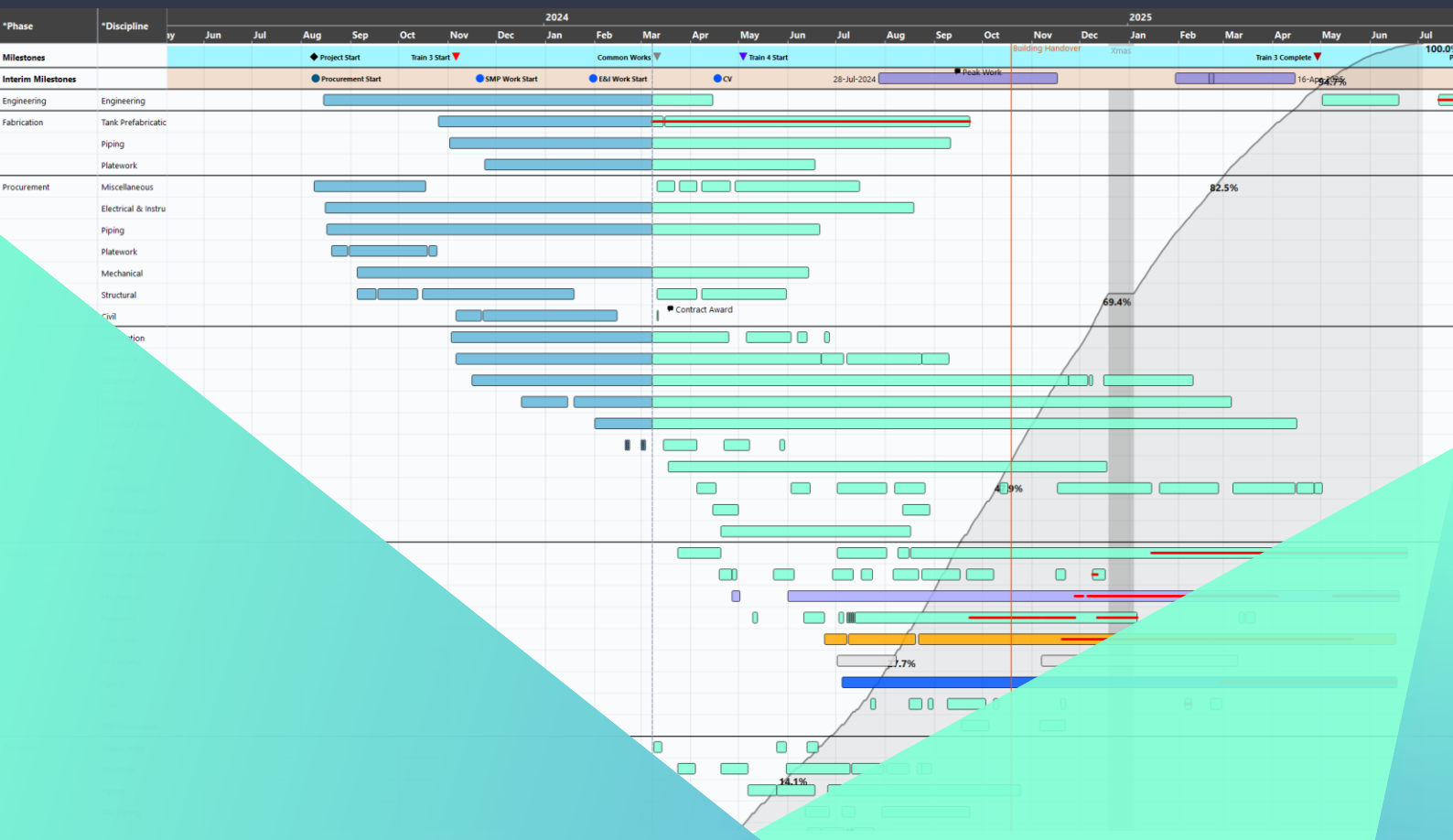
Schedule Prism

www.SchedulePrism.com



Getting Started

Schedule Prism User Guide

Import, organise and select schedules, configure your workspace, and prepare for analysis.

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1. Schedule Prism Workspace

The Schedule Prism workspace is the main starting point for working with schedules. From here, you can import and manage schedule files, select schedules for analysis, and access Single Schedule, Two Schedule, Multiple Schedule, Portfolio and Tools features.

Workspace Overview

The Schedule Library is displayed on the left side of the main workspace. From here, schedules can be added, organised into folders and sub-groups, selected for analysis, and managed using the right-click menu.

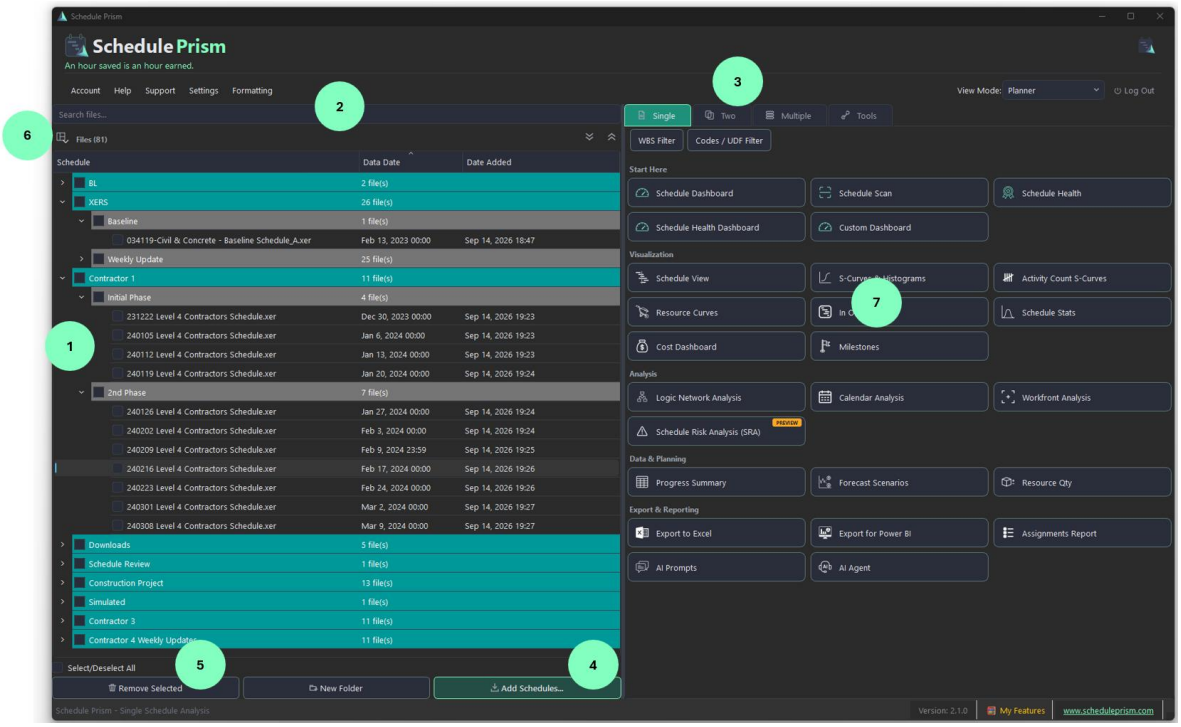


Figure 1 - Schedule Prism main workspace

No.	Area	Description
1	**Schedule Library**	View, select and organise imported schedules, folders and sub-groups.
2	**Search**	Search the schedules displayed in the Schedule Library.
3	**Analysis Mode**	Switch between **Single**, **Two**, **Multiple** and **Tools** modes.
4	**Add Schedules**	Import schedule files or folders into Schedule Prism.
5	**Schedule Management**	Select schedules and use options such as **Remove Selected** and **New Folder**.

6	**File Layouts**	Create and manage saved layouts containing selected schedules.
7	**Features & Analysis**	Open the analysis, visualisation, planning and reporting features available for the selected mode.

Add Schedules

Schedule files can be added individually, from a folder, or by drag and drop.

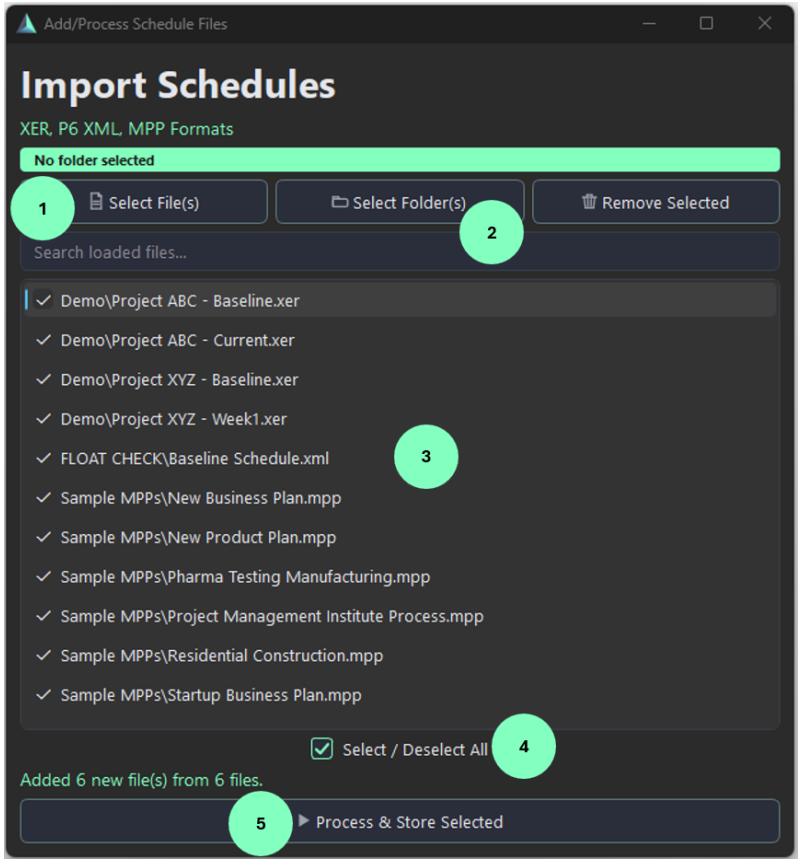


Figure 2 - Import Schedules window

No.	Control	Description
1	**Select File(s)**	Browse and select one or more individual schedule files.
2	**Select Folder(s)**	Browse and load supported schedule files from a selected folder.
3	**Loaded Files**	Displays the schedule files available for processing. Files can be selected or deselected as required.
4	**Select / Deselect All**	Selects or deselects all files currently displayed in the list.

5	**Process & Store Selected**	Processes the selected schedule files and adds them to the Schedule Library.

Drag and Drop

1. Drag the required schedule file(s) into the **Schedule Library** area.
2. Schedule Prism opens **Add Schedules** dialog.

Add Individual Files

1. Click **Add Schedules**.
2. In the **Import Schedules** window, click **Select File(s)**.
3. Browse to and select the required schedule file(s).
4. Confirm that the required files are selected.
5. Click **Process & Store Selected**.

Add Schedules from a Folder

1. Click **Add Schedules**.
2. Click **Select Folder(s)**.
3. Select the required folder.
4. Confirm that the required files are selected.
5. Click **Process & Store Selected**.

When schedules are loaded from folders, Schedule Prism automatically creates folders based on their source folder names.

Supported formats: XER, P6 XML and MPP.

Organise Schedules

Create a Folder

1. Right-click in the **Schedule Library**.
2. Select **New Folder**.
3. Enter the folder name.

Rename a Schedule or Folder

1. Right-click the schedule or folder.
2. Select **Rename**.

3. Enter the new name.

Move Schedules to Another Folder

Schedules can be moved using **Move to Folder** or **Cut and Paste**.

Using Move to Folder

1. Select the required schedule(s). Hold **Ctrl** to select multiple schedules.
2. Right-click the selection.
3. Select **Move to Folder**.
4. Select the destination folder.

Using Cut and Paste

1. Select the required schedule(s).
2. Right-click and select **Cut**.
3. Right-click the destination folder.
4. Select **Paste**.

Create a Sub-group

1. Select the required schedule(s) within a folder.
2. Right-click the selection.
3. Select **Move to Sub-group**.
4. Select **New Subgroup**.
5. Enter the subgroup name.

Change the Folder Order

1. Right-click the required folder.
2. Select **Move Up** or **Move Down**.
3. Repeat as required to position the folder.

Sort Schedules

1. Click the required **column header** to sort schedules by that column.
2. Click the same column header again to reverse the sort order.

Delete Schedules

Delete Selected Schedules

1. Tick the schedule(s) to delete.
2. Click **Remove Selected**.

Alternatively, right-click a schedule and select **Delete**.

Delete All Schedules in a Folder

1. Tick the folder to select all schedules within it.
2. Click **Remove Selected**.

File Layouts

File Layouts can be used to save a selected collection of schedules for quick access.

Create a File Layout

1. Tick the schedules to include.
2. Click the **Layout** icon.
3. Select **Save Layout As**.
4. Enter a layout name.
5. Click **OK**.

Add Schedules to an Existing Layout

1. Select the schedule(s) to add.
2. Open the **Layout** menu.
3. Select **Add to Layout**.
4. Select the required layout.

Remove Schedules from a Layout

1. Open the required layout.
2. Select the schedule(s) to remove.
3. Open the **Layout** menu.
4. Select **Remove from Layout**.

Delete a Layout

1. Open the **Layout** menu.
2. Select **Delete Layout**.
3. Select the layout to delete.

4. Confirm the deletion.

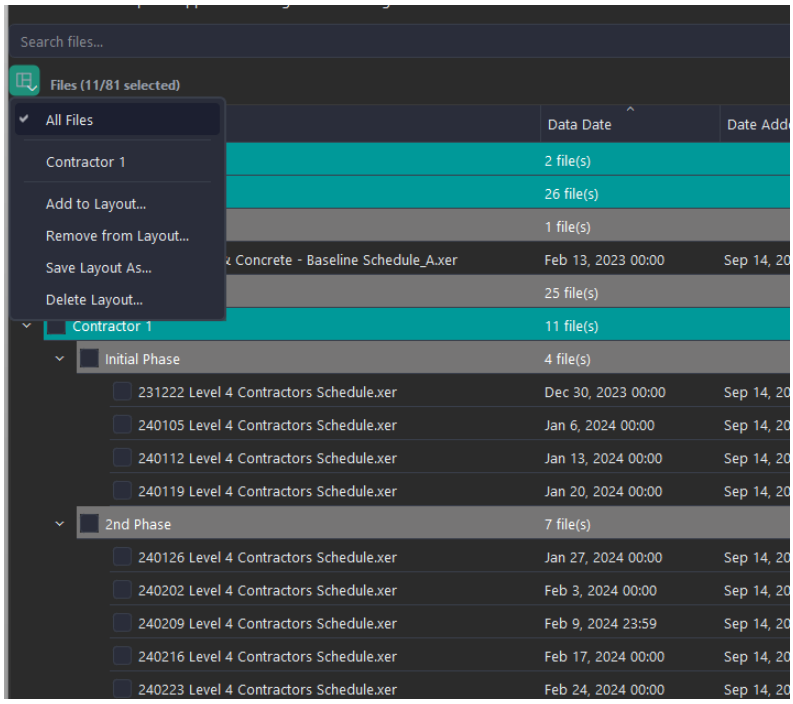


Figure 3 - Layout menu open

Save Layout As / Add to Layout / Remove from Layout / Delete Layout

Schedule Right-Click Menu

Right-click a schedule in the **Schedule Library** to access schedule management options.

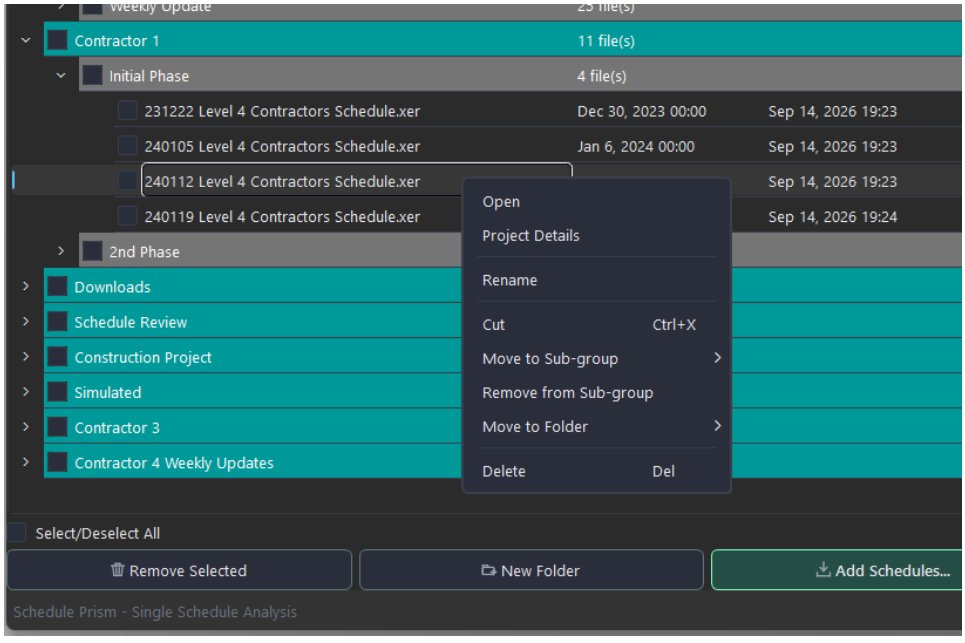


Figure 4 - Schedule right-click menu

Option	Action
Open	Opens the selected schedule directly in **Schedule View**.
Project Details	Displays high-level project information for the selected schedule.
Rename	Renames the selected schedule.
Cut	Cuts the selected schedule so it can be pasted into another folder or group.
Move to Sub-group	Moves the selected schedule into an existing or new sub-group.
Remove from Sub-group	Removes the selected schedule from its current sub-group.
Move to Folder	Moves the selected schedule to another folder in the Schedule Library.
Delete	Removes the selected schedule from Schedule Prism. The **Delete** key can also be used.

Open a Schedule Directly

1. Right-click the required schedule.
2. Select **Open**.
3. The schedule opens in **Schedule View**.

View Project Details

1. Right-click the required schedule.
2. Select **Project Details**.
3. Review the high-level project information.

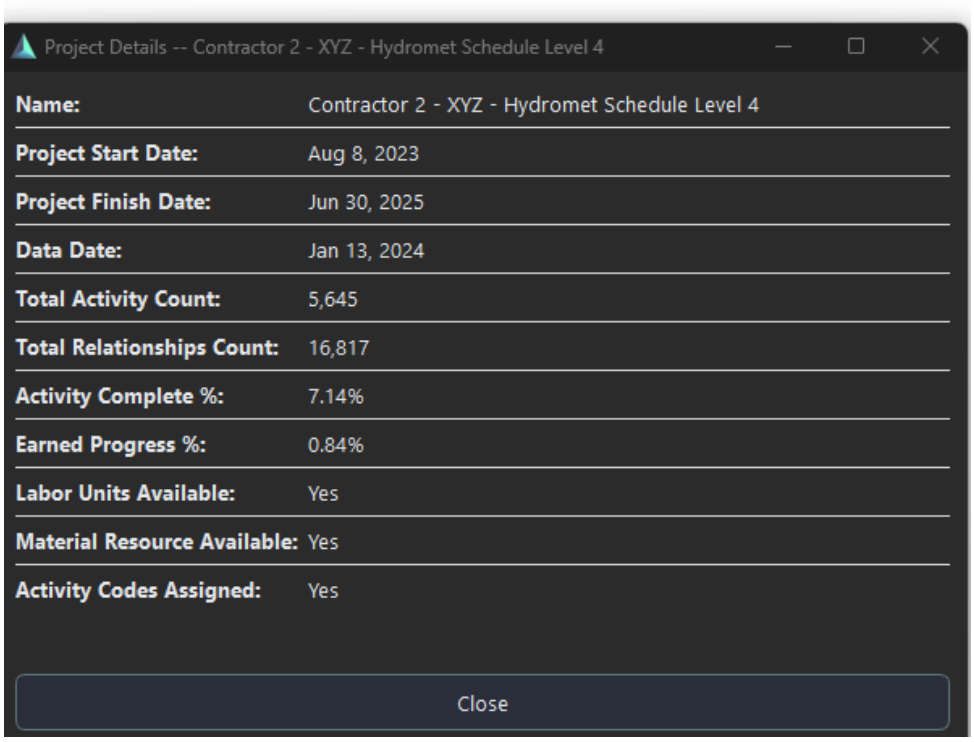


Figure 5 - Project Details

2. Selecting Schedules for Analysis

Schedules must be selected from the **Schedule Library** before running an analysis. The number of schedules required depends on the analysis mode being used.

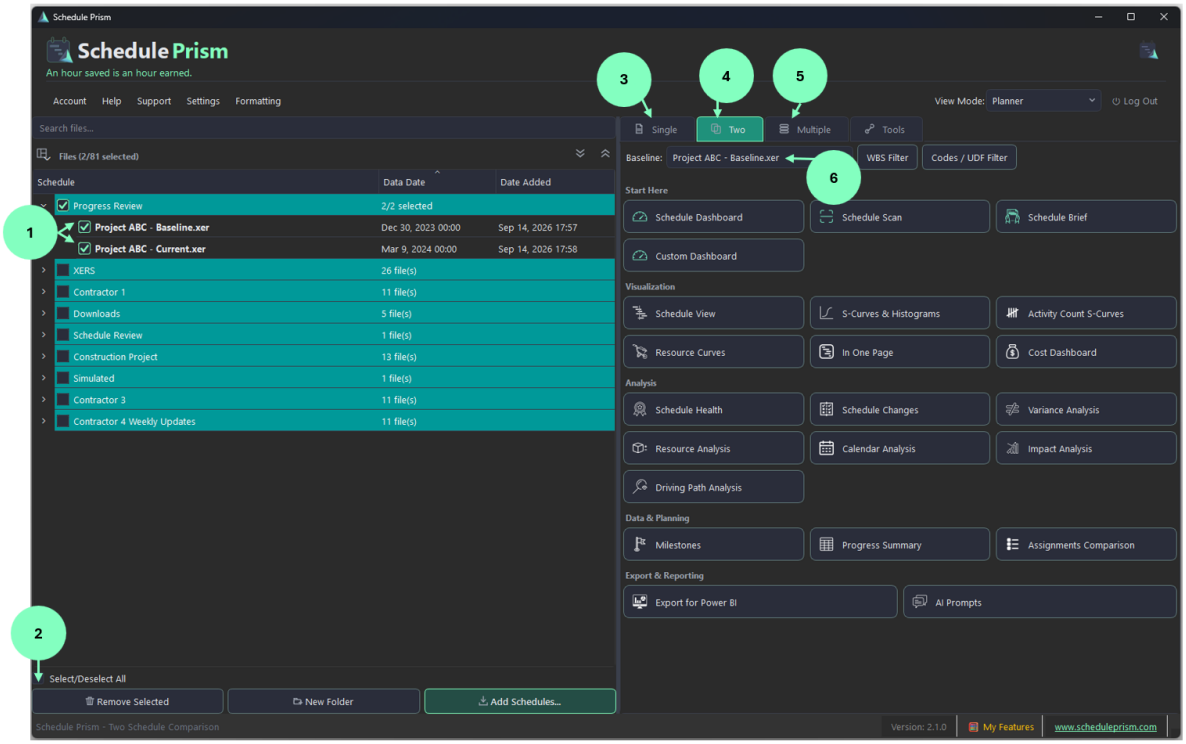


Figure 6 - Selecting schedules and choosing Single, Two or Multiple analysis mode.

No.	Area	Description
1	Schedule Checkboxes	Select the schedules to analyse.
2	Select/Deselect All	Select or clear all displayed schedules.
3	Single	Analyse one schedule.
4	Two	Compare two schedules.
5	Multiple	Analyse multiple schedule updates or a portfolio.
6	Baseline	Select the baseline schedule when using Two Schedule mode.

Select Schedules

1. Locate the required schedule in the **Schedule Library**.
2. Tick the checkbox next to the schedule.
3. To select multiple schedules, tick each required schedule.

Schedules can be selected from different folders or sub-groups.

Select or Deselect All Schedules

Use **Select/Deselect All** at the bottom of the Schedule Library to quickly change the selection.

1. Tick **Select/Deselect All** to select all displayed schedules.
2. Untick it to clear the selection.

Select an Analysis Mode

After selecting the required schedule(s), choose the appropriate analysis mode from the top of the workspace.

Mode	Selection	Use
Single	1 schedule	Analyse an individual schedule.
Two	2 schedules	Compare two schedule versions.
Multiple	Multiple schedules	Analyse trends and movement across a series of schedule updates, or analyse a portfolio of schedules.

Single Schedule Analysis

1. Select one schedule.
2. Click **Single**.
3. Select the required feature from the Single Schedule workspace.

Two Schedule Comparison

1. Select two schedules.
2. Click **Two**.
3. Select the schedule to use as the **Baseline** from the Baseline selector.
4. Select the required comparison feature.

This baseline selection is important enough that I would show it in the screenshot.

Multiple Schedule Analysis

1. Select the schedules to analyse.
2. Click **Multiple**.
3. Select the required trend, movement or portfolio feature.

For trend and movement analysis, schedules should represent the required sequence of schedule updates.

3. Applying Global Filters

Global Filters can be used to limit the schedule data included in an analysis using **WBS**, **Activity Codes**, or **UDFs**.

Before applying a Global Filter, select the required schedule(s) based on the analysis mode:

- **Single mode:** Select **one schedule**, then select **Single**.
- **Two mode:** Select **two schedules**, select **Two**, and confirm the required **Baseline** schedule.

Once the schedule(s) and analysis mode are selected, use **WBS Filter** or **Codes / UDF Filter** at the top of the workspace to define the required analysis scope.

Apply a WBS Filter

Click **WBS Filter** to limit the analysis to selected WBS elements.

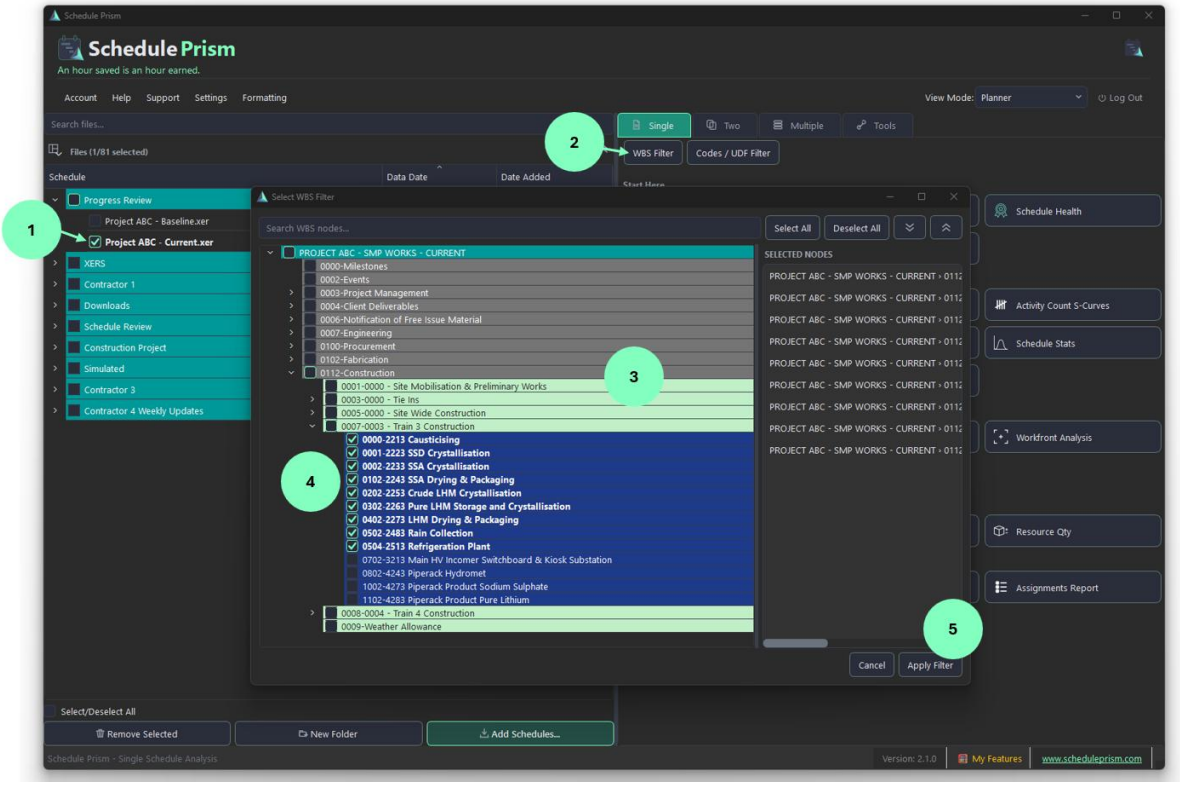


Figure 7 - Selecting WBS elements for analysis.

Select WBS Elements

1. Select the required schedule(s) and analysis mode.
2. Click **WBS Filter**.
3. Expand the WBS hierarchy to locate the required WBS element(s).

4. Select the WBS element(s) to include.
5. Click **Apply Filter**.

If no WBS elements are selected, the **full schedule** is included.

Find a WBS

Use **Search WBS nodes** to quickly locate a WBS within a large hierarchy.

Select or Deselect All

Use **Select All** to select all available WBS elements or **Deselect All** to clear the current selection.

Apply an Activity Code Filter

Click **Codes / UDF Filter** to filter the analysis using Activity Code values.

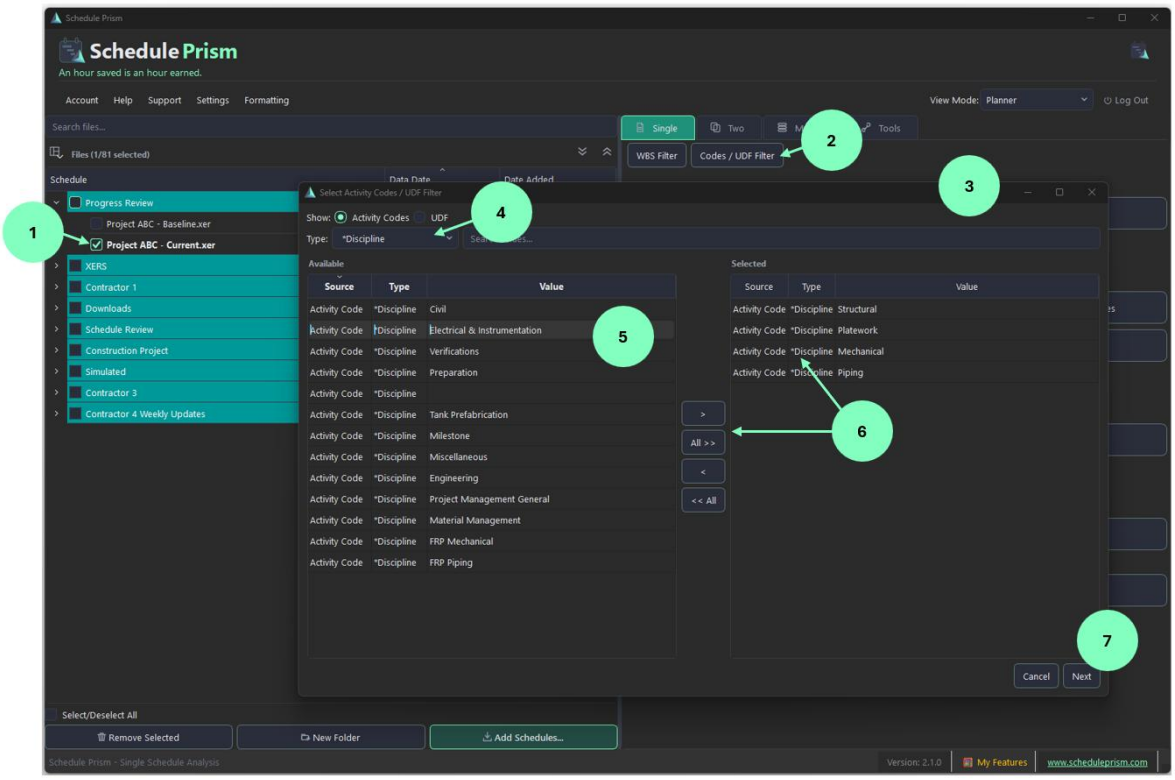


Figure 8 - Selecting Activity Code values for filtering.

Select Activity Code Values

1. Select the required schedule(s) and analysis mode.
2. Click **Codes / UDF Filter**.
3. Select **Activity Codes**.
4. Select the required Activity Code **Type**.

5. Select the required value(s) from the **Available** list.
6. Click **>** to move the selected value(s) to the **Selected** list.
7. Click **Next** and complete/apply the filter.

Selection Controls

Control	Action
>	Adds the selected value(s).
All >>	Adds all available values.
<	Removes the selected value(s).
<< All	Removes all selected values.

Use **Search values** to quickly find a value when an Activity Code contains a large number of values.

Apply a UDF Filter

UDF filtering is accessed from the same **Codes / UDF Filter** window.

1. Click **Codes / UDF Filter**.
2. Select **UDF**.
3. Select the required UDF type/field.
4. Select the required value(s).
5. Move the required values to the **Selected** list.
6. Click **Next** and complete/apply the filter.

Using Global Filters

Once applied, the filter limits the data used by the relevant Schedule Prism analyses.

To change the analysis scope, reopen **WBS Filter** or **Codes / UDF Filter** and modify the selection.

4. View Modes

View Mode controls which Schedule Prism features are displayed in the workspace. Select a predefined View Mode to display a set of relevant features, or use **Custom** to create your own workspace.

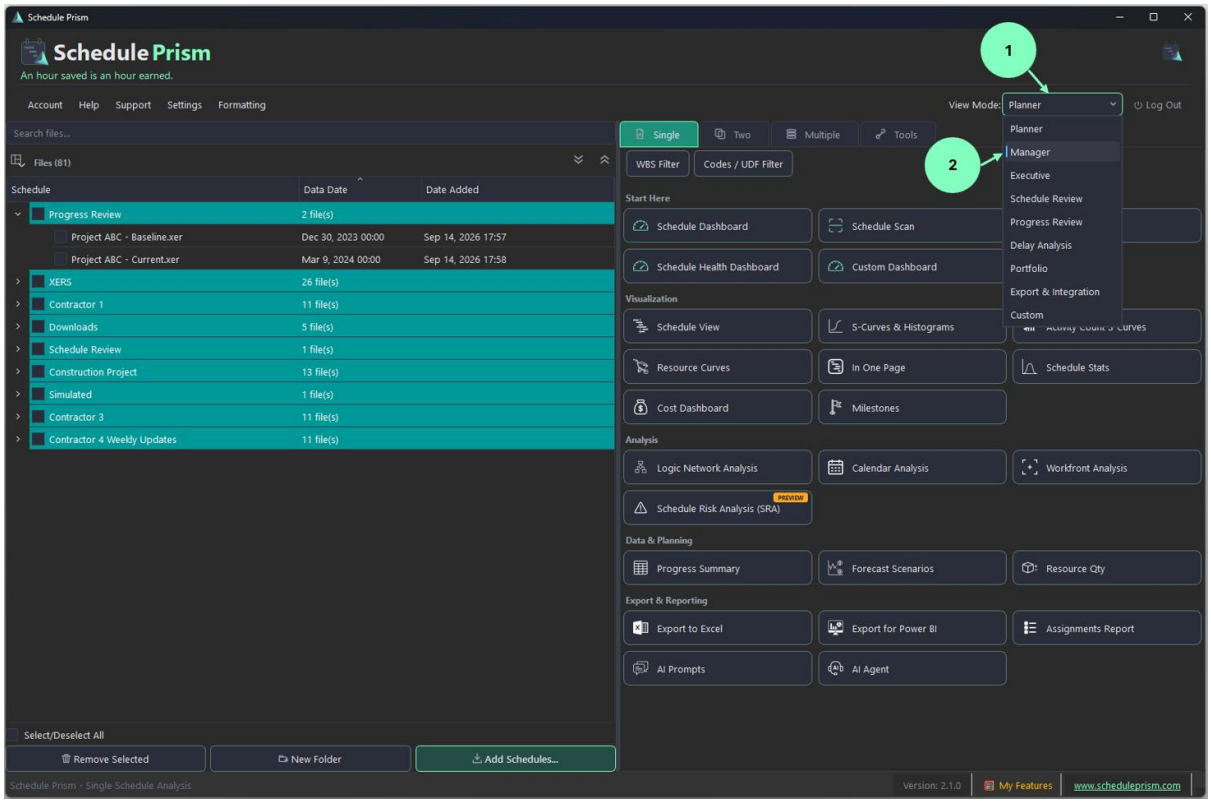


Figure 9 - Selecting a View Mode.

Select a View Mode

1. Click the **View Mode** drop-down in the upper-right corner of the workspace.
2. Select the required View Mode.
3. The workspace updates to display the features included in the selected mode.

Available View Modes include:

- **Planner**
- **Manager**
- **Executive**
- **Schedule Review**
- **Progress Review**
- **Delay Analysis**

- **Portfolio**
- **Export & Integration**
- **Custom**

The selected View Mode controls the features displayed in the workspace. It does not change the underlying schedule data.

Create a Custom View

Use **Custom** View Mode to choose which features are displayed in your workspace.

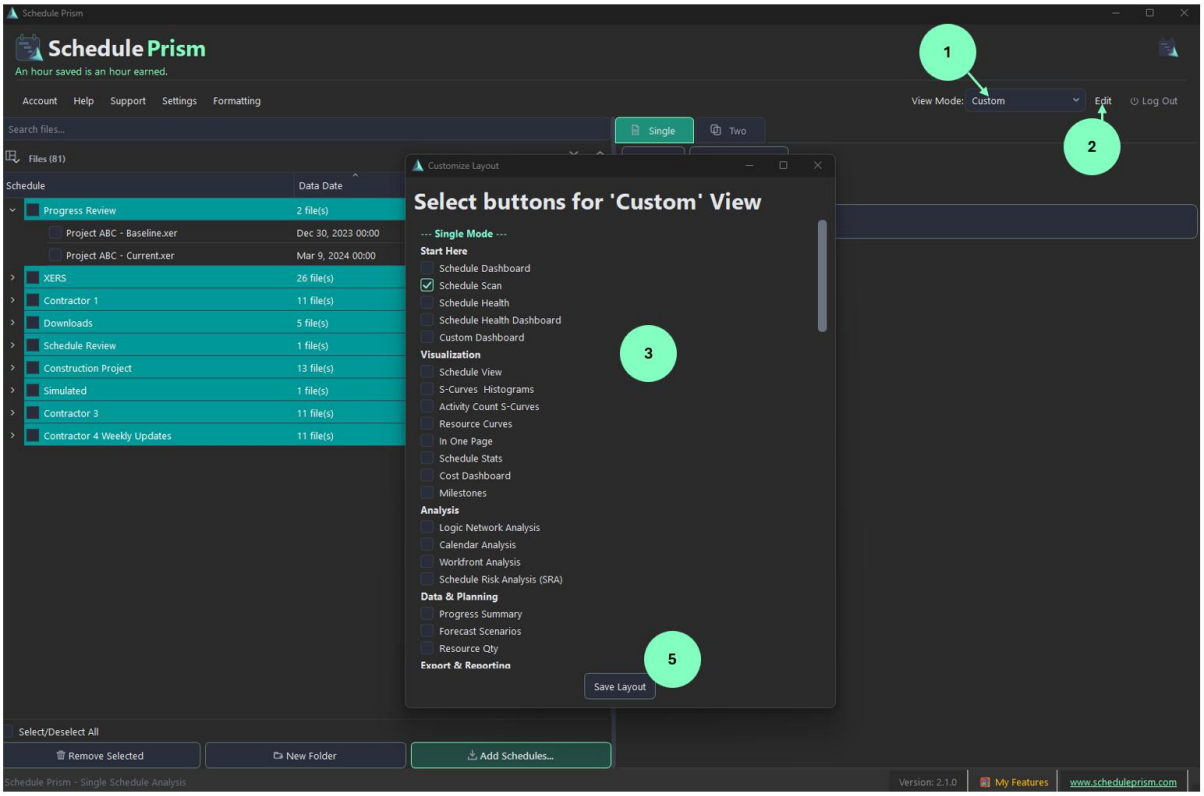


Figure 10 - Selecting features for the Custom View.

1. Select **Custom** from the **View Mode** drop-down.
2. Click **Edit** next to the View Mode selector.
3. In the **Customize Layout** window, tick the features you want to display.
4. Select features for the required **Single**, **Two**, and **Multiple** modes.
5. Click **Save Layout**.
6. The Custom workspace updates to show the selected features.

Edit the Custom View

1. Select **Custom** as the View Mode.

2. Click **Edit**.
3. Select or deselect the required features.
4. Click **Save Layout**.

5. Application Menus

The main application menus provide access to account options, help resources, support information, application settings and formatting options.

Account

Use the **Account** menu to view feature access and subscription options.

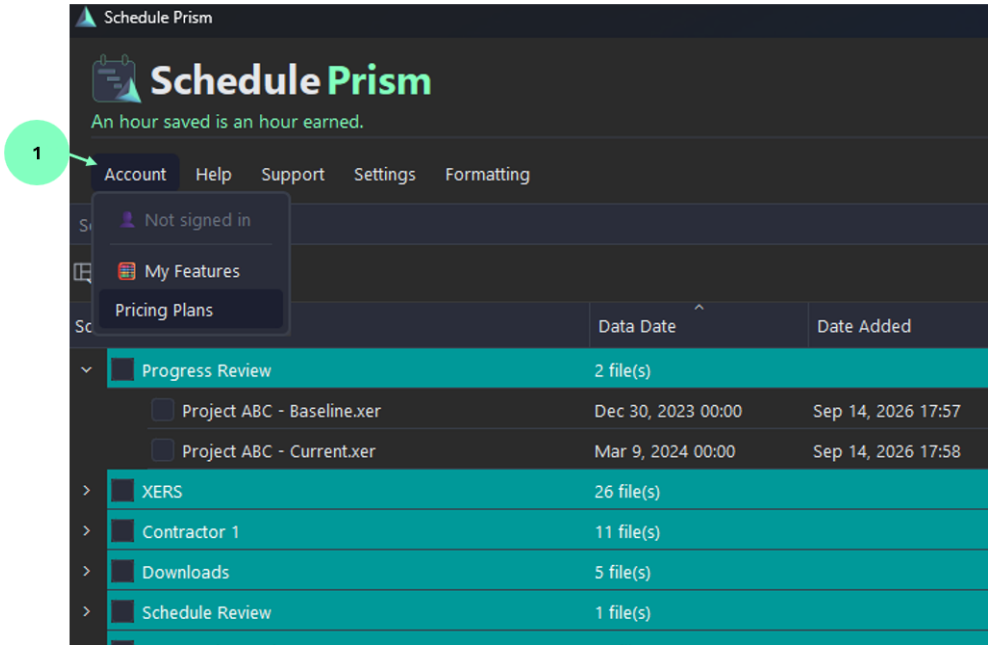


Figure 11 – Account menu.

Option	Purpose
Sign-in Status	Shows the current account sign-in status.
My Features	View and manage the Schedule Prism features available to your account.
Pricing Plans	View available Schedule Prism subscription plans.

No further step-by-step instructions are needed here. **My Features** can have its own guide later if there is enough functionality behind it.

Help

Use the **Help** menu to access Schedule Prism guides, tutorials, release information and other resources.

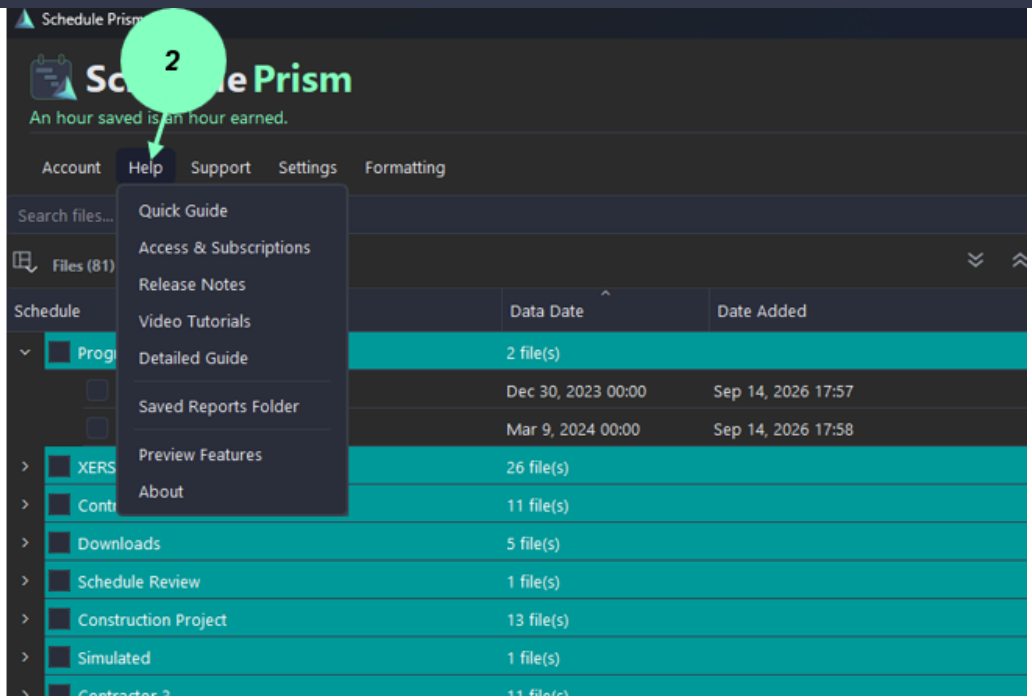


Figure 12 - Help menu

Option	Purpose
Quick Guide	Opens the Schedule Prism quick guide.
Access & Subscriptions	Opens information about access and subscriptions.
Release Notes	Displays Schedule Prism release information.
Video Tutorials	Opens the available video tutorials.
Detailed Guide	Opens the detailed Schedule Prism user guide.
Saved Reports Folder	Opens the folder containing saved reports.
Preview Features	Displays information about available preview features.
About	Displays application and version information.

Support

Use the **Support** menu to access Schedule Prism support contact details.

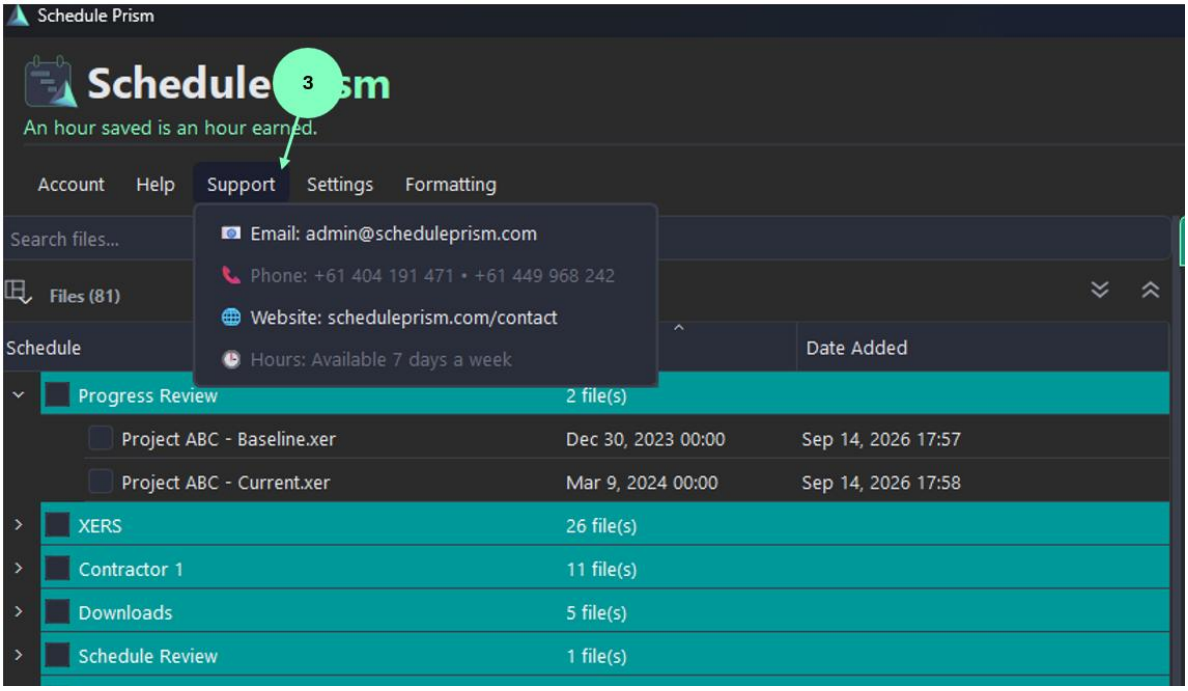


Figure 13 - Support options

The Support menu provides access to:

- **Email support**
- **Phone support**
- **Schedule Prism contact page**
- **Support availability information**

Settings

Use the **Settings** menu to configure calculation and analysis settings used across Schedule Prism.

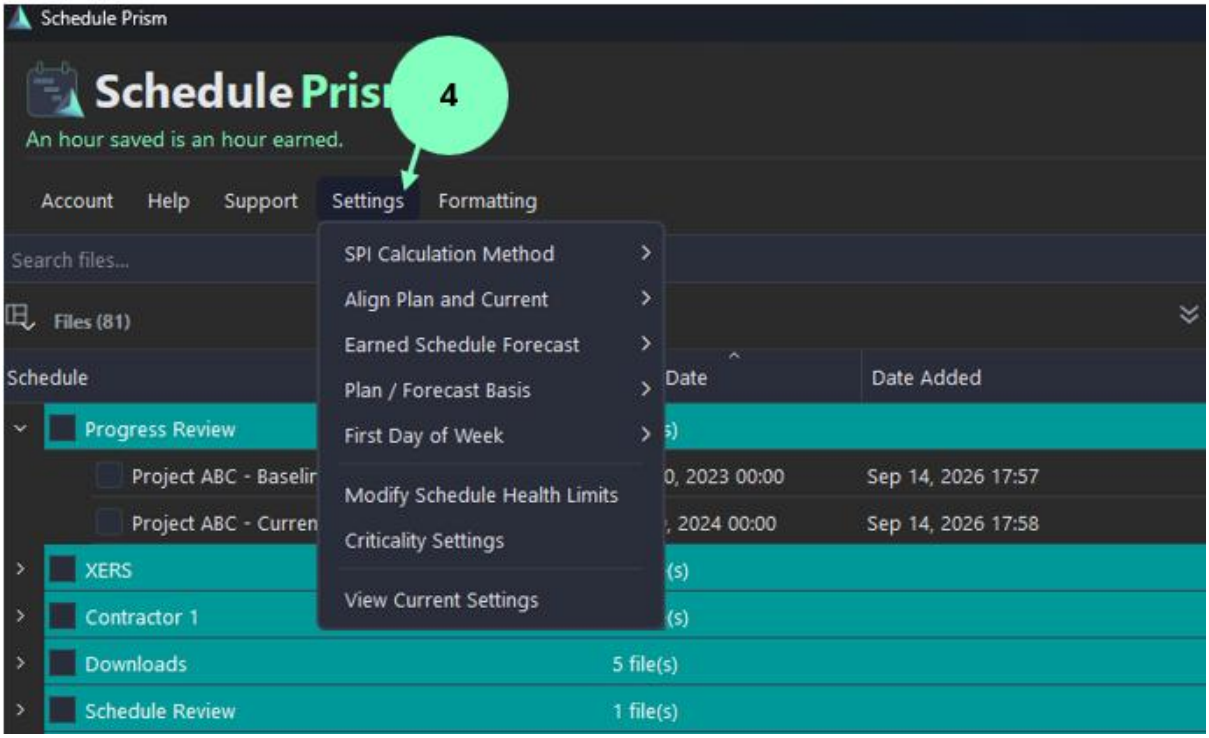


Figure 14 - Settings menu.

Option	Purpose
SPI Calculation Method	Select the method used for SPI calculations.
Align Plan and Current	Configure the alignment of planned and current s-curves.
Earned Schedule Forecast	Configure Earned Schedule forecast settings.
Plan / Forecast Basis	Select the basis used for plan and forecast calculations.
First Day of Week	Set the first day used for weekly calculations and reporting.
Modify Schedule Health Limits	Configure limits used by Schedule Health.
Criticality Settings	Configure settings used to determine schedule criticality.
View Current Settings	View the currently applied settings.

Note: Individual settings are explained in the relevant feature guides where applicable.

Formatting

Use the **Formatting** menu to configure common display and output formatting.

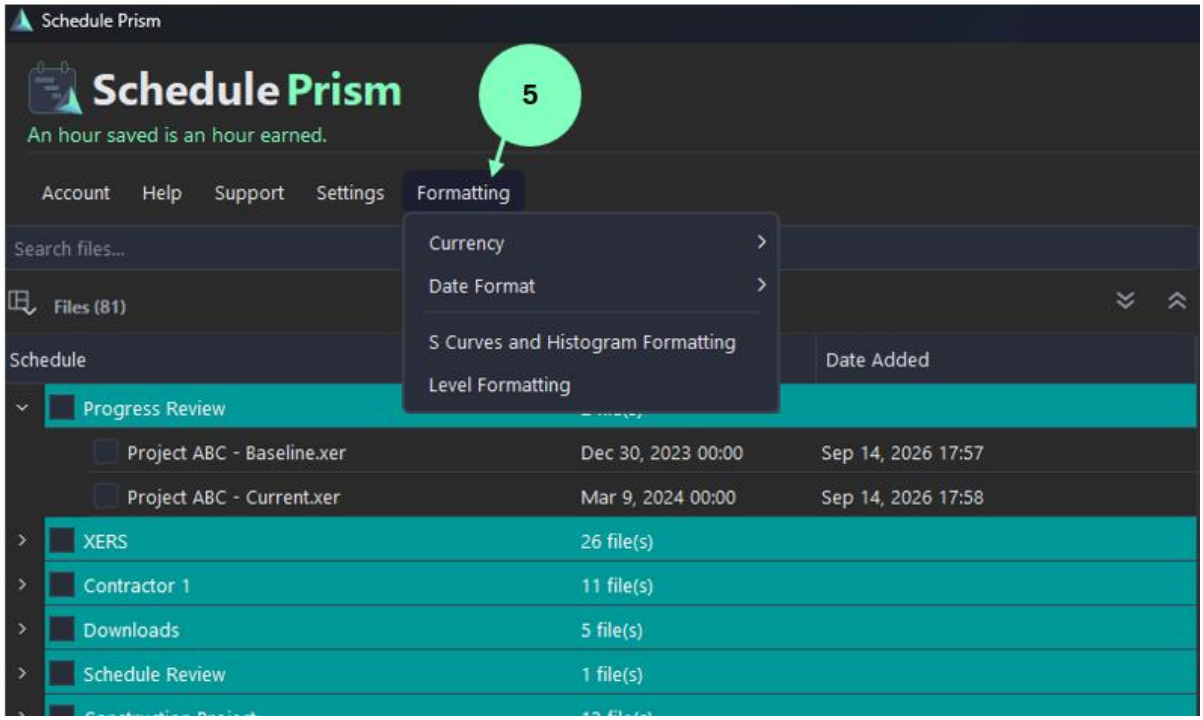


Figure 15 - Formatting menu.

Option	Purpose
Currency	Set the currency display format (ex: AUD).
Date Format	Select the date display format (ex: dd-mmm-yy).
S Curves and Histogram Formatting	Configure formatting used for S-Curves and histograms.
Level Formatting	Configure formatting for hierarchy levels (ex: WBS levels of schedule view).

Note: Feature-specific formatting options are explained in the relevant feature guides.