Cloud Reports and Dashboard Guide

The Timebars Cloud Dashboard delivers a powerful suite of interactive reports, visualizations, and data management tools designed for portfolio managers, project leaders, resource planners, and executives. Access your project data from anywhere with real-time updates, multi-level drilldown capabilities, and intelligent health indicators across all portfolio levels.

What is the Cloud Dashboard?

The Cloud Dashboard is a web-based platform that transforms data from your Agilebars, Timebars, or Costbars applications into dynamic visualizations—like graphs, line charts, pie charts, bar charts, and tabular reports. Unlike the client apps which work offline, the Cloud Dashboard requires an internet connection and active subscription.

Key Benefits:

- **Real-Time Updates**: Changes sync automatically when you publish from client apps
- **Anywhere Access**: View reports from any device with a modern web browser
- **Multi-User Collaboration**: Share insights with team members and stakeholders
- **Interactive Intelligence**: Filter, sort, search, and drill down through hierarchical data
- **Seven-Dimension Health Tracking**: Monitor project health across Overall, Scope, Schedule, Cost, Hours, Risk, and Issues

How to Access the Dashboard

Prerequisites:

- Active Timebars Ltd. Cloud subscription
- Published data from Agilebars, Timebars, or Costbars client application
- Internet connection

Two Ways to Access:

1. **From Client Applications**:
    - After publishing your data, click the "Dashboard" button in the client app
    - You'll be automatically logged in and directed to the dashboard
2. **Direct Web Access**:
    - Visit www.timebars.com/dashboard
    - Log in with your credentials
    - Choose "Dashboard" from the picklist after successful login

Dashboard Navigation

The dashboard uses a **left sidebar navigation** to browse available reports:

Main Report Categories

1. **Executive Portfolio Reports**: Portfolio-wide visibility and variance tracking
2. **Card-Based Drilldown**: Interactive hierarchical navigation with health indicators
3. **Charts and Visualizations**: Burndown charts, pie charts, and bar charts
4. **Resource Reports**: Resource allocation, utilization, and cost analysis

To View a Report:

- Click any report name in the sidebar
- The report displays in the main viewing area
- Use filters and search to focus on specific data

Executive Portfolio Reports

Project Status Report (Dashboard Home)

Location: `/dashboard`

Your command center for portfolio-wide visibility. This comprehensive tabular report displays all portfolios, projects, work packages, tasks, and resource allocations in a unified view.

Key Features:

- **Multi-Level Search**: Search by project name or unique ID with instant filtering
- **Advanced Filtering**: Filter by Project (L2), Type, Owner, and Status simultaneously
- **Smart Sorting**: Click any column header to sort ascending/descending
- **Color-Coded Rows**: Visual distinction between:
  - Portfolios (light green background)
  - Projects (light orange background)
  - Tasks (default background)
- **Hierarchical Indentation**: Clear visual hierarchy showing Portfolio → Project → Work Package → Task relationships
- **One-Click Details**: Click any row to open detailed item dialog with full editing capabilities
- **License-Aware Columns**: Display adapts to show Agilebars, Timebars, or Costbars-specific fields based on your license
- **Real-Time Updates**: Data refreshes automatically using SWR caching

When to Use:

- Daily portfolio status reviews
- Executive briefings
- Identifying project bottlenecks
- Tracking ownership and accountability
- Quick access to any project detail

Export Options:

- Export to Excel with all filtered/sorted data
- Export to CSV for external analysis
- Maintains column order and formatting

Project Variance Report

Location: `/dashboard/tabular/variance`

Track deviations from baseline plans with variance-specific metrics showing the delta between planned and actual performance across cost, schedule, and scope dimensions.

Key Features:

- **Variance-Focused Columns**: Display baseline vs. actual comparisons for:
  - Start Date Variance (days early/late)
  - Finish Date Variance (days early/late)
  - Duration Variance (work days)
  - Work Variance (hours)
  - Cost Variance (budget units)
- **Deviation Highlighting**: Quickly identify projects off-track from original plans
- **Same Powerful Filtering**: All search, filter, and sort capabilities from main report
- **Historical Tracking**: Compare current state against original baseline commitments
- **Performance Indicators**: Visual cues for schedule variance, cost variance, and scope creep

When to Use:

- Earned Value Management (EVM) analysis
- Monthly project performance reviews
- Identifying projects requiring corrective action
- Executive reporting on plan adherence
- Forecasting final project outcomes

Benefits:

- Early warning system for project drift
- Baseline accountability
- Data-driven decision-making
- Trend identification across portfolio

Interactive Card-Based Drilldown

Project Status Cards - Hierarchical Navigation

Location: `/dashboard/tabular/cardtop`

Experience project data in a visually engaging, click-to-drill format with collapsible cards representing each level of your portfolio hierarchy. Navigate from portfolio to project to work package to individual tasks with interactive health indicators on every card.

Four-Level Hierarchy

Level 1 - Portfolio Cards (Light Brown Background)

- High-level portfolio overview cards

- Shows aggregated health indicators for all projects within
- Click any portfolio card to reveal its projects

Level 2 - Project Cards (Light Green Background)

- All projects within selected portfolio
- Displays project-level health, dates, owner, status
- Click any project card to reveal work packages and associated Tasks/Risks/Issues

Level 3 - Work Package Cards (Light Orange Background)

- Work packages within selected project
- Shows sub-project level details
- Click any work package to reveal its Level 4 items

Level 4 - Tasks, Risks, Issues (Tabbed Interface)

- Detailed tabular data for individual work items
- Separate tabs for:
  - **Tasks Tab**: All tasks with status, dates, owner, progress
  - **Risks Tab**: Risk probability, impact, mitigation status
  - **Issues Tab**: Issue priority, severity, resolution tracking
- Full editing capabilities on each tab

Interactive Features

Breadcrumb Navigation Path:

- Shows current location: L1 > L2 > L3
- Click breadcrumb levels to navigate back up hierarchy
- Always know where you are in the portfolio structure

Hide/Show Controls:

- Toggle visibility of card levels as needed
- Collapse levels to focus on specific areas
- Expand all to see complete hierarchy

Health Indicator Lights: Every card displays 7 color-coded health indicators:

- 🟢 **Green**: On track
- 🟡 **Yellow**: Needs attention
- 🔴 **Red**: Critical issue
- 🟠 **Orange**: Not yet assessed

Seven Health Dimensions:

1. Overall Health
2. Cost Health
3. Hours Health
4. Risk Health
5. Schedule Health

6. Scope Health
7. Issues Health

Planned vs. Current Comparison:

- See baseline dates and current dates side-by-side
- Instantly identify schedule drift
- Variance indicators on each card

When to Use:

- Executive presentations requiring visual engagement
- Project health assessment at-a-glance
- Understanding risk/issue context within project structure
- Mobile access (card interface is touch-friendly)
- Rapid identification of problem areas

Charts and Visualizations

Agilebars Burndown Chart

Location: `/dashboard/burndown`

Track sprint velocity and work completion rates with the classic agile burndown chart showing ideal vs. actual progress over time.

Chart Components:

- **Ideal Line** (Blue): Shows planned work burn rate based on sprint timeline
- **Actual Line** (Red/Green): Shows actual work completion to date
- **X-Axis**: Sprint timeline (days or iterations)
- **Y-Axis**: Remaining work (hours or story points)

Key Features:

- Visual comparison of planned burn rate against actual progress
- Work remaining tracking throughout sprint cycles
- Sprint performance evaluation
- Team velocity assessment
- Forecast completion dates

Prerequisites:

- Must publish Active Pubset from Agilebars client application
- Must run Burndown calculation in client before publishing
- Data must include sprint-based work items

When to Use:

- Sprint retrospectives and planning
- Daily standup reference

- Stakeholder sprint progress updates
- Velocity trend analysis across sprints
- Early detection of scope creep or velocity issues

Benefits:

- Agile team performance monitoring
- Data-driven sprint planning
- Transparent stakeholder communication
- Historical velocity for forecasting

Resource Cost & Usage - Pie Charts

Location: `/dashboard/charts`

Visualize cost distribution across your portfolio with interactive pie charts breaking down resource costs and hours by multiple dimensions.

Four Pie Charts Displayed (2×2 grid):

1. **By Project (L2)**:
    - See which projects consume the most resources
    - Identify high-cost projects requiring attention
    - Support project-level chargeback
2. **By Resource Role**:
    - Cost distribution across Developer, Manager, QA, Architect, etc.
    - Understand team composition costs
    - Plan hiring based on role needs
3. **By Resource Location**:
    - Geographic cost analysis (Office locations, Remote, Offshore)
    - Support location-based budgeting
    - Optimize distributed team costs
4. **By Department**:
    - Departmental resource allocation and spend
    - Support departmental chargeback/showback
    - IT, Finance, Operations cost visibility

Indicator Cards (Top of Page):

- **Total Cost Cards**: Large, prominent cards showing total costs for each dimension
- **Currency Formatting**: Professional $USD formatting with thousands separators
- **Quick Summary**: Instant visibility into top cost drivers
- **Responsive Grid**: Adapts from 1-4 columns based on screen size

Interactive Features:

- **Hover Details**: Hover over pie slices for exact values and percentages
- **Click to Filter**: Click pie slices to filter other charts (future enhancement)
- **Legend**: Color-coded legend with labels
- **Percentage Labels**: Show percentage on larger slices

When to Use:

- Monthly financial reviews
- Budget allocation decisions
- Cost optimization initiatives
- Chargeback reporting to business units
- Resource planning and forecasting

Benefits:

- Budget tracking by dimension
- Identify high-cost areas
- Support for chargeback/showback models
- Resource planning insights
- Executive-level cost transparency

Resource Usage - Bar Charts

Location: `/dashboard/resources`

Detailed bar chart analysis of resource utilization across six critical dimensions showing both hours and cost consumption patterns.

Six Resource Dimensions:

1. **By Resource Name**:
    - Individual resource utilization and costs
    - Identify over/under-allocated individuals
    - Track contractor vs. employee costs
2. **By Project (L2)**:
    - Project-level resource consumption
    - Compare resource costs across projects
    - Portfolio-wide resource distribution
3. **By Resource Role**:
    - Role-based allocation analysis (PM, Dev, QA, Architect, BA, etc.)
    - Understand skill mix across portfolio
    - Plan skill-based hiring
4. **By Primary Skill**:

   - Skill-based resource distribution (Java, Python, Cloud, Database, etc.)
   - Technical skill utilization patterns
   - Identify skill shortages

5. **By Resource Location**:

   - Geographic resource allocation
   - Office vs. remote distribution
   - Location-based capacity planning

6. **By Department**:

   - Departmental resource usage
   - IT, Finance, Operations, R&D allocation
   - Cross-functional resource sharing

Chart Features:

- **Stacked Bar Charts**: Show both hours (blue) and cost (green) in single view
- **Dual Y-Axis**: Left axis for hours, right axis for costs
- **Sortable Data**: Click to sort by hours, cost, or name
- **Configurable Metadata**: Works with your custom metadata fields from Timebars client
- **Drill-Down Ready**: Click bars to see detailed resource breakdowns (future enhancement)
- **Legend Toggle**: Show/hide hours or cost bars independently

When to Use:

- Resource capacity planning meetings
- Skill gap identification for hiring
- Geographic resource optimization
- Departmental cost allocation
- Utilization rate analysis
- Workforce planning decisions

Benefits:

- Visual identification of resource hotspots
- Data-driven hiring justification
- Balanced resource distribution
- Support for resource leveling
- Capacity vs. demand analysis

Common Features Across All Reports

Search & Filter

Available on All Tabular Reports:

Text Search:

- Search by project name or description
- Search by unique ID or hierarchy order
- Instant filtering as you type
- Case-insensitive search

Multi-Select Filters:

- **By Project**: Filter to specific project (L2 level)
- **By Type**: Portfolio, Project, Sub-Project, Task, Milestone, Allocation
- **By Owner**: Filter by assigned resource
- **By Status**: Active, On Hold, Cancelled, Complete
- **"All" Option**: Clear specific filter dimension instantly

Filter Combinations:

- Combine multiple filters for precise data views
- Filters persist during navigation
- Clear all filters with one click

Sorting

Click Any Column Header:

- First click: Sort ascending
- Second click: Sort descending
- Arrow indicators show current sort direction
- Maintains filter state during sort operations
- Sort by dates, text, numbers, status

Data Management

Inline Editing:

- Click row action button (pencil icon) to open edit dialog
- Full CRUD operations: Create, Read, Update items directly from reports
- Built-in field validation prevents data errors
- Auto-save: Changes sync immediately to backend
- Optimistic UI updates for instant feedback

Edit Dialog Features:

- All metadata fields available
- Rich text editor for descriptions and notes
- Date pickers for schedule fields
- Dropdown selectors for picklist fields
- Validation messages for required fields

Health Indicators

Seven-Dimensional Health Tracking:

All cards and detail views display health across:

1. **Overall Health**: Aggregate health score
2. **Cost Health**: Budget tracking (green = under budget, red = over budget)
3. **Hours Health**: Effort tracking (green = on track, red = over hours)
4. **Risk Health**: Risk exposure (green = low risk, red = high risk)
5. **Schedule Health**: Timeline status (green = on schedule, red = late)
6. **Scope Health**: Scope management (green = stable, red = scope creep)
7. **Issues Health**: Issue severity (green = no issues, red = critical issues)

Color Coding:

- 🟢 **Green**: On track / healthy
- 🟡 **Yellow**: Needs attention / at risk
- 🔴 **Red**: Critical issue / off track
- 🟠 **Orange**: Not yet assessed / no baseline

Responsive Design

Mobile-Friendly Layouts:

- Touch-optimized controls for tablets and phones
- Adaptive column display (fewer columns on smaller screens)
- Collapsible sections for better mobile navigation
- Swipe gestures for card navigation
- Responsive font sizes for readability

Desktop Optimization:

- Multi-column layouts for large screens
- Fixed headers during scroll
- Keyboard shortcuts for power users
- Hover states for interactive elements

Performance

Fast Loading:

- **SWR Caching**: Client-side data caching for instant navigation
- **Automatic Revalidation**: Data stays fresh with background updates
- **Stale-While-Revalidate**: Show cached data while fetching updates
- **Loading States**: Professional loading indicators during data fetch
- **Error Handling**: Graceful error messages with retry options
- **Pagination**: Large datasets load in chunks for better performance

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Data Export & Integration

Export Options

Available on Tabular Reports:

- **Excel Export**: Full data export with formatting and formulas
- **CSV Export**: Raw data for external analysis tools
- **Maintains Filters**: Export only filtered/sorted data
- **Column Order**: Preserves visible column order
- **Metadata Fields**: Includes all metadata in export
- **One-Click Download**: Simple download button

Export Uses:

- Offline analysis in Excel
- Integration with BI tools
- Executive report attachments
- Audit trails and archiving
- Data migration

Cloud Integration

Seamless Data Flow:

1. **Publish from Client**:
   - One-click publish from Timebars/Agilebars/Costbars desktop clients
   - Choose Main Menu > Publish
   - Select PubSet with blue background (Dashboard PubSet)
   - Click "Re-Publish!" to update cloud data
2. **Real-Time Sync**:
   - Changes in client reflect in dashboard within seconds
   - Dashboard automatically refreshes with new data
   - No manual refresh needed
3. **Secure Authentication**:
   - Enterprise-grade JWT security for all data access
   - Encrypted data transmission (HTTPS/TLS)
   - Role-based access control (future enhancement)
4. **Multi-User Support**:
   - Collaborate with team members on shared data
   - Multiple users can view dashboard simultaneously
   - Each user sees data based on their access level

License Tiers & Report Availability

Report availability varies by subscription tier:

Basic Tier (T01)

- Dashboard Home (Project Status Report)
- Basic filtering and search
- Export to Excel/CSV

Standard Tier (T02)

- All Basic features
- Project Variance Report
- Resource Pie Charts
- Resource Bar Charts
- Card-based drilldown

Professional Tier (T03)

- All Standard features
- Burndown Charts (Agilebars)
- Advanced analytics
- Custom report configuration (future)
- API access for integrations (future)

Check Your License:

- View license details in client app: Main Menu > Publish > Show License
- License type, expiration date, and PubSets available displayed
- Upgrade at www.timebars.com/pricing

Getting Started with Cloud Dashboard

Step-by-Step:

1. **Publish Your Data**:
    - Open your Timebars, Agilebars, or Costbars client
    - Navigate to Main Menu > Publish
    - Log in to cloud service
    - Click "Activate" if first time (one-time setup)
    - Identify the PubSet with blue background (Dashboard PubSet)
    - Click "Re-Publish!" to send data to cloud
2. **Access Dashboard**:
    - Visit www.timebars.com/dashboard
    - Sign in with your credentials
    - Choose "Dashboard" from picklist
3. **Explore Reports**:

- Use sidebar navigation to browse reports
- Start with Dashboard Home for portfolio overview
- Try Card-based drilldown for visual navigation

4. **Filter & Search**:

   - Use search boxes to find specific projects
   - Apply filters to focus on project types, owners, or status
   - Combine filters for precise views

5. **View Details**:

   - Click cards or row action buttons to see full item details
   - Make edits directly in the dashboard
   - Changes sync back to cloud storage

6. **Analyze with Charts**:

   - View Resource charts for capacity planning
   - Use Pie charts for cost distribution analysis
   - Track sprint progress with Burndown charts (Agilebars)

Tips for Effective Dashboard Use

1. **Regular Publishing**: Publish data daily or weekly to keep dashboard current
2. **Consistent Metadata**: Use consistent tagging and naming for better filtering
3. **Baseline First**: Set baselines in client before using Variance Report
4. **Health Tracking**: Update health indicators regularly for accurate status
5. **Use Cards for Presentations**: Card view is excellent for executive briefings
6. **Export for Offline**: Create Excel exports for offline analysis or board meetings
7. **Leverage Filters**: Save time by filtering to your specific projects or departments
8. **Check License**: Ensure license is current for uninterrupted access

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Troubleshooting

Dashboard Not Loading

Possible Causes:

- Internet connection issue
- Subscription expired
- No data published yet

Solutions:

- Check internet connection
- Verify subscription status at www.timebars.com/login
- Publish data from client application

Reports Show No Data

Possible Causes:

- Data not published from client
- Filters excluding all data
- Wrong PubSet published

Solutions:

- Publish from client using Dashboard PubSet (blue background)
- Click "All" to clear all filters
- Verify data exists in client before publishing

Visualization Not Updating

Possible Causes:

- Browser cache
- Old data in SWR cache
- Publishing to wrong PubSet

Solutions:

- Refresh browser page (F5 or Ctrl+R)
- Clear browser cache
- Re-publish from client to Dashboard PubSet

Cannot Edit Data

Possible Causes:

- Read-only access level (future)
- Network connectivity issue
- Session expired

Solutions:

- Check internet connection
- Log out and log back in
- Verify subscription is active

Related Help Topics

- Cloud Publishing Guide - How to publish data to the cloud
- Local Reports Guide - Reports available in client apps
- Data Structure Guide - Understanding the data model
- User Interface Guide - Navigate the client apps

Support

Need Help?

- Knowledge Base: www.timebars.com/knowledgebase
- Email Support: jcox@tbcox.com
- Feature Requests: jcox@tbcox.com
- Phone: (613) 255-5374

The Cloud Dashboard transforms your project data into strategic intelligence—accessible anytime, anywhere, on any device.