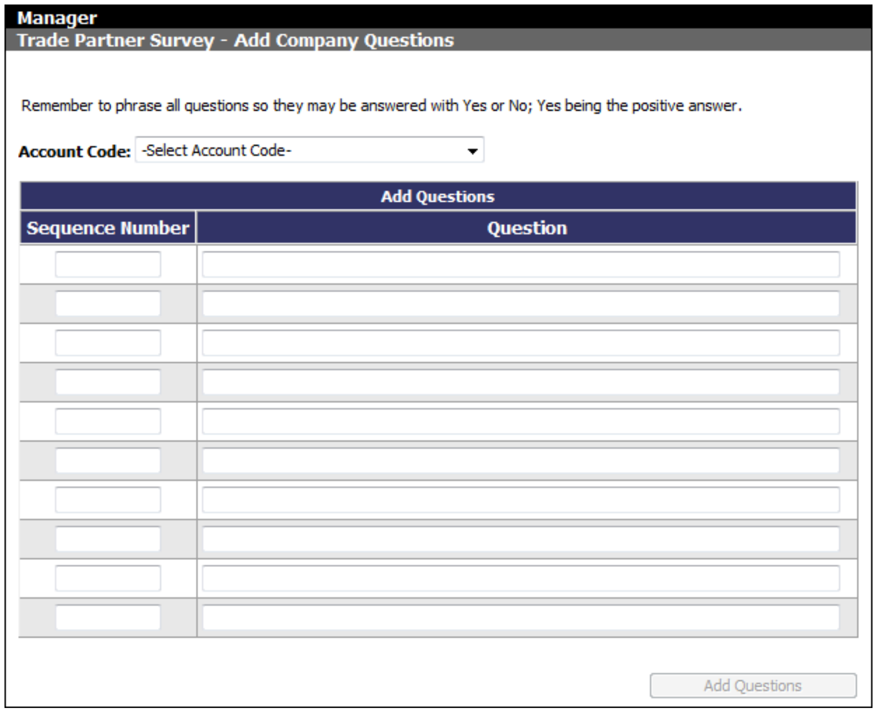


FIGURE 2. Add Trade Partner Survey Questions

## Update Trade Partner Survey Questions

Questions may be updated at any time. Note that changing a Question will change it permanently; even if the Question has already been answered in a survey. This could skew the context in which the original Question was answered.

### To update a Trade Partner Survey Question

1. From the **Manager** home tab click the **Update Company Questions** link.
2. Select an **Account Code**.
3. Modify the **Sequence Number** or **Question** and click the **Update Questions** button.

   **Note:** If you are changing the context of a Question completely, it is best to change the Status of the Question to Inactive and add a new Question. Changing the context of the question will change it permanently; even if the Question has already been answered in a survey. This could skew the context in which the original Question was answered.

### To change the Status of a Question

1. Select an **Account Code**.
2. Change the **Status** to Inactive.
3. Click the **Update Questions** button.

   **Note:** Changing the Status of a Question will remove it from the survey when an Account Code (Task) is completed.


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**To delete a Question**

1. From the **Manager** home tab click the **Update Company Questions** link.
2. Select an **Account Code**.
3. Click the **Delete** button.

   **Note:** Questions may not be deleted if they have been answered in a survey.

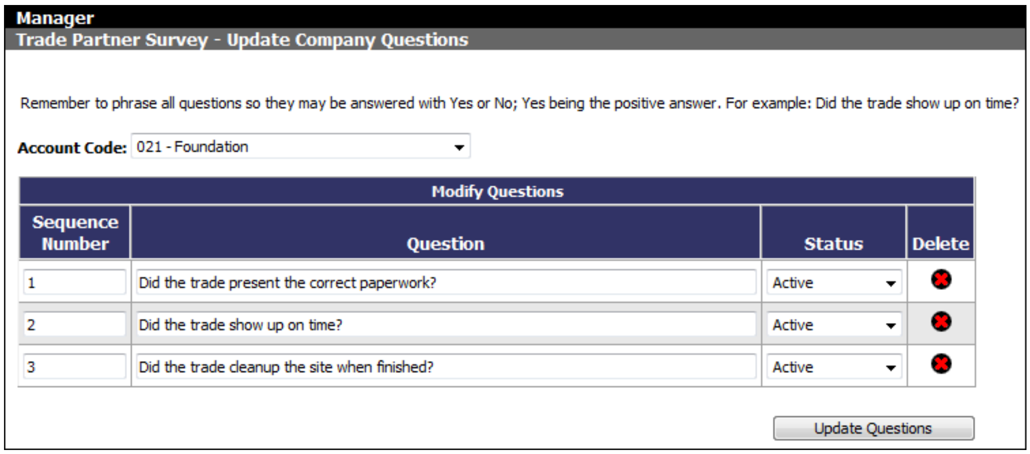


FIGURE 3. Update Trade Partner Survey Questions

## Answering a Trade Partner Survey

Any time a Task in BuildPro with Questions assigned is marked Complete, the Trade Partner Survey will appear. All users must answer the survey in order to mark the Task Complete.

> **Note:** The Trade Partner Survey will not appear when completing a Task from the PDA site, Pocket PC application, or BuildPro on the Go!

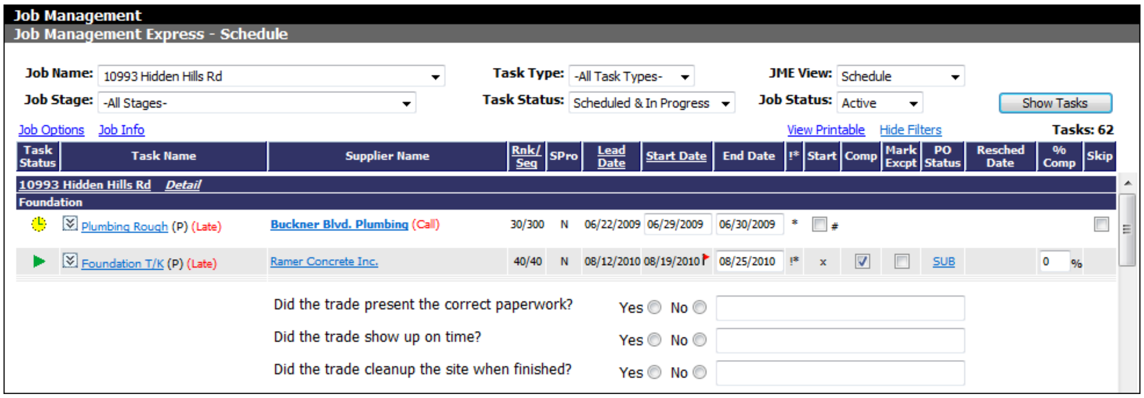


FIGURE 4. JME Page with Trade Partner Survey

## Trade Partner Survey Report

In the ReportConnect tab, under the Activity Reports sections, click the **Trade Partner Survey** link. This report will display answers to Questions by User, Account Code, and Trade Partner. For more information on this report, see the ReportConnect Overview of Reports document. This guide can be found by clicking the **Training Site and Release Notes** link on the Home tab left nav.

# 17 Custom Options

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter you should have a basic understanding of:

- The difference between Options and Custom Options
- How to approve Custom Options

# Custom Options

Most homebuilders send Options to BuildPro as part of the Purchase Order (PO). These Options have been approved during the course of the sales process. The Custom Option functionality allows the back office to send Option information to BuildPro via integration. Construction Managers must select Cost Codes, Vendors, and enter costs that make up the Custom Option. After approval by the CM, a second level approver must approve the Custom Option. Once approved by the VP, the Custom Option data will be exported to the back office accounting system. A PO will be created and sent back to BuildPro and inserted into the Job schedule. From there, the PO (Task) may be managed as any other Task in BuildPro.

## Custom Options Modules and Roles

There are several requirements for setup and use of the Custom Options functionality. Integration imports and exports must be setup with BuildPro. Modifications must be made to the regular Options file to identify Custom Options. The PO Detail file (Commitment) must also be modified to include a key identifying Custom Options. Contact Hyphen Solutions' Customer Care for details regarding integration requirements.

There are three application/functions that allow users access to Custom Options. Application/functions are parts of a user's role that allow them to perform specific functions in BuildPro. These application/functions may be added to an existing role or make up a custom role.

1. Jobs - Custom Option Approval Level 1 (View and Change). The View function displays any hyperlinks on BuildPro pages to allow users access to the various pages of Custom Options. The Change function displays the Submit for Approval button on the Custom Options page. This application (and functions) should be enabled for users who will input the Cost Code, Vendor and Cost of the Custom Option.
2. Jobs - Custom Option Approval Level 2 (View and Change). The View function displays any hyperlinks on BuildPro pages to allow users access to the various pages of Custom Options. The Change function displays the Approve Options button on the Custom Options page. This application (and functions) should be enabled for users who will approve the Custom Option before exporting to the back office system.
3. Jobs - Custom Option Update Only (View and Change). The View function displays any hyperlinks on BuildPro pages to allow users access to the various pages of Custom Options. The Change function displays the Save Changes button on the Custom Options page. This application (and functions) should be enabled for users who will input the Cost Code, Vendor and Cost of the Custom Option but not submit for approval by a second level person.

| | | | | |
|---|---|---|---|---|
| **Jobs - Custom Option Approval Level 1** | | Change | | View |
| **Jobs - Custom Option Approval Level 2** | | Change | | View |
| **Jobs - Custom Option Update Only** | | Change | | View |

FIGURE 1. Custom Option Application Functions

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### Managing Custom Options

When new Custom Options are added to BuildPro via integration a new alert will appear in the Current Activity section of the Home page.

**Current Activity**

886 active jobs.
12039 orders in progress.
1 task for today.
2 new Custom Options.
No Custom Options Requiring Approval
448 Order & JIO/CO Alert(s).

FIGURE 2. Current Activity Section of the Home Page

**Note:** Users with the Jobs - Custom Option Approval Level 1 (View) application/function in their role will see this link. Users with the Jobs - Custom Option Approval Level 2 (View) application/function in their role will see a link for Custom Options Requiring Approval (assuming there are Custom Options to approve). Users with the Jobs - Custom Option Update Only (View) application/function will see both links.

Click the link to view new Custom Options. The New Custom Options alert page will display a list of all newly created Custom Options. Click the Go to Options Page link beside one of the Custom Options to manage it.

| Job Name | Custom Options Document Name | Status | Date of | Manage Options |
|---|---|---|---|---|
| 61213810116 - 3604 Delany Drive - 1414 | Custom Option Test | New Option | 01/17/2013 | Go to Options Page |
| 61213810116 - 3604 Delany Drive - 1414 | Custom Option | New Option | 01/17/2013 | Go to Options Page |

FIGURE 3. Alerts - New Custom Options Page

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# 18 Progress Pay Tasks

*BuildPro System Administrator User Guide*

## Objectives

After reading this chapter you should have a basic understanding of:

- How to setup Progress Pay Tasks
- How suppliers/trades submit payment for Progress Pay Tasks
- How builders approve/reject payment for Progress Pay Tasks
- How suppliers/trades assign approved payment amounts to subs
- How suppliers and subs are paid for Progress Pay Tasks

## Progress Pay Tasks Overview

Some construction Tasks span weeks; months; even years. Purchase Orders for these Tasks typically have large quantities and dollar amounts and suppliers/trades are paid by draws over time. This BuildPro functionality enables users to flag cost codes (account codes) as Progress Pay Tasks. After a Progress Pay Task has been started (submitted to SupplyPro) suppliers/trades may request payment based on progression of work. Upon builder approval, the supplier/trade may assign portions of the approved dollar amount to Subs. BuildPro integration will export the assigned dollar amounts to your back office system to pay the supplier/trade and subs. Lien waivers may be created from remittance data returned to BuildPro.

**Note:** Preliminary lien waivers may be created and signed by suppliers/trades/subs using SupplyPro. See the Lien Release Documents user guide for details on electronically signing lien waivers.

## Progress Pay Requirements

In order to fully utilize the Progress Pay Task functionality, your company must be using Hyphen Solutions' Integration. You must be able to send Job and PO Detail files along with Payment Data (remittance or check information). There are two new export files from Hyphen Solutions you must be able to receive and process. These files will contain data for paying trades/suppliers and subs. For more information regarding these export files, contact Hyphen Solutions' Integration Support.

In addition, your suppliers/trades must be using SupplyPro. The SupplyPro user interface allows them to request payment, assign approved payments to Subs, and electronically sign lien waivers.

## Progress Pay Module Information

The Progress Pay functionality is controlled by a BuildPro module. To have this module turned on, contact Hyphen Solutions' Customer Care and reference module# 271 Progress Pay Tasks.

## Progress Pay Role Information

There are five Application/Functions that affect user access to Progress Pay Tasks:

1. **Jobs - Progress Payments (View)**. The View function allows users to filter the JME page by Progress Pay Tasks.
2. **Jobs - Progress Pay Assign Subs (View and Change)**. The View function displays the Add Subs to Trade hyperlink on the Job Actions page. The Change function displays the Update button on the Add Subs to Trade page.
3. **Jobs - Progress Pay CM Approve (View and Change)**. The View function displays hyperlinks in the Progress Pay section of JME. This allows users access to view Progress Pay Task information. The Change function displays the Update button on the Approve Payment Requests tab of the Progress Payments page (when CM approval is required).


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4. **Jobs - Progress Pay PM Approve (View and Change)**. The View function displays hyperlinks in the Progress Pay section of JME. This allows users access to view Progress Pay Task information. The Change function displays the Update button on the Approve Payment Requests tab of the Progress Payments page (when PM approval is required).

5. **Jobs - Progress Pay 3rd Level Approve (View and Change)**. The View function displays hyperlinks in the Progress Pay section of JME. This allows users access to view Progress Pay Task information. The Change function displays the Update button on the Approve Payment Requests tab of the Progress Payments page (when 3rd Level approval is required).

**Note:** Users must also be assigned to the Job in order to view it in the JME page.

**Note:** To have a new custom role created or the Application/Functions above added to an existing role(s), contact Hyphen Solutions' Customer Care.

## Progress Pay Setup

The following sections outline the steps to setup Progress Pay Tasks.

### Template Setup

To flag specific Tasks in BuildPro as Progress Pay Tasks, use the Progress Payment link in the Task Update section of the Template Actions page. Users with the Template Admin role will have access to this link.

1. Click the Templates tab.
2. Click a Template Name.
3. Click the Progress Payment link.

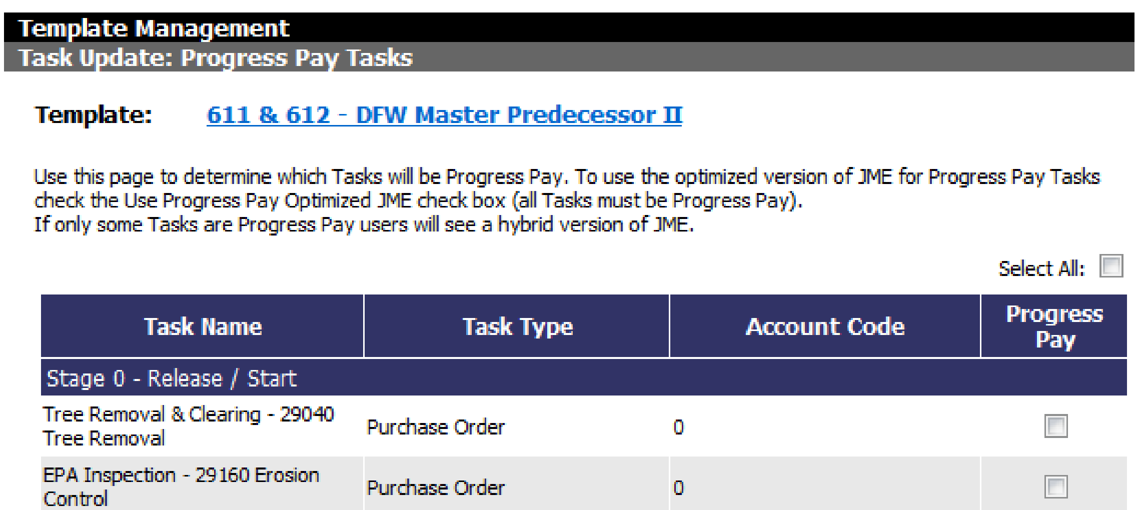


FIGURE 1. Task Update: Progress Pay Tasks Page

Use this page to flag specific Cost Codes (Account Codes) that will use the Progress Pay functionality. Only Purchase Order, Work Order, Contract, and Pay Point Task Types may use the Progress Pay functionality. Memos, Reminders, and Measurement POs may not be used as Progress Pay Tasks. Use the check boxes in the **Progress Pay** column to indicate which Tasks will be Progress Pay Tasks. When Jobs are created from the Template, the flag will be copied from the Template Task to the Job Task. Use the Select All check box to indicate all Tasks will be Progress Pay Tasks. Click the Update Progress Pay Flags button to save your changes.

**Note:** This setup must be repeated for each Template that contains Cost Codes that must be managed as Progress Pay Tasks.

### Job Setup

You are now ready to load Jobs and POs via integration. Upon successful loading, you may confirm the Progress Pay flag has been copied to Tasks in the Job. Click the Manage Job (JME) navigation button near the top of BuildPro. Select the Job and click the Show Tasks button. Scroll down to find the Cost Code flagged as Progress Pay. Under the Supplier Name will appear a section labeled **Progress Pay Data**. A **View** link will appear beside the **Subs** label.

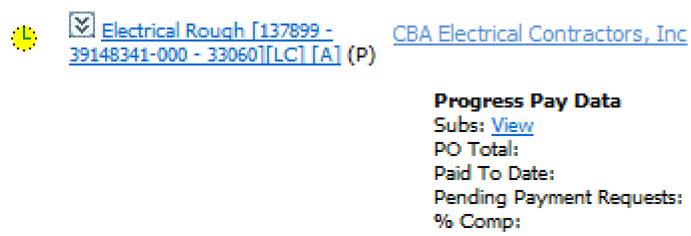


FIGURE 2. JME Task Name with Progress Pay Data Section

**Note:** When a Progress Pay Task is in Scheduled status, the links for PO Total, Paid to Date, Pending Payment Requests, and % Comp are not displayed. After you start the Task (submit it to SupplyPro), these links will be displayed.

**Note:** Currently, Job Management Express is the only page that displays the additional Progress Pay Data links. You may start Progress Pay Tasks from any page in BuildPro but they can only be completed from JME. Since JME is the only page that displays the Progress Pay Data section, it will prevent users from completing the Task without first reviewing the Progress Pay Data for Pending Payment Requests or check the % Complete.

**Progress Pay Data Section Hyperlinks**

- **Subs** - navigates to the Add Subs to Trades page.
- **PO Total** - navigates to the Items tab for Progress Pay Tasks.
- **Paid to Date** - navigates to the History tab for Progress Pay Tasks.
- **Pending Payment Requests** - navigates to the Approve Payment Requests tab for Progress Pay Tasks.

The % Complete label displays the percentage complete by dividing Paid to Date by PO Total.

The next step is to enter the Progress Pay 3rd Level Approval and Retention amounts. Click the Job Name hyperlink on the JME (or other) page. Click the Job Detail link. Near the bottom of the


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page, enter a dollar amount in the Progress Pay 3rd Level Approval text field. The amount entered here will be used in determining if a 3rd level approval is needed for payment requests. If you leave this field blank, no 3rd level approval will be required. Entering 0 (zero) will require 3rd level approval on all requests. If you enter a number such as 5000, only payment requests $5000 and above will require 3rd level approval.

The Retention text field is not used for calculations. It is for display purposes only. The text entered here will appear on the Progress Pay pages of BuildPro and SupplyPro in the upper right corner.

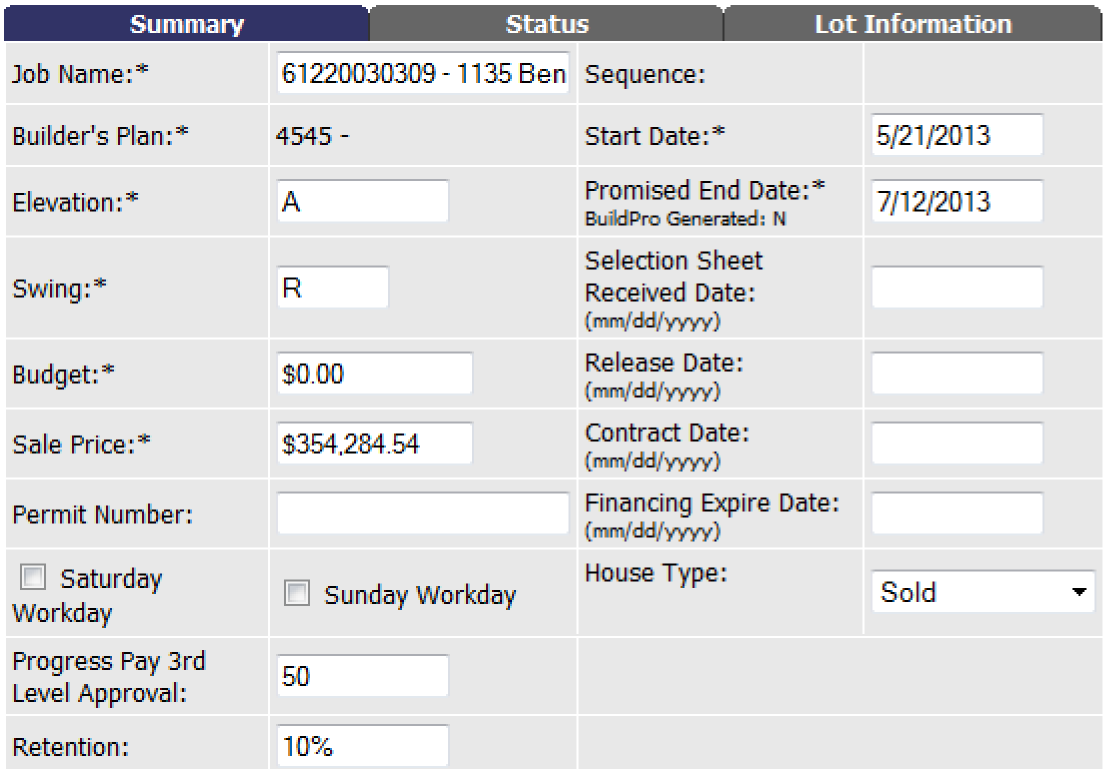


FIGURE 3. Job Detail Page


FIGURE 4. Job Detail Text Fields and Progress Pay Information

Other information in the filter section of Progress Payment pages:

- **Trade** - Name of the supplier/trade assigned to the Task.
- **Task Status** - Status of the Task.
- **PO Total** - Dollar amount of the Task/PO including tax.
- **Total Paid to Date** - Total dollar amount approved by BuildPro for the Task.
- **Pending Approval** - Dollar amount to be approved by BuildPro for the Task.
- **Percent Complete** - Total Paid to Date divided by PO Total.
- **Retention** - Text entered in Retention text box from the Job Detail page.
- **Pay Data Received in BP/SP** - Dollar amount sent to BuildPro via integration for this Task.

### Sub Supplier Setup

Final setup requires the assigning of Sub Suppliers to a Trade. From JME or other page, click the hyperlinked Job Name and then click the Add Subs to Trade link (Job Setup tab).

Assigning a Sub to a Trade assures they will be connected to the Order and may be assigned payment after a payment request has been approved.

From the Add Subs to Trade page, click the Trade in the **Select Trade** section you wish to assign a Sub(s). The selected Trade will be shown in bold text. The sections on the right side of the page will be populated with information for the selected Trade.

Use the **Filter** section to narrow your search. As you type, the list will update.

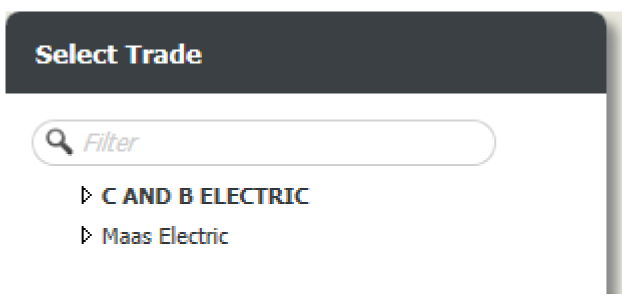


FIGURE 5. Selected Trade

The **Trade Information** section displays Tasks (Purchase Orders) assigned to the selected Trade.



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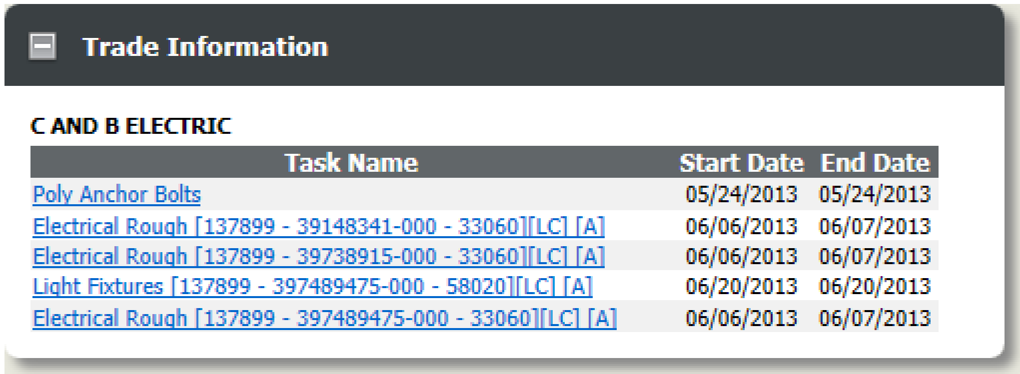


FIGURE 6. Trade Information Section

The **Lien Waiver Information** section displays Lien Waivers manually created, signed, and sent from SupplyPro. You may use this as the indication to check the Prelim Notice check box (once a preliminary document appears in the list). Suppliers/trades that are assigned to a Task/PO in the Job will have this check box "checked" by default. Once a Final Lien Waiver has been signed by the supplier/trade (when it appears in the list) use the check box next to the Final Waiver label.

**Note:** The Prelim Notice check box must be checked before the supplier/trade (or sub) may be assigned payment from a payment approval Batch (covered later in this chapter).

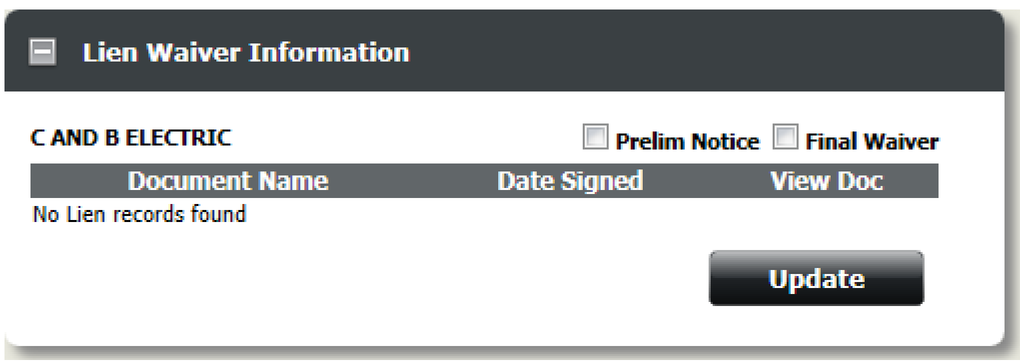


FIGURE 7. Lien Waiver Information Section

Use the **Add Subs to Selected Trade** section to assign a Sub(s) to the trade in the Selected Trade section. Select one or more Subs by checking the box next to the Sub's name and click the Update button. Use the **Filter** section to narrow your search. As you type, the list will update.

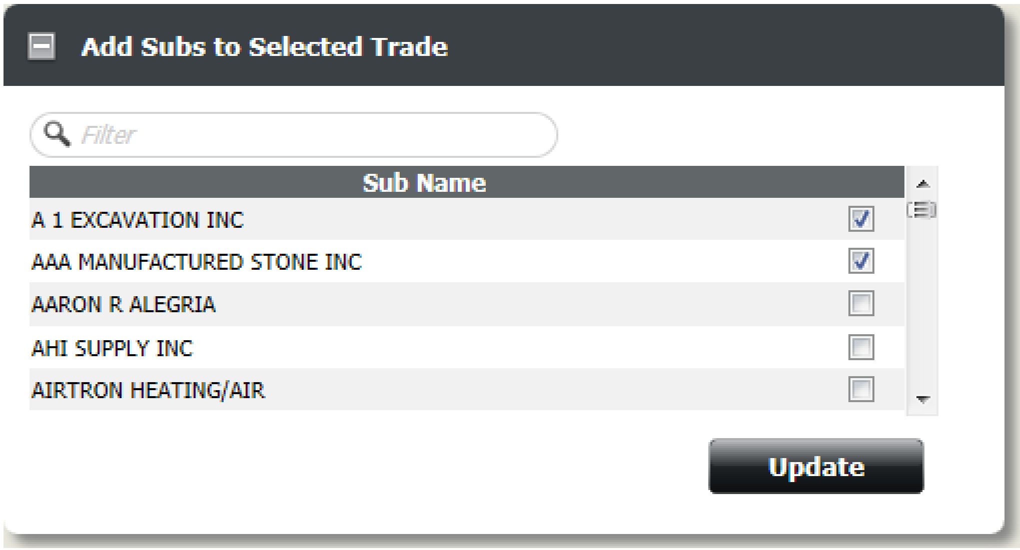


FIGURE 8. Add Subs to Selected Trade Section

The Subs will appear in the Select Trade section indented, under the selected trade.

**Note:** You may add Subs to Subs by selecting the Sub in the Select Trade section and then choose the Sub from the Add Subs to Selected Trade section. There is no limit to the number of Subs or Sub of Subs you can add.

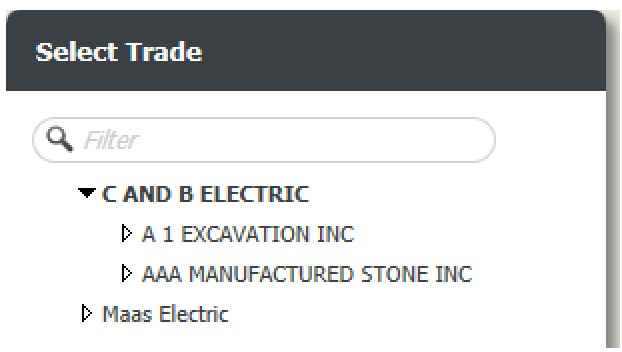


FIGURE 9. Subs Assigned to a Trade

Repeat this setup for all Trades and Subs for a Job.

**Note:** The Subcontractor relationships are at a Job level. You must repeat this setup for each Job that has Progress Pay Tasks.

To assign Subs for other Progress Pay Jobs, use the filter section at the top of the page. Click the plus sign  to expand the filter section.

Use the Job filter to choose another Job. The Job filter will only contain Jobs that have Progress Pay Tasks.

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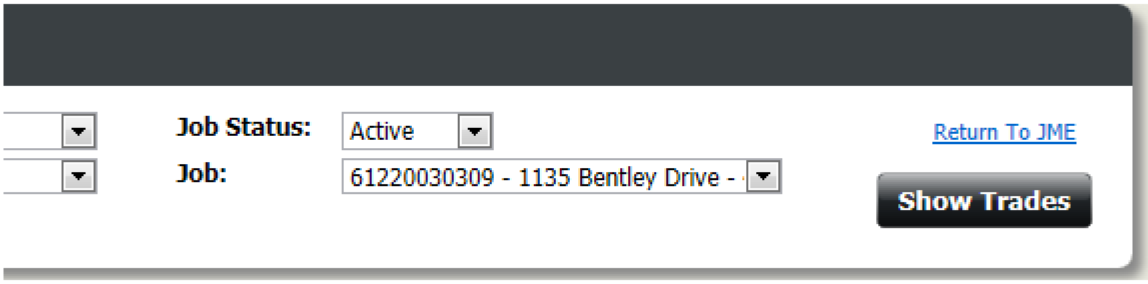


FIGURE 10. Filter Section at Top of Add Subs to Trade Page

## Progress Pay Task Workflow

If you use the Lien Waiver functionality in BuildPro/SupplyPro, suppliers/trades may now submit Preliminary Lien Waivers (if required by law) via SupplyPro. For more information on lien waivers see the Lien Release Documents user guide.

Like other BuildPro Tasks, start the Task by clicking the check box in the Start column of the JME page. Adjust the Start Date or End Date as necessary. Click the Update button to submit the Task (Order) to the supplier/trade.

Only suppliers/trades using SupplyPro may use the Progress Pay functionality. If the supplier/trade does not use SupplyPro, the check box in the Start column will be disabled.

Progress Pay Tasks are easily identified by a section labeled **Progress Pay Data** below the Supplier Name in JME.

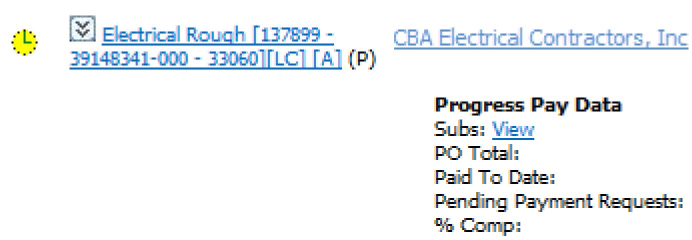


FIGURE 11. JME Task Name with Progress Pay Data Section

**For an optimized view of Progress Pay Tasks**

1. Choose **Progress Payment** from the **JME View** filter.
2. Click the **Show Tasks** button.

This view only displays Progress Pay Tasks. Notice the scheduling columns have been replaced with columns for Subs, PO Total Amount, Paid to Date, Pending Payment Requests, and % Comp. These are the same labels displayed below the Supplier Name in the Progress Pay Data section of the Schedule View of JME.

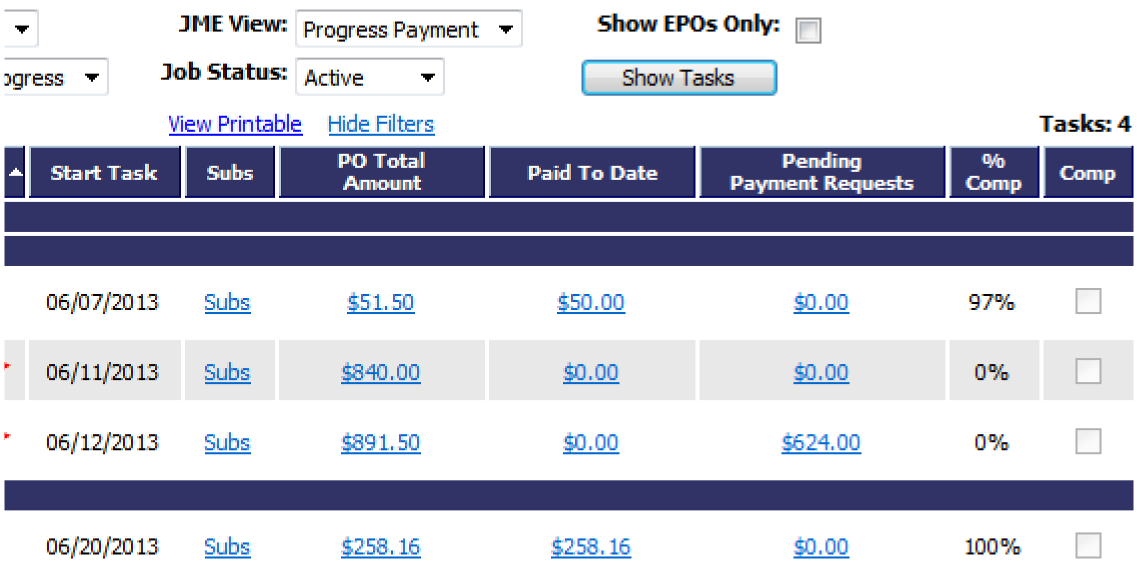


FIGURE 12. Progress Payment View of JME

### SupplyPro Request Payment

SupplyPro users may accept the Order (Task) as they do today from the Order List page. For details of Progress Pay Tasks in SupplyPro see the SupplyPro System Admin guide. After the supplier/trade has begun work, they may request payment based on progress.

**Note:** SupplyPro users may request payment at any time and there is no limit to the amount they may request up to the total dollar amount of the PO. However, BuildPro users have the ability to modify or reject a request.

SupplyPro users will request payment from the Submit Payment Requests page. Requests are made from each line item (Product) within the Order (Task). If the line item has a Qty of 1, users will enter an **Amt** (dollar amount). If the line item has a Qty greater than 1, they will enter a **Qty** that will be multiplied by the Unit Price to determine the amount of the request.

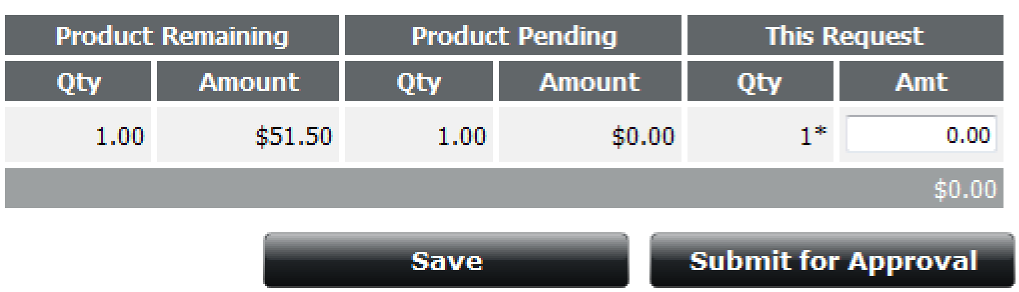


FIGURE 13. Submit Payment Request for Item with Qty of 1 (SupplyPro)



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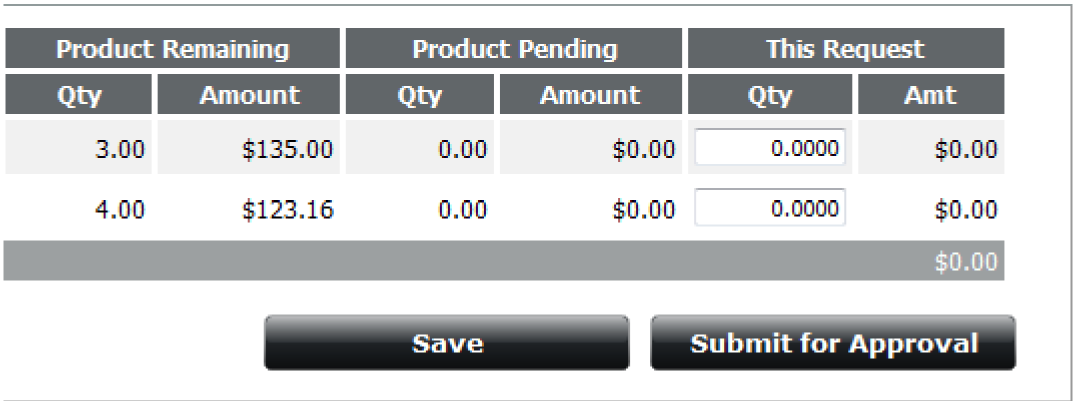



FIGURE 14. Submit Payment Request for Items with Qty Greater than 1 (SupplyPro)

When a supplier/trade submits a request for payment on an Order (Task), the dollar amount of the request will appear next to the **Pending Payment Requests** label in the Supplier Name column of JME. Other links are now enabled for PO Total, and Paid To Date.

**Note:** The hyperlinked PO Total takes you to a page to view the line items in the Order (Task). The Paid to Date hyperlink takes you to page where you can view the history of payments submitted and approved. The Pending Payment Requests link takes you to a page to approve payment requests. Each of these pages will be discussed later in this chapter.

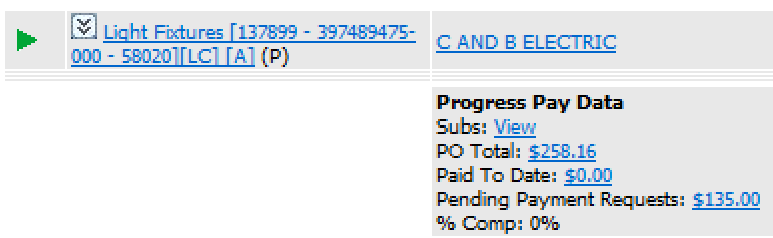



FIGURE 15. BuildPro JME (Pending Payment Requests)

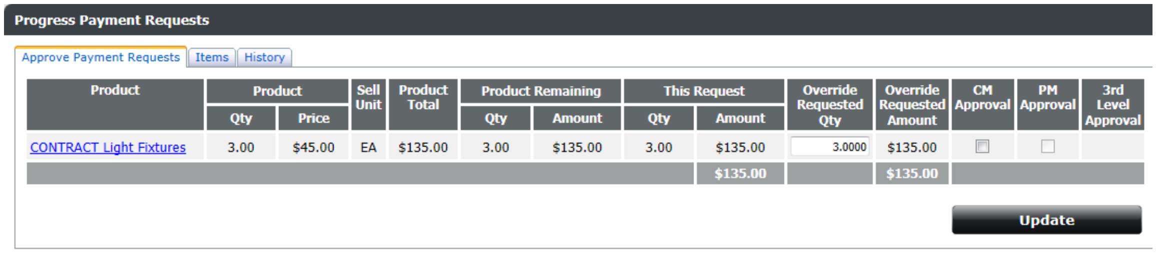
### Approve Payment Request

**To approve a payment request from SupplyPro:**

1. Click the hyperlinked dollar amount labeled Pending Payment Requests under the Progress Pay Data section in JME.
2. From the Progress Payment Requests page, check the box in the CM Approval column.
3. Click the Update button.

**Note:** Only users with the Jobs - Progress Pay CM Approve (Change) application/function in their role will have the check box enabled. Contact Hyphen Solutions' Customer Care for help with setup of roles.

**Note:** There are potentially three levels of approval of a payment request: CM, PM, and 3rd Level. One user may have all three roles or the roles may be split up among different users.


Progress Payment Requests

Approve Payment Requests | Items | History

| Product | Product | | Sell Unit | Product Total | Product Remaining | | This Request | | Override Requested Qty | Override Requested Amount | CM Approval | PM Approval | 3rd Level Approval |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Qty | Price | | | Qty | Amount | Qty | Amount | | | | | |
| CONTRACT Light Fixtures | 3.00 | $45.00 | EA | $135.00 | 3.00 | $135.00 | 3.00 | $135.00 | 3.0000 | $135.00 | ☐ | ☐ | |
| | | | | | | | | $135.00 | | $135.00 | | | |

Update

FIGURE 16. Progress Payment Requests Page

The Progress Payment Requests page is designed to be used by all three approvers (CM, PM, and 3rd Level). When a payment request has been submitted by SupplyPro, only the check box in the CM Approval column will be enabled. The CM (Construction Manager) must approve the request before the check box in the PM Approval column is enabled. After the CM approves the PM (Project Manager) must approve the request before the check box in the 3rd Level Approval is enabled. If no 3rd Level approval is required, the request will be approved when the PM has approved.

**Note:** For more information on whether a 3rd Level approval is required, see the Job Setup section of this chapter.

If the CM wishes to decline a request for payment, simply enter 0 in the Override Requested Qty or Override Requested Amount text box and click the Update button. This will appear in the History tab as an approval for $0.00. At least two approvals (or rejections) are required for every request. The check box for the PM is now enabled. In order to completely decline/reject the request the PM must also approve the $0.00 override amount. The PM may override the CM by changing the Override Requested Qty/Amount. This would approve the request for payment (unless 3rd Level approval is required). Should the PM approve the $0.00, it would appear in the History tab as Declined.

**Note:** After overriding a Qty, click out of the text box (anywhere on the page) and the Override Requested Amount column will re-calculate.

**Note:** When multiple line items have been submitted for payment, each line item must be approved/rejected separately.

Additional information in the Approve Payment Requests tab (filter section):

- **Product** - Line item description and/or SKU.
- **Product (Qty)** - Quantity of the Product.
- **Product (Price)** - Dollar amount per unit.
- **Sell Unit** - Units which the Product is sold.
- **Product Total** - Total dollar amount of the Product.
- **Product Remaining (Qty)** - Quantity the supplier/trade has not requested to be paid.
- **Product Remaining (Amount)** - Dollar amount the supplier/trade has not requested to be paid.
- **This Request (Qty)** - Quantity the supplier/trade has requested to be paid for.
- **This Request (Amount)** - Dollar amount the supplier/trade has requested to be paid.



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- **Override Requested Qty** - Use this text box to override the Qty the supplier/trade has requested to be paid.
- **Override Requested Amount** - Use this text box to override the dollar amount the supplier/trade has requested to be paid.
- **CM Approval** - Check box for the Construction Manager to approve the payment request.
- **PM Approval** - Check box for the Project Manager to approve the payment request.
- **3rd Level Approval** - Check box for the 3rd Level Approver to approve the payment request.

Use the filter section at the top of this page to jump to another Order or Job. The Job Name filter will only contain Active Jobs assigned to you that have Progress Pay Tasks. The Order filter will contain all Progress Pay Tasks from the selected Job.

To approve other payment requests, use the filter section at the top of the page. Click the plus sign  to expand the filter section.

Use the Job Name filter to choose another Job. The Job filter will only contain Jobs that have Progress Pay Tasks. Use the Order filter to select another Order/Task. The Order filter will only contain Progress Pay Tasks from the chosen Job.

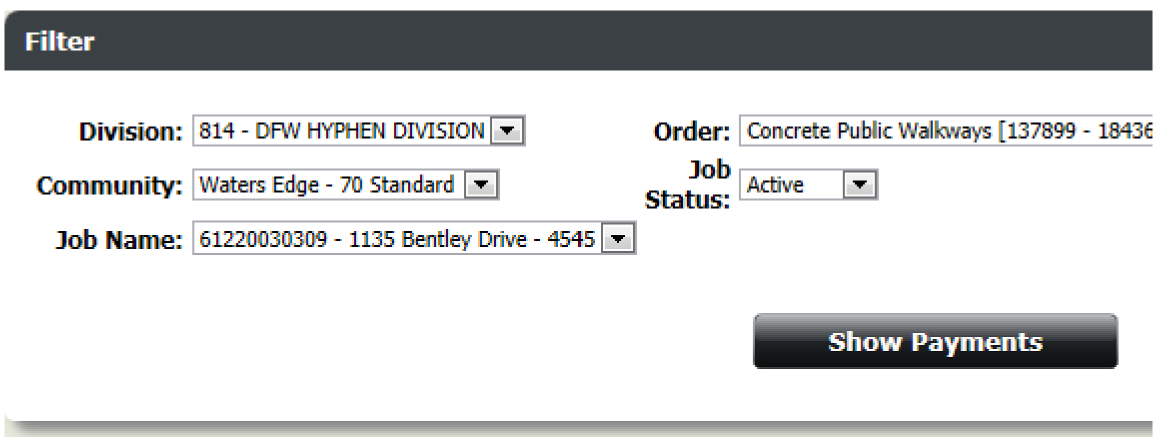



FIGURE 17. Filter Section at Top of Progress Payment Requests

### SupplyPro Assign Payment to Subs

When BuildPro approves a payment request, the line items approved are grouped into a Batch. It is possible for BuildPro to only approve some of the line items from a request. These will be grouped into a Batch. If the remaining line items are approved at a later time they will be grouped into a new Batch. SupplyPro must assign payment to Subs from a Batch. Once payments have been assigned and submitted, the data will be exported to the builder for the purpose of check/remittance creation.

In the example below a Batch was created for $258.16. A1 Excavation Inc and AAA Manufactured Stone Inc are both Subs of C and B Electric. Notice they are indented underneath C and B Electric (the supplier/trade assigned to the Order (Task)).

**Note:** If the Prelim Notice check box was not checked for C and B Electric (Add Subs to Trade page), the entire Batch would not appear in the Payment Request Approvals tab. If the Prelim

Notice check box was not checked for A1 Excavation or AAA Manufactured Stone, they would not appear in the Batch.

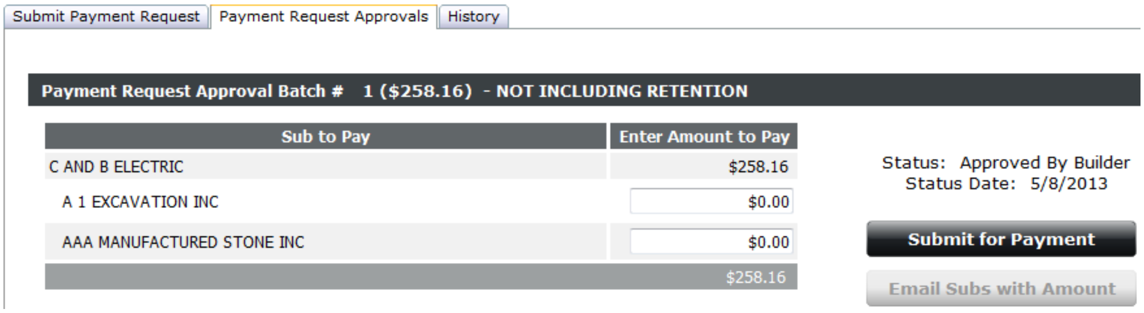



FIGURE 18. Payment Request Approvals Page (SupplyPro)

SupplyPro may assign payment amounts to one or more Subs. It is not required they assign any amount to a Sub; they may submit the entire Batch amount as payment to themselves.

**Note:** A supplier/trade may not assign more than 90% of the total Batch to any one Sub.

After the supplier/trade submits payment amounts the data will be exported to the builder's back office accounting system. Checks may be created but not delivered. Check (or voucher) data may be sent back to BuildPro. This data will appear in the payment reports in both BuildPro and SupplyPro.

If your BuildPro company has lien waiver functionality enabled, lien waivers will be created for each supplier/trade or sub receiving payment (assuming they are using SupplyPro). Electronically signed lien waiver data may be exported to the accounting system for release of payment. For more information on lien waivers see the Lien Release User Guide.

## Completing Progress Pay Tasks

Once the Order (Task) has been completed, you may complete the Task as necessary from JME.

**Note:** Progress Pay Tasks may only be completed from JME. When you check the box in the Comp column of JME, a message will confirm you want to complete the task.

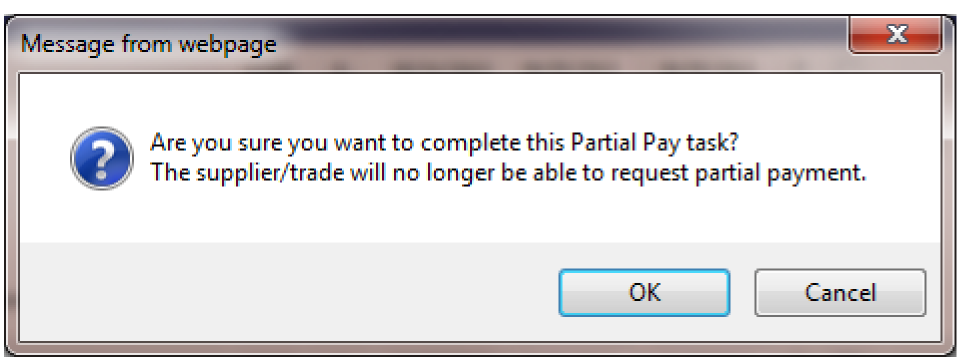



FIGURE 19. Confirmation Message when Completing Progress Pay Task

Once completed, the Task details will be exported in the completion export process.

**Note:** Once a Progress Pay Task has been completed, the supplier/trade may no longer request payment. Any payment requests made by the supplier/trade may be approved or declined. After approval, the supplier/trade may assign payment to subs and the pay assignments exports to the back office accounting system.

### Additional Information

At any time during the Progress Pay workflow use the Items or History tabs to view additional information regarding a Progress Pay Task.

**To access the Items tab for a Progress Pay Task:**

1. Click the **Manage Job (JME)** navigation button.
2. Choose the Job and click the **Show Tasks** button.
3. Scroll to the Progress Pay Task and click the hyperlinked dollar amount beside the **PO Total** label.


| Product | Qty | Price Each | Sell Unit | Unit Price | Total |
|---|---|---|---|---|---|
| CONTRACT Electrical - Rough | 3.00 | $120.00 | EA | $120.00 | $360.0 |
| CONTRACT Electrical - Rough | 4.00 | $120.00 | EA | $120.00 | $480.0 |
| | | | | Total: | $840.0 |

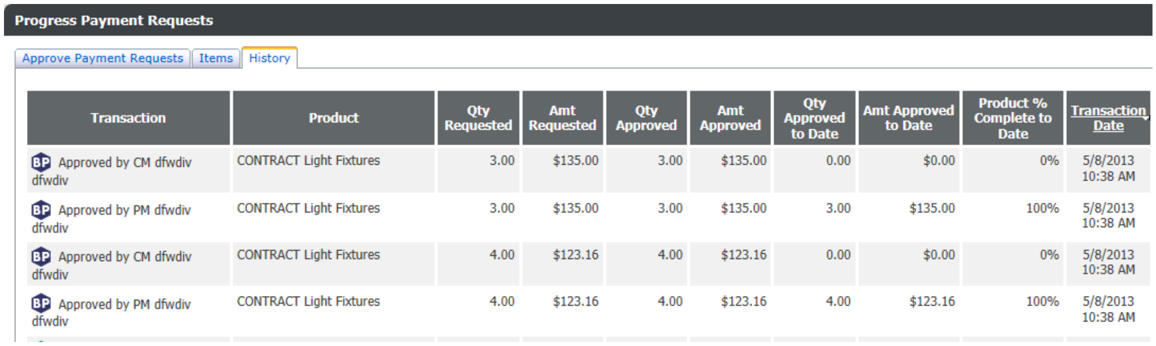
FIGURE 20. Items Tab of a Progress Pay Task

Additional information in the Items tab:

- **Product** - SKU and/or description of the materials or labor from the Purchase Order.
- **Qty** - Quantity of the SKU, Product, or Line Item.
- **Price Each** - Dollar amount for each Product.
- **Sell Unit** - Description of how the Product has been purchased (EA, MBF, SQFT, etc).
- **Unit Price** - Price per unit based on the Sell Unit column.
- **Total** - Total dollar amount for each line item. The total dollar amount of the PO will be shown in a footer row.

**To access the History Tab for a Progress Pay Task:**

1. Click the **Manage Job (JME)** navigation button.
2. Choose the Job and click the **Show Tasks** button.
3. Scroll to the Progress Pay Task and click the hyperlinked dollar amount beside the **Paid to Date** label.



Progress Payment Requests

Approve Payment Requests | Items | History

| Transaction | Product | Qty Requested | Amt Requested | Qty Approved | Amt Approved | Qty Approved to Date | Amt Approved to Date | Product % Complete to Date | Transaction Date |
|---|---|---|---|---|---|---|---|---|---|
| BP Approved by CM dfwdiv dfwdiv | CONTRACT Light Fixtures | 3.00 | $135.00 | 3.00 | $135.00 | 0.00 | $0.00 | 0% | 5/8/2013 10:38 AM |
| BP Approved by PM dfwdiv dfwdiv | CONTRACT Light Fixtures | 3.00 | $135.00 | 3.00 | $135.00 | 3.00 | $135.00 | 100% | 5/8/2013 10:38 AM |
| BP Approved by CM dfwdiv dfwdiv | CONTRACT Light Fixtures | 4.00 | $123.16 | 4.00 | $123.16 | 0.00 | $0.00 | 0% | 5/8/2013 10:38 AM |
| BP Approved by PM dfwdiv dfwdiv | CONTRACT Light Fixtures | 4.00 | $123.16 | 4.00 | $123.16 | 4.00 | $123.16 | 100% | 5/8/2013 10:38 AM |

Additional information in the History tab:

- **Transaction** - This column displays the action that occurred and by whom.
- **Product** - SKU and/or description of the materials or labor from the Purchase Order.
- **Qty Requested** - Quantity requested by the supplier/trade when the request was made.
- **Amt Requested** - Dollar amount of the request made by the supplier/trade.
- **Qty Approved** - Quantity approved by the CM, PM, or 3rd Level approver.
- **Amt Approved** - Dollar amount approved by the CM, PM, or 3rd Level approver.
- **Qty Approved to Date** - Total quantity approved at time of the Transaction.
- **Amt Approved to Date** - Dollar amount approved at time of the Transaction.
- **Product % Complete to Date** - Paid to Date amount divided by PO Total at time of the Transaction.
- **Transaction Date** - Date and time the Transaction occurred.

**Note:** The default sort on this column is by date/time descending. To sort ascending, click the hyperlinked column heading.