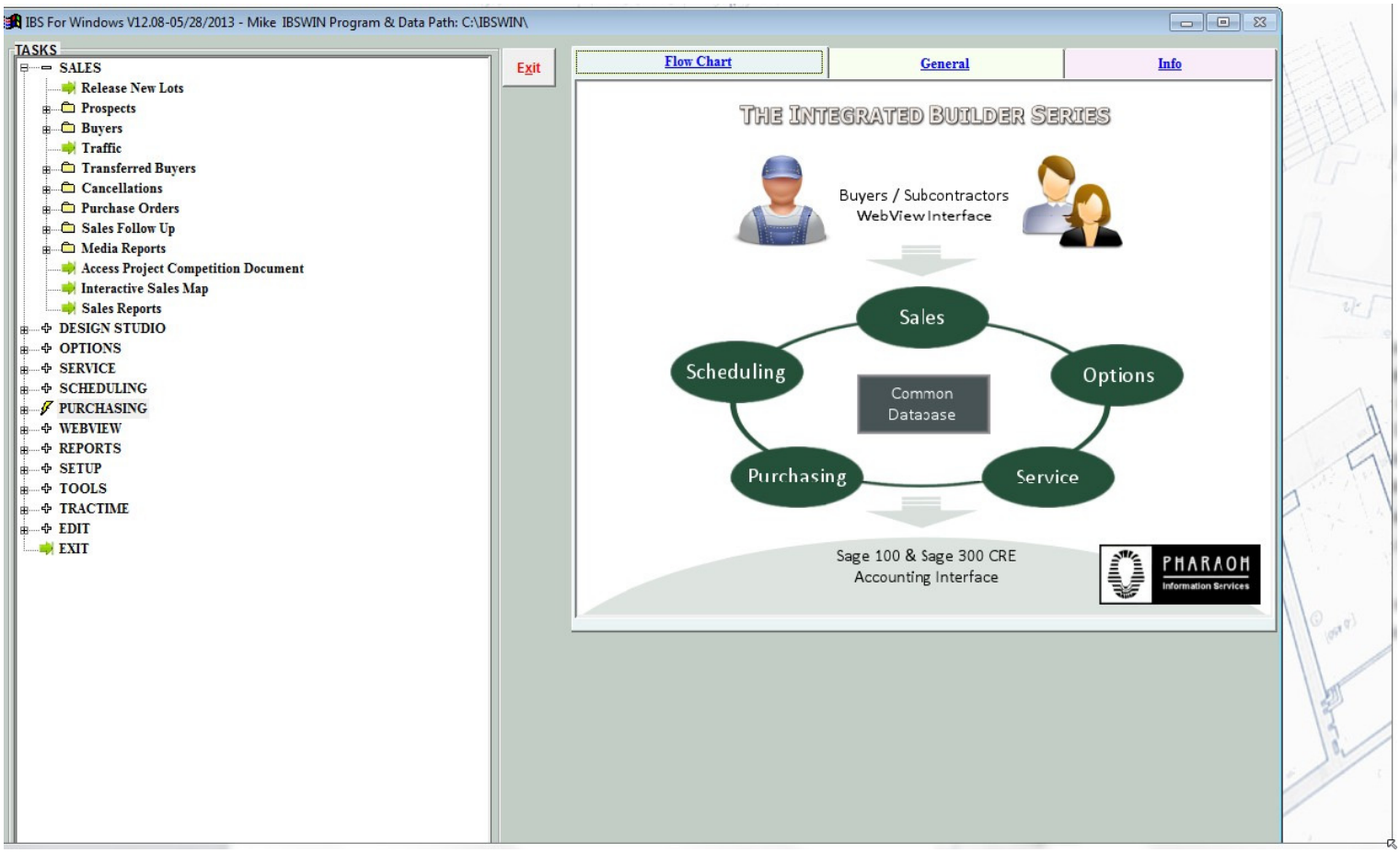
Scheduler Plus

for *IBSWIN*

(Version 12.XX)

Expanded User Guide



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IBSWIN - *Scheduler Plus User Guide*

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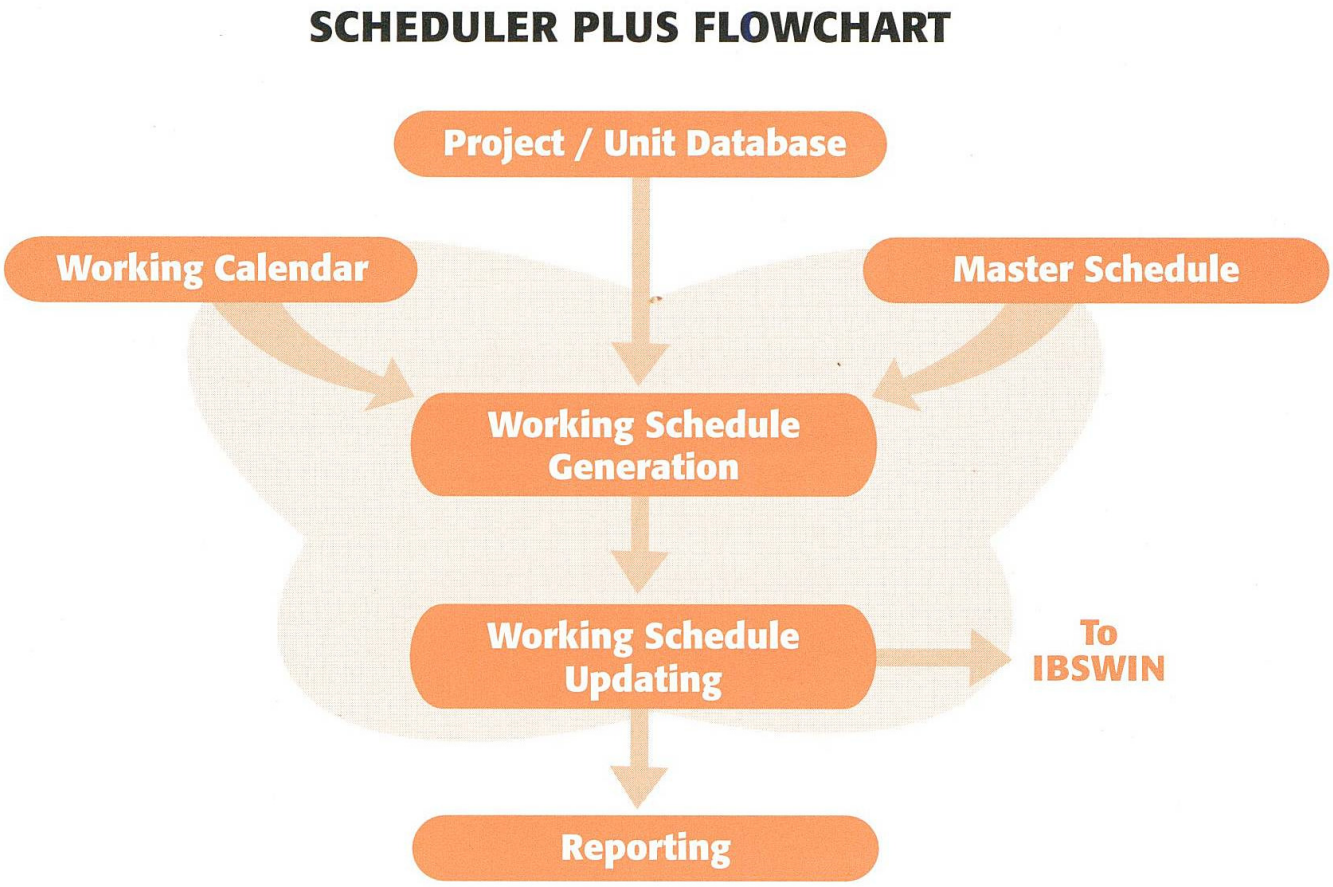
Introduction

Scheduler Plus is designed to keep scheduling simple. First, it is very easy to set-up the original schedule. And, more importantly it is even easier to update the ongoing schedule on a daily or weekly basis. Unlike generic scheduling software, it is designed specifically for residential builders. As a result, much of the complex set-up procedures have been eliminated. The reports are designed by and for construction managers and provide simple and concise information on each home under construction. And what makes it even more valuable to your company is the integration with the other IBSWIN modules.



Plotting of each lot and plan/elevation

Provides for easy and fast set-up of your lot information. Supports both predetermined construction sequence set-up, as well as lot by lot scheduling.

Calendar Set-up

Easy calendar set-up allows you to determine your non-working days. Provides for both standard (Saturday/Sunday) non-working days and other holidays.

Master Schedules

Provide for one time definition of standard construction tasks. Allows you to easily tailor the master schedule for each specific phase.

Unlimited Task Definition

Depending on the complexity of the product type you are building, you can set up as many tasks as required. Certain tasks can be flagged as "milestone" tasks for management reporting purposes.

Easy Working Schedule Generation

Initial generation of the "working schedule" is fast and easy. Just tell the system the lots you want to schedule, the master schedule you want to use, and the day you want to start construction.

Simplified Schedule Updates

On a daily basis actual task completions can be recorded. In seconds, the system provides revised schedule dates for the remaining tasks on a lot by lot basis.

Reporting the way you want to see it

The Scheduler Plus system provides many reporting options. You can "condition" the output to print only what you want to see. For example, print only the tasks that affect the plumbing contractor for all the lots.

Scheduler Plus will provide your construction department with a valuable tool to communicate to management construction status in a fast, efficient manner. In addition, by interfacing with the other IBSWIN Modules, sales option cut-off problems can be greatly reduced.

Construction Scheduling Setup

The Construction Scheduling **(*Scheduler Plus*)** module provides a very simple way of setting up an initial schedule by each home and then updating it on a regular basis. It is designed for production builders that want to track multiple homes with multiple ***construction stages***. It allows you to design your construction stages by product type ***(phase)***, and assumes that each of your construction stages are on the critical path and that each stage is dependent on the prior stage.

By keeping the scheduling assumptions simple, we are able to provide a link to the options system so that critical options cut-offs can be tracked in real-time. It provides immediate feedback to the options ordering staff as to the stage of construction and whether specified options can still be ordered at the standard price. It also provides an excellent working ***Construction Schedule*** report that provides an updated status of all the homes under construction.

Defining the Working Schedule

Step number one is to set up your working schedule. This is done under the **Setup: Company Config: Edit**. This step involves eliminating the ***non-working*** days from the schedule.

Choose the ***ConSched*** tab and then the select the **Holidays** button and indicate all the holidays that you like to eliminate from the working schedule. In addition, if you want to include Saturdays and Sundays in your working schedule, check the ***Construction Works Sat & Sun*** box on the above screen. The system default will eliminate Saturdays and Sundays from the schedule.

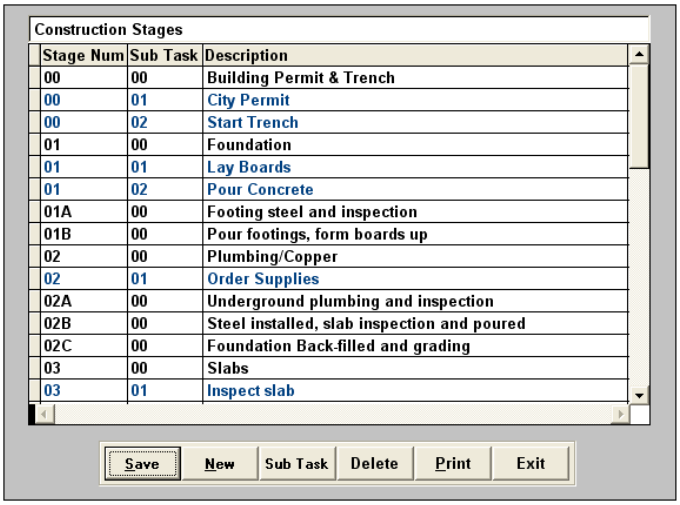
Setting Up The Lots

To set up the lots to include in the schedule you must have your basic ***Common DataBase Files*** set up and operational. These can be specifically found on pages 10-12 in the general set-up manual which focus on setting up ***Phases*** & ***Sequence Sheets.***

Note: When setting up your Sequence Sheets you must have an alphanumeric numbering system with leading zeros in the Seq column. These numbers must be entered correctly for the scheduling to work properly. If you are a **non-spec builder** leave the sequence number field blank and enter them later as the construction starts for each lot.

Setting Up the Construction Stages

The next step is to define all the construction stages that you will potentially use for each product type being built. These construction stages are set up in the system to provide a simple scheduling system. Each ***cutoff stage*** must be entered in the order of construction and be part of the schedule critical path. This screen sets up the global construction stages. Using this list each phase can then be set up with individual ***days to complete*** for each cutoff stage *(see next section)*.

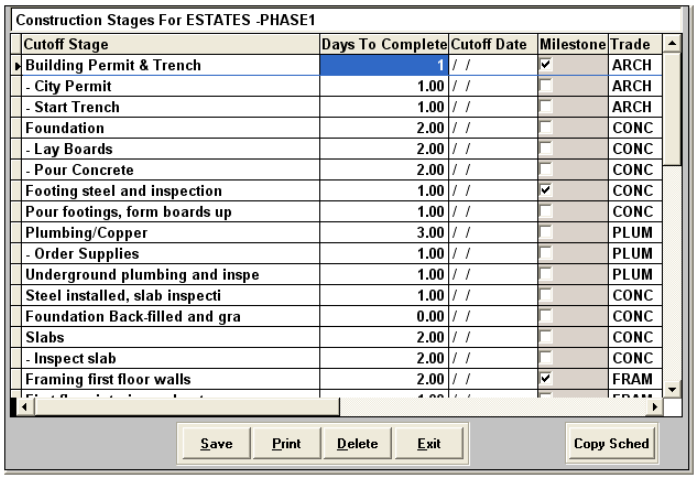


The construction stages play a major part in option and flooring ordering to advise the designer when options selections need to be completed. Construction Stages can easily be found under **Setup: Construction Stages** and usually comes with a default customizable list.

Select **New** to add stages that will be added in sequence by the ***Stage Number***. We recommend that you setup each construction stage with the ***Stage Num*** in increments of 10 to allow for any additional construction stages to be added at a later date if necessary. *Remember:* This global list must be in order of construction. You can also create a ***Sub Task*** under any construction stage that you have selected. These are identifiable as being blue. Each subtask will be assigned a ***Sub Task*** number automatically and will increase incrementally as each subtask is added to a construction stage. Use the **Delete** button to remove any stages not required. The **Print** button will either print or display a list of the stages entered. Use **Save** to save any changes and **Exit** to close the window without saving. This is the master list of the stages to be used for all project/phases. The next step will be to tailor this master list for each project/phase.

Note: Phases which have both single and double story houses will need to be divided into 2 phases in order to be able to create an accurate construction schedule and critical path.

Tailoring the Construction Stages for each Phase



Tailoring the master list is done by selecting **Scheduling: Schedule Days To Complete** where you will first need to select the phase that you are building the schedule for. Or alternatively you can access this from the ***Const Stages*** button in the Phases setup screen *(**Setup: Inventory: Phases**)*.

The ***Days to Complete*** screen displays the master list of Construction Stages (tasks) from the global list you setup previously (see above). Here will now enter the number of working days required to complete each task. If a specific task is not going to be used for this phase leave the number of days at **0** and this task will ***not*** be included in the schedule for this phase. As an alternative there is a column called *(Actual)* ***Cutoff Date*** which allows you to enter a specific cut-off date for options cut-offs and will override the calculated schedule date for cut-offs. If you want a simple way to enter cut-off dates without using the full scheduling capabilities, this is your alternative however these cutoff dates will remain the same for each lot *throughout* the phase.

The **Copy Sched**ule button allows you to copy a schedule from the current phase to another.

The ***Milestone*** column is used as bookmark or flag point to highlight specific stages in the construction of a phase that requires special attention. This will allow you to printing various versions of certain scheduling reports showing only the milestone tasks. This comes in handy for management reports to focus in on specific stages during construction. It will also reduce the size of the reports which can get very long.

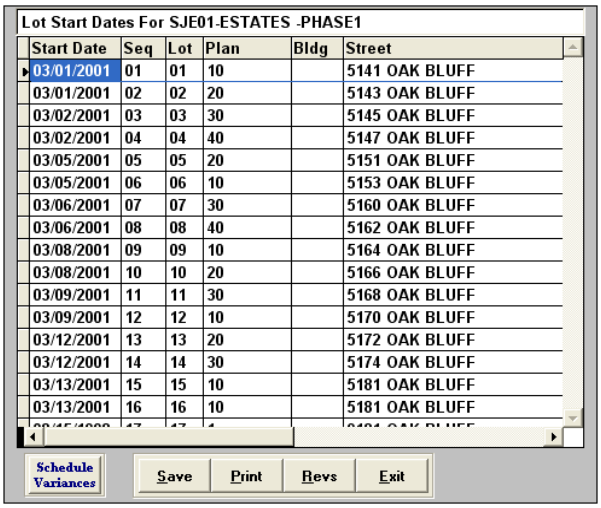
The ***Trade*** column is used to assign each stage to a specific trade. This will allow you to print a scheduling report for specific trades or subcontractors.

Once completed you can either **Save** your changes or **Exit** without saving your changes. The **Print** button will either print or display the ***Scheduled Construction Stages*** report. This will display the information entered into this screen.

Processing & Maintaining a Schedule

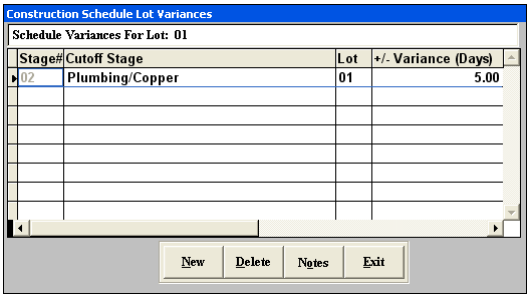
After the initial setup as outlined in the previous pages the actual maintenance of the Construction Schedule is very simple and consists of two main functions. The first is to enter the actual start dates for each lot and the second to enter the actual dates for each construction stage to ensure that your schedule is up to date. Each of these are outlined below.

Entering the Lot Start Dates



Once you have tailored the Construction Stages to the specific phases that you are building you now ready to enter the ***Lot Start Dates***. This is found under **Scheduling: Lot Start Dates**. Again, you will select the phase that you are working on. The lots previously setup for this phase will be displayed.

Simply enter the starting construction date for each lot and this will automatically create the schedule for each lot. The **Schedule Variances** button allows you to change the number of days to complete a construction stage for a specific lot. This may be necessary if there are lot specific delays or changes to the schedule. Simple select the New button and choose the affected construction stage and enter the number of days variance. Any additional **Notes** or explanation can also be added. Hit exit to save and return to the main lot start dates screen.



Once all entries have been completed use the **Save** button to save your changes and exit this screen or the **Exit** button to exit without saving your changes. The **Print** button is used to print out a lot sequence list and the **Revs** button allows you to enter lot revision notes if required.

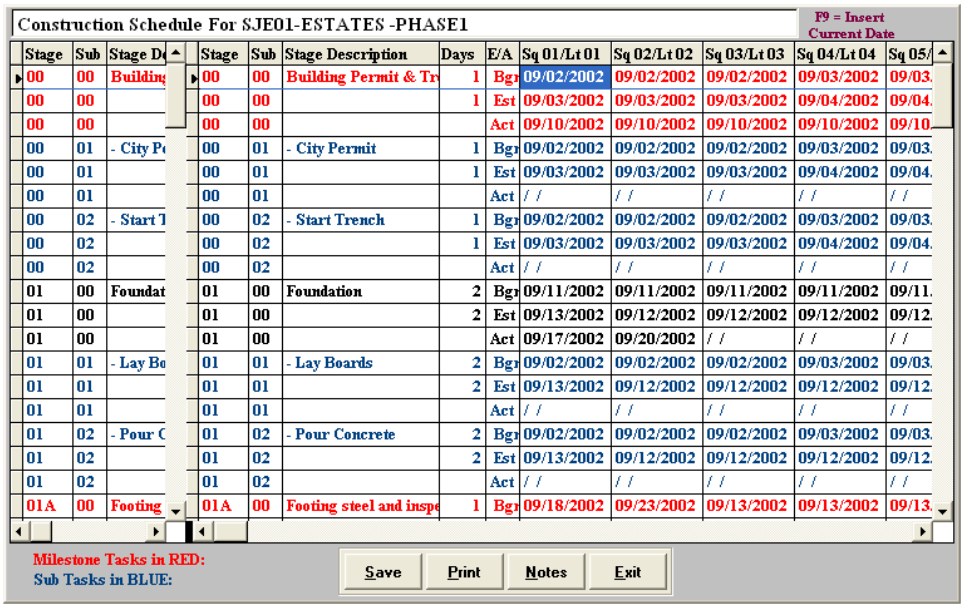
Maintaining Actual Completion Dates

The scheduling system is a ***dynamic*** system that allows you to have construction enter ***actual completion dates*** for each construction stage if desired. By doing this, the scheduling system will revise the schedule for all the remaining tasks in the schedule. It will always keep track of where you are on each home relative to the original estimated schedule. To update the schedule ***actuals***, select **Scheduling: Update Schedule Actuals**. Next choose the phase that you will be updating and whether or not you want the original estimated start date to be displayed and the screen on the following page will appear.

Note: Only the critical path items are affected by the ***actual dates*** entered. The subtasks *(in blue)* do not change.

For each Stage, enter the ***Act*** (actual) or ***Est*** (estimated) date where required for the all following dates for each future stage to recalculate. Pressing F9 with the cursor in any of the date fields will automatically insert today's date. Any ***Milestone Tasks*** will appear in red and the ***Sub Tasks*** in blue. Each lots are indicated is indicated at the top and is it's own column so that you can update all the lots from this one screen. Use the **Save** button to save your changes and exit this screen or use the **Exit** button to exit without saving. The **Print** button is used to print the ***Construction Schedule*** (as described below) however please make sure that you **Save** your information before doing so. The **Notes** button provides a way of adding notes to the construction schedule report. (eg: rain delays, labor problems, etc).

That is basically all there is to setting up and maintaining the schedule for each phase of construction. By keeping it simple, we make it easier for you.

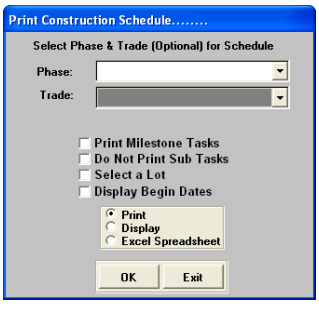


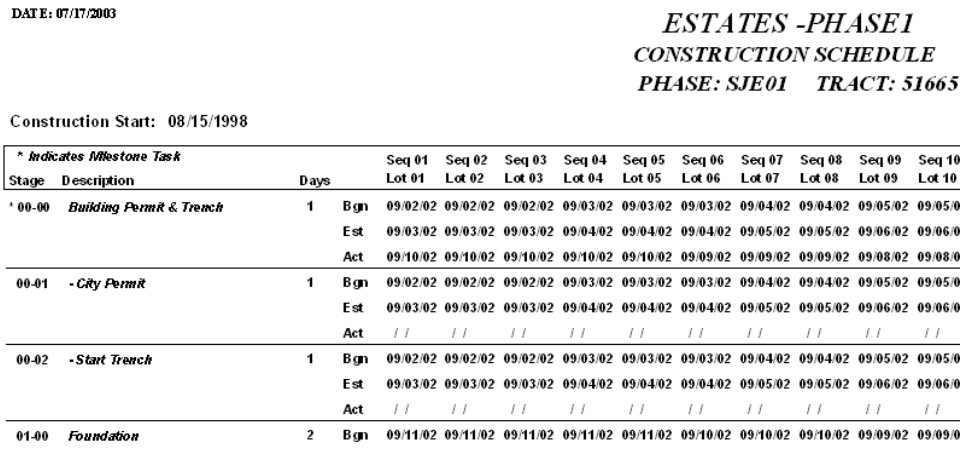
Stage	Sub	Stage De	Stage	Sub	Stage Description	Days	E/A	Sq 01/Lt 01	Sq 02/Lt 02	Sq 03/Lt 03	Sq 04/Lt 04	Sq 05/
00	00	Buildin	00	00	Building Permit & Tr	1	Bgn	09/02/2002	09/02/2002	09/02/2002	09/03/2002	09/03.
00	00		00	00		1	Est	09/03/2002	09/03/2002	09/03/2002	09/04/2002	09/04.
00	00		00	00			Act	09/10/2002	09/10/2002	09/10/2002	09/10/2002	09/10.
00	01	- City Pe	00	01	- City Permit	1	Bgn	09/02/2002	09/02/2002	09/02/2002	09/03/2002	09/03.
00	01		00	01		1	Est	09/03/2002	09/03/2002	09/03/2002	09/04/2002	09/04.
00	01		00	01			Act	/ /	/ /	/ /	/ /	/ /
00	02	- Start T	00	02	- Start Trench	1	Bgn	09/02/2002	09/02/2002	09/02/2002	09/03/2002	09/03.
00	02		00	02		1	Est	09/03/2002	09/03/2002	09/03/2002	09/04/2002	09/04.
00	02		00	02			Act	/ /	/ /	/ /	/ /	/ /
01	00	Foundat	01	00	Foundation	2	Bgn	09/11/2002	09/11/2002	09/11/2002	09/11/2002	09/11.
01	00		01	00		2	Est	09/13/2002	09/12/2002	09/12/2002	09/12/2002	09/12.
01	00		01	00			Act	09/17/2002	09/20/2002	/ /	/ /	/ /
01	01	- Lay Bo	01	01	- Lay Boards	2	Bgn	09/02/2002	09/02/2002	09/02/2002	09/03/2002	09/03.
01	01		01	01		2	Est	09/13/2002	09/12/2002	09/12/2002	09/12/2002	09/12.
01	01		01	01			Act	/ /	/ /	/ /	/ /	/ /
01	02	- Pour C	01	02	- Pour Concrete	2	Bgn	09/02/2002	09/02/2002	09/02/2002	09/03/2002	09/03.
01	02		01	02		2	Est	09/13/2002	09/12/2002	09/12/2002	09/12/2002	09/12.
01	02		01	02			Act	/ /	/ /	/ /	/ /	/ /
01A	00	Footing	01A	00	Footing steel and inspe	1	Bgn	09/18/2002	09/23/2002	09/13/2002	09/13/2002	09/13.

Scheduling Reports

Print Construction schedule

To print the initial estimated construction schedule for each lot select **Scheduling: Print Construction Schedule** and select the phase. If choose to print by trade then the construction schedules for the selected trade will appear. The other options associated with this print button are self explanatory. You can also print the schedule to an Excel Spreadsheet.





DATE: 07/17/2003

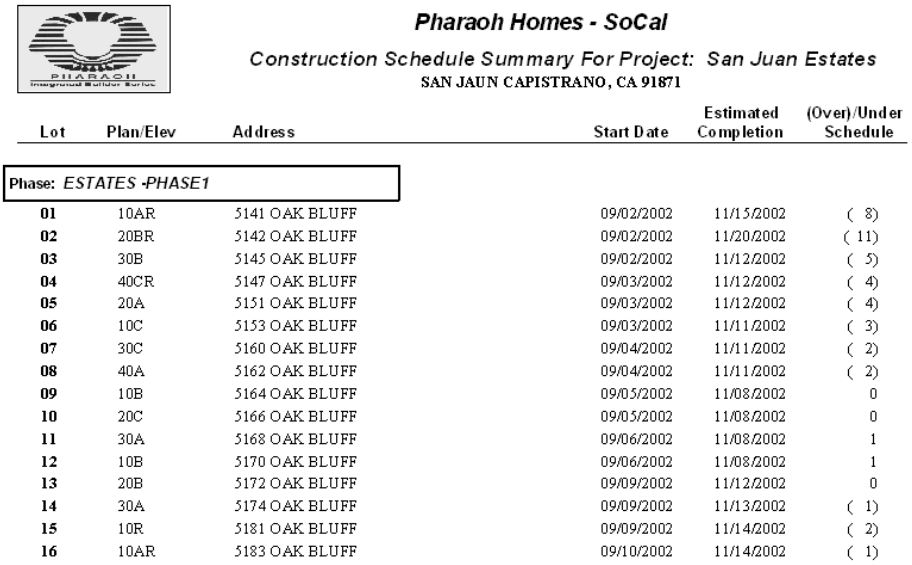
ESTATES -PHASE1
CONSTRUCTION SCHEDULE
PHASE: SJE01 TRACT: 51665

Construction Start: 08/15/1998

* Indicates Milestone Task Stage	Description	Days		Seq 01 Lot 01	Seq 02 Lot 02	Seq 03 Lot 03	Seq 04 Lot 04	Seq 05 Lot 05	Seq 06 Lot 06	Seq 07 Lot 07	Seq 08 Lot 08	Seq 09 Lot 09	Seq 10 Lot 10
* 00-00	*Building Permit & Trench*	1	Bgn	09/02/02	09/02/02	09/02/02	09/03/02	09/03/02	09/03/02	09/04/02	09/04/02	09/05/02	09/05/0
			Est	09/03/02	09/03/02	09/03/02	09/04/02	09/04/02	09/04/02	09/05/02	09/05/02	09/06/02	09/06/0
			Act	09/10/02	09/10/02	09/10/02	09/10/02	09/10/02	09/09/02	09/09/02	09/09/02	09/08/02	09/08/0
00-01	*- City Permit*	1	Bgn	09/02/02	09/02/02	09/02/02	09/03/02	09/03/02	09/03/02	09/04/02	09/04/02	09/05/02	09/05/0
			Est	09/03/02	09/03/02	09/03/02	09/04/02	09/04/02	09/04/02	09/05/02	09/05/02	09/06/02	09/06/0
			Act	/ /	/ /	/ /	/ /	/ /	/ /	/ /	/ /	/ /	/ /
00-02	*- Start Trench*	1	Bgn	09/02/02	09/02/02	09/02/02	09/03/02	09/03/02	09/03/02	09/04/02	09/04/02	09/05/02	09/05/0
			Est	09/03/02	09/03/02	09/03/02	09/04/02	09/04/02	09/04/02	09/05/02	09/05/02	09/06/02	09/06/0
			Act	/ /	/ /	/ /	/ /	/ /	/ /	/ /	/ /	/ /	/ /
01-00	*Foundation*	2	Bgn	09/11/02	09/11/02	09/11/02	09/11/02	09/11/02	09/10/02	09/10/02	09/10/02	09/09/02	09/09/0

Print Project Summary Schedule

This report lists your lots by phase and provides the start date along with the estimated completions date and the number of days that you are either over or under.



Pharaoh Homes - SoCal

Construction Schedule Summary For Project: San Juan Estates

SAN JAUN CAPISTRANO, CA 91871

Lot	Plan/Elev	Address	Start Date	Estimated Completion	(Over)/Under Schedule
Phase: *ESTATES -PHASE1*					
01	10AR	5141 OAK BLUFF	09/02/2002	11/15/2002	(8)
02	20BR	5142 OAK BLUFF	09/02/2002	11/20/2002	(11)
03	30B	5145 OAK BLUFF	09/02/2002	11/12/2002	(5)
04	40CR	5147 OAK BLUFF	09/03/2002	11/12/2002	(4)
05	20A	5151 OAK BLUFF	09/03/2002	11/12/2002	(4)
06	10C	5153 OAK BLUFF	09/03/2002	11/11/2002	(3)
07	30C	5160 OAK BLUFF	09/04/2002	11/11/2002	(2)
08	40A	5162 OAK BLUFF	09/04/2002	11/11/2002	(2)
09	10B	5164 OAK BLUFF	09/05/2002	11/08/2002	0
10	20C	5166 OAK BLUFF	09/05/2002	11/08/2002	0
11	30A	5168 OAK BLUFF	09/06/2002	11/08/2002	1
12	10B	5170 OAK BLUFF	09/06/2002	11/08/2002	1
13	20B	5172 OAK BLUFF	09/09/2002	11/12/2002	0
14	30A	5174 OAK BLUFF	09/09/2002	11/13/2002	(1)
15	10R	5181 OAK BLUFF	09/09/2002	11/14/2002	(2)
16	10AR	5183 OAK BLUFF	09/10/2002	11/14/2002	(1)

Print Construction Efficiency Report

This report is a custom report similar to the Project Summary Schedule except for some additional columns that have been added. It is recommended that you use the Project Summary Report as the additional columns will not display anything.