

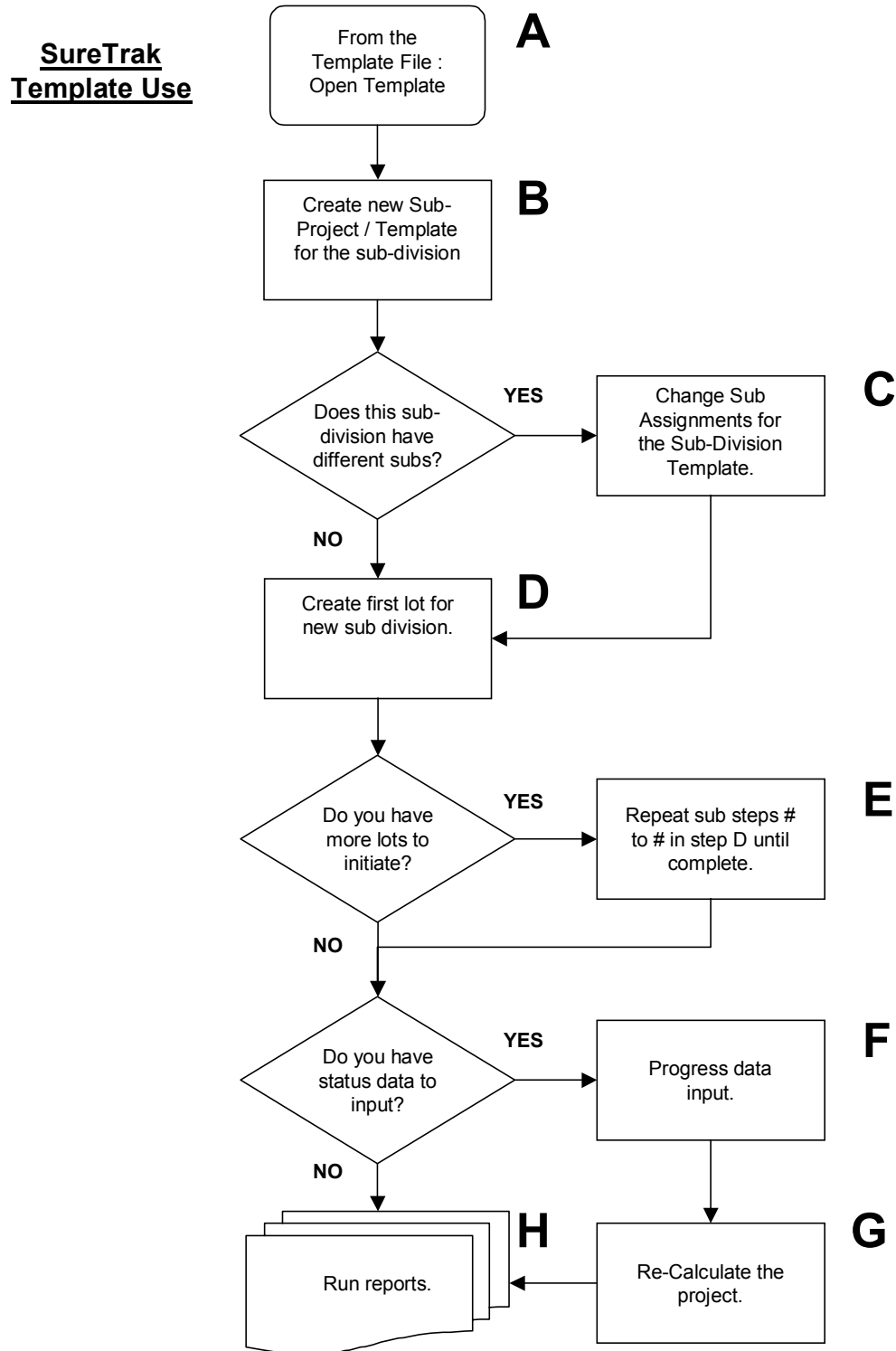
## **1.0 OVERVIEW**

This procedure documents the use of the SureTrak Planning software for Apple Orchard Home Builders. In particular it outlines the use and implementation of a template used to create plans for sub-divisions by lot.

This data is then used to generate reports that are faxed to each responsible sub contractor. See section 4.0 for examples of the output.

## 2.0 FLOW CHART

This flow chart describes the work process for users.



### 3.0 PROCEDURE



#### A. Open the Template Project

**NOTE: SureTrak for this implementation will always be working with the "Project Groups" format or project type.**

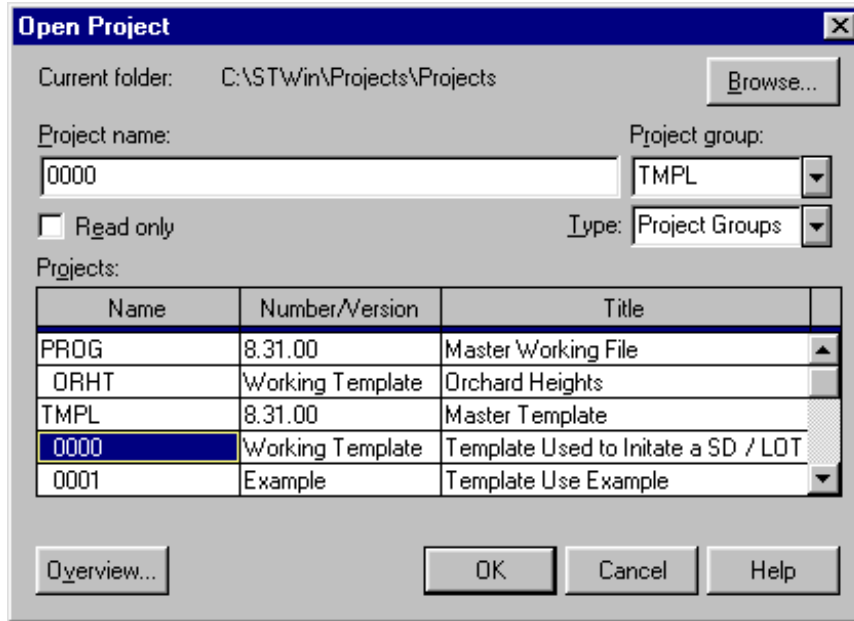
A.1 Launch the SureTrak for windows program.

A.2 After launching, the program will display the "Welcome Screen" shown below.



From this screen you can open the Template project if it is the last project you opened. The button at the bottom of this window will display "0000" if it was the last project opened.

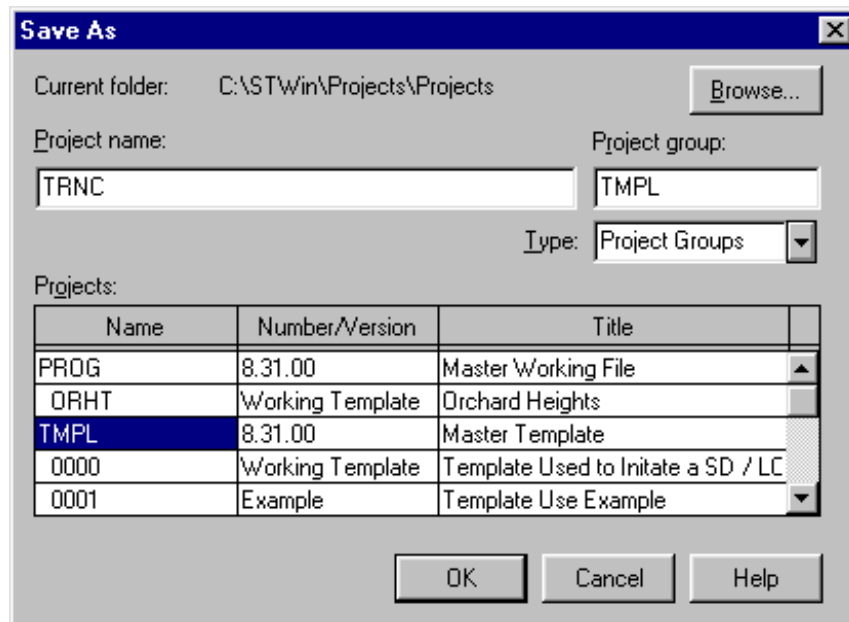
If it is not listed, click on the "Open an existing SureTrak project", or close this window and select [File|Open] from the menu and the "Open Project" window will display. Select the sub-project "0000" from project group "TMPL" and proceed to step B.



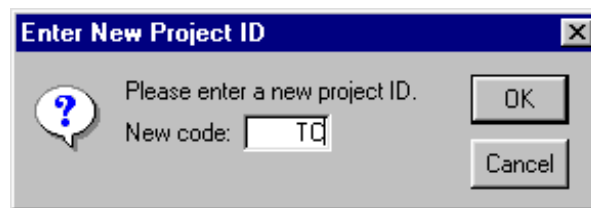
**B. Create New Sub-Project / Template for Sub-Division**

**B**

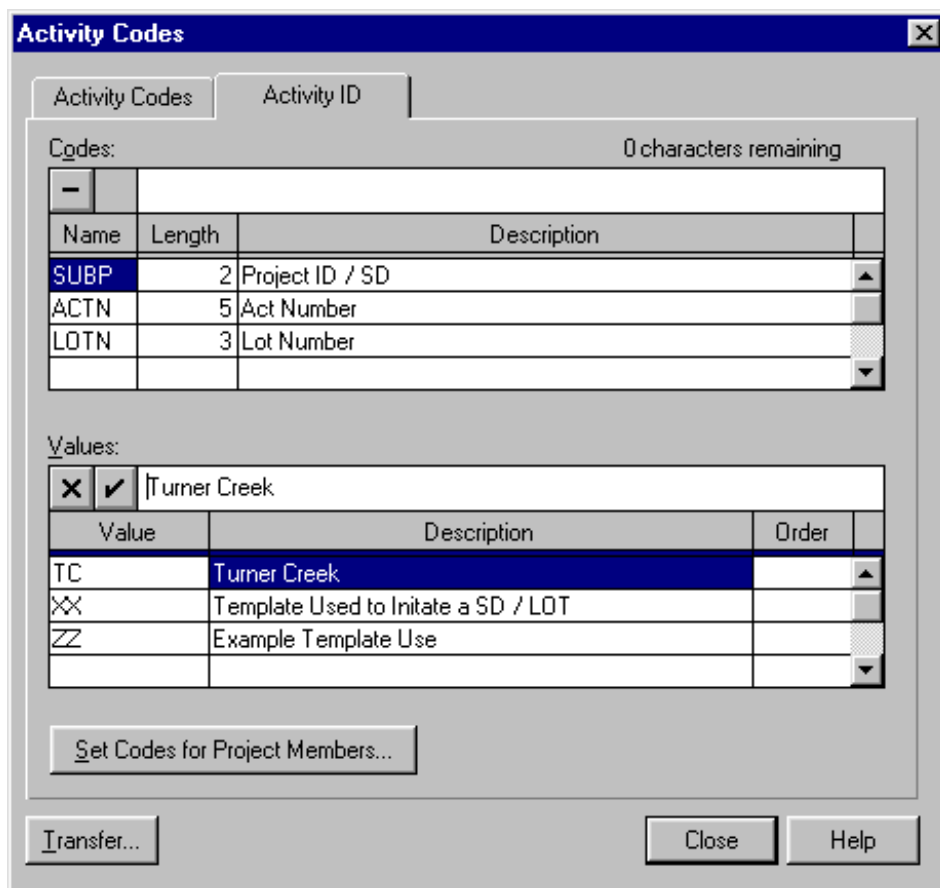
- B.1 After opening the sub-project "0000" of project group "TMPL", chose |File|Save as| from the menu. The window shown below B.2 will display.
- B.2 Save this file to the project group "TMPL" with a new 4-letter name related to the sub-division that this template is for. For our example we are using the 4 letters "TRNC" for Turner Creek and the project group is "TMPL".



- B.3 Click OK and the "Enter New Project ID" screen will display. Input the two letters that will uniquely identify the tasks in the schedule for Turner Creek. For our example, we will use "TC". See example below.



- B.4 Click OK and the new sub-division template is created with the proper project id. Next, close the project and you will be prompted to save changes. Click yes.
- B.5 Next we have to update the project id within the data dictionary to reflect the correct title. From the menu, select |File|Open| and open the project group "TMPL". We have to be in the project group to change this data.



- B.6 After the file opens, select |Define|Activity Codes| from the menu and the activity codes window will display. Next select the "Activity ID" tab to get to the data we want to change. See window display below.

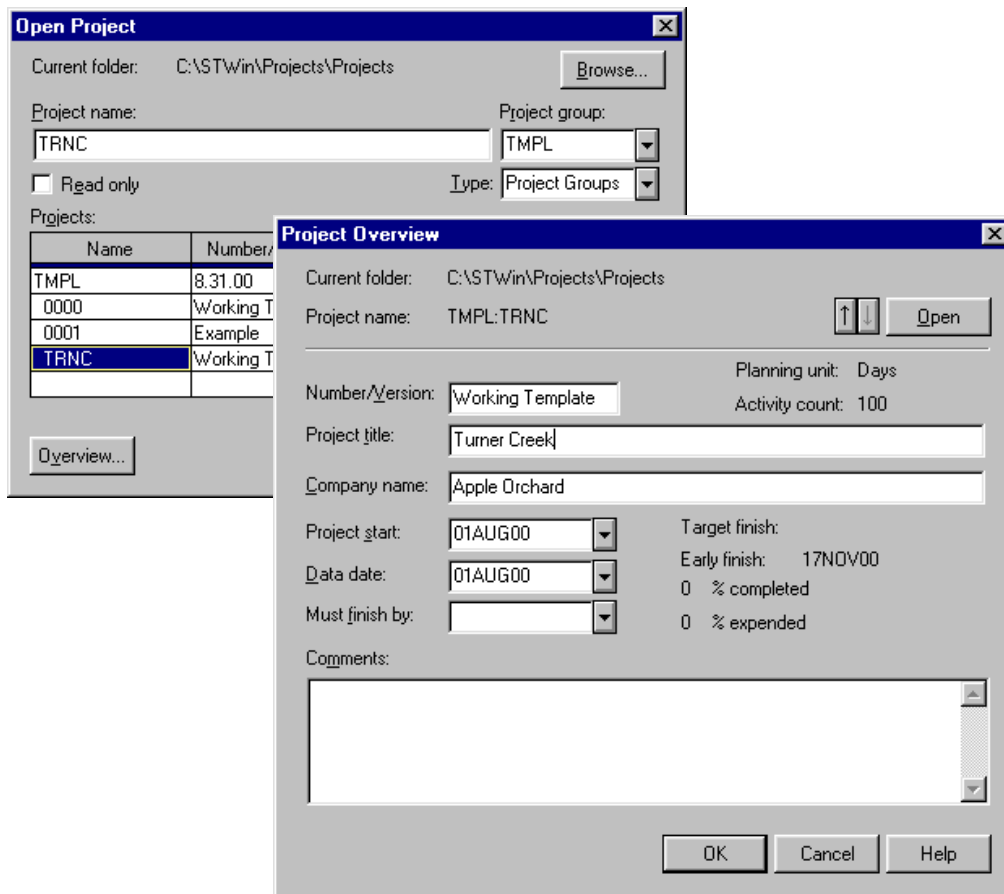
- B.7 In the lower pane of this window titled "Values", select the project id code for Turner Creek, "TC". Place your cursor into the description box and then click above in the edit space. Change the description here to the correct sub-division name.
- B.8 After inputting the correct description, click on the check button and then close the window. Then close the project and you will be prompted to save changes. Click "Yes".
- B.9 Before proceeding, determine if this sub-division has different sub contractor assignments than the generic template. If the subs are different, proceed to step C. If the subs are the same, proceed to step D.

C

**C. Change Sub Assignments in Sub-Division Template**

C.1 Open the sub division template that you just created. For your example we will again open the Turner Creek template named “TRNC”. Go to |File|Open| and select the sub project.

**NOTE: Before opening the file, change the “Title” in the open project window to read as the sub division name. To do this, highlight the project and then click on the “Overview” button.**



C.2 After the sub project finishes loading; select the activity that has a sub contractor assignment that is different than the template sub project. You can tell the activity is selected because it will be highlighted. See Below.

| AKS Engineering and Forestry |                             |                               |
|------------------------------|-----------------------------|-------------------------------|
| TC-045-                      | Stake Out                   | ■ Stake Out                   |
| Bear Electric                |                             |                               |
| TC-265-                      | Rough Electrical            | ■ Rough Electric              |
| TC-270-                      | Electrical Inspection       | ■ Electrical Insp             |
| TC-285-                      | Call for Permanent Power    | ■ Call for Perr               |
| TC-400-                      | Electrical Finish           |                               |
| BMC West Building Materials  |                             |                               |
| TC-070-                      | Drop P & B                  | ■ Drop P & B                  |
| TC-100-                      | P & B Installed             | ■ P & B Installed             |
| TC-115-                      | P & B Sturctural Inspection | ■ P & B Sturctural Inspection |
|                              |                             | ■ P & B Inspected             |

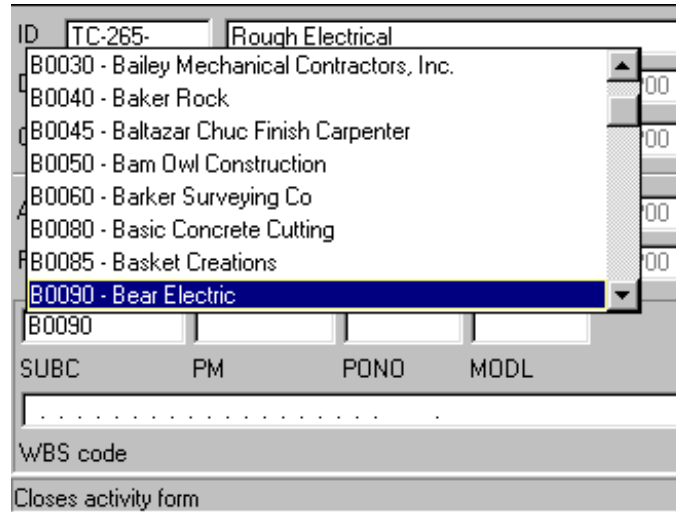
C.3 As you can see, we have chosen an activity assigned to Bear Electric titled “Rough Electrical”. Next we want to access the detail for the activity. Press [F7] on the keyboard and the detail pane will open at the bottom of the screen for the selected activity. Initially, you will not see the code fields. To reveal them, click on the “More” button at the bottom right of the detail pane.

|          |         |                                   |              |          |              |
|----------|---------|-----------------------------------|--------------|----------|--------------|
| ID       | TC-265- | Rough Electrical                  | Close        | Previous | Next         |
| Duration | 2       | <input type="checkbox"/> Started  | Early Start  | 12SEP00  | Rem Duration |
| Calendar | 1       | <input type="checkbox"/> Finished | Early Finish | 13SEP00  | % Complete   |
|          |         |                                   |              |          | 0.0          |
|          |         |                                   |              |          | More >>      |
|          |         |                                   |              |          | Turner Creek |
|          |         |                                   |              |          | 17NOV00      |
|          |         |                                   |              |          | TMPL         |
|          |         |                                   |              |          | F/B          |

|  |         |                                   |              |             |                                     |       |  |  |  |      |    |      |      |
|--|---------|-----------------------------------|--------------|-------------|-------------------------------------|-------|--|--|--|------|----|------|------|
| ID   | TC-265- | Rough Electrical                  | Close        | Previous    | Next                                |       |  |  |  |      |    |      |      |
| Duration   | 2       | <input type="checkbox"/> Started  | Early Start  | 12SEP00     | Rem Duration                        |       |  |  |  |      |    |      |      |
| Calendar   | 1       | <input type="checkbox"/> Finished | Early Finish | 13SEP00     | % Complete                          |       |  |  |  |      |    |      |      |
|  |         |                                   |              |             | 0.0                                 |       |  |  |  |      |    |      |      |
|  |         |                                   |              |             | << Less                             |       |  |  |  |      |    |      |      |
| Act. Type  | Task    | Late Start                        | 13SEP00      | Total Float | 1d                                  |       |  |  |  |      |    |      |      |
| Priority   | 1       | Late Finish                       | 14SEP00      | Free Float  | 0                                   |       |  |  |  |      |    |      |      |
| <table border="1"> <tr> <td>B0090</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SUBC</td> <td>PM</td> <td>PONO</td> <td>MODL</td> </tr> </table> |         |                                   |              |             |                                     | B0090 |  |  |  | SUBC | PM | PONO | MODL |
| B0090  |         |                                   |              |             |                                     |       |  |  |  |      |    |      |      |
| SUBC   | PM      | PONO                              | MODL         |             |                                     |       |  |  |  |      |    |      |      |
| WBS code   |         |                                   |              |             |                                     |       |  |  |  |      |    |      |      |
|  |         |                                   |              |             | Spotlights activities with progress |       |  |  |  |      |    |      |      |
|  |         |                                   |              |             | Turner Creek                        |       |  |  |  |      |    |      |      |
|  |         |                                   |              |             | 17NOV00                             |       |  |  |  |      |    |      |      |
|  |         |                                   |              |             | TMPL                                |       |  |  |  |      |    |      |      |
|  |         |                                   |              |             | F/B                                 |       |  |  |  |      |    |      |      |

C.4 After revealing all the detail, you will see the sub contractor code field at the bottom left of the opened pane. Place your cursor in this field and a drop down arrow will become visible.

Click on the drop down arrow and you can select any of the sub contractors currently input into the software.



C.5 After changing the code, you have to click the “OK” button that now appears at the top right of the detail pane. Clicking “OK” will commit the change to the file. If you want to cancel the change, the click on the “CANCEL” button located in the same area.

**NOTE: SureTrak is memory resident software. This means that data is not permanently saved until you click on the save button or save the file when exiting the software.**

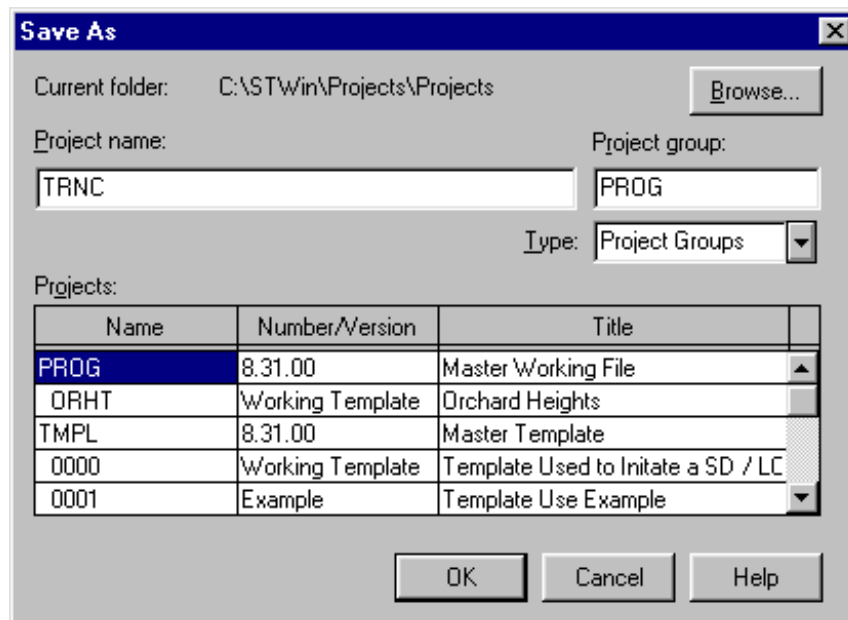
C.6 Repeat steps C.2 through C.5 until all changes have been made. Click the save button to save the changes to the template. Next move on to step D.

**NOTE: Use the detail window to make any other changes to the schedule template before creating your first lot.**

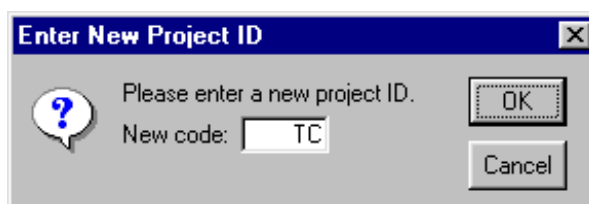
**D. Create First Lot for New Sub-Division**

**D**

- D.1 Open the sub division template that you just created. For your example we will again open the Turner Creek template named "TRNC". Go to |File|Open| and select the sub project.
- D.2 After the file finishes loading, select |File|Save As| and save the template project to the current project file named "PROG".



- D.3 Click OK and the "Enter New Project ID" screen will display. You do not have to input the two letters that will uniquely identify the tasks in the schedule because we will use the same two letters. For our example, we will continue to use "TC". See example below.



- D.4 Click OK and the file is now saved into the project group "PROG" as the Turner Creek sub project "TRNC".

- D.5 After the file finished loading under the new name, next select |File|Project Overview| and the “Project Overview” window will display with the “Number/Version” field highlighted. Change this field to “Current” or a date that is representative of the progress as of date. For our example we will input 09.13.00 for a progress cut off date of September 13, 2000. See example below.

Project Overview

Current folder: C:\STWin\Projects\Projects

Project name: PROG:TRNC

Number/Version: 09.13.00

Project title: Turner Creek

Company name: Apple Orchard

Project start: 01AUG00

Data date: 01AUG00

Must finish by:

Planning unit: Days

Activity count: 100

Target finish: 17NOV00

0 % completed

0 % expended

Comments:

OK Cancel Help

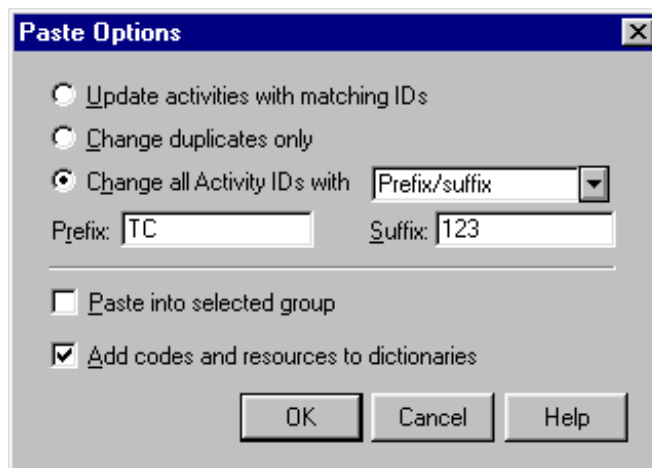
**NOTE:** You can enter comments in the field at the bottom of this window to capture additional information about the sub division that is relevant.

- D.6 Next click the save button on the tool bar to make sure our work is committed.
- D.7 Now that we have created the sub division’s sub project we now want to create the first lot. Next, from the menu select |Edit|Select All|. When you do this you will see all activities become highlighted.

- D.8 Next, select from the menu |Edit|Copy Activity|. This will copy all the activities into the computer systems clipboard.
- D.9 Next, select from the menu |Edit|Paste Activity| and then the “Paste Options” window will display. From here we will choose the radio button titled “Change All Activity IDs with” and then click the drop down arrow to the left of the field. From the drop down list, select “Prefix/Suffix”. This will reveal in the window the “Prefix” and “Suffix” fields.

DO NOT CHANGE THE PREFIX. INPUT THE LOT NUMBER INTO THE SUFFIX FIELD. THREE NUMBERS MAXIMUM.

For our example we will use the number 123. Then click the “OK” button. Clicking the “OK” button will paste every activity into the sub project and create the lot number you input.



- D.10 Next we need to remove the activities that do not have a lot number associated with them. To do this, from the menu select |Edit|Invert Selection| and this will switch the selection to the other activities.

**NOTE: The invert selection will only work as long as you have not clicked on another activity after the paste was executed. To select the activities manually, click on the first one and then hold the shift key and arrow down to the last one.**

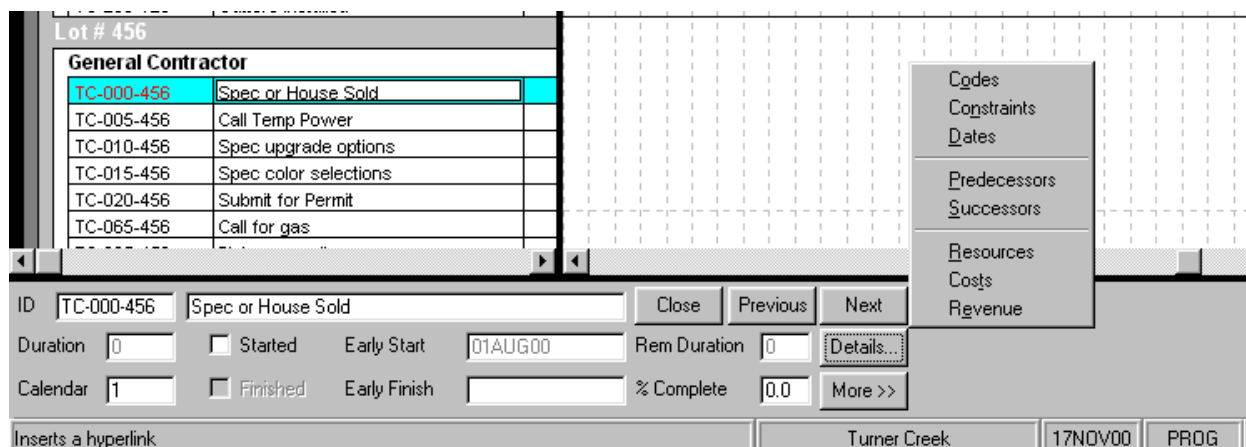
- D.11 Next we select from the menu, |Edit|Delete Activity| and the delete window will display. Click on the button that is titled “Yes to All”. This removes all the activities that do not have a lot number. See window below.



D.12 We have now successfully added the first lot for the sub-division. Click the save button to commit the changes.

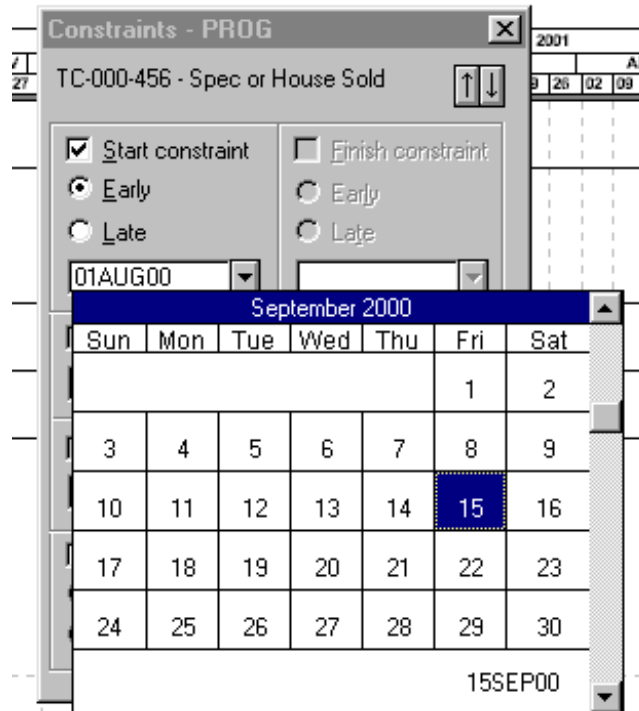
D.13 To complete the initiation of a lot we have to input the planned start and finish of the lot. Assuming that you have the lot still open, we need to select the activity ID of TC-000-456, for our example. This is the activity titled “Spec or House Sold”.

D.14 Next select the |F7| key on the keyboard and bring up the detail window. In the bottom right is a button titled “Details...”. Click on the button and a short cut menu will come up allowing you to select “Constraints”.

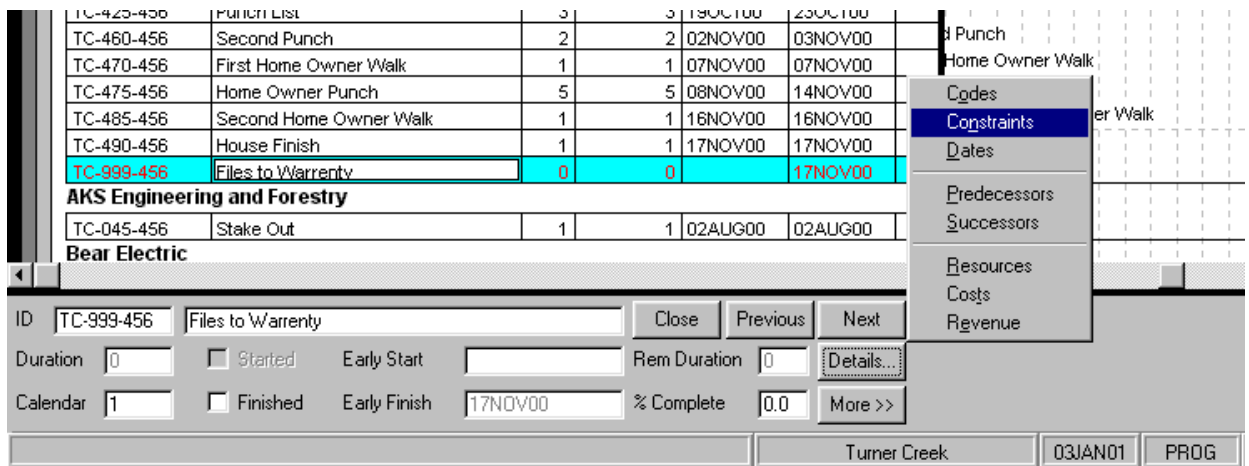


D.15 Selecting “Constraints” brings up the constraint window. Because this is a start milestone for the lot, we are going to assign an Early Start Constraint. For our example we are

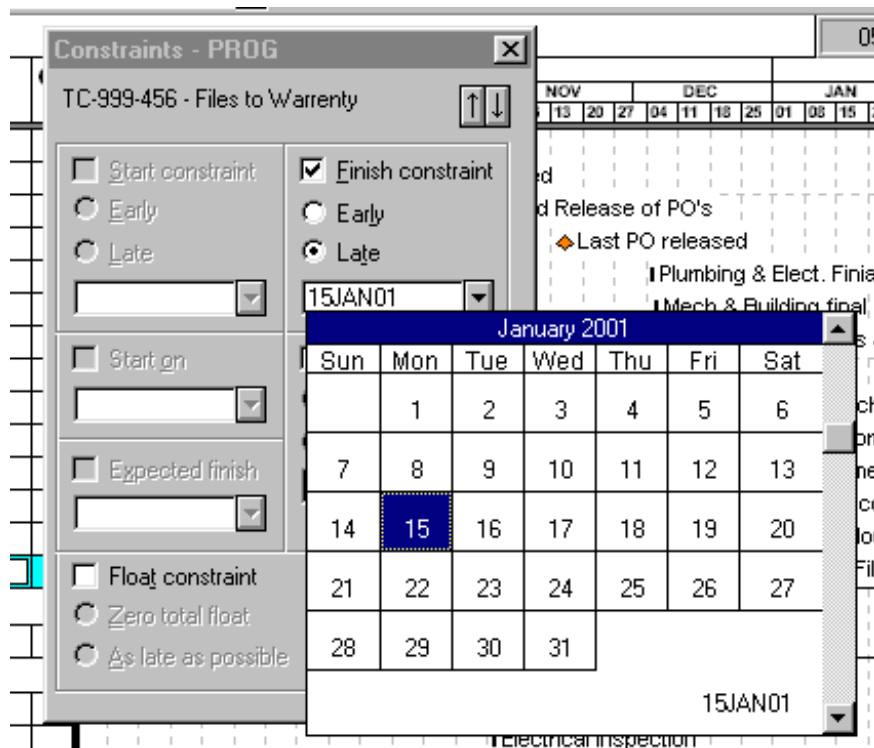
going to choose an early start constraint of September 15, 2000.



- D.16 We have now successfully planned the start date of the lot. Next we have to plan the finish of the lot.
- D.17 Assuming that you have the lot still open, we need to select the activity ID of TC-999-456, for our example. This is the activity titled "Files to Warranty".
- D.18 Next select the |F7| key on the keyboard and bring up the detail window. In the bottom right is a button titled "Details...". Click on the button and a short cut menu will come up allowing you to select "Constraints".



D.19 Selecting “Constraints” brings up the constraint window. Because this is a Finish milestone for the lot, we are going to assign a Late Finish Constraint. For our example we are going to choose a late finish constraint of January 15, 2000.



D.20 We have now successfully planned the finish of the lot. Click the save button to commit the changes.

D.21 Go to step G to re-calculate the schedule.

## E. Create Additional Lots for the Sub Division



- E.1 Open the sub division template that you created in the project group TMPL. For your example we will again open the Turner Creek template named “TRNC”. Go to |File|Open| and select the sub project.
- E.2 Next, open the same “TRNC” sub project in the project group “PROG”. We now have both projects open at the same time.
- E.3 Switch to the project group “TMPL” and from the menu select |Edit|Select All|. This will highlight all the activities for “TRNC” in the project group “TMPL”.
- E.4 Next, from the menu select |Edit|Copy Activity|. We are going to copy data from “TMPL:TRNC” to “PROG:TRNC”.
- E.5 Switch to the project group “PROG” and from the menu select |Edit|Paste Activity|. This will display the same paste options window that we used in step D earlier. From here we will choose the radio button titled “Change All Activity IDs with” and then click the drop down arrow to the left of the field. From the drop down list, select “Prefix/Suffix”. This will reveal in the window the “Prefix” and “Suffix” fields.  
**DO NOT CHANGE THE PREFIX. INPUT THE LOT NUMBER INTO THE SUFFIX FIELD. THREE NUMBERS MAXIMUM.**  
For our example we will use the number 456. Then click the “OK” button. Clicking the “OK” button will paste every activity into the sub project and create the lot number you input.
- E.6 We have now successfully added another lot to the sub-division. Click the save button to commit the changes. Repeat these steps until you have created all the lots you need.
- E.7 To complete the planning of the lot, refer back to steps D.13 to D.21 for inputting planned constraints.



**F. Progress Data Input**

- F.1 Open the project that you want to update and select the activity that you want to add progress data to.
- F.2 Next we want to access the detail for the activity. Press [F7] on the keyboard and the detail pane will open at the bottom of the screen for the selected activity.

|          |         |                                   |              |          |              |
|----------|---------|-----------------------------------|--------------|----------|--------------|
| ID       | TC-265- | Rough Electrical                  | Close        | Previous | Next         |
| Duration | 2       | <input type="checkbox"/> Started  | Early Start  | 12SEP00  | Rem Duration |
| Calendar | 1       | <input type="checkbox"/> Finished | Early Finish | 13SEP00  | % Complete   |
|          |         |                                   |              | 0.0      | More >>      |
|          |         |                                   |              |          | Turner Creek |
|          |         |                                   |              |          | 17NOV00      |
|          |         |                                   |              |          | TMPL         |
|          |         |                                   |              |          | F/B          |

- F.3 After revealing all the detail, you will see the all the data related to your activity. To status an activity, we will be inputting actual start dates, percentage complete, and actual finish dates.

To input an actual start date, check the box next to the Early Start date titled “Started”. After clicking the “Started” box, the Early Start will become Actual Start. Click in the date field and use the drop down arrow to select a date from the calendar.

|                                    |                               |   |              |         |              |     |            |              |         |
|------------------------------------|-------------------------------|---|--------------|---------|--------------|-----|------------|--------------|---------|
| <b>Bear Electric</b>               |                               |   |              |         |              |     |            |              |         |
| TC-265-123                         | Rough Electrical              |   |              |         |              |     |            |              |         |
| TC-270-123                         | Electrical Inspection         |   |              |         |              |     |            |              |         |
| TC-285-123                         | Call for Permanent Power      | Sun   | Mon          | Tue     | Wed          | Thu | Fri        | Sat          |         |
| TC-400-123                         | Electrical Finish             |   |              |         |              |     | 1          | 2            |         |
| <b>BMC West Building Materials</b> |                               |   |              |         |              |     |            |              |         |
| TC-070-123                         | Drop P & B                    | 3   | 4            | 5       | 6            | 7   | 8          | 9            |         |
| TC-100-123                         | P & B Installed               |   |              |         |              |     |            |              |         |
| TC-115-123                         | P & B Sturctural Inspection   | 10  | 11           | 12      | 13           | 14  | 15         | 16           |         |
| TC-125-123                         | P & B decked                  |   |              |         |              |     |            |              |         |
| TC-130-123                         | 1st floor walls dropped & Ins | 17  | 18           | 19      | 20           | 21  | 22         | 23           |         |
| TC-140-123                         | Install joist & deck          | 24  | 25           | 26      | 27           | 28  | 29         | 30           |         |
| ID                                 | TC-265-123                    | Rough Electrical                            |              |         |              |     |            |              | 12SEP00 |
| Duration                           | 2                             | <input checked="" type="checkbox"/> Started | Actual Start | 12SEP00 | Rem Duration | 2   | Details... |              |         |
| Calendar                           | 1                             | <input type="checkbox"/> Finished           | Early Finish | 13SEP00 | % Complete   | 0.0 | More >>    |              |         |
|                                    |                               |   |              |         |              |     |            | Turner Creek |         |

To input a percent complete, place your cursor in the field titled “% Complete” and simply input a number between 00.0 and 100.0. Note that a percent complete of 100 means that the task is done and requires the input of a finish date.

|          |            |   |              |          |                    |
|----------|------------|---|--------------|----------|--------------------|
| ID       | TC-265-123 | Rough Electrical                            | Close        | Previous | Next               |
| Duration | 2          | <input checked="" type="checkbox"/> Started | Actual Start | 12SEP00  | Rem Duration       |
| Calendar | 1          | <input type="checkbox"/> Finished           | Early Finish | 12SEP00  | % Complete         |
|          |            |   |              |          | 67.0               |
|          |            |   |              |          | Details... More >> |

Turner Creek

To input an actual finish date, check the box next to the Early Finish date titled “Finished”. After clicking the “Finished” box, the Early Finish will become Actual Finish. Click in the date field and use the drop down arrow to select a date from the calendar. Note that when you input an actual finish date, the percent complete automatically goes to 100.0%.

|          |            |  |               |          |                    |
|----------|------------|--|---------------|----------|--------------------|
| ID       | TC-265-123 | Rough Electrical                             | Close         | Previous | Next               |
| Duration | 2          | <input checked="" type="checkbox"/> Started  | Actual Start  | 12SEP00  | Rem Duration       |
| Calendar | 1          | <input checked="" type="checkbox"/> Finished | Actual Finish | 13SEP00  | % Complete         |
|          |            |  |               |          | 100.0              |
|          |            |  |               |          | Details... More >> |

Turner Creek

F.4 After making the changes, you have to click the “OK” button that now appears at the top right of the detail pane. Clicking “OK” will commit the change to the file. If you want to cancel

the change, the click on the “CANCEL” button located in the same area.

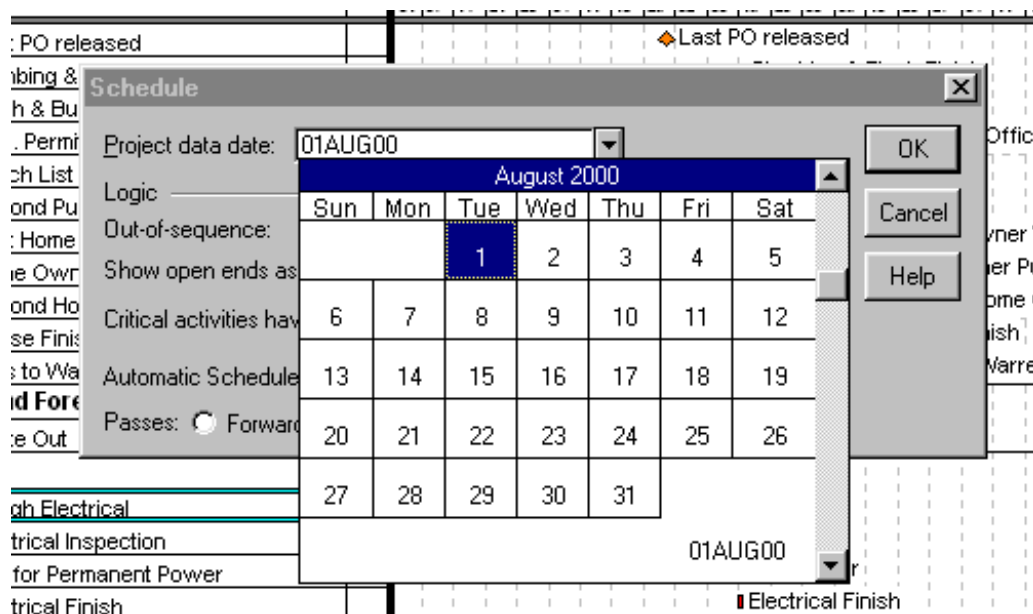
**NOTE: SureTrak is memory resident software. This means that data is not permanently saved until you click on the save button or save the file when exiting the software.**

F.5 Repeat this process for each activity that you want to input progress data for. Then move on to step G.



**G. Re-Calculate the Project.**

- G.1 We will assume that you already have the project you want to recalculate open. If not, open it now using the |File|Open| command from the menu.
- G.2 After the file finishes loading, from the menu select |Tools|Schedule|. This will display the schedule window.



- G.3 Click you mouse into the project data date window and use the drop down arrow to select the new date using the calendar.
- G.4 After selecting the new data date, click OK and SureTrak will re-calculate the schedule.
- G.5 Next you should evaluate the schedule and determine where you are ahead of schedule or behind schedule.

**NOTE: Total float that is greater than 0 means you are ahead of schedule or have slack. Total float that is equal to 0 means that it is critical and must start or finish on the dates calculated to avoid and delays. Total float that is**

**less than 0 means you are behind schedule. To recover delays, you can either extend the house closing date or accelerate work remaining. Acceleration can be a combination of performing activities in less time or performing work concurrently that would normally take place serially.**

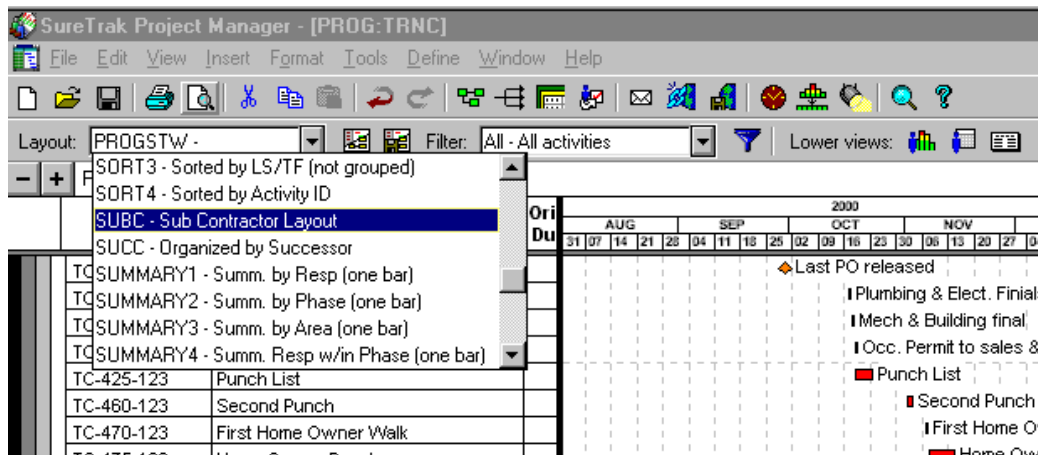
G.6 Once you have finished making your changes and finished re-calculating the schedule move on to step H – Reports.

**NOTE: SureTrak is memory resident software. This means that data is not permanently saved until you click on the save button or save the file when exiting the software.**

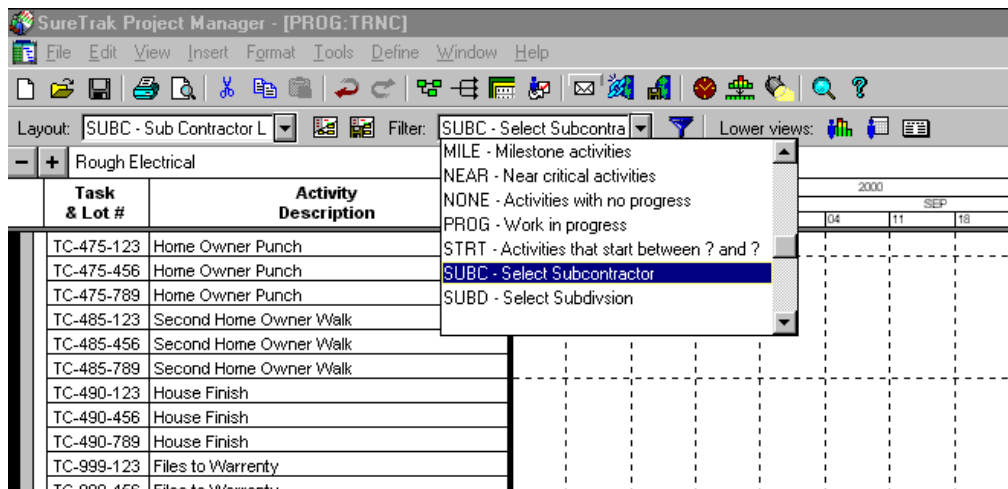


## H. Run Sub Contractor Reports.

- H.1 To run the sub contractor reports, we have to open the project group “PROG”.
- H.2 After the file finishes loading, from the tool bar, select the layout drop down arrow located at the top left. From the list of layouts select the layout titled “SUBC”. This will group all of the activities by Sub-Division and then by sub.



- H.3 Next, from the tool bar select the filter drop down list. It is located at the top to the right of the layout field. Again, we will select the filter titled “SUBC”.



- H.4 This will display the “Filter Value – Select Subcontractor” window. Use the drop down arrow and select the subcontractor you are reporting to. For our example we are choosing Bear Electric, B090. Then click the OK button.
- H.5 This will display only the activities assigned to Bear Electric. Next, make sure that your fax software is your default printer. Then from the tool bar select the print button.
- H.6 Repeat this process for each sub that you want to send a report to.

**NOTE: See section 4 of this procedure for examples of reports.**

#### 4.0 **EXAMPLES**

|       |  |
|-------|--|
| EX-01 | Sub Contractor Report – Bear Electric        |
| EX-02 | Standard Report with Total Float             |
| EX-03 | Generic Template Report with Sub Assignments |
| EX-04 | TBD  |
| EX-05 | TBD  |
| EX-05 | TBD  |