



TRADE-UP

Trade-Up

Create or Edit Project Instructions





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Introduction

Trade-Up can be used to measure the productivity of any project, material installation or task. This is done by generating a unique productivity target based on the estimated effort required to install materials.

The timesheet information and material installation data is collected to report and compare how the project is progressing against the estimated productivity score and the delivery time of the project.

Primary and Secondary material/task relationships

When completing a construction project there is usually one or a group of materials or tasks that make up the core of the job. This may be the trade package your company works on e.g. Bricks and Blocks for a Masonry Contractor or Stud Frames for a Carpenter . Or it could be the material or task that takes the most effort in the project you are completing. These items are what we refer to as the **Primary materials** or tasks.

Secondary materials are items that contribute to the project being complete but are outside the scope of the primary items. These could be sundry items or one of many tasks that are needed to set up or complete the project.

Project Productivity Target and Score

Your overall project target will only include those items that are selected as primary materials and Tasks on the job. These must all be entered in the same metric. You will be guided to select which items will be your primaries by first selecting a “Primary Metric” for your project. This will by default mark everything that is not the primary metric to secondary items.

For all the Materials and Tasks that are the primary metric, you will be able to choose whether or not to have them counted as primary or secondary items.

As suggested above we recommend you include those that make up the core work of your project. Once you have finished choosing these primary items, your project productivity target will be calculated based on these selections.

Productivity results achieved on a daily basis will be graphed relative to this overall project productivity target.

There is also opportunity to create graphs to separately display the individual productivity results of materials and sections of the project.

Project Burndown Graph

Trade-Up shows a burndown graph to represent the progression of the job vs the time allowed, also comparing the contract dates and actual work dates. This allows your team to visualise if they are tracking to complete the project on time.

For more information on how the graphs work please refer to the [Tracking Productivity Graph](#).



Instructions - Create a Project

The first step is to create a project so the foreman can start entering Time sheet and Productivity data. Click on the “Projects” tab and then click on “Add New Project” (highlighted below) to begin.

Add new Project - Button

Opens workflow to add new project , existing projects listed to left side.

TRADE-UP

Projects | Tenders | Employees

ADD NEW PROJECT

Bruce's House

Summary | Graphs | Timesheets | Productivity

Project Name: Bruce's House
 Job Number: 4847887927
 Contract Start Date: 01 Jun 2017
 Contract End Date: 15 Jun 2017
 Work Start Date: 01 Jun 2017
 Work End Date: 15 Jun 2017
 State: VIC

Config
 Productivity tracking: Score
 Primary Metric: m2 (meters squ.)

MATERIAL	TRACKING	QUANTITY	PRODUCTIVITY	EFFORT
section 1				
Natural Grey Block	Primary	1000 m2	10 m2 per man day	100 days
Gyprock Plasterboard	Secondary	50 m2	100 m2 per man day	0.5 days
Brick Cleaning	Secondary	100 m	100 m per man day	1 days
Concrete slab	Secondary	50 m2	50 m2 per man day	1 days

Delete | Save

Project name

Represents project name

Job number

Auto populated - can be edited by user

Contract Start and Finish Dates

These dates will be displayed on the burndown graph. End date is used to report if the project is tracking to be completed on time.

Work start - end dates

Timesheets can only be entered during the specified work dates - can be edited at any time during the project.



State

Add your State

Productivity tracking (How the results are viewed)

* For detailed information on reading Trade-Up graphs refer to Graphs Guide in help screen.

The productivity tracking configuration is how you would like to view the results of the productivity achieved. This can be changed whenever required and many users like to alternate between for various reasons.

A burndown graph is shown for all projects with percentage and score view. This shows the progression of the project, based on the time allocated between Work Start date and Contract end Date. If the graph is green, it means tracking at this pace the project will be completed on time. If it shows red it indicates the project is behind schedule.

Score View

The Project target score represents the amount of the primary materials you want the team to install per man , per day (8hrs). This is calculated by dividing the total amount of installation or tasks completed by the amount of team members contributing.

Eg 100 m2 of plasterboard installed with assistance of 5 workers on site = 100m2 divided by 5 men. The score achieved would be 20m2 per man.

The graph when reporting in this method shows a blue line with the target and an orange line representing what was actually achieved.

Percentage View

When viewing a project with the percentage method , the graph shows the variance between the target and the achieved score as a percentage. For example , if the target for the day was 10, and your team achieved a score of 12.5 , the percentage graph would show +25% , as you were 25% above your goal. If you achieved a score of 10, exactly the desired target , the percentage graph would show 0 , as there was no variance between your target and score.

None

Used for timesheets only. No productivity or quantitative tracking of materials or tasks. No graphs shown.

Primary Metric

Here there is a dropdown menu that allows the user to choose the primary metric for the project.

Choosing a Primary Metric for your project starts the process of deciding which are the core materials or tasks that you will include in the overall Project Productivity Target. This may be



the metric your Trade Package is primarily measured in or the task that is the most labour intensive in the project. The project productivity target will only include materials/tasks measured in this metric and selected as primary materials or tasks.

The default for this box is m2. The primary metric can be changed at any time throughout the project. Please note this will change your project target score and the graphed results to date.

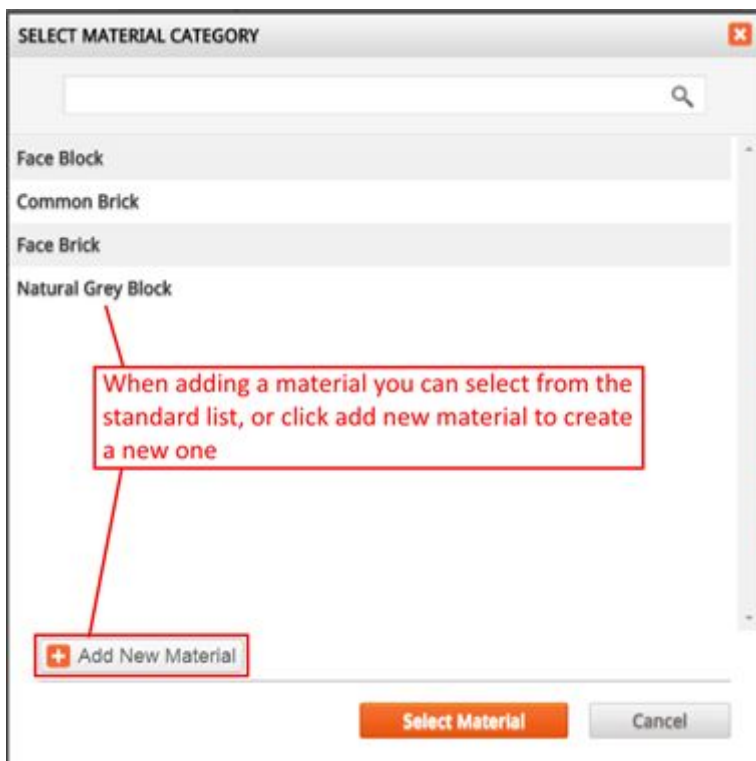
Add section

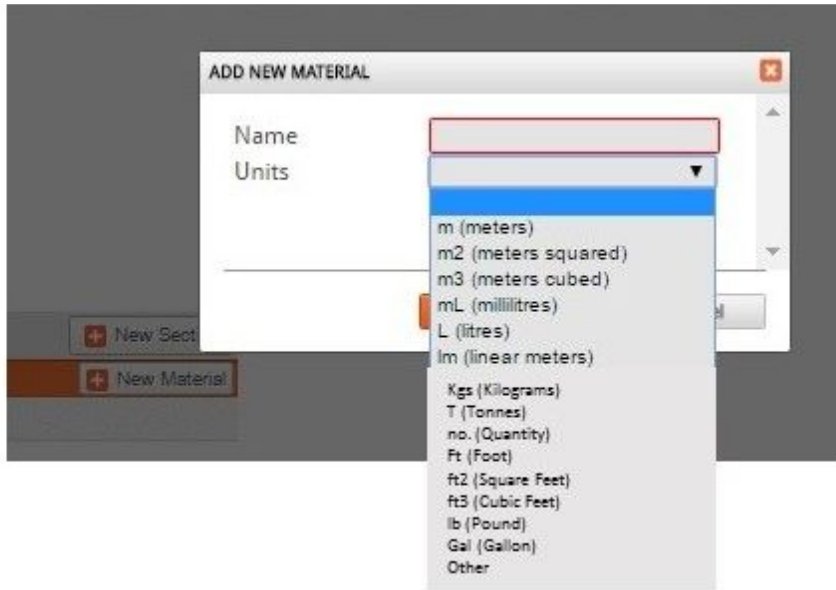
To break up different sections of the project - this may be areas or levels of the job.

Add Material

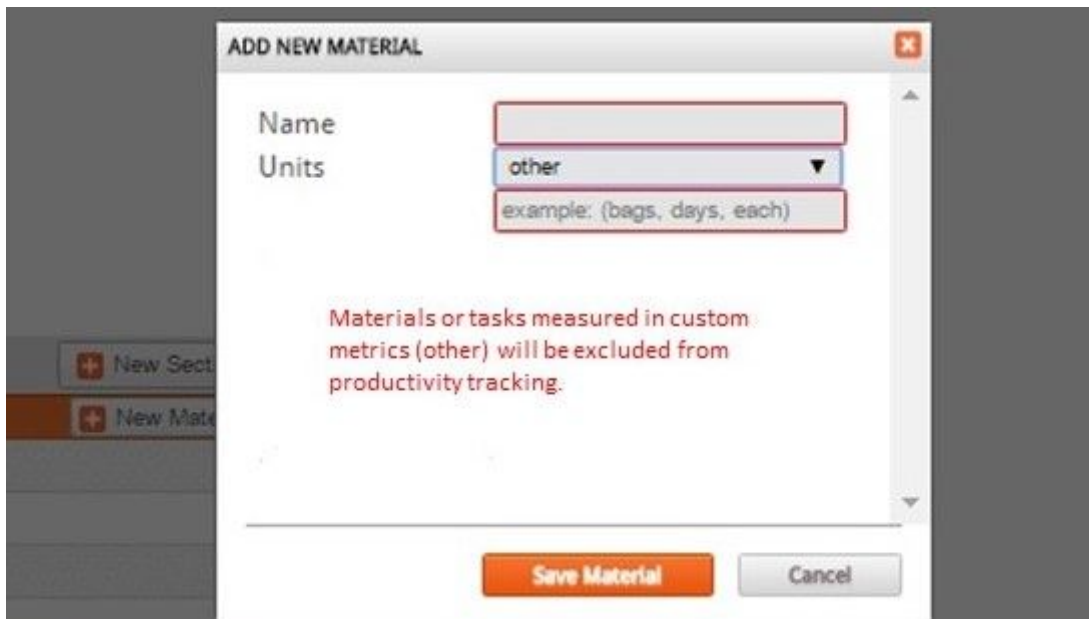
Choose from the materials that are listed when this button is pressed or choose add new material.

Please note a material can not be removed from the project once productivity results have been entered against it.





The option to create a custom metric is available , with a limitation that productivity cannot be tracked for these items.



Quantity

The user enters the quantity of material or task to be completed. Can be edited throughout the project at anytime.



Productivity Targets

Once the sections have been created and materials chosen, you need to set individual productivity targets for each material or task. The productivity target represents how many of the measured metric is expected to be installed by one man per day. Eg If 18m² of brickwork is installed by 3 people in one man day (8hrs), the productivity score is 18 divided by 3 = 6m²

Some things to consider when setting this target:

- The entire team working on the project needs to be included eg Foreman and Labourers. It's not just the labour of the person physically installing the material, but everybody on site who contributes.
- Sundries such as core filling and standing door frames will affect the productivity.
- If you are unsure of what to set the target as look at the productivity of previous projects. If you are new to Trade-Up refer to the Trade-Up Productivity Guide.

See below how to enter productivity targets for materials in Trade-Up:

MATERIAL	QUANTITY	PRODUCTIVITY	EFFORT	+ New Section
Ground Floor				+ New Material
Natural Grey Block	450 m ²	7 m ² per man day	64.3 days	
Level 1				+ New Material
Face Block	100 m ²	5 m ² per man day	20 days	
Level 2				+ New Material
Natural Grey Block	300 m ²	8 m ² per man day	37.5 days	
Level 3				+ New Material

Delete **Save**

For each section click here to add a new material. Once the material is added, enter the total m² and the target for that material.

Saving your project

Once you are satisfied that the project is setup, click save and it is ready for the entry of timesheets and productivity data. This can also be done throughout set up if you need to go away and come back to it.

Deleting a Project

You can delete a project. This will require a password and you will no longer have access to it or the data entered against it. The project will automatically Archive once it falls a week out of date range and we recommend you do this rather than deleting any project work has been



completed on. If you require assistance recovering a deleted project please contact Trade-up support team.

Project Edit Screen - entered via pencil icon

At any time during the project you can edit the details by entering the project edit screen. You will see a pencil icon next to the name of your project.



Graphs

For more information on how projects, primary materials and Secondary Items are graphed , please refer to “A guide to understanding Trade-Up Productivity Graphs and Scores” in help menu.

Timesheets and Productivity

Information on how to enter timesheets and productivity results can be found in help menu “*Supervisor's Guide* “

Support for Trade-Up Users

Please contact us 24/7 with any questions or technical support.

support@trade-up.com.au or 1800 015 570

All administration enquiries to 0413 476 076