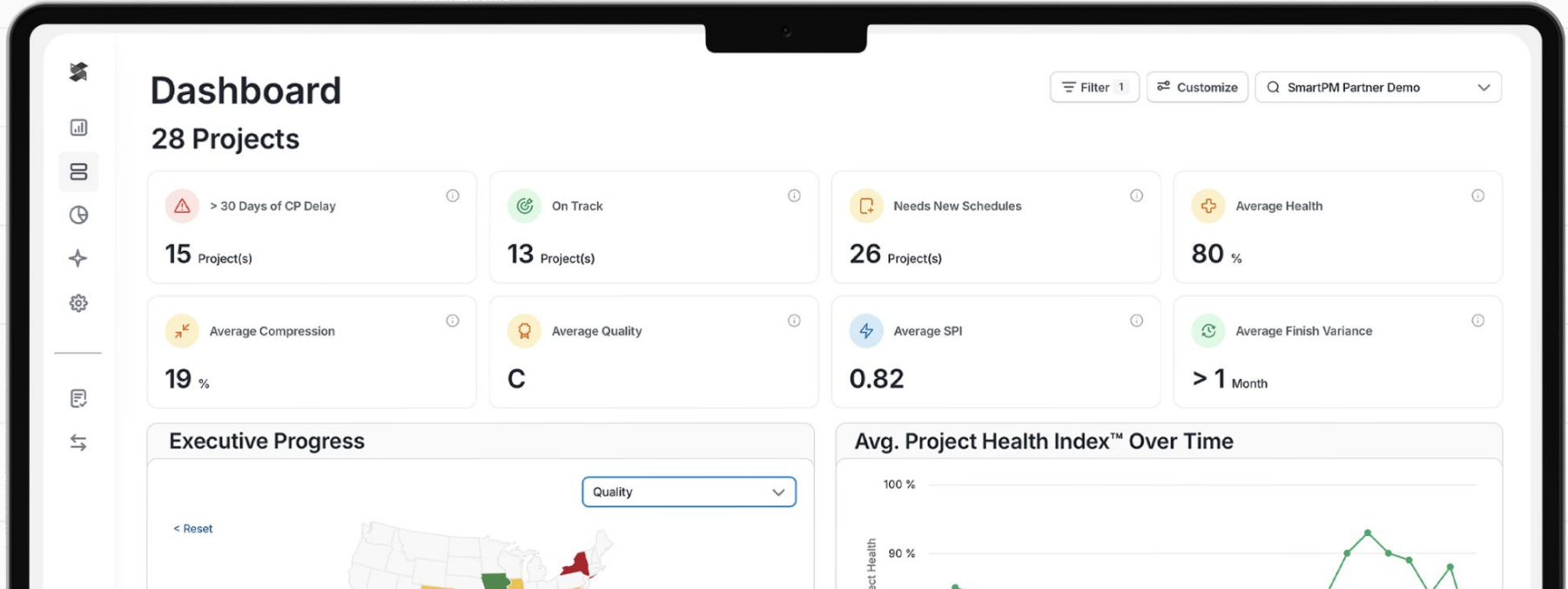




Introducing Customizable Workspaces

A New Way to Experience Your Projects in SmartPM



Your Workspace, Your Way

SmartPM's new Customizable Workspace gives every user — from site teams to executives — a tailored project view that surfaces exactly the information they need, the moment they need it.



Personalize Your View

Configure your workspace to look and feel exactly how you want it. Set it as your default so you land there every time you open a project.



Admin-Managed Workspaces

Company admins can create public workspaces and assign them to specific users or roles across the organization.



Ready-Made Templates

Hit the ground running with 5 out-of-the-box workspace templates designed for common roles and use cases.



See It in Action

Live Demo

Let's walk through Customizable Workspaces live inside SmartPM – from creating your own workspace to assigning a template to your team.



Personal Workspace Setup

Create, configure, and save a personal default view.



Admin Workspace Assignment

Build a public workspace and assign it to a user group.



OOB Templates Walkthrough

Explore the 5 out-of-the-box templates and when to use each.

Build the Perfect Workspace

Customizable Workspaces put you in control of your project experience. Choose the metrics and views that matter most to your role and save them as your default.

1

Select Your Widgets

Choose from a library of views- including SS/SF, Monthly Distribution, and more with select views offering additional filtering options.

2

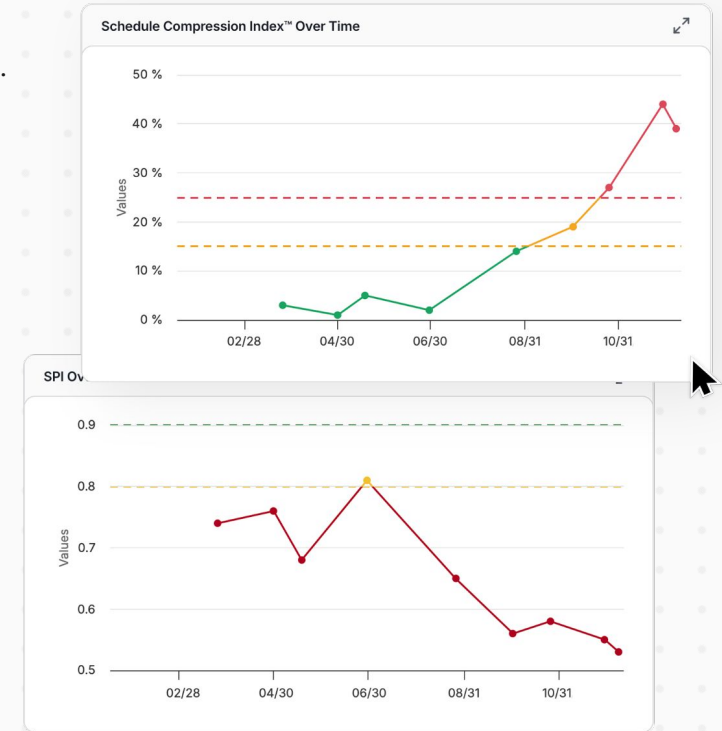
Arrange & Save

Drag, configure, and save your layout. Set it as your personal default view so every project opens exactly how you like it.

3

Share Across Your Team

Admins publish workspaces and assign them to users by role — ensuring everyone sees what's relevant to them from day one.



Empower Your Organization with **Role-Based Workspaces**

Company admins have the ability to create public workspaces and assign them directly to users – ensuring consistent, role-appropriate views across every project in your portfolio.

What Admins Can Do



Create Public Workspaces

Build shared workspaces visible to assigned users across your entire organization.



Assign by Role or User

Assign workspaces to individual users or groups – tailor the experience for PMs, site teams, execs, and more.



Set Organization Defaults

Ensure new users start with the right view from the moment they log in.

Example: Project Manager View

An admin creates a workspace featuring:

- **Should Start / Should Finish**
- **Earned Value Metrics**
- **Monthly Distribution**

This workspace is then assigned to all Project Managers – so when they open any project, this is the first thing they see.



5 Templates. Ready to Use Today.

SmartPM ships with five pre-built workspace templates designed around the most common roles and needs in construction project management. Use them as-is or as a starting point for your own custom workspaces.

1

Default Workspace

The familiar current workspace view.

2

Boots on the Ground

Built for the site team overseeing day-to-day execution.

3

Executive Oversight

High-level performance and risk visibility for leadership.

4

Management Overview

An in-depth look at all aspects of project progress.

5

Project Health Details

A focused view into key risks on the project.



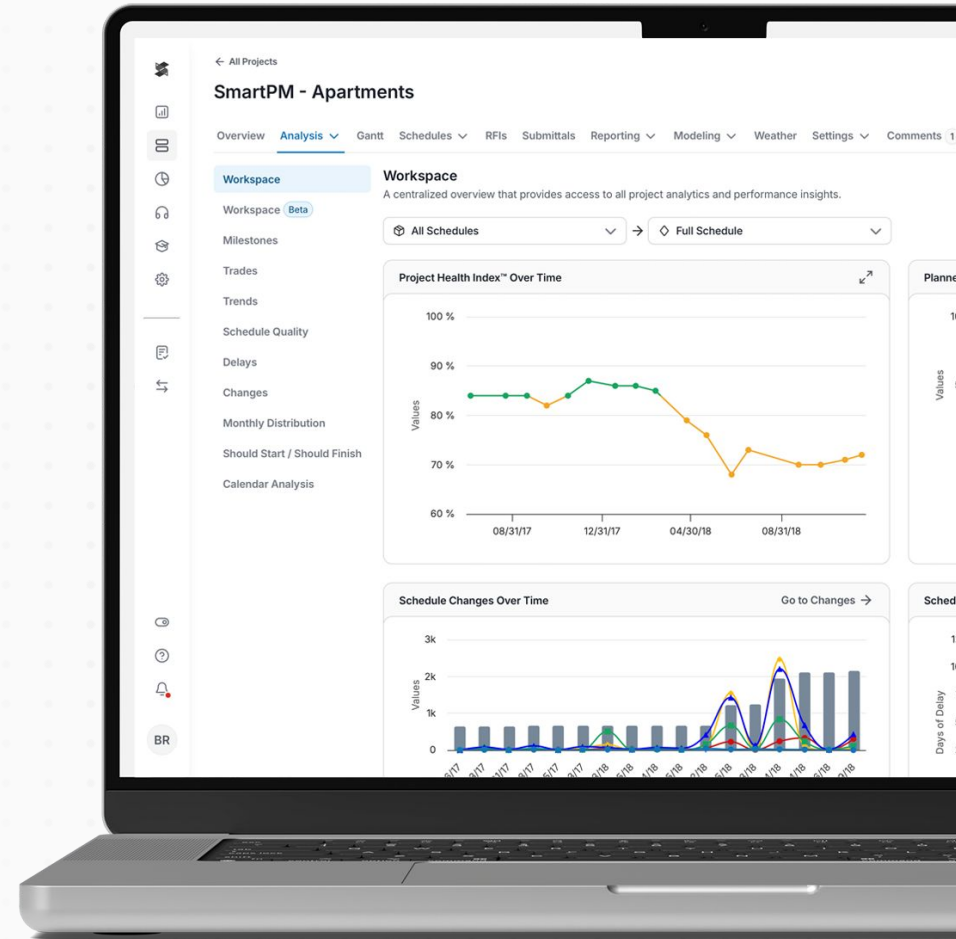
Default Workspace

The Default Workspace is the familiar experience you know today — your existing workspace view, preserved exactly as it is.



Already comfortable with SmartPM? Your current experience is not going anywhere. This template ensures continuity for users who prefer the status quo.

Use this as a baseline to build your own customized workspace, or stick with what works for your team.



Boots on the Ground

Designed for the **site team** who needs to oversee daily execution and understand real-time project performance in the field.

Performance Metrics

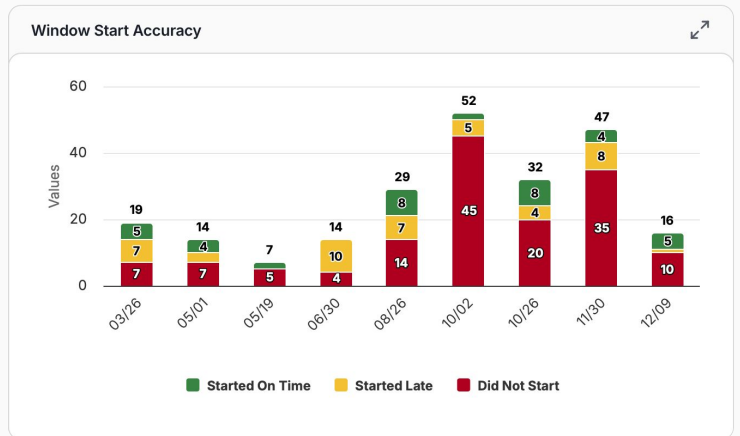
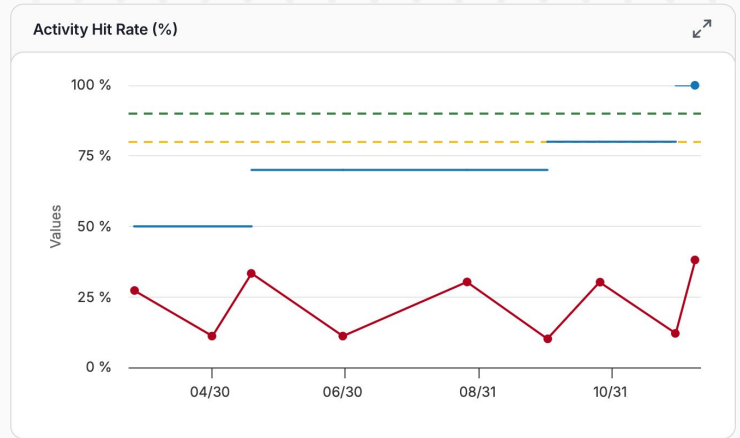
Understand how the project is performing against plan at a glance.

Hit Rate

Track how accurately activities are being completed as scheduled.

Start/Finish Date Accuracy

Monitor how reliably activities are starting and finishing on their planned dates.



Executive Oversight

Built for **executives** drilling into a project – balancing high-level performance awareness with a clear picture of risk and schedule health.

Key Milestone Performance

Understand how the project's most critical milestones are trending.

Schedule Quality & Performance

Assess the reliability of the schedule and performance trends over time.

Health & Risk Over Time

See how project risk and overall health have evolved across the schedule lifecycle.

Compression & Hit Rate

Identify schedule compression patterns and activity completion accuracy.

Earned Value

Evaluate planned vs. actual progress in quantifiable terms.

End Date Change

Track how the projected completion date has shifted over time.



Management Overview

A comprehensive, **in-depth look at the project for managers** who need the full picture – combining field-level detail with executive-level insight, plus deeper analysis of project dynamics.

Everything in Boots on the Ground

Performance metrics, hit rate, and start/finish date accuracy for field-level visibility.

Everything in Executive Oversight

Milestones, health/risk, earned value, performance and compression over time, end date change.

Change Analysis

Understand the changes occurring on the project and their schedule impact.

Float & Activity Distribution

Deep dive into schedule float and how activities are distributed across the project timeline.



Project Health Details

A focused, risk-first view designed for teams who need to quickly identify and act on the **key risks present on the project**.

Where other workspaces give a broad picture of project performance, Project Health Details zeroes in on what could go wrong — and what already is.

Use this workspace when you need to understand project vulnerability, prepare for a risk conversation, or investigate a project that's showing signs of distress.



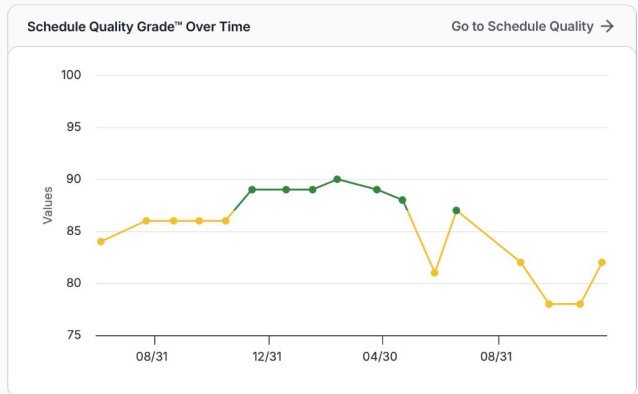
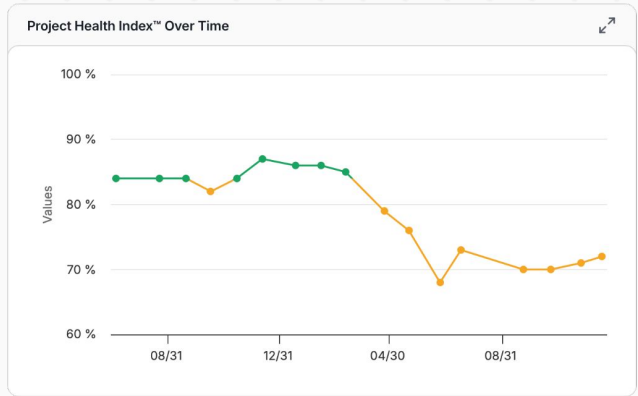
Key Risk Identification

Surface the most significant schedule risks on the project at a glance.



Project Health View

Understand the overall health state of the project and where vulnerabilities exist.





Questions?

We'd love to hear from you.

Customizable Workspaces is available to all SmartPM customers today. Reach out to your **Customer Success Manager** to get started or learn more about setting up workspaces for your team.