

## Dashboard – Explanation of the Views

### Overview of the Dashboard:

The Dashboard pulls information from the Task Manager Report and presents the data in an intuitive, readily understandable format. The purpose of the Dashboard is to look to see how compliant the project team is with its contractual obligations. It therefore starts by looking at what is **currently outstanding**, then looks at **what has been completed** (and whether they were completed on time or late), then **looks ahead** at what needs to be done going forward. The final view is **completion efficiency** – how efficient the project was at completing the Tasks on time. If your ‘Notice’ obligations have been tasked, there is also a separate **Notice** view to show these particularly important Tasks. The **Timeline View** gives you a comprehensive overview of *all* your Tasks for the selected period. For ease of use, the Dashboard Views are pre-configured, but data can be filtered as required.

### Accessing the Dashboard:

Click on the Dashboard icon to open. The application opens on the Filters page with the default view showing the user’s full extent of permissions, based on what they would be able to view in the Task Manager Report. This is shown as ‘—All—’ under Saved Filters.

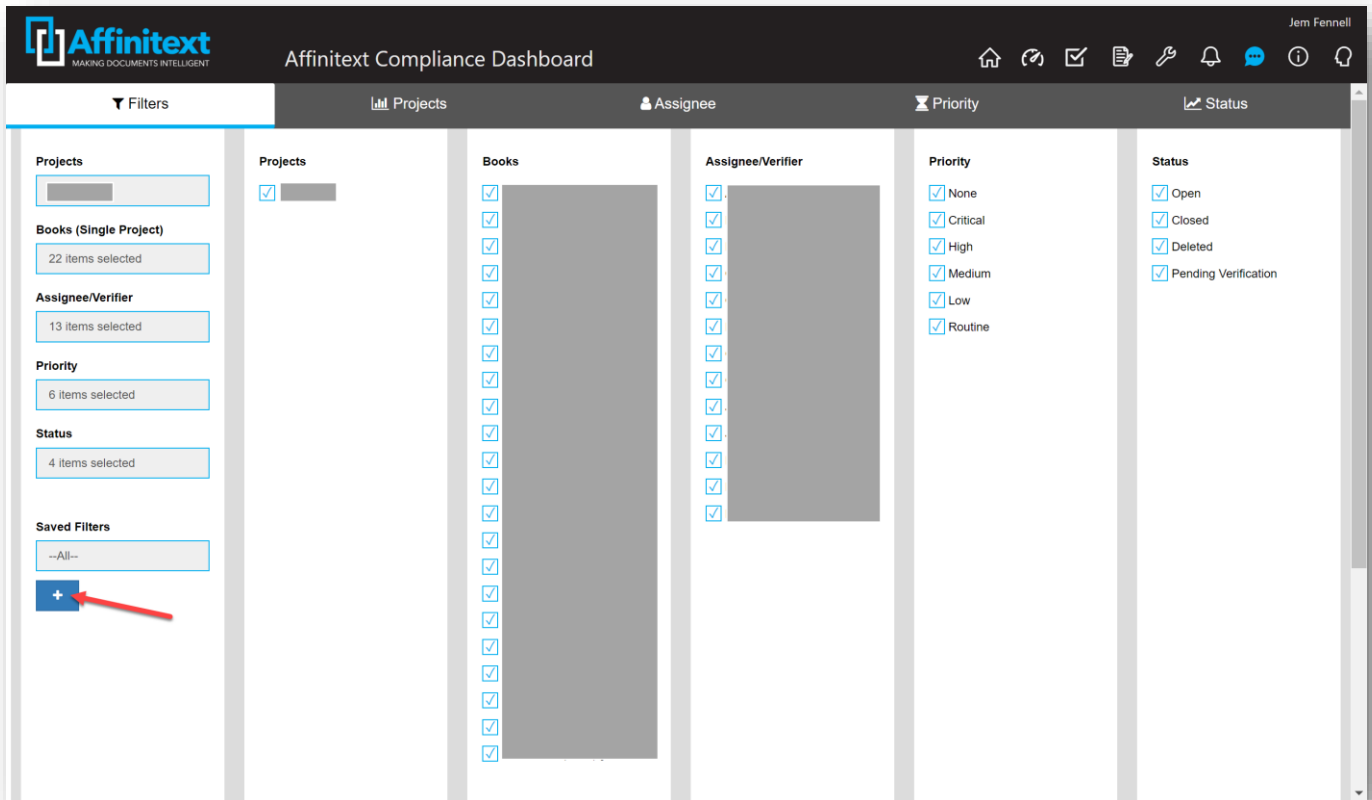
Filters can be applied to show specified information in the views. To filter your views, click the grey boxes in the left-hand pane to filter by Project, Book (if a single project is selected), Assignees/Verifiers, Priority and/or Status. Alternatively unselect the required tick boxes in the Projects, Books, Assignees/Verifiers, Priority and Status columns.

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## Saved Filters:

Once a filter has been selected, it may be saved for future use:

- To **create** a new filter, click on the '+' button, enter a name in the 'Filter Name' box, then click on 'save' button.
- To **edit** an existing filter, select the filter to edit from the 'Filter Name' box, make the changes to the parameters required, then click on the edit button and then save your changes.
- To **delete** a saved filter, select from Load Filters, then click on the delete button and confirm to delete.

Your selected filter will be retained when you log out for the next time you access the Dashboard.

## Presentation of Data:

Once the filter has been set (or keeping the default filter), select your view:

- **Project View:** data relating to the project(s) selected.
- **Assignee View:** project data by user(s), as an Assignee or Verifier.

- **Priority View:** project data broken down Priority of the Task (Critical, High, Medium, Low, Routine).
- **Status View:** project data broken down by the status of the Task (Open, Pending Verification, etc).

### **Date Range and Periodicity:**

A **default date range and periodicity** has been set per view, but can be edited. For the views: 'Currently Overdue Tasks', 'Completed Tasks' and 'Task Completion Efficiency', the default setting shows a date range of 'this month to date plus five months looking back' with a periodicity of 'monthly'. The 'Upcoming Tasks' view shows a date range of 'this month to date plus five months looking forward' with a periodicity of 'monthly'. The 'Timeline View' shows a date range of 'two months looking back, this month plus three months looking forward'.

### **Further Details:**

To drill down for further information on any of the data presented in the views, simply click on the relevant selection of the graph or pie chart. This will open the Task Manager Report which will display the individual Tasks to show you the full details behind the Dashboard data.

### **Temporary Refining of View:**

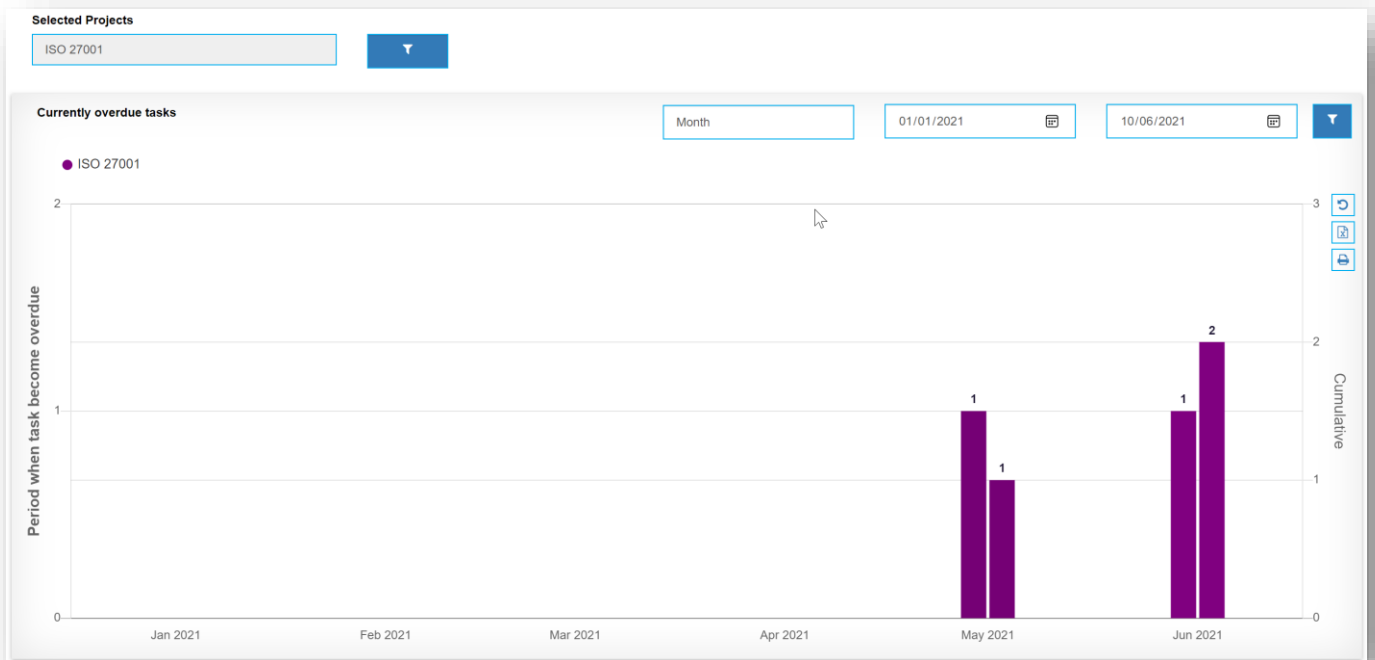
To exclude items from the view temporarily, simply click on the required item in the legend. The removed item (eg assignee) will be scored through and the data removed from the table.

### **Dashboard Views:**

The Dashboard Views are the same for each data presentation. Examples shown below are for the Project View.

### **View: Currently Overdue Tasks:**

Shows the Tasks which are currently overdue for the date range selected and cumulatively (within date range selected).



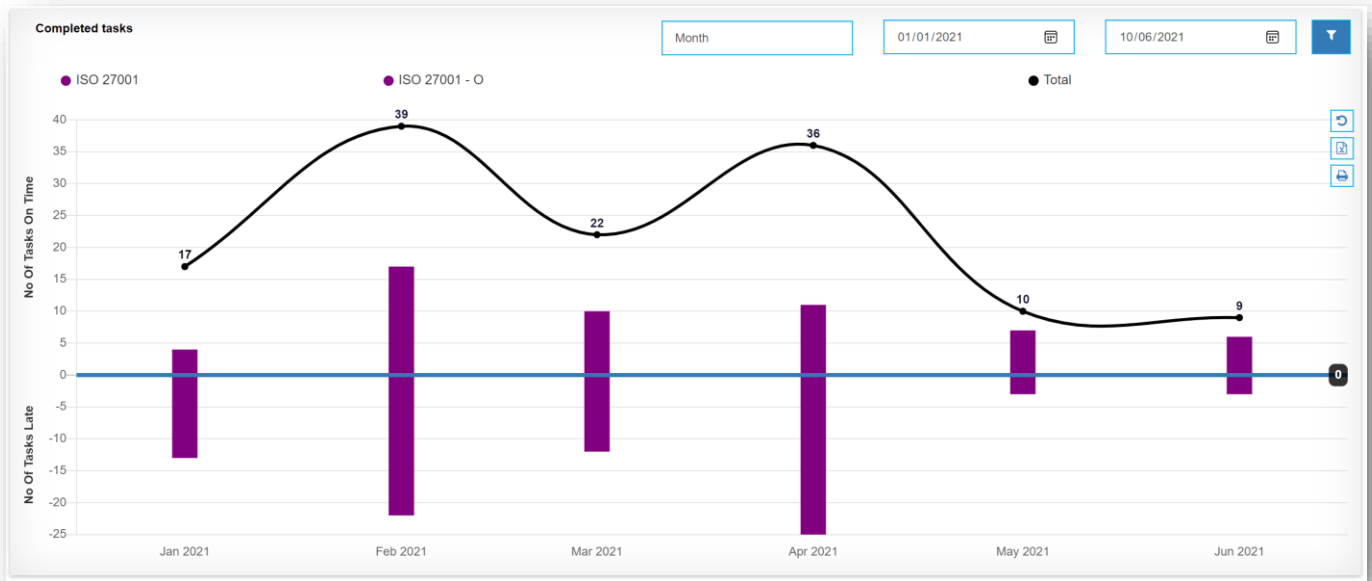
### View: Completed Tasks:

Shows Tasks completed during the date range selected.

For any period, the bar value above the zero line shows the number of Tasks completed at any time within the date range selected, which were due to be completed in that period and were completed on or before the due date, 'on-time'.

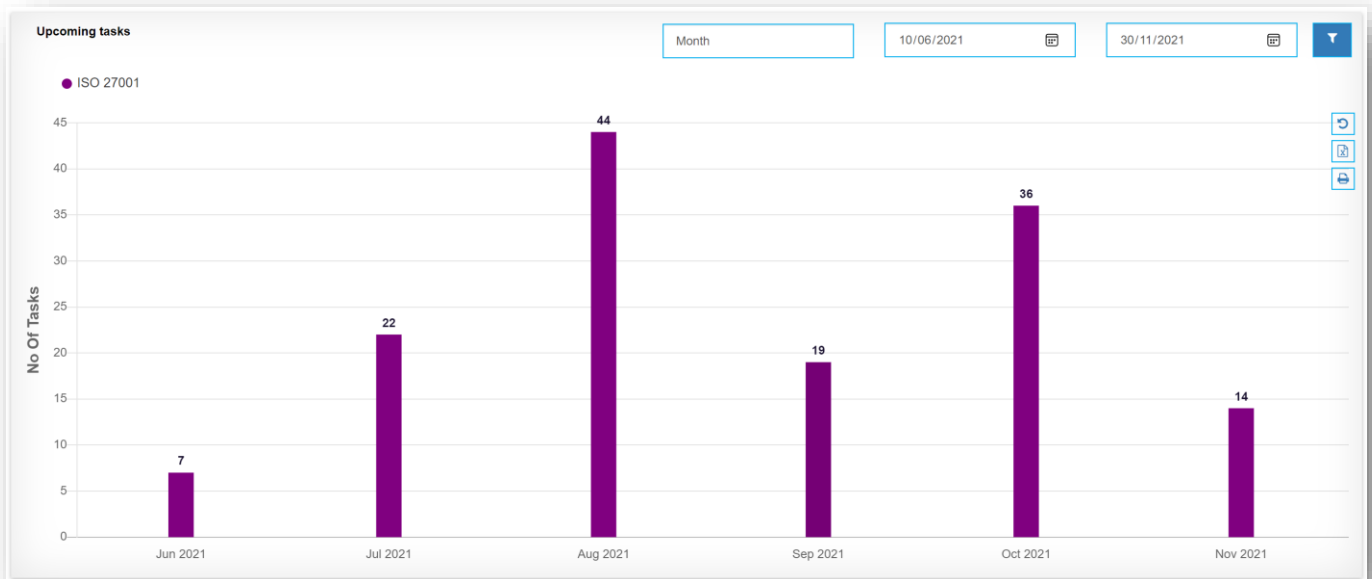
For any period, the bar value below the zero line shows the number of Tasks completed at any time within the date range selected, which were due to be completed in that period and were completed after the due date, 'late'.

The black 'total' line shows the sum of 'on-time' and 'late' Tasks.



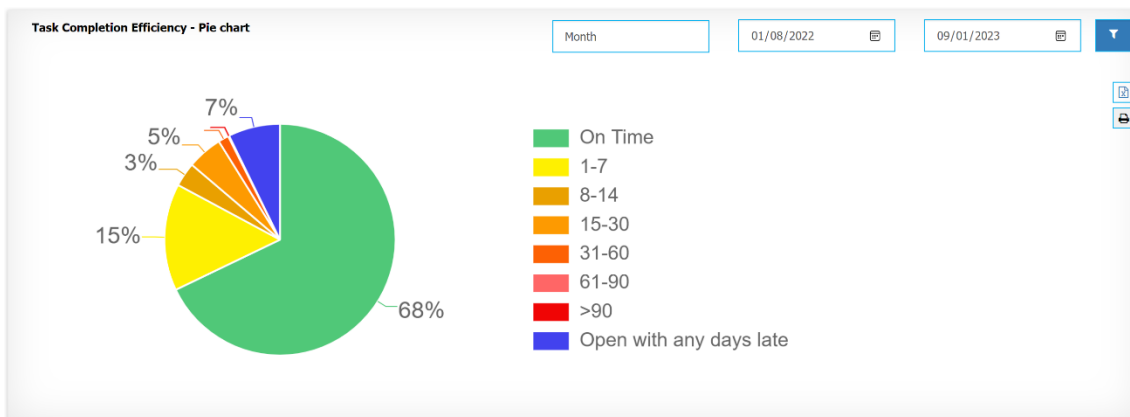
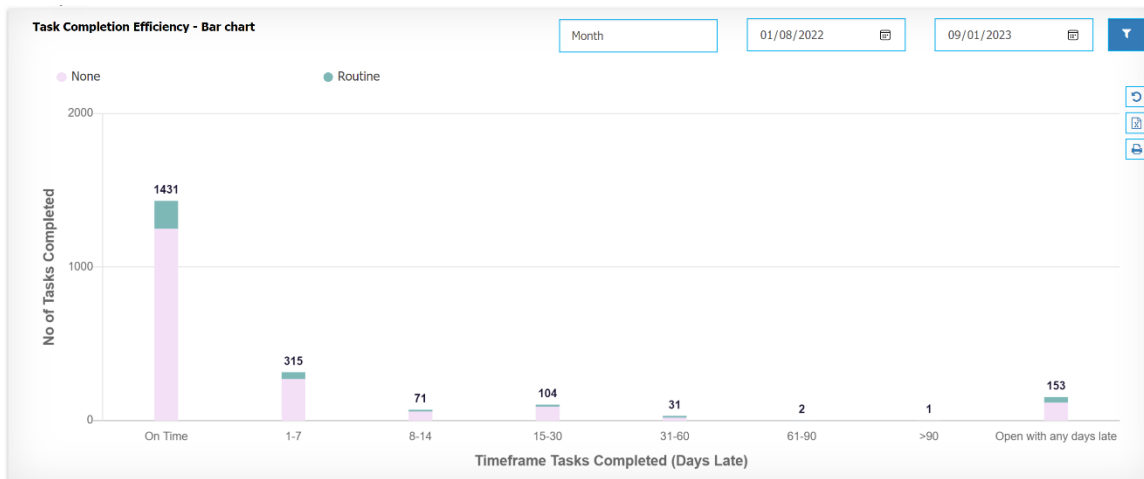
**View: Upcoming Tasks:**

Shows open Tasks for each period for the date range selected.



### View: Task Completion Efficiency (Bar and Pie Charts):

Shows the efficiency of Task completion for Tasks completed within the date range selected, presented both as bar and pie charts. Shows Tasks completed on time, between 1 – 7 days late, etc.



### View: Notice Provision:

Where an obligation which gives rise to a notice to be provided, our recommendation is that the Task title be supplemented with the text '(Notice)' so that these obligations can be specifically marked out for close scrutiny. Where tasking is provided as a service, notice obligations are marked in this way.

The left-hand view shows which party is required to give a notice and the right-hand view shows the notice period, where stated in the contract.



## Document Version Control

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