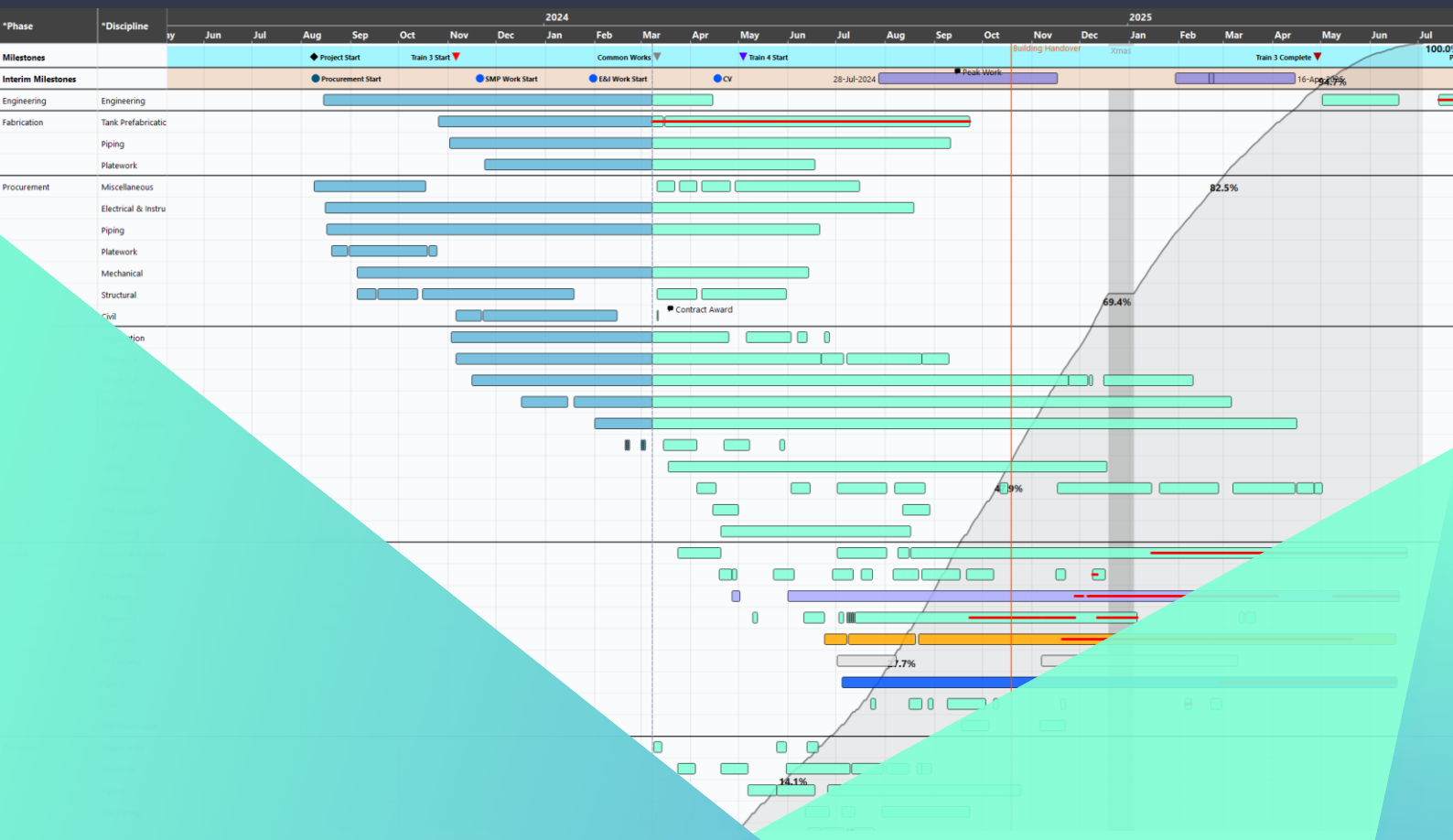
Schedule Prism

www.SchedulePrism.com



Custom Dashboards

Schedule Prism User Guide

Create customised dashboards by selecting, arranging, and formatting visuals. Save layouts for reuse or export them for reporting.

Version 2.1.0

Updated: 04-Oct-26
Rev-01

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1. Custom Dashboards

Custom Dashboards allow users to create their own schedule reporting layouts by selecting, arranging, resizing, and formatting the required visuals.

Dashboards can be created for **Single Schedule, Two Schedule, and Multiple Schedule** analysis. The calculations and visual logic are built into Schedule Prism, allowing the same saved dashboard layout to be reused with other schedules.

Opening a Custom Dashboard

1. Select the required schedule or schedules in the Schedule Prism Workspace.
2. Select **Single**, **Two**, or **Multiple Schedule** mode as required.
3. Select **Custom Dashboard**.

The Custom Dashboard opens using the current or previously saved dashboard configuration.

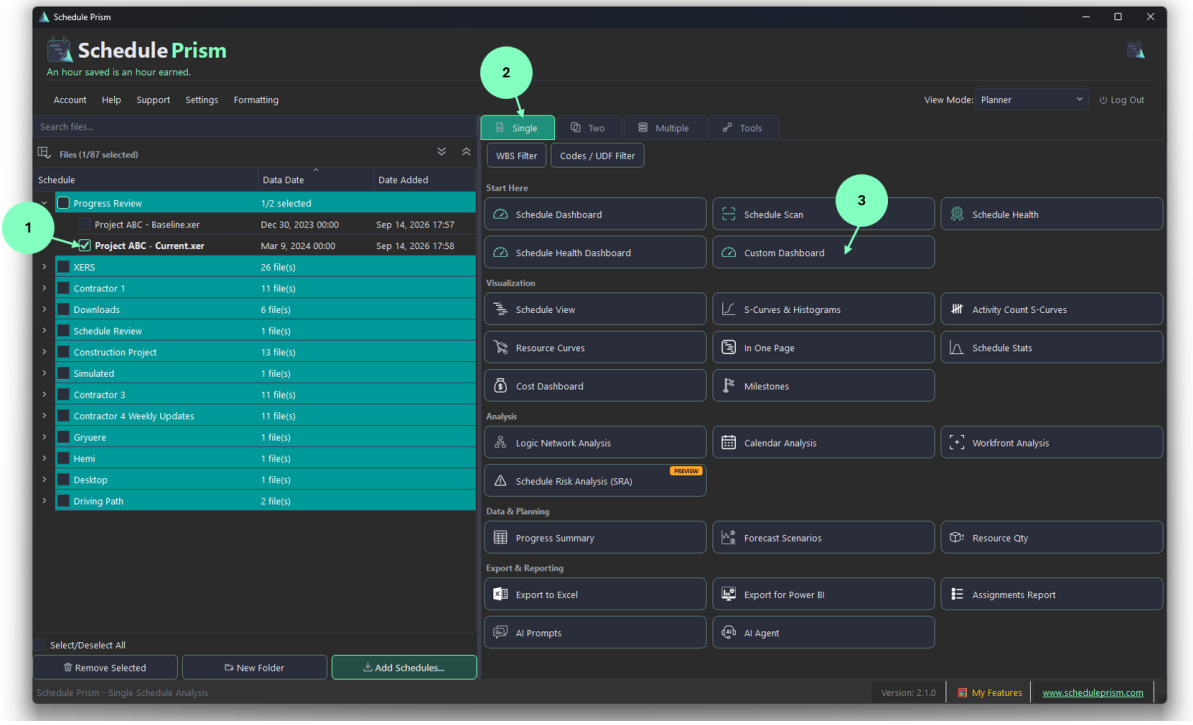


Figure 1 - Single Schedule Custom Dashboard

Custom Dashboard Interface

Schedule Prism includes built-in dashboard layouts that can be used as a starting point.

Alternatively, users can create a dashboard from a blank workspace.

To start with an empty dashboard, select **Remove All** to remove the currently displayed visuals.

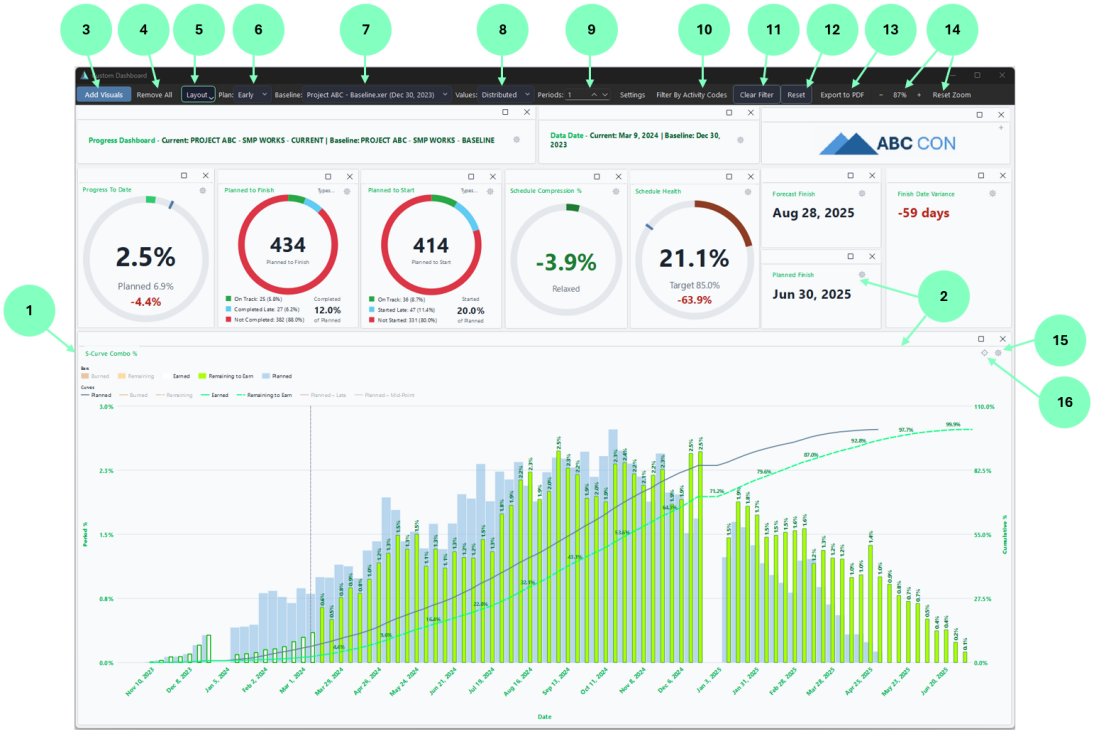


Figure 2 - Custom Dashboard Interface

① **Workspace** – Main area used to arrange and display dashboard visuals.

② **Visuals** – Individual charts, cards, tables, images, and other dashboard components.

③ **Add Visuals** – Add one or more visuals to the dashboard.

④ **Remove All** – Remove all displayed visuals from the workspace.

⑤ **Layout** – Create, save, delete, import, and export dashboard layouts.

⑥ **Plan** – Select the planning basis: **Early, Late, or Mid-Point**. Not applicable to Single Schedule Custom Dashboards.

⑦ **Baseline** – Select the schedule to use as the baseline. Available in Multiple Schedule Custom Dashboards.

⑧ **Values** – Select **Distributed** or **Stored** values for Earned and Burned period calculations. Available in Multiple Schedule Custom Dashboards.

⑨ **Periods** – Select the number of schedule periods used to calculate period values, such as Earned, Burned, and Forecast values over the last four periods.

⑩ **Filter by Activity Codes** – Filter the entire dashboard by selected Activity Codes. For Two and Multiple Schedule dashboards, Activity Codes are taken from the latest schedule.

⑪ **Clear Filter** – Remove the currently applied dashboard filter.

⑫ **Reset** – Reset dashboard filtering and stacking selections to their defaults.

⑬ **Export to PDF** – Export the dashboard as a one-page PDF report.

⑭ **Zoom** – Zoom the dashboard content in or out to suit the available screen size.

⑮ **Visual Formatting** – Open the formatting and configuration options for the selected visual.

⑯ **Focus** – Focus the displayed time range around the Data Date. Available for **S-Curve and Histogram** visuals.

Add Visuals

Select **Add Visuals** from the toolbar to open the visual selection dialog. This is used to add charts, cards and tables to the dashboard workspace.

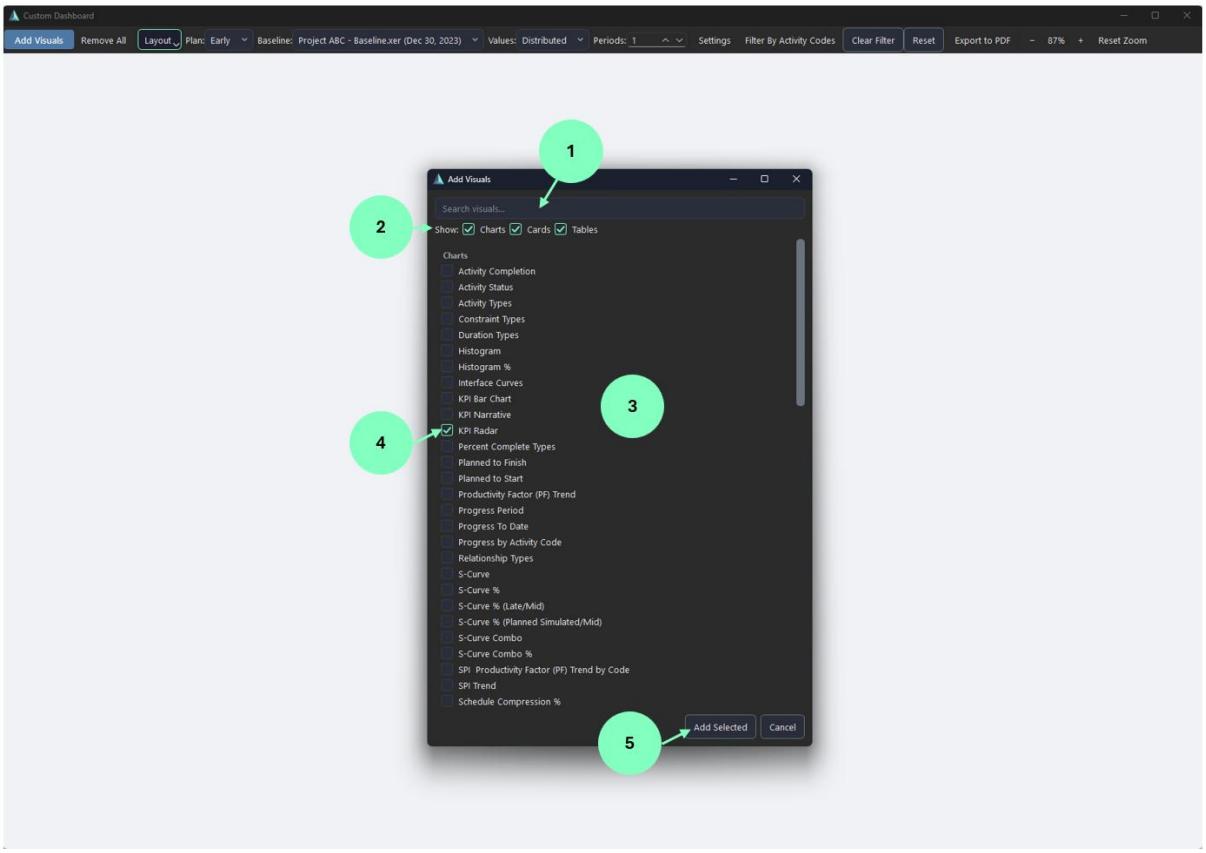


Figure 3 - Add Visual Dialog

① **Search Visuals** – Search for a visual by entering part or all of its name.

② **Visual Type Filters** – Use **Charts**, **Cards**, and **Tables** to control which types of visuals are displayed in the list. Multiple types can be enabled at the same time.

③ **Available Visuals** – Browse the available visuals. Scroll through the list to see additional options.

④ **Select Visuals** – Tick one or more visuals that you want to add to the dashboard. Multiple visuals can be selected and added together.

⑤ **Add Selected** – Adds all selected visuals to the dashboard workspace.

Using Search and Filters

The **Search** and **Show** options can be used together to quickly find a visual. For example, enable only **Cards** to display card visuals, then enter part of the required visual name in the search field to narrow the list further.

Once added, visuals appear in the dashboard workspace where they can be **positioned, resized and formatted**.

Repositioning and Resizing Visuals

Visuals can be freely positioned and resized within the dashboard workspace to create the required layout.

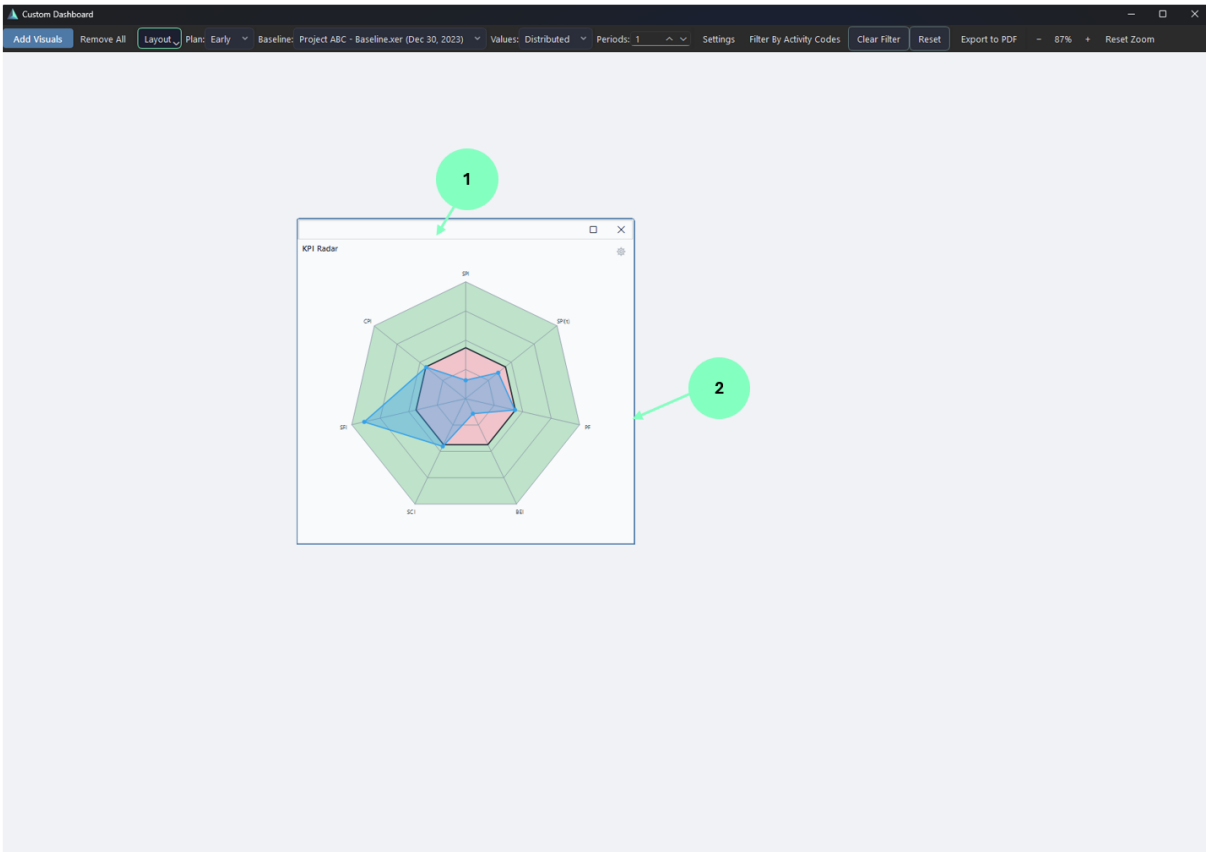


Figure 4 - Repositioning and Resizing Visuals

① **Reposition a Visual** – Click and hold the **top ribbon of the visual**, then drag it to the required position. For smaller adjustments, select the visual and use the **arrow keys** to move it precisely.

② **Resize a Visual** – Drag a **side edge** to change either the width or height. Drag a **corner** to change the width and height at the same time.

Visual Formatting

Each dashboard visual can be individually formatted to control its appearance and presentation.

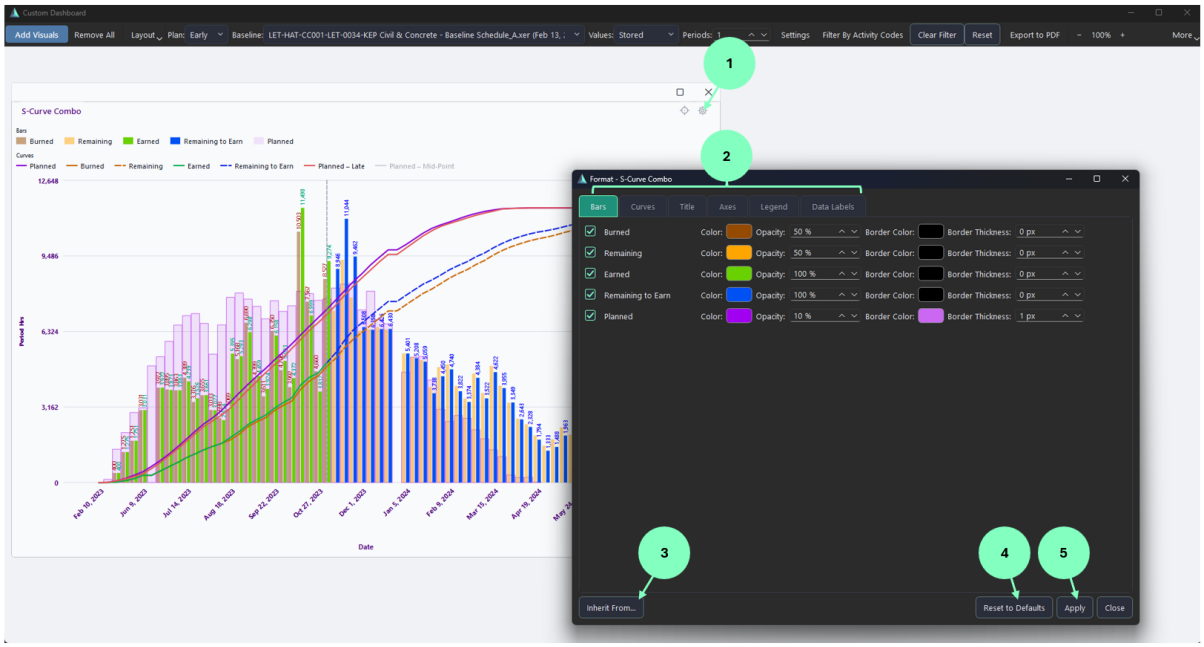


Figure 5 - Formatting Dialog

① **Open Formatting** – Click the **Formatting** icon on the visual to open its formatting dialog. The available options vary depending on the type of visual.

② **Formatting Sections** – Use the available tabs to format different elements of the visual. These options vary by visual. **Title** is common to all visuals and controls the visual title, such as *S-Curve Combo*.

③ **Inherit From** – Apply formatting from another similar visual. This is useful for quickly creating consistent formatting across the dashboard. This option is available only between compatible visual types.

④ **Reset to Defaults** – Restores the visual's formatting to its default settings.

⑤ **Apply** – Applies the selected formatting changes to the visual.

The **Visual Formatting** dialog provides both common formatting options and **visual-specific customisation settings**. The available options vary depending on the type of visual.

For example, the **SPI & Productivity Factor (PF) Trend by Code** visual includes a **Show Last** option, allowing you to control the number of recent periods displayed in the trend.

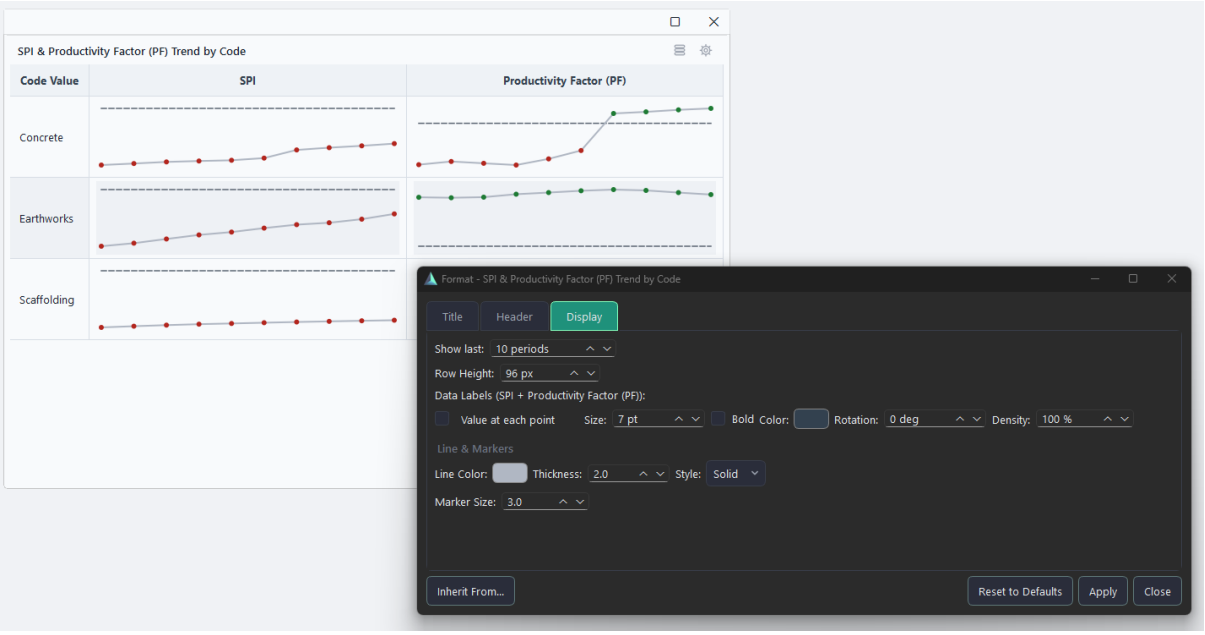


Figure 6 - Visual-specific customisation

Customising and Inheriting Formatting

Some visuals use predefined or conditional colours by default. These can be overridden when custom formatting is required.

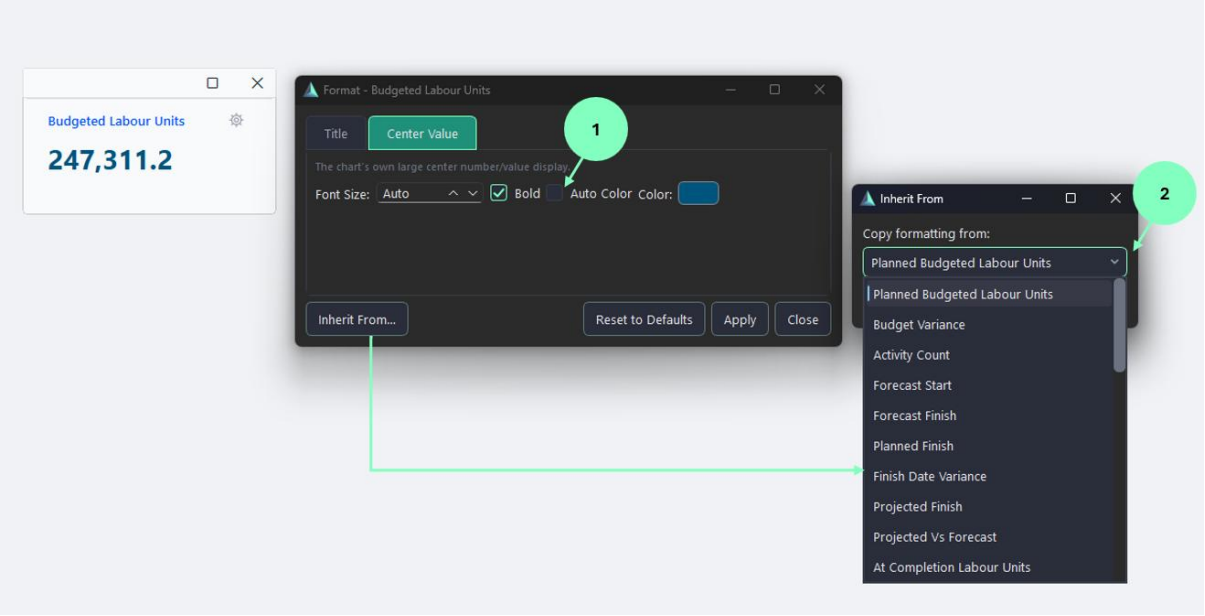


Figure 7 - Customising and Inheriting Formatting

① **Customise Default Colours** – Untick **Auto Color** to override the visual's default or conditional colour and select a custom colour.

② **Inherit Formatting** – Select **Inherit From** and choose a compatible visual from the dropdown. The formatting from the selected visual is copied to the current visual, making it easier to maintain consistent formatting across the dashboard.

Table Visual Formatting

Table visuals include additional formatting options for controlling the displayed columns and the appearance of individual columns.

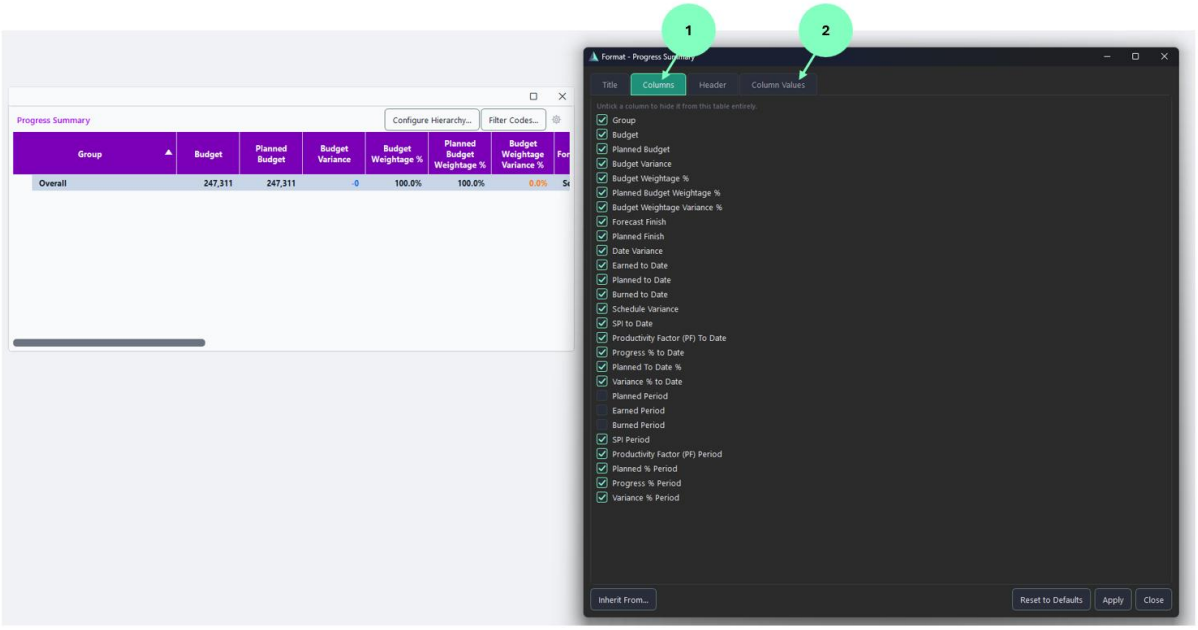
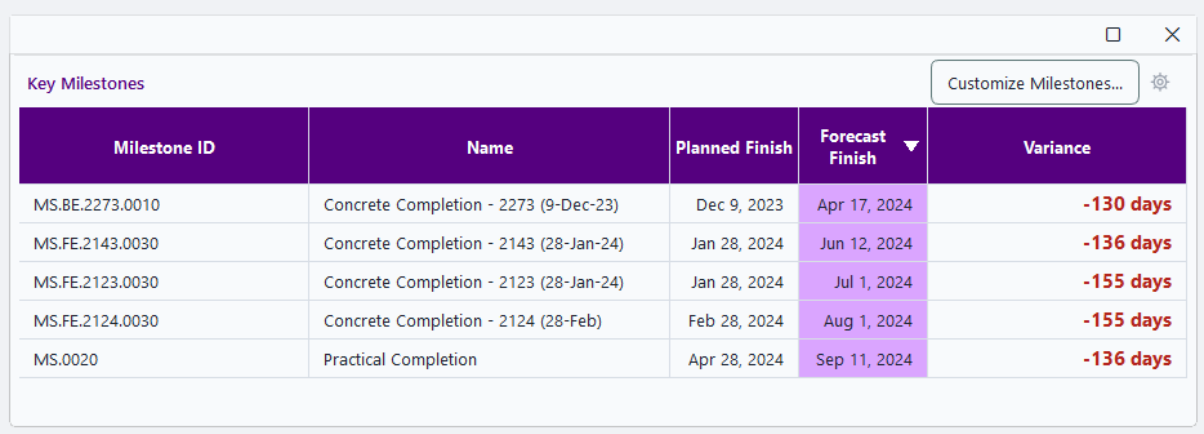


Figure 8 - Table Visual Formatting

① **Columns** – Select which columns are displayed in the table. Tick or untick individual columns to show or hide them.

② **Column Values** – Format individual columns separately, including settings such as **font** and **background**. This allows important columns or values to be visually highlighted.



Milestone ID	Name	Planned Finish	Forecast Finish	Variance
MS.BE.2273.0010	Concrete Completion - 2273 (9-Dec-23)	Dec 9, 2023	Apr 17, 2024	-130 days
MS.FE.2143.0030	Concrete Completion - 2143 (28-Jan-24)	Jan 28, 2024	Jun 12, 2024	-136 days
MS.FE.2123.0030	Concrete Completion - 2123 (28-Jan-24)	Jan 28, 2024	Jul 1, 2024	-155 days
MS.FE.2124.0030	Concrete Completion - 2124 (28-Feb)	Feb 28, 2024	Aug 1, 2024	-155 days
MS.0020	Practical Completion	Apr 28, 2024	Sep 11, 2024	-136 days

Figure 9 - Column Values Formatted

Focus on the Data Date

For time-phased visuals such as **S-Curves and Histograms**, the Focus option can be used to concentrate the chart around the Data Date.



Figure 10 - Focus on the Data Date

① **Focus** – Click the **Focus** icon to limit the displayed time range to the periods around the Data Date.

② **Data Date** – The focused range is centred around the schedule's **Data Date**.

③ **Focus Settings** – Select **Settings** from the dashboard toolbar to define the number of **Lookback Periods** before the Data Date and **Lookahead Periods** after the Data Date.

This is useful for concentrating a time-phased visual on the periods most relevant to the current reporting date.

Show and Hide Series

For some visuals, such as **S-Curves and Histograms**, individual data series can be shown or hidden to focus the visual on the information required for the analysis.

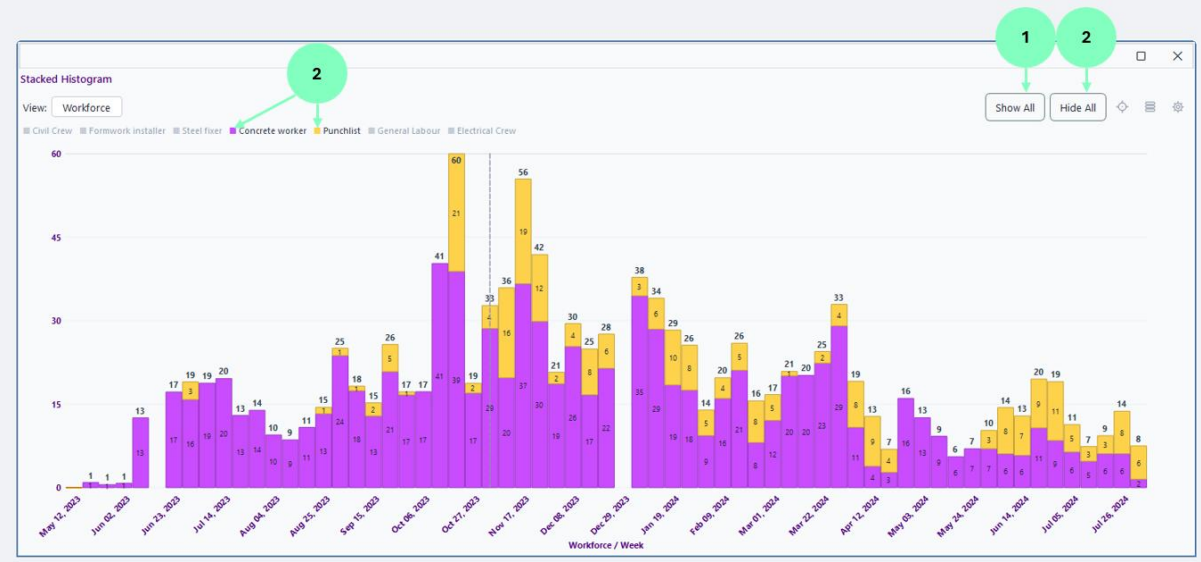


Figure 11 - Show and Hide Series

① **Show All** – Displays all available series or stacked segments.

② **Hide All** – Hides all available series or stacked segments.

③ **Show / Hide Individual Series** – Click a series in the legend to toggle it between visible and hidden.

Zooming Time-Phased Charts

Time-phased visuals, such as **S-Curves and Histograms**, can be zoomed horizontally to focus on a specific time range.

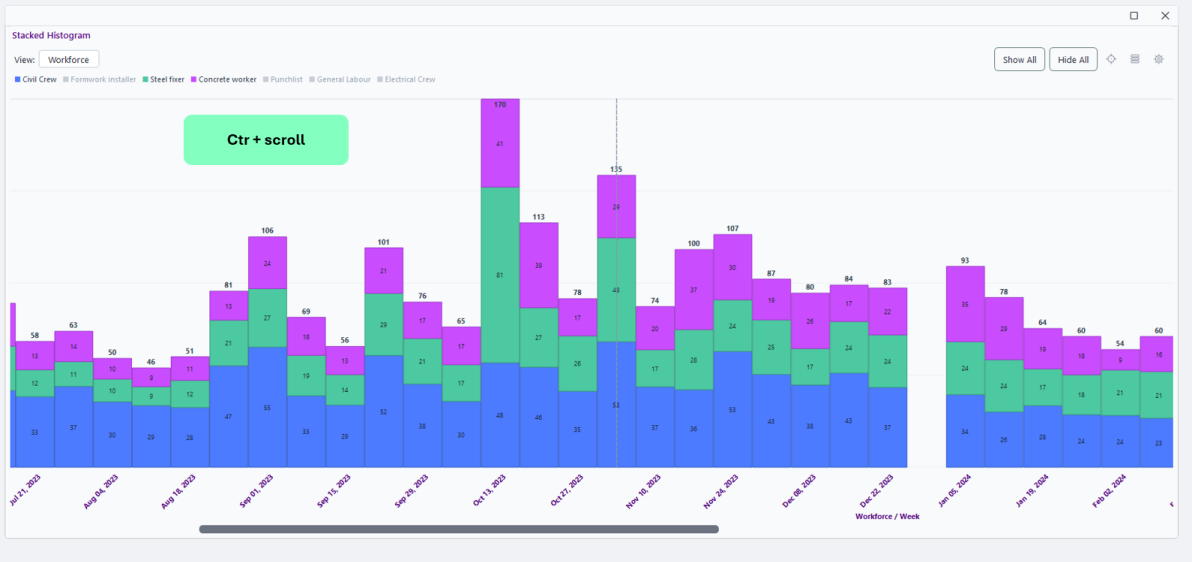


Figure 12 - Zoomed horizontally to focus

Hold **Ctrl** and use the **mouse wheel** to zoom in or out on the chart timeline.

Stacked Histogram View

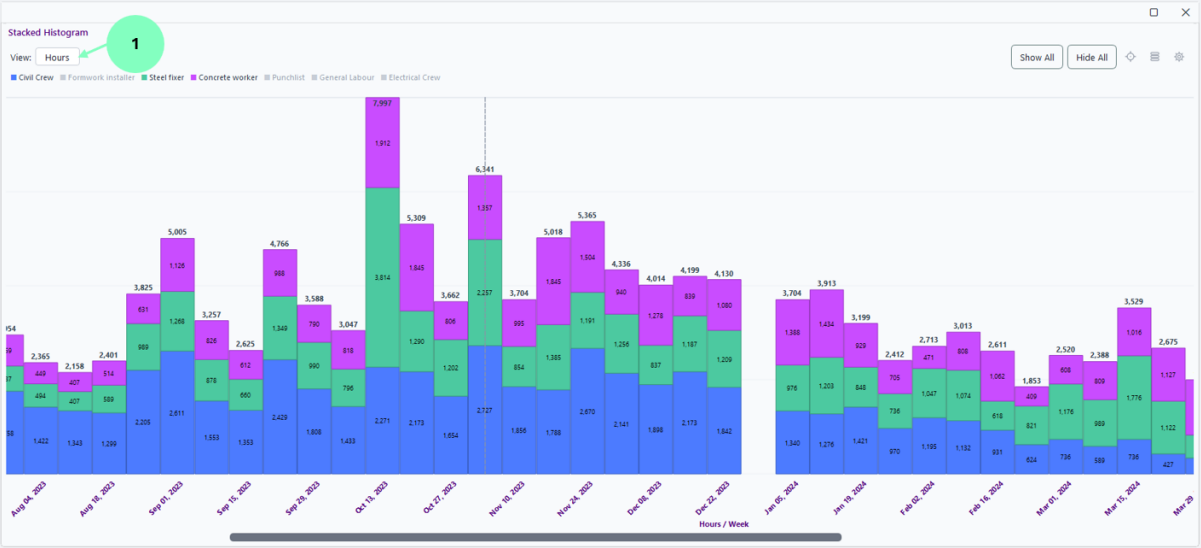


Figure 13 - Between Hours and Workforce

① **View** – Switch the **Stacked Histogram** between **Hours** and **Workforce**.

- **Hours** displays the time-phased labour units.
- **Workforce** converts the labour units into workforce numbers for each period.

Selecting Activity Codes for Visuals

Several dashboard visuals allow **Activity Codes** to be selected to define how information is grouped or displayed. The selection process is the same across supported visuals.

For example, the **Stacked Histogram** is stacked by Resources by default, but Activity Codes can instead be used to define the stacked categories.

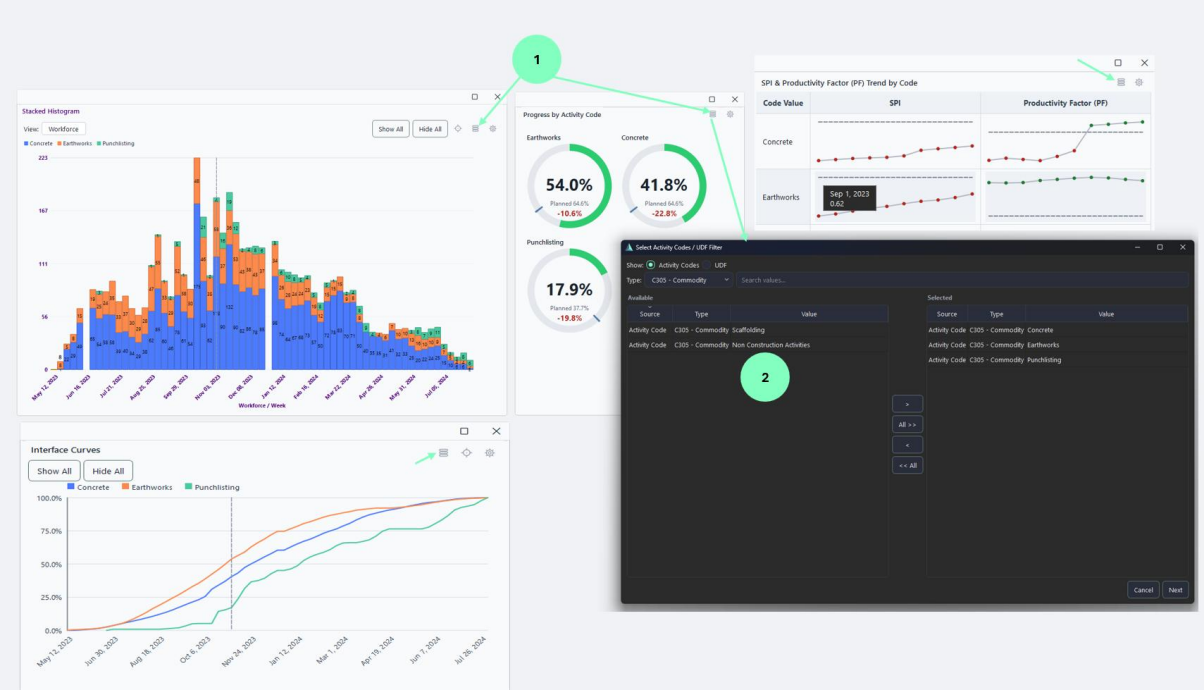


Figure 14 - Stacking by Activity Codes

① **Activity Code Selection** – Click the Activity Code icon on the visual to open the **Activity Code Selection** dialog.

② **Select Codes** – Select the required Activity Code type and values. The visual will then use the selected code values as the stacked categories.

This same selection method applies to other supported visuals, such as **Progress by Activity Code, Interface Curves, and SPI & Productivity Factor (PF) Trend by Code**.

Progress Summary by Activity Codes

By default, the **Progress Summary** displays results at the overall project level. The table can be further broken down using up to **three Activity Code hierarchy levels**, allowing progress, schedule variance, cost and performance metrics to be analysed by different

project areas or disciplines.



Group	Finish Date	Baseline Finish Date	Date Variance	Budgeted Labor Units	Budgeted Cost	Progress % to Date	Planned % to Date	Variance % to Date	SPI to Date	Productivity Factor (PF) to Date
Overall	28-Aug-2025	30-Jun-2025	-59 days	960,834	$124,908,355	2.5%	6.9%	-4.4%	0.36	0.99
Not In Current Schedule	—	25-Feb-2024	—	0	$0	—	—	—	—	
Train 4	24-Jun-2025	24-Apr-2025	-61 days	452,639	$58,843,109	0.0%	0.0%	-0.0%	0.00	
Structural	17-Jun-2025	31-Mar-2025	-78 days	118,550	$15,411,435	0.0%	0.0%	0.0%	—	
Platework	21-Mar-2025	10-Jan-2025	-70 days	13,102	$1,703,260	0.0%	0.0%	0.0%	—	
Piping	18-Jun-2025	16-Apr-2025	-63 days	147,219	$19,138,444	0.0%	0.0%	0.0%	—	
Mechanical	19-Jun-2025	08-Apr-2025	-72 days	64,493	$8,384,090	0.0%	0.0%	0.0%	—	
Electrical & Instrumentation	24-Jun-2025	24-Apr-2025	-61 days	109,276	$14,205,880	0.0%	0.2%	-0.2%	0.00	
Civil	28-Feb-2025	05-Dec-2024	-85 days	0	$0	—	—	—	—	
Train 3	16-Apr-2025	01-Dec-2024	-136 days	456,672	$59,367,386	5.3%	13.9%	-8.6%	0.38	0.99
Structural	10-Feb-2025	15-Oct-2024	-118 days	117,406	$15,262,715	15.8%	35.8%	-20.0%	0.44	0.99
Platework	23-Oct-2024	15-Aug-2024	-69 days	13,135	$1,707,550	26.0%	51.3%	-25.3%	0.51	1.00
Piping	18-Dec-2024	21-Nov-2024	-27 days	147,286	$19,147,154	0.0%	2.6%	-2.6%	0.00	—
Mechanical	06-Mar-2025	12-Nov-2024	-114 days	64,761	$8,418,930	1.6%	16.1%	-14.5%	0.10	1.00
Electrical & Instrumentation	16-Apr-2025	01-Dec-2024	-136 days	114,085	$14,831,037	1.0%	0.4%	+0.6%	2.39	1.00
Civil	30-May-2024	29-Apr-2024	-31 days	0	$0	—	—	—	—	—
Engineering	28-Aug-2025	30-Jun-2025	-59 days	0	$0	—	—	—	—	—
Engineering	28-Aug-2025	30-Jun-2025	-59 days	0	$0	—	—	—	—	—

Figure 15 - Progress Summary by Activity Codes

① **Configure Hierarchy** – Click Configure Hierarchy to select the Activity Code types used to group the Progress Summary.

② **Select Activity Code Levels** – Select up to three Activity Code types. The order of selection determines the hierarchy displayed in the table, from Level 1 to Level 3.

③ **Filter Codes** – Click **Filter Codes** to include only selected Activity Code values in the Progress Summary.

④ **Column Management** – Open the **Columns** dialog to add, remove or reorder the columns displayed in the Progress Summary table.

⑤ **General Formatting** – Open the formatting dialog to customise the table's appearance, including general formatting settings.

⑥ **Export to Excel** – Export the Progress Summary table to Excel for further analysis or reporting.

Additional Column Options

Right-click any column header to access additional options:

- **Format Column** – Customise the formatting of the selected column, including fonts and background colours.
- **Hide Column** – Hide the selected column from the table.
- **More Columns** – Open the Columns dialog to add, remove or reorder displayed columns.

Tip: Each column can be formatted individually, allowing important metrics such as Date Variance, SPI and Productivity Factor (PF) to be highlighted for easier interpretation.

Longest Path – Activity Code Swimlanes

The **Longest Path** visual can display Activity Code bands behind the Gantt, making it easier to see how longest-path activities move across different coded areas or disciplines.

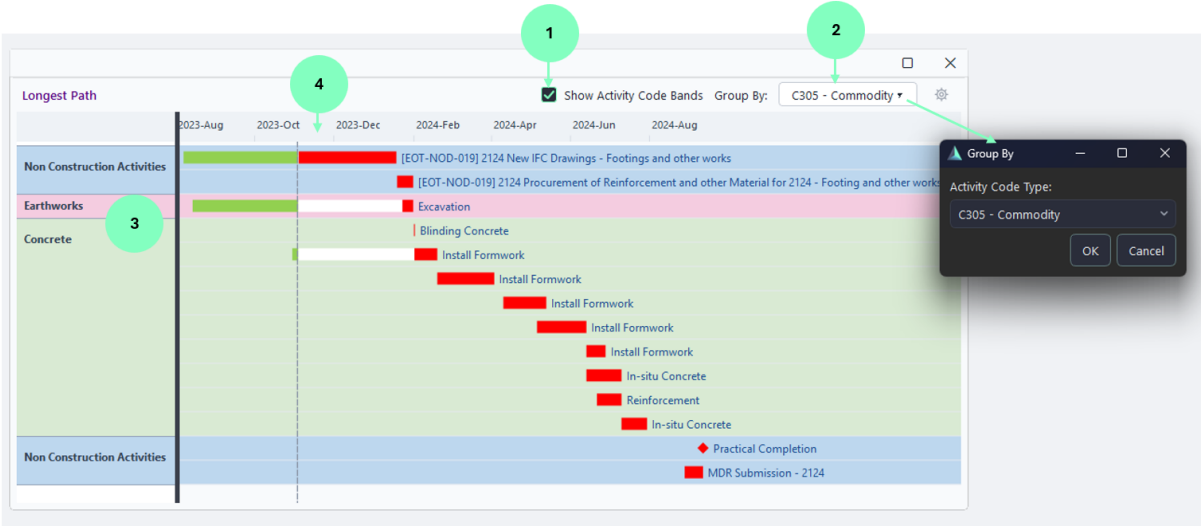


Figure 16 - Longest Path – Activity Code Swimlanes

① **Show Activity Code Bands** – Select this option to display Activity Code swimlanes behind the Longest Path Gantt.

② **Group By** – Select the Activity Code type to use for the swimlanes.

③ **Activity Code Swimlanes** – Activities are displayed within coloured bands based on their assigned Activity Code values.

④ **Timeline Zoom** – Hold **Ctrl** and use the **mouse wheel** to zoom in or out on the Gantt timeline.

Key Milestones Table

By default, when the **Key Milestones** visual is added, Schedule Prism automatically selects key milestones based on factors such as **criticality**. You can customise the visual by selecting the specific milestones you want to display.

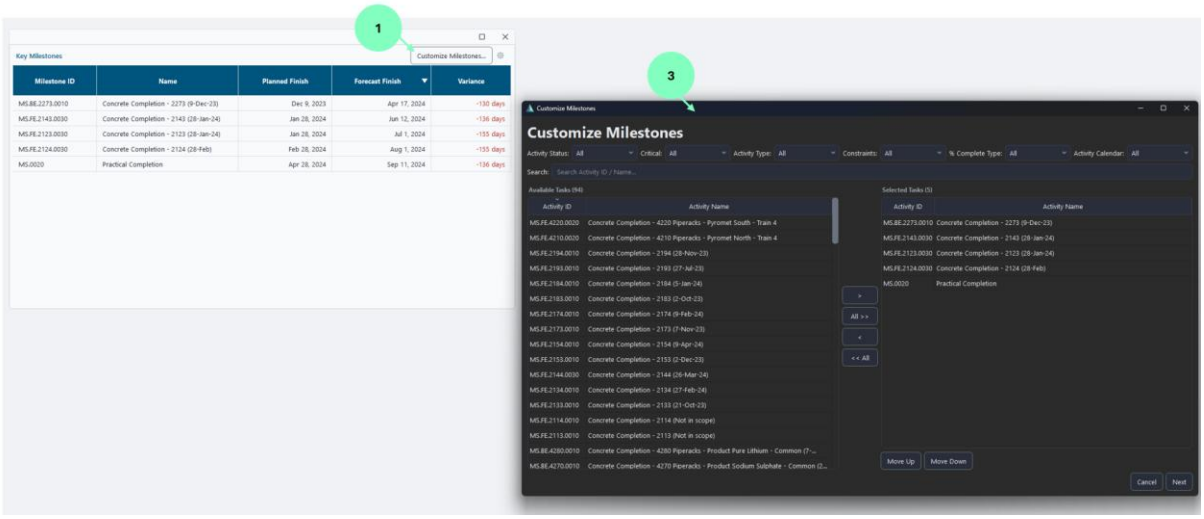


Figure 17 - Key Milestones Table

① **Customize Milestones** – Click **Customize Milestones** to open the milestone selection dialog.

② **Select Milestones** – Use the available filters or search to find the required milestones. Select the milestones, move them to the **Selected Tasks** panel on the right, arrange their order if required, and click **Next** to apply the selection.

Constraints Table

The **Constraints Table** lists constrained activities and provides options to focus the table on the constraints relevant to your analysis.

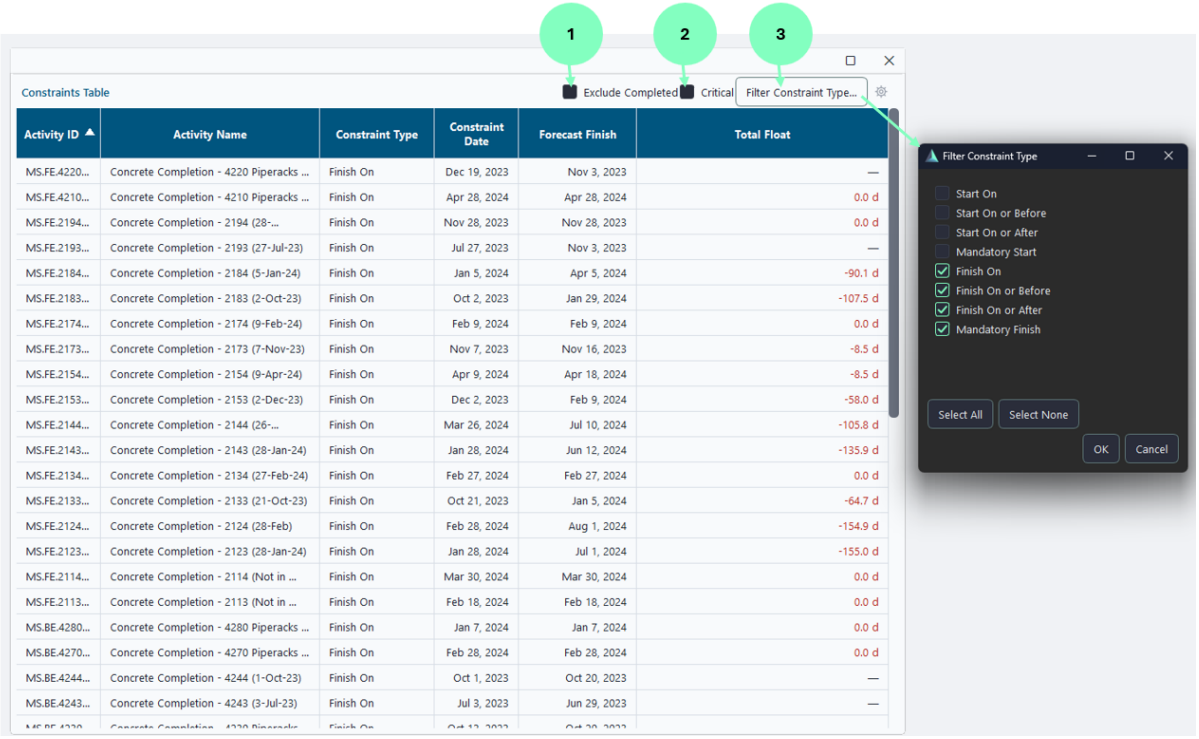


Figure 18 - Constraints Table

① **Exclude Completed** – Include or exclude constraints associated with completed activities.

② **Critical** – Show only constraints associated with **critical activities**.

③ **Filter Constraint Type** – Select the **constraint types** to display, such as Finish constraints, Start constraints, or specific constraint types such as **Finish On** or **Start On**.

Lookahead Gantt

The **Lookahead Gantt** provides a focused view of upcoming activities grouped by WBS. The lookahead period and Total Float threshold can be adjusted to focus the view on upcoming critical and near-critical work.

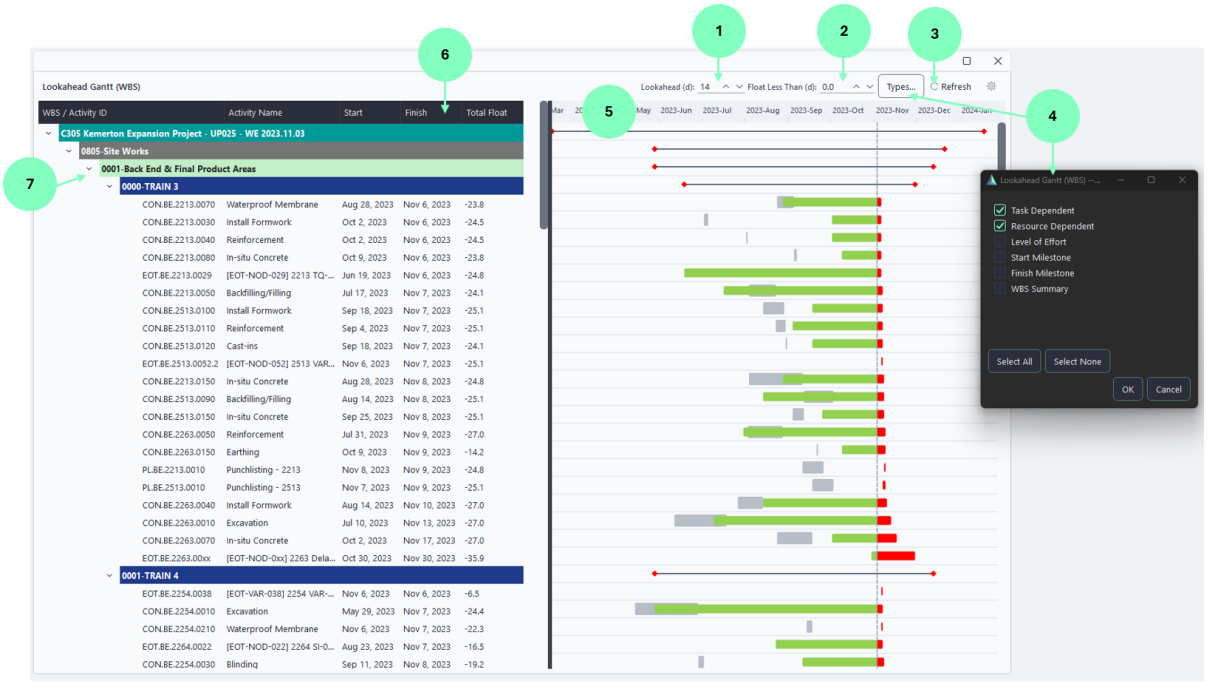


Figure 19 - Customise Lookahead Gantt

① **Lookahead Period** – Set the number of days to include in the lookahead. For example, **14 days** displays activities relevant to the next 14 days.

② **Total Float Filter** – Set the Total Float threshold to focus the Lookahead Gantt on activities within the required float range.

③ **Refresh** – Refresh the visual after changing the **Lookahead Period** or **Total Float** settings.

④ **Activity Types** – Select the Activity Types to include in the Lookahead Gantt.

⑤ **Timeline Zoom** – Hold **Ctrl** and use the **mouse wheel** to zoom in or out on the Gantt timeline.

⑥ **Column Sorting** – Click a column header to sort the activities by that column while maintaining the WBS structure.

⑦ **WBS Expand / Collapse** – Expand or collapse WBS nodes to control the level of detail displayed.

Drill Through to Schedule View

Many Custom Dashboard visuals support **drill-through to Schedule View**. This allows you to move directly from a summary result to the activities behind that result for further analysis.

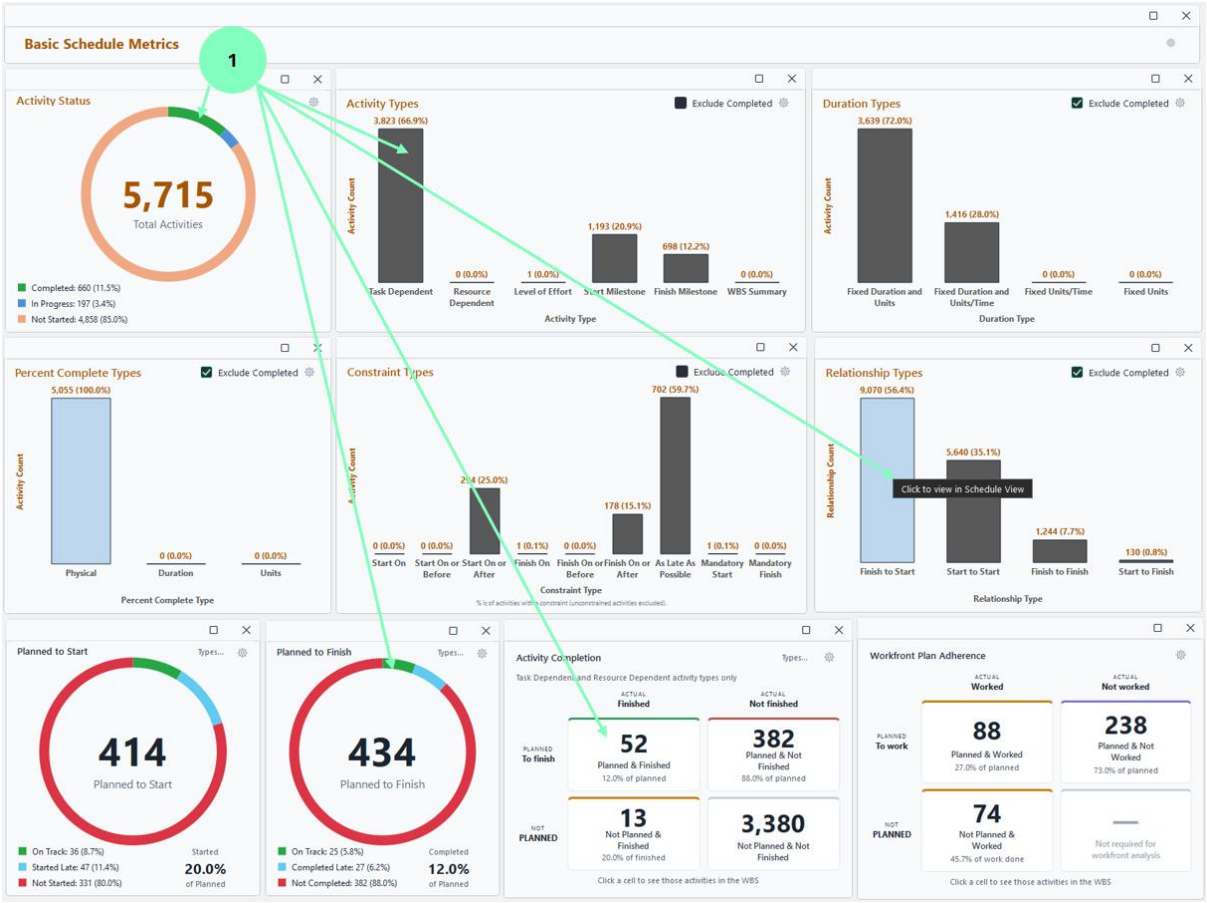


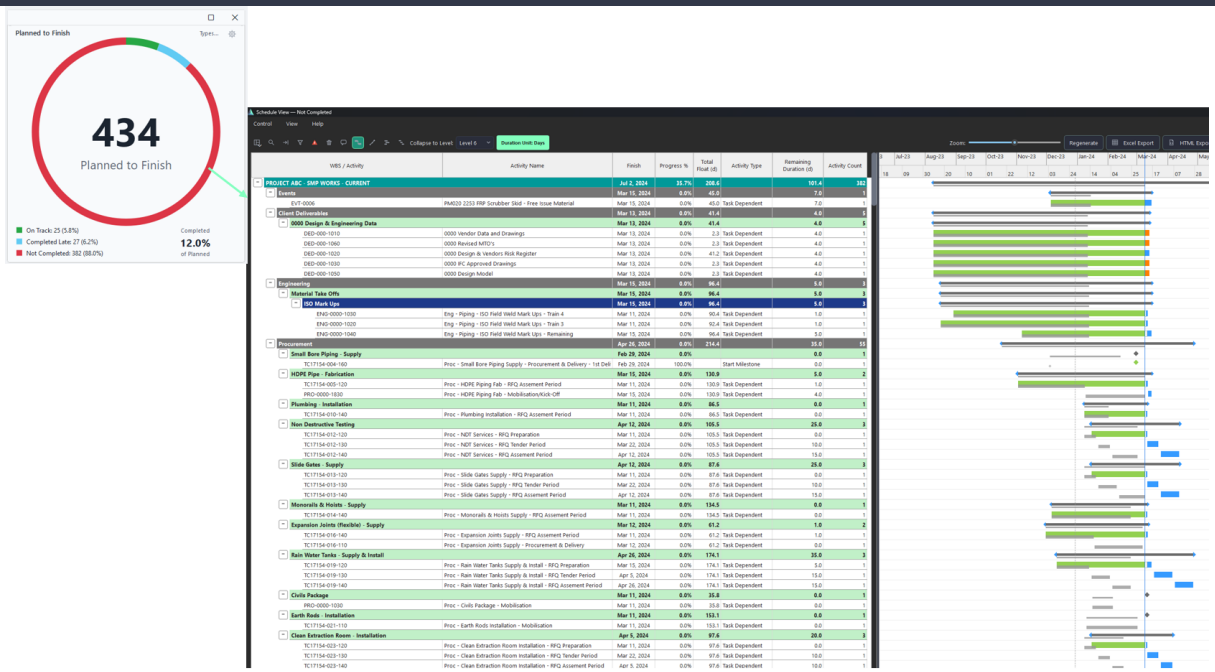
Figure 20 - Drill Through to Schedule View

① **Drill Through** – Click the required chart segment, category, or result to open **Schedule View** filtered to the relevant activities.

The Schedule View opens in the mode appropriate to the visual. For example, where the result involves both the current and baseline schedules, such as the **Not Completed** segment in **Planned to Finish**, Schedule View opens in **Two Schedule mode**.

Drill-Through Schedule View

The drill-through opens **Schedule View** showing the activities behind the selected dashboard result.

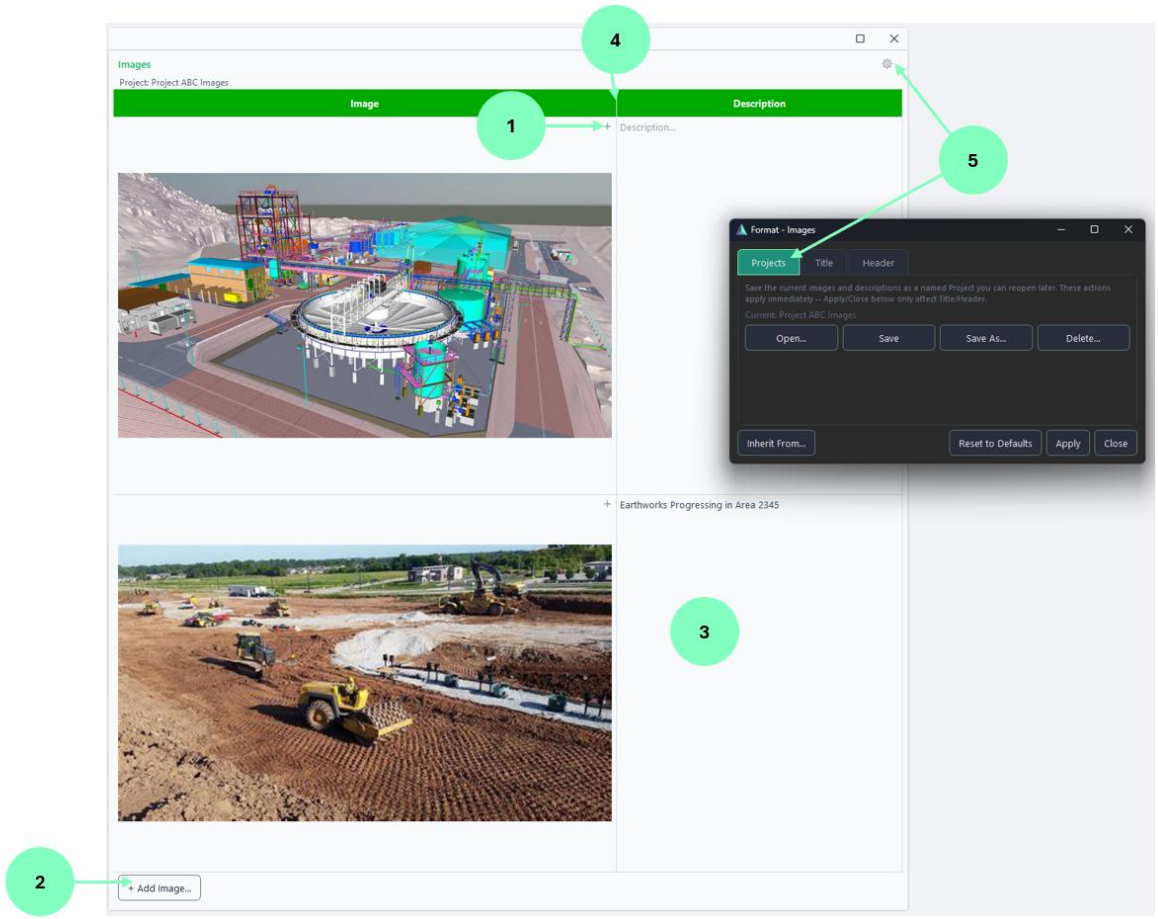


In this example, the **382 Not Completed** activities from the **Planned to Finish** visual are displayed. Both **Baseline and Current bars** are shown, allowing the planned position to be compared with the current schedule.

Close the Schedule View when finished. The **Custom Dashboard remains open**, allowing you to continue the analysis.

Image Visual

The **Image Visual** allows project images to be added to the dashboard, organised into saved image sets such as **Project ABC Progress Photos** or **Project ABC Model Shots**. A description can be added alongside each image.



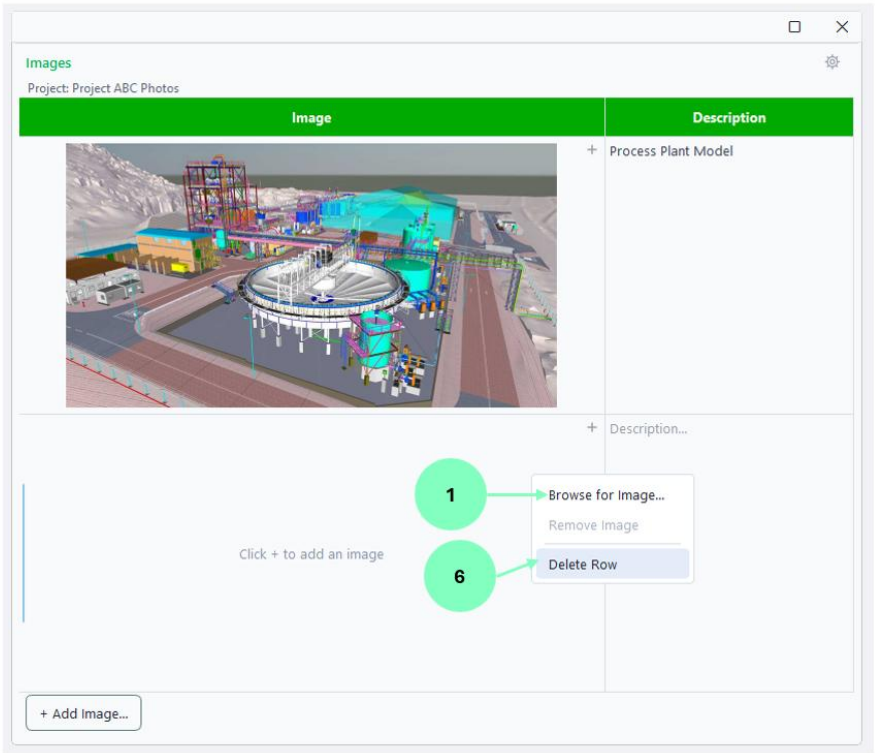


Figure 21 - Image Visual

1. **Add Image** – Browse for and add an image to the visual.

2. **Add More Images** – Add additional image rows. By default, one row is displayed.
3. **Description** – Enter or paste a description for each image using **Ctrl + V** or the right-click menu.
4. **Resize Images** – Drag the column divider to change the image width. Images maintain their aspect ratio.
5. **Image Sets** – Open, Save, Save As, or Delete image sets. Once saved, the image set can be reopened without adding the images and descriptions again.
6. **Delete Row** – Right-click an Image cell and select **Delete Row** to remove the entire row, whether empty or containing an image.

Note: After making changes to the Image Visual, remember to **save the dashboard layout** to retain the changes.

Notes Visual

The **Notes Visual** allows commentary to be added alongside the dashboard visuals, such as **progress commentary, schedule review findings, key observations, or reporting notes**. Notes can be formatted and saved for later use.

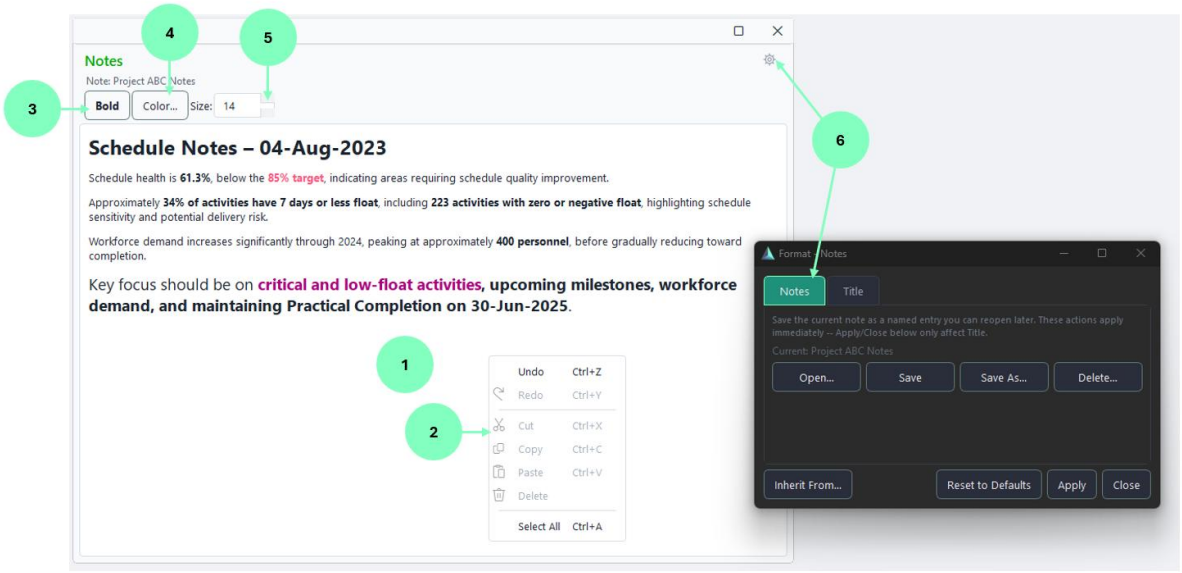


Figure 22 - Notes Visual

1. **Note Area** – Type notes directly or copy and paste text into the visual.
2. **Right-Click Menu** – Access common editing options such as **Copy, Paste, Undo, Redo,** and **Select All**.
3. **Bold** – Select text and apply **Bold** formatting.
4. **Text Color** – Select text and change its colour.

5. **Font Size** – Select text and increase or decrease its font size.
6. **Saved Notes** – Open, Save, Save As, or Delete named notes. Saved notes can be reused without entering the commentary again.

Note: After making changes to the Notes Visual, remember to **save the dashboard layout** to retain the changes.

Logo Visual

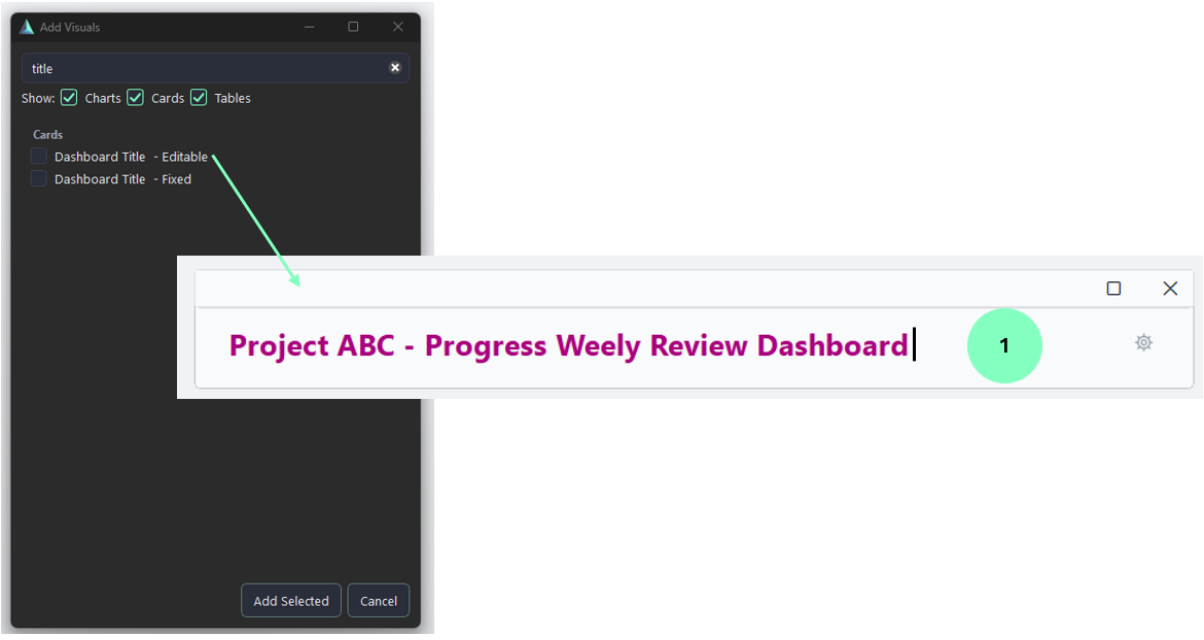
The **Logo** visual allows you to add a company or project logo to the dashboard.



① **Add Logo** – Click the **+** icon and browse for your logo in **PNG or JPEG** format. Once added, the logo remains available for use in the dashboard.

Dashboard Title – Editable

The **Dashboard Title – Editable** visual allows you to add a custom title to the dashboard.



① **Edit Title** – Click in the title area and enter the required text. Use the **Formatting** icon to customise the title appearance, as with other visuals.

Note: A separate visual, **Dashboard Title – Fixed**, is automatically populated using the project name.

Drill-Down Capability

Many visuals in the **Custom Dashboard** support drill-down functionality, allowing users to explore the detailed schedule information behind summary values, chart segments and performance indicators.

This helps users move directly from high-level dashboard analysis to the underlying activities and driving logic.

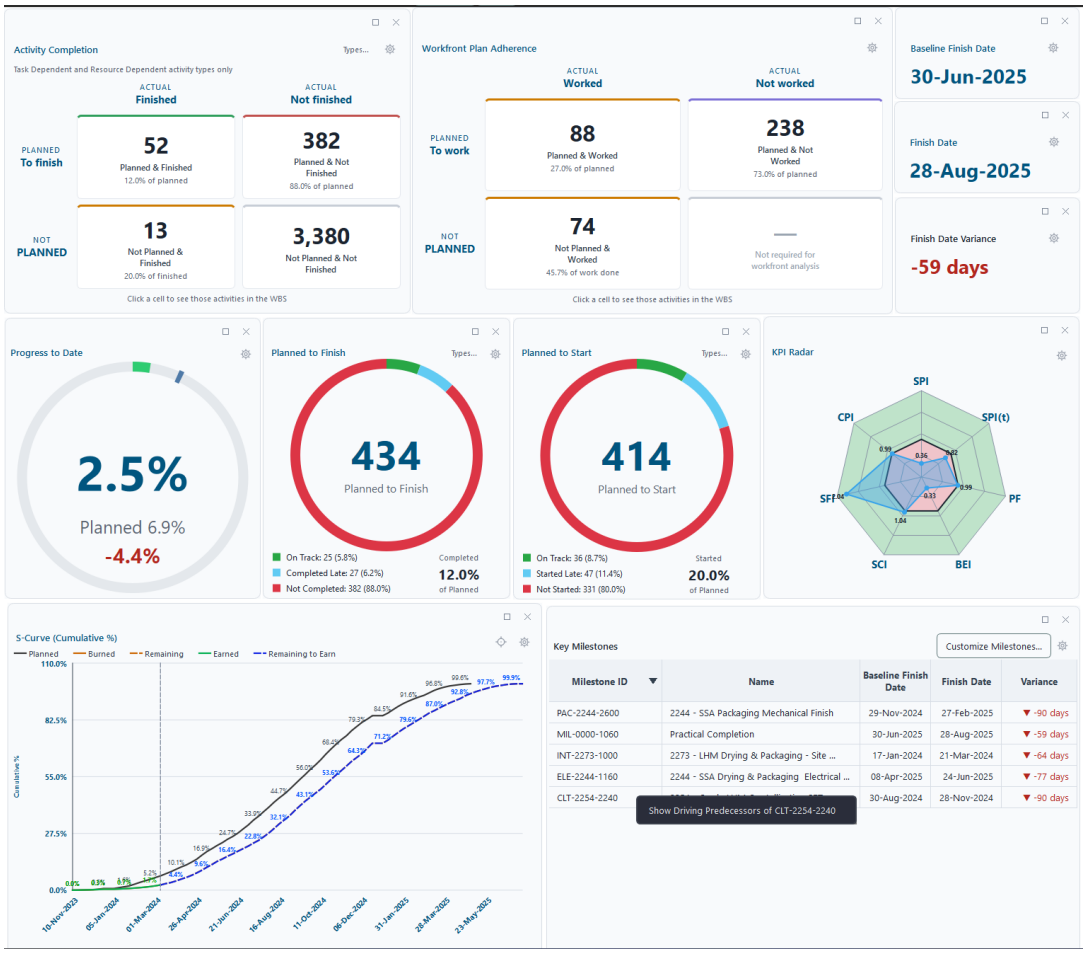


Figure 23 - Drill-Down Capability

Examples of Drill-Down Functionality:

① **Key Milestones** – Right-click a milestone and select **Show Driving Predecessors** to open its driving path in Schedule View. This helps identify the activities and logic driving the milestone's forecast finish date and any delay against the baseline.

② **Planned to Finish / Planned to Start** – Click a chart segment (e.g., Not Completed or Started Late) to open Schedule View filtered to the relevant activities.

③ **Activity Completion** – Click a card (e.g., Planned & Not Finished) to display the corresponding activities.

④ **Workfront Plan Adherence** – Click a card (e.g., Planned & Not Worked) to review the activities contributing to that category.

Note: Where the analysis involves both current and baseline schedules, the drill-down opens Schedule View in Two Schedule mode, allowing users to compare dates, variances and Gantt bars.

The Custom Dashboard remains open while exploring the detailed schedule, making it easy to return to the dashboard and continue the analysis.