

# Costbars Complete Reference Guide

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## Project Portfolio Management (PPM)

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## 1. Getting Started

### Welcome

Costbars is a browser-based Project Portfolio Management (PPM) tool that includes all Timebars Resource Scheduler functionality plus comprehensive portfolio prioritization, scoring, selection, and balancing capabilities. No installation required—launch it in your browser and start managing your portfolio immediately.

**Product URL:** [cb.timebars.com](https://cb.timebars.com)

## Prerequisites

Before getting started, we recommend:

- Reading the [comprehensive presentation](#) and [functional benefits](#) articles
- Understanding that Costbars = Timebars + PPM functionality
- Reviewing the Timebars Help file for Resource Scheduling details

## How to Use for Free

Try Costbars for free without registering. Full functionality is available with data limitations (number of projects, tasks, resources, and Pubsets). Use it as long as you wish—no time limit.

**Important:** Your data is stored in your browser cache, not on our servers (unless you use the optional Pubset feature). We don't install cookies on your device.

## How to Get a License

1. **Register:** Visit [timebars.com/auth/new-user](https://timebars.com/auth/new-user) and sign up with email and password
2. **Verify:** Check your email for a verification link and confirm your account
3. **Purchase:** Go to [timebars.com/sales/pricing](https://timebars.com/sales/pricing) and select your subscription
4. **Log In:** Use your email/password in the app—the license downloads automatically

Subscriptions are single-person monthly licenses. Purchase 1-12 months in one transaction.

## First Launch

When you first load the app:

1. Demo data is automatically populated (includes seed data for picklists, resources, settings)
2. The Getting Started page appears
3. Close it to see the Timescale Canvas

## Quick Start Workflow

1. Download the spreadsheet template (Hamburger > Data Actions)
2. Populate Projects with costs/hours (resource-loaded schedules optional)
3. Configure Alignment Values for your organization
4. Run SV Score prioritization
5. Run AE Score scoring
6. Use Bubble Chart for project selection
7. Balance portfolio with the Balanced Scorecard

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## 2. Product Overview

### What is Costbars?

Costbars is the complete Project Portfolio Management solution from Timebars Ltd. It combines:

- **All Timebars functionality** (resource scheduling, 5-level hierarchy, allocations, supply/demand)
- **PPM capabilities** (prioritization, scoring, selection, balancing, what-if scenarios)

Who Uses Costbars?

- **Portfolio Managers** — Prioritize, score, select, and balance project portfolios
- **Resource Managers** — Allocate resources, monitor supply and demand
- **Project Managers** — Schedule projects, track progress, manage risks
- **Executives** — Review portfolio health, strategic alignment, make go/no-go decisions

What is a Resource-Loaded Schedule?

A resource-loaded schedule includes not only task durations and dependencies but also the assignment of resources (labor, equipment, materials) to those tasks. It integrates resource availability and workload into the project timeline.

**Good news:** Resource-loaded schedules are NOT mandatory for PPM analysis. You can add Costs and Hours directly to Projects without creating Tasks and Allocations.

Key PPM Capabilities

Capability	Description
SV Score	Strategic Value based on Alignment Values (0-100, higher = better)
AE Score	Ability to Execute based on health, costs, complexity (0-100, higher = better)
Financial Score	NPV, IRR, Payback Period (integrated into SV Score when data available)
Project Assessment	Evaluate risk, size, complexity, executive commitment
Project Leveling	Drag-and-drop rescheduling with real-time resource feedback
Bubble Chart Selection	Visual project selection based on SV Score and AE Score
Balanced Scorecard	Portfolio balance across strategic, risk, resource, and time dimensions
Notifications	Threshold-based alerts to executives via SMS, Push, or Email

3. The Data Hierarchy

Overview

Costbars supports the same flexible 3-5 level hierarchy as Timebars. Each level is color-coded.

Color Coding

Level	Color	Purpose
L1	Brown/Dark Grey	Portfolio or Program
L2	Green	Project (always)

Level	Color	Purpose
L3	Orange	Sub-Project or Work Package
L4	Blue	Task (including milestones and gates)
L5	Gold	Resource Allocation

5-Level Hierarchy (Maximum)



4-Level Hierarchy (Medium)

Same as 5-level without L3 (Orange) bars.

3-Level Hierarchy (Minimum)

Same as above without L1 (Brown) bars.

PPM Without Resource-Loaded Schedules

For PPM analysis, you can work with just L1 (Portfolio) and L2 (Project) levels, entering costs and hours directly on Projects. Tasks and Allocations are optional.

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## 4. The User Interface

Top Menu

- Product icon and name
- Import/Export arrows
- Bar refresh icon
- Shopping cart icon
- Login icon (yellow)
- Current user (or license status)

Main Menu

A row of icons for core functionality:

- **Hamburger Icon:** Access Filter Menu, Getting Started, FAQ, Data Actions
- **Switch Modes:** Toggle between Timescale and Kanban
- **Bar Creator:** Create new bars at all hierarchy levels
- **Resources:** Launch Resource Allocator
- **Reports:** Access tabular and visual reports

- **RIC:** Risks, Issues, and Change Requests
- **Dashboard:** Local dashboard
- **PPM:** Project Portfolio Management functions
- **Publish:** Cloud publishing features

The PPM Menu

The PPM menu provides access to portfolio management functions:

Menu Item	Function
Prioritize	Generate SV Scores based on Alignment Values
Score	Generate AE Scores based on project data
Level	Resource leveling with visual feedback
Select / Bubble Chart	Bubble Chart project selection
Balance / Score Card	Portfolio balance scorecard
Tabular View	PPM tabular analysis with filtering
Card View	PPM card view (preferred for analysis)
Process Help ?	Open PPM documentation

Canvas Settings

Access via Tools > Set Canvas:

Setting	Purpose
Timescale	Weekly or monthly view
Zoom Factor	Zoom in/out
Start Date	Timeline starting point
Report Date	Status date for calculations
Baseline Bars	Show/hide baseline lines
Visible Levels	Control which hierarchy levels display (L1-L5)
Light/Dark Mode	Visual theme toggle

5. Prerequisite Workflow: Establish the Data Foundation

Before running the Project Selection Process, complete these five setup steps.

Prerequisite Step 1: Configure Resource Pool & Metadata

Download the spreadsheet template through the Hamburger Icon menu. Populate the Resources Tab with resource IDs, names, roles, skills, and rates. Then drag and drop onto the Canvas to build your centralized

resource pool.

Prerequisite Step 2: Establish Resource Summary Task

Create a resource summary task that serves as the foundation for resource allocation. This task provides a consolidated view and enables accurate resource planning across the project portfolio.

Prerequisite Step 3: Allocate Resources to Tasks

Assign resources from your centralized pool to specific tasks using the Resource Allocator. The system automatically calculates hours, ensuring accurate workload distribution and capacity planning.

Prerequisite Step 4: Set Strategic Metadata

Configure strategic metadata against projects to determine Strategic Value (SV) Scores. This metadata drives portfolio balance decisions and ensures alignment with organizational priorities.

Set values for each project:

- Investment Category
- Investment Initiative
- Investment Objective
- Investment Strategy

**Tip:** Use the Edit Metadata Icon to launch the Core Form from Tabular or Card View, or use the spreadsheet sync process.

Prerequisite Step 5: Complete Project Assessment

Fill in the Project Assessment form to finalize business cases. This comprehensive assessment captures all critical project information, justification, and expected outcomes.

Project Assessment Form Fields:

The Project Assessment captures data that feeds into the AE Score calculation:

Field	Purpose
Risk vs Size and Complexity	0-100 scale rating of project complexity
Executive Level Commitment	Level of senior leadership support
Estimation Class	SWAG / Based on History / Resource Driven
ROM Estimate	Rough Order of Magnitude budget range
Health Indicators	Issues, Schedule, Scope status (In-Flight projects)

For In-Flight Projects, also assess:

- Health Issues status (Green/Yellow/Red)
- Health Schedule status (Green/Yellow/Red)
- Health Scope status (Green/Yellow/Red)

- Budget Cost
- Baseline Hours

**For New Projects, also assess:**

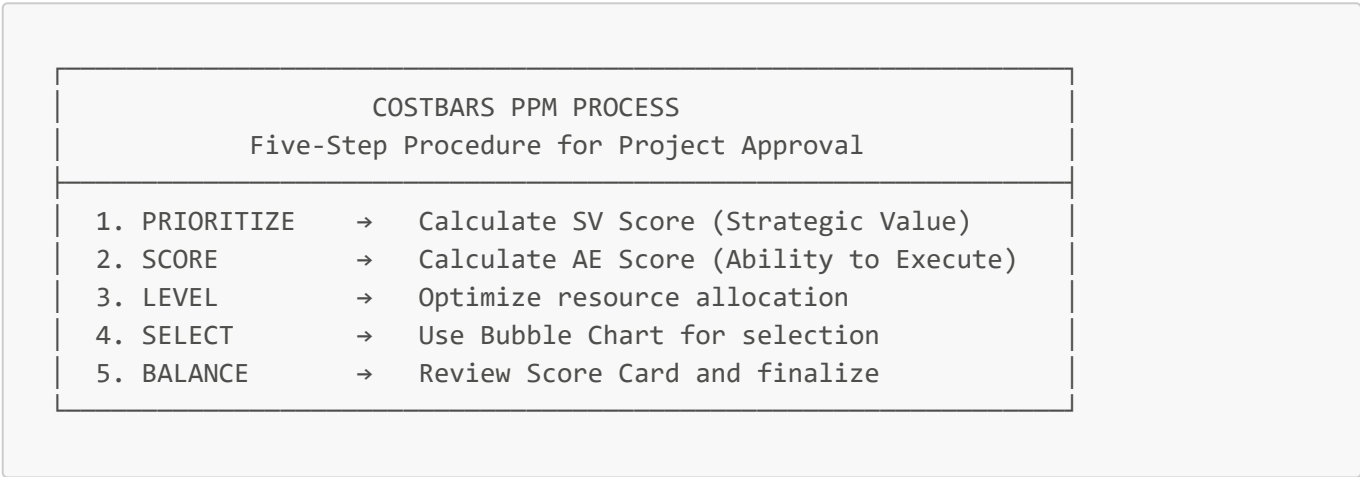
- Cost estimate
- Work hours estimate
- State (Approved/Awaiting Approval/etc.)

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## 6. The PPM Process

### High-Level Process Diagram

The PPM process begins after projects are ready for analysis. Resource-loaded schedules are optimal but not required—ensure Hours and/or Cost estimates are entered on each Project.



The SV Score (Strategic Value Score) measures strategic alignment. It ranges from 0-100, where 100 indicates perfect alignment with your organizational strategy. **Higher scores are better.**

How to Generate SV Scores

- 1. **Launch:** Main Menu > PPM > Prioritize
- 2. **Configure:** Set Order of Importance by dragging items (most important at top)
- 3. **Test:** Click "Prioritize Test!" to preview results
- 4. **Finalize:** Click "Prioritize Finalize!" to store SV Scores

Configuring Alignment Values

Alignment Values should reflect your organization's strategic priorities. Use Spreadsheet Sync to customize:

Field	Purpose
Investment Categories	Funding priorities (e.g., Innovation, Compliance)
Investment Initiatives	Strategic initiatives
Investment Objectives	Strategic goals (e.g., Grow Market Share)
Investment Strategies	High-level strategies

How to Change Alignment Values

- 1. Download spreadsheet (Hamburger > Download Excel or LibreOffice)
- 2. Open the Tags Tab
- 3. Filter Picklist Name for each field above
- 4. Enter your organization's values
- 5. Open Metadata Tab > Toggle Cols > Investment Alignment
- 6. Set metadata for each project
- 7. Drag and drop spreadsheet onto Canvas

Order of Importance

Adjust the weighting of each alignment category to reflect your executives' priorities. Categories with higher importance contribute more to the final SV Score.

Financial Data Integration

When financial data is available (at least 4 of 7 fields populated), the SV Score blends strategic and financial components:

Scoring Method	When Applied
Strategic + Financial (50/50)	Projects with ≥4 financial fields populated
Strategic Only (100%)	Projects with insufficient financial data (no penalty applied)

Financial Fields:



- Net Present Value (NPV)
- Internal Rate of Return (IRR)
- Benefit/Cost Ratio
- Payback Period
- Economic Value Added (EVA)
- Opportunity Cost
- Sunk Costs (reference only)

## 8. Project Scoring (AE Score)

What is the AE Score?

The AE Score (Ability to Execute Score) evaluates project risk and feasibility. It uses health indicators, costs, hours, Size vs. Complexity, and metadata.

**Higher AE Score = Higher Ability to Execute = More Likely to Succeed**

Score Interpretation

Score Range	Level	Meaning
≥80	Strong (Green)	High ability to execute
60-79	Moderate (Yellow)	Some concerns, review needed
<60	Weak (Red)	Significant challenges

How to Generate AE Scores

1. **Launch:** Main Menu > PPM > Score
2. **Review:** Check Data Requirements dropdown for scoring elements
3. **Test:** Click "Generate Ability to Execute Scores - Test" to preview
4. **Finalize:** Click "Generate Ability to Execute Scores - Final" to save

Data Requirements for Accurate Scoring

Ensure complete data entry for:

- Health indicators (Issues, Schedule, Scope)
- Budget, baseline, and forecast values
- Size vs. Complexity assessments
- Executive Commitment level
- Risk scores (from Risk log)

Scoring Components

**In-Flight Projects:**

Component	Weight	Source
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Component	Weight	Source
Health Score (Scope/Schedule/Issues)	20%	Health indicators
Risk/Size/Complexity	20%	Assessment rating
Executive Commitment	15%	Commitment level
Budget Performance	15%	Actual vs Budget
Hours Performance	15%	Actual vs Baseline
Top 3 Risks Average	15%	Risk log scores

New Projects:

Component	Weight	Source
Risk/Size/Complexity	20%	Assessment rating
Executive Commitment	20%	Commitment level
Hours Demand	20%	Hours vs portfolio average
Budget Performance	15%	Cost vs ROM Estimate
Top 3 Risks Average	15%	Risk log scores
Estimation Methodology	10%	Estimation class

Decision Outputs

In-Flight Projects:

AE Score	Recommendation
≥80	Continue
60-79	Review
<60	Consider Terminating

New Projects:

AE Score	Recommendation
≥80	PROCEED: Strong scoring
60-79	REVIEW: Moderate scoring
<60	REJECT: Weak scoring

9. Project Assessment Tool

Overview

The Project Assessment Tool objectively evaluates project feasibility, complexity, and risk before committing resources. Assessment data feeds directly into the AE Score calculation.

Key Assessment Fields

Field	What It Measures
Risk vs Size/Complexity	0-100 scale project complexity rating
Executive Commitment	Full, Strong, Moderate, Limited, Not Clear
Estimation Class	SWAG, Based on History, Resource Driven
ROM Estimate	Budget range (0-100K, 101K-300K, etc.)
Health Indicators	Issues, Schedule, Scope status (In-Flight only)

How Assessment Impacts AE Score

Lower complexity + Higher commitment + Better estimation = Higher AE Score

Risk/Complexity Rating	Impact on AE Score
0-10 Very Small/Simple	+95 points (weighted)
41-50 Complex but Manageable	+55 points (weighted)
91-100 Extremely Complex/Risky	+5 points (weighted)

Executive Commitment	Impact on AE Score
Full	+100 points (weighted)
Strong	+80 points (weighted)
Moderate	+60 points (weighted)
Limited	+40 points (weighted)
Not Clear	+20 points (weighted)

How to Launch an Assessment

- 1. Open Costbars PPM Tabular or Card view
- 2. Locate the project to assess
- 3. Click Edit Metadata icon or actions menu
- 4. Complete Project Assessment fields
- 5. Save assessment

Best Practices

- Be brutally honest—optimism bias kills projects
- Complete assessments early, before committing resources
- Involve multiple perspectives (technical, business, PM)
- Reassess at major milestones

- Don't ignore weak scores
- 

## 10. Project Leveling

### Overview

Project resource leveling ensures selected projects can be successfully achieved by optimizing resource allocation through drag-and-drop rescheduling.

### How to Level Projects

1. **Launch:** Main Menu > PPM > Level
2. **View:** Canvas displays resource demand vertical bars
3. **Adjust:** Move project bars to reschedule
4. **Monitor:** Observe demand changes in real-time
5. **Resolve:** Continue until red over-allocation bars are gone

### Using Project Hours

If resource-loaded schedules are not available:

1. Click "Use Project Hours" button
2. System uses hours entered directly on Projects

### Resource Quantity

The demand vertical bars are controlled by Resource Quantity in the Resource Pool:

- Field Name: "Qty Avlbl"
- For generic resources, this sets available capacity
- Modify via Spreadsheet Sync > Resources Tab

### Visual Feedback

- **Green bars:** Resources within capacity
  - **Red bars:** Resources over-allocated
  - Drag project bars to redistribute workload across timeline
- 

## 11. Bubble Chart Project Selection

### Overview

The Bubble Chart uses an algorithmic approach to assist project selection based on SV Score and AE Score. It visually maps projects, helping you assess relative importance and ability to execute.

### How to Use the Bubble Chart

1. **Launch:** Main Menu > PPM > Select (or Bubble Chart)
2. **View:** Projects displayed as bubbles on the chart

- 3. **Set SV Score Threshold:** Cutoff for strategic value (recommend starting at 50)
- 4. **Set AE Score Threshold:** Cutoff for ability to execute (recommend starting at 50)
- 5. **Test Run:** Click "Select Test" to preview which projects will be selected
- 6. **Final Run:** Click "Select Final" to update selection status in database

Understanding the Bubble Chart

- **X-Axis:** Strategic Value (SV Score)
- **Y-Axis:** Ability to Execute (AE Score)
- **Bubble Size:** Budget Cost or Forecast Hours
- **Bubble Color:** By Status or by Product

Quadrant Interpretation

Position	SV Score	AE Score	Interpretation
Top-Right	High	High	Strategically aligned, more likely to succeed
Top-Left	Low	High	Misaligned low risk projects
Bottom-Right	High	Low	Strategically aligned, less likely to succeed
Bottom-Left	Low	Low	Misaligned and risky projects

Selection Algorithm

The selection formula combines both scores:

```
Final Score = (SV Score × 60%) + (AE Score × 40%)
Threshold = (SV Input + AE Input) / 2

If Final Score > Threshold → Selected: Yes
If Final Score ≤ Threshold → Selected: No
```

12. Balanced Scorecard

Overview

The Balanced Scorecard (Score Card) ensures your project mix supports organizational strategy while managing risk, optimizing resources, and maintaining appropriate investment distribution.

How to Access

Main Menu > PPM > Balance (or Score Card)

Score Card KPI Sections

Section	What It Measures
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Section	What It Measures
SV Score Distribution	Very High (80-100) to Very Low (0-19)
AE Score Distribution	Same ranges as SV Score
Investment Strategy	Projects by strategy alignment
Investment Objectives	Run/Grow/Transform balance
Investment Category	Category concentration
Risk Balance	Risk coverage across priorities
Resource Balance	Allocation by priority level
Duration Balance	Short (0-4mo) / Medium (4-12mo) / Long (12+mo)

KPI Indicators

- **Green:** Balanced
- **Yellow:** Needs attention
- **Red:** Action required

Setting Metadata for Balance Control

Use Spreadsheet Sync to define:

- **Investment Categories** — Funding priorities (Innovation, Compliance, etc.)
- **Investment Objectives** — Strategic goals (Run/Grow/Transform)
- **Risk Indicators** — Exposure and scenario planning
- **Resource Attributes** — Availability, skills, cost profiles

Balancing Actions

1. Review KPI indicators for problem areas
2. Re-select killed projects if needed
3. Kill additional projects to free resources
4. Reschedule projects to improve timing
5. Re-run scoring if metadata changes

Reading the Balanced Scorecard

Each metric area shows how well your portfolio aligns with balance criteria:

- **Healthy:** Balanced proportions matching organizational strategy
- **Skewed:** Significant imbalance signals need to adjust priorities

**Tip:** Publish the scorecard view to the cloud alongside scenario analysis for executive decision-making.

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# 13. Comprehensive Portfolio Report

Overview

The Comprehensive Portfolio Report provides executive-level insights across all portfolio dimensions with embedded rules and recommendations.

## Main Sections

### **Strategic Balance:**

- Strategic Portfolio Balance Analysis
- Strategic Balance Assessment
- Strategic Balance Score
- Strategic Balance Recommendations

### **Investment Strategy:**

- Investment Strategy Balance
- Investment Strategy Distribution
- Mix alignment with objectives

### **Investment Objectives:**

- Investment Objective Balance
- Distribution across Run/Grow/Transform

### **Investment Category:**

- Category Distribution
- Balance across Digital Transformation, Business Systems, Innovation

### **Risk Balance:**

- Risk Balance Analysis
- Risk Score Portfolio Balance
- Risk-Strategic Balance Analysis
- Mitigation status and coverage

### **Resource Balance:**

- Portfolio Resource Balance Analysis
- Resource Optimization Insights
- Resource Capacity Analysis
- Role Balance Scorecard

### **Time Horizon Balance:**

- Time Horizon Balance Analysis
- Short-term (0-4 months): Quick wins
- Medium-term (4-12 months): Steady evolution
- Long-term (12+ months): Strategic positioning

### **Risk Profile & Mitigation:**

- Portfolio Risk Exposure

- Portfolio Risk Matrix
- Top 5 High Impact Risks
- Risk coverage percentage

Key Metrics Displayed

Metric	Description
SV Score	Strategic Value Score by range
AE Score	Ability to Execute Score by range
Projects	Count and percentage
Total Budget	Dollar allocation
Balance KPI	Qualitative rating (Excellent/Good/Moderate/Poor)

14. Portfolio Status and Balancing Report

Overview

The Portfolio Status and Balancing Report provides portfolio-wide intelligence for strategic decisions about what to start, continue, delay, or kill.

When to Use This Report

- Before quarterly portfolio review meetings
- When evaluating new project proposals
- When identifying projects to kill or delay
- When assessing strategic alignment
- When reporting to executive leadership

Generating the Report

Step 1: Ensure Data is Current

- Health indicators updated
- Budget, baseline, forecast values current
- Strategic priority scores assigned
- AE scores calculated
- Project phases and states accurate

Step 2: Navigate to the Report

- Reports menu > Portfolio Reports
- Or Dashboard view if configured

Step 3: Configure Parameters

- Date range
- Portfolio selection



- Project states filter
- Include/exclude proposals

**Step 4: Generate and Export**





- Click "Generate Report"
- Export to PDF for distribution
- Export to Excel for custom analysis

Executive Summary

**Portfolio Performance Summary:**

Indicator	Description
Overall	Composite synthesizing all dimensions
Scope	Delivering planned scope?
Schedule	Meeting timeline commitments?
Cost	Spending aligned with budgets?
Hours	Work effort tracking to estimates?
Risk	Aggregate portfolio risk profile
Issues	Active issues impacting delivery?

**Color Coding:**

-  **Green:** Performing well
-  **Yellow:** Requires monitoring
-  **Red:** Immediate attention required
-  **Gray:** Not assessed

Financial Summary Sections

**Portfolio Investment by Category:**

- In Progress Projects
- New and Approved Projects
- New and Not Approved Projects

**For Each Category:**

- Budget (original planned)
- Baseline (committed after planning)
- Forecast (current expected total)
- Budget Variance
- Status indicator

Portfolio Rebalancing Actions

Action	When to Use
Kill Projects	Budget overruns, low strategic value, high risk
Delay Projects	Resource conflicts, dependency waiting, lower priority
Accelerate Projects	High strategic value, quick wins, resource availability
Approve New Projects	Under-represented categories, improve balance
Phase Projects	Large/high-risk projects, reduce commitment
Adjust Approval Criteria	Prevent future imbalances

Best Practices

- Generate reports monthly minimum
- Ensure data quality
- Share widely with stakeholders
- Act on insights—reports without action waste time
- Establish portfolio targets for risk, initiative types, time horizons

## 15. Supply and Demand Planning

Overview

The Supply vs. Demand grid provides visibility into resource capacity planning across projects.

Key Concepts

**Supply:** Available resource capacity (FTE or hours) **Demand:** Resource requirements from project allocations  
**Variance:** Supply minus Demand

The Five Summary Rows

Row	Background	What It Shows
Supply (FTE)	Blue	Total available capacity
Demand (FTE)	Green	Total requirements from allocations
Variance (S-D)	Yellow	Difference (green=excess, red=deficit)
Month Header	Gray	Calendar months
Resource/Project/Role	White	Grouping header

View Modes

FTE vs. Hours:

- FTE for strategic planning (1.0 = one full-time resource/month)
- Hours for tactical planning (160 hours/month = 1.0 FTE)

**Weekly vs. Monthly:**

- Monthly for long-term planning (6-24 months)
- Weekly for short-term planning (1-3 months)

Named vs. Generic Resources

**Named Resources (Human):**

- Specific individuals
- Track actual people doing work

**Generic Resources:**

- Role-based placeholders
- Used for early planning before specific assignments
- Quantity can represent multiple FTEs

Common Variance Patterns

Pattern	Meaning	Action
Supply = Demand	Optimal utilization	Monitor closely
Consistent negative	Under-capacity	Hire, contract, reduce scope
Spiky negative	Temporary bottleneck	Shift tasks, temp help
Large positive	Under-utilization	New projects, reduce headcount

## 16. Notification Thresholds and Alerts

Overview

The Notification & Escalation Settings allow you to define when project status triggers alerts to portfolio managers and executives.

Accessing Notifications

Admin → Notifications from the main menu

Setting Up Notifications

1. **Add/Edit Notification Profile**
2. **Set Contact Details:** Name, phone, email
3. **Select Primary Channel:** SMS, Push Notification, or Email
4. **Set Threshold Values** for each monitoring category

Threshold Rules

Rule	What It Monitors	Example
------	------------------	---------

Rule	What It Monitors	Example
Days Overdue	Actual vs. planned dates	Alert if >5 days late
Budget Overrun %	Forecast vs. budget	Notify if > 15% over
Overall Health	G/Y/R status	Flag any Red project
Executive Commitment	Support level	Alert if below "Strong"
Risk/Size/Complexity	Risk scoring	Flag high-risk projects
Strategic Value %	SV scoring	Flag if >70% and at risk
Ability to Execute %	AE scoring	Flag if <40%

Preferences Settings

Setting	Purpose
Primary/Secondary Channel	Delivery methods
Quiet Hours	No notifications during this window
Business Hours Only	Restrict non-critical alerts
Weekend Notifications	Allow/block weekend sends
Cooldown Hours	Minimum time between alerts
Max Notifications Per Day	Daily limit

Escalation Settings

Setting	Purpose
Enable Escalation	Turn on executive SMS
Escalation Delay Hours	Wait time before escalating
Max Escalation Attempts	Retry limit
Escalation Phone	Executive contact number

Testing Configuration

- 1. Navigate to Notification Testing section
- 2. Click "Run Manual Test"
- 3. Review flagged projects
- 4. Preview notification messages
- 5. Adjust thresholds if needed
- 6. Set profile to Active for automated alerts

Best Practices

- Start with looser thresholds, tighten over time
- Use Manual Test frequently when changing settings
- Reserve executive escalation for high-impact projects
- Document your threshold logic

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# 17. Tabular and Card Views

## Overview

Use Tabular and Card views for PPM analysis and manual overriding of automated decisions.

## Accessing Views

- Main Menu > PPM > Tabular View
- Main Menu > PPM > Card View (preferred)

## Tabular View Features

- Search and filtering
- Column sorting
- Project selection
- Inline editing
- Export to CSV

## Example Tabular Output

ID	Type	Name	Status	SV Score	AE Score	Selected	Decision
A002	Portfolio	Business Systems	In progress	N/A	N/A	N/A	N/A
A008	Project	Centralized Billing	In progress	72.50	85	Yes	Continue
A011	Project	Core Operations	New	77.50	45	No	Review

## Card View Features

- Visual card-based layout
- Search and filtering
- Quick access to project details
- Edit via card actions
- Better for analysis workflows

## Manual Overriding

Both views allow you to:

- Override automated decisions (Continue/Review/Terminate)
- Adjust Selected status
- Modify metadata values
- Enter decision notes

# 18. Spreadsheet Sync

## Overview

Spreadsheet Sync enables bidirectional data exchange between Costbars and Excel/LibreOffice.

## Download Templates

- [LibreOffice Calc \(.ods\)](#)
- [MS Office Excel \(.xlsm\)](#)

**Important:** File name must begin with "tbClient" for import to work.

## Key Spreadsheet Tabs for Costbars

Tab	Purpose
Timebars	Projects, Sub-Projects, Tasks
Resources	Resource Pool
Tags	Picklist values (including Alignment Values)
Fields	FOCD form field configuration
Core Report	Show/hide fields in Core Report
Metadata	Metadata assignments for projects

## How It Works

### Export Cycle:

1. Export data from app (Data Actions > Export)
2. CSV files save to Downloads
3. Import CSVs into spreadsheet
4. Edit data
5. Save and drag onto Canvas

### Import Cycle:

1. Populate spreadsheet with project data
2. Save
3. Drag and drop onto Canvas top menu

## Configuring Alignment Values

Use the Tags tab to customize:

- Investment Categories
- Investment Initiatives
- Investment Objectives

- Investment Strategies

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# 19. Metadata and Tagging

## Overview

Metadata organizes, categorizes, and enables reporting on portfolio work. Over 100 metadata fields can be configured.

## PPM-Critical Metadata

Field	Purpose
Investment Category	Funding priority classification
Investment Objective	Strategic goal alignment
Investment Strategy	High-level strategy link
Initiative Type	Maintenance, Innovation, Growth, Compliance
Size	Small, Medium, Large, Very Large
Complexity	Low, Medium, High, Very High
Risk Score	From Project Assessment Tool
Strategic Pillar	Organizational strategic area

## How to Assign Metadata

### Via Slide Out Form:

1. Click bar title
2. Select values from picklists
3. Add/remove fields as needed

### Via Spreadsheet Sync:

1. Open Metadata tab
2. Toggle Cols to show Investment Alignment
3. Set values for each project
4. Import via drag and drop

## Metadata Impact on PPM

Metadata values directly influence:

- SV Score calculations
- Balanced Scorecard visualizations
- Portfolio balance analysis
- Report categorizations

## 20. FOCD Forms Configuration

### Overview

FOCD (Forms on Cached Data) allows adding/removing fields from forms without coding.

### Available Forms in Costbars

Form Name	Description
PF1	Portfolio (L1) Flyout Right Form
PJ1	Project (L2) Flyout Right Form
SPJ1	Sub-Project (L3) Flyout Right Form
TASK1	Task (L4) Flyout Right Form
ALLOC1	Allocation (L5) Flyout Right Form
dfRisk	Risk Edit Form
dfIssue	Issue Edit Form

### Configuration via Spreadsheet

The Fields tab controls form configuration with columns:

- ID, Coord Top, Coord Left, Width
- Name (must match existing field)
- Type (NoPicklist or With Picklist)
- Form Name (target form)
- Label (display text)

---

## 21. Risks, Issues & Change Requests

### Creating Risks, Issues, or CRs

1. Create a Task using Bar Creator
2. Open Slide Out Form (click bar title)
3. Change SubType to Risk, Issue, or CR
4. Fill in relevant metadata

### Managing via RIC Page

Main Menu > RIC

Features:

- Search and filtering
- Status picklists
- Edit Risk or Issue details



- Toggle Tabular/Card views

Risk Metadata for PPM

Field	Purpose
Risk Impact	Very Low to Very High
Risk Probability	Very Unlikely to Certain
Mitigation Status	Identified, Assessed, In Progress, Mitigated
Category	Product, Financial, Operational, Technical, Schedule

22. Reports and Dashboards

Reports Menu

Main Menu > Reports

PPM-Specific Reports

Report	Description
PPM Tabular Report	PPM with search, filtering, project selection
PPM Cards Report	PPM cards with filtering
Comprehensive Portfolio Report	Full portfolio analysis with recommendations
Portfolio Status and Balancing	Balance analysis across all dimensions
Resource Usage	Supply and demand grids/charts

Standard Reports

Section	Report	Description
General	General Tabular View	Tabular with search and filtering
General	General Card View	Card view with search and filtering
General	Print WBS	WBS in markdown format
Portfolio	Drilldown from Portfolio	Color hierarchy report
Project	Project Status	All projects with G/Y/R indicators
Task	Items Overdue	Past baseline milestones
Resource	Shared Resource Pool	All resources

Local Dashboard

Main Menu > Dashboard

**Tabs for Costbars:**

- Summary (L1 data)
- Resources (Demand charts)
- Project (L2 children)
- Finance (L1 financial data)
- Strategy (alignment analysis)
- Priorities (SV Score distribution)

---

## 23. AI Project Generator

### What It Does

Transform natural language descriptions into complete project structures with tasks, milestones, and risks.

### Basic Usage

```
Create a portfolio called Digital Transformation with 5 projects
```

### Override Defaults

```
Create a project called ERP Implementation with 15 tasks, 8 milestones, and 10 risks
```

### Provide Context

```
Create a portfolio for a financial services company's regulatory compliance initiative.
Include GDPR, SOX, and PCI-DSS compliance projects.
Each project should have 10 tasks, 4 milestones, and 6 risks.
The portfolio should span 18 months.
```

### Tips for Best Results

- Be specific about domain and industry
- Mention key phases and dependencies
- State quantities explicitly
- Provide scale and timeline context

---

## 24. Cloud Publishing and Dashboard

### Overview

The Cloud Dashboard transforms your data into dynamic visualizations accessible across devices.

Getting Access

- 1. Purchase subscription at [timebars.com/dashboard](https://timebars.com/dashboard)
- 2. Log in via Main Menu > Publish > Login

Publishing Your Data

- 1. Open Costbars
- 2. Work on your portfolio
- 3. Go to Cloud Menu > Activate Pubsets
- 4. Click **Publish**
- 5. Data sent securely via HTTPS

Working with Pubsets

Action	Purpose
Re-Publish!	Update cloud with current data
Re-Hydrate!	Download Pubset to current app
Clear!	Remove data from Pubset

Cross-Device Workflow

- Publish from one device
- Log into another device
- Re-Hydrate to download
- Continue working seamlessly

---

## 25. Data Management

Backup and Restore

**Automatic Backups:**

- App backs up to Downloads folder constantly
- JSON format with all data tables

**Manual Backup:** Hamburger > Full Backup

**Restore:** Drag and drop backup file onto Canvas

Export Options

- Export to CSV (Data Actions > Export)
- Export to JSON for integrations

Import Options

- Drag and drop spreadsheet files
- Drag and drop CSV files
- Drag and drop backup JSON files

## Demo Data Management

- Clear Demo Data (Hamburger > Data Actions)
  - Load Demo Data (Small or Large)
- 

## 26. Security

### Encryption

- HTTPS/TLS end-to-end encryption
- All data transmitted securely

### No Cookies

- No cookies stored on device

### Token-Based Authentication

- JSON Web Tokens (JWT) on login
- Server-side, encrypted with password

### Data Location

- Default: Browser cache (IndexedDB)
  - Optional Cloud: Only when you Publish
  - Credential-based isolation
- 

## 27. Licensing and Support

### Subscription Tiers

Three pricing tiers with increasing data limits. Features are the same across all tiers.

### Contact Information

#### **Sales:**

- Phone: (613) 255-5374
- Email: [jcox@tbcox.com](mailto:jcox@tbcox.com)

#### **Jim Cox:**

- Phone: (613) 255-5374
- Email: [jcox@tbcox.com](mailto:jcox@tbcox.com)

#### **Support:**

- Email: [jcox@tbcox.com](mailto:jcox@tbcox.com)

## Learning Resources

- [Costbars Presentation](#)
  - [Costbars Features](#)
  - [Knowledge Base](#)
- 

## 28. Troubleshooting

### Missing Data Warnings

**Problem:** Score shows 0 or "Not Assessed"

**Solutions:**

- Check that Project Assessment fields are populated
- Verify Risk vs Size/Complexity is assessed (not "Not Assessed")
- Ensure Executive Commitment is set
- For In-Flight: Check health indicators and baseline hours
- For New: Check Estimation Class and ROM Estimate

### Projects Not Appearing in PPM Views

**Problem:** Projects missing from Bubble Chart or Score Card

**Solutions:**

- Confirm Status is not "Closed"
- Check State is not "Spawned"
- Verify project is at L2 (Project) level

### Financial Score Shows Zero

**Problem:** Financial component not contributing to SV Score

**Solutions:**

- Need at least 4 of 7 financial fields populated
- Values of "Not Assessed" don't count toward the 4-field minimum
- Check NPV, IRR, Payback Period, Benefit/Cost Ratio, EVA, Opportunity Cost

### AE Score Lower Than Expected

**Problem:** Project scoring poorly despite good project health

**Check these components:**

- Health indicators all Green? (contributes 20%)
- Risk/Complexity rating low? (contributes 20%)
- Executive Commitment at Full or Strong? (contributes 15-20%)

- Budget on track? (contributes 15%)
- Hours on track? (contributes 15-20%)
- Top 3 Risks low severity? (contributes 15%)

### Selection Not Working as Expected

**Problem:** Projects selected/rejected unexpectedly

**Understanding the formula:**

Final Score = (SV Score × 60%) + (AE Score × 40%)  
Threshold = (Your SV Input + Your AE Input) / 2

A project with SV=70, AE=80 has Final Score = (70×0.6)+(80×0.4) = 74 If your inputs were SV=60, AE=60, Threshold = 60 74 > 60, so project is Selected: Yes

### Resource Leveling Shows No Data

**Problem:** Demand chart is empty

**Solutions:**

- Check that resources are allocated to tasks
- Or click "Use Project Hours" to use project-level hours
- Verify Resource Quantity (Qty Avlbl) is set in Resource Pool

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## 29. Appendix: Scoring Details and Examples

This appendix provides additional detail on how SV Score and AE Score are calculated.

### SV Score Calculation

The SV Score measures strategic alignment using four dimensions, each weighted equally at 25%:

Dimension	Weight	Source
Investment Category	25%	Order of Importance ranking
Investment Initiative	25%	Order of Importance ranking
Investment Objective	25%	Order of Importance ranking
Investment Strategy	25%	Order of Importance ranking

**How Order of Importance Works:** Items ranked higher in the Order of Importance list receive higher scores. The system normalizes scores from 0-100 based on relative position.

**Financial Integration:** When ≥4 of 7 financial fields are populated:

- SV Score = (Strategic Score × 50%) + (Financial Score × 50%)

When <4 financial fields:

- SV Score = Strategic Score × 100% (no penalty)

## AE Score Calculation

### In-Flight Projects (6 Components):

Component	Weight	How It's Scored
Health Score	20%	Green=100, Yellow=50, Red=0 (average of 3 indicators)
Risk/Complexity	20%	Lower complexity = higher score
Executive Commitment	15%	Full=100, Strong=80, Moderate=60, Limited=40, Not Clear=20
Budget Performance	15%	On/under budget=100, scales down with overrun
Hours Performance	15%	On/under baseline=100, scales down with overrun
Top 3 Risks	15%	Average of top 3 risk scores (inverted)

### New Projects (6 Components):

Component	Weight	How It's Scored
Risk/Complexity	20%	Lower complexity = higher score
Executive Commitment	20%	Same scale as In-Flight
Hours Demand	20%	Hours vs portfolio average
Budget Performance	15%	Cost vs ROM Estimate range
Top 3 Risks	15%	Average of top 3 risk scores
Estimation Method	10%	Resource Driven=100, Based on History=75, SWAG=25

## Worked Example: In-Flight Project

### Project: CRM Upgrade

- Health: Issues=Green, Schedule=Yellow, Scope=Green
- Risk/Complexity: "41-50 Complex but Manageable"
- Executive Commitment: Strong
- Budget: \$95,000 actual vs \$100,000 budget (5% under)
- Hours: 850 actual vs 800 baseline (6% over)
- Top 3 Risks: scores of 60, 45, 30

### Calculation:

1. **Health Score:**  $(100+50+100)/3 = 83.3 \rightarrow$  normalized to 83
2. **Risk/Complexity:** "41-50" maps to score of 55
3. **Executive Commitment:** Strong = 80
4. **Budget Performance:** 5% under = 100

- 5. **Hours Performance:** 6% over  $\approx 94$
- 6. **Top 3 Risks:**  $(60+45+30)/3 = 45 \rightarrow$  inverted = 55

**Final AE Score:**

$$\begin{aligned} &(83 \times 0.20) + (55 \times 0.20) + (80 \times 0.15) + (100 \times 0.15) + (94 \times 0.15) + (55 \times 0.15) \\ &= 16.6 + 11.0 + 12.0 + 15.0 + 14.1 + 8.25 \\ &= 76.95 \rightarrow \text{rounded to } 77 \end{aligned}$$

**Recommendation:** Review (score 60-79)

Worked Example: New Project

**Project: Mobile App Development**

- Risk/Complexity: "31-40 Large with Moderate Complexity"
- Executive Commitment: Full
- Hours: 1,200 (portfolio average is 1,000)
- Cost: \$180,000 vs ROM "101K to 300K" (within range)
- Top 3 Risks: scores of 40, 35, 25
- Estimation Class: Based on History

**Calculation:**

- 1. **Risk/Complexity:** "31-40" maps to score of 65
- 2. **Executive Commitment:** Full = 100
- 3. **Hours Demand:** 1,200 vs 1,000 avg = slightly above, score  $\approx 85$
- 4. **Budget Performance:** within ROM range = 90
- 5. **Top 3 Risks:**  $(40+35+25)/3 = 33.3 \rightarrow$  inverted  $\approx 67$
- 6. **Estimation Method:** Based on History = 75

**Final AE Score:**

$$\begin{aligned} &(65 \times 0.20) + (100 \times 0.20) + (85 \times 0.20) + (90 \times 0.15) + (67 \times 0.15) + (75 \times 0.10) \\ &= 13.0 + 20.0 + 17.0 + 13.5 + 10.05 + 7.5 \\ &= 81.05 \rightarrow \text{rounded to } 81 \end{aligned}$$

**Recommendation:** PROCEED (score  $\geq 80$ )

Score Color Reference

Score Range	Color	SV Meaning	AE Meaning
$\geq 80$	Green	High strategic value	Strong ability to execute
60-79	Yellow	Moderate strategic value	Moderate ability to execute
$< 60$	Red	Low strategic value	Weak ability to execute



For Complete Technical Details

For full algorithm specifications including all formulas, database field mappings, and code references, see the **Costbars PPM Technical Design Specification**.

Quick Reference Card

PPM Process Flow

1. Prioritize → SV Score (0-100, higher = more strategic)

2. Score → AE Score (0-100, higher = better execution ability)

3. Level → Resolve resource conflicts

4. Select → Bubble Chart selection

5. Balance → Score Card review

Key Scores

Score	Range	Meaning
SV Score	0-100	Strategic Value (higher = better alignment)
AE Score	0-100	Ability to Execute (higher = more likely to succeed)

Score Thresholds

Score	Level	In-Flight Action	New Project Action
≥80	Strong	Continue	PROCEED
60-79	Moderate	Review	REVIEW
<60	Weak	Consider Terminating	REJECT

PPM Menu Quick Access

Function	Path
Prioritize	PPM > Prioritize
Score	PPM > Score
Level	PPM > Level
Select	PPM > Select / Bubble Chart
Balance	PPM > Balance / Score Card
Tabular View	PPM > Tabular View
Card View	PPM > Card View

Notification Channels

- SMS
- Push Notification
- Email
- Executive Escalation (SMS)

Hierarchy Summary

Level	Color	Type
L1	Brown	Portfolio
L2	Green	Project
L3	Orange	Sub-Project
L4	Blue	Task
L5	Gold	Allocation

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*Transform Your Portfolio Management: Data-driven decisions. Strategic alignment. Optimized outcomes.*

*For additional support, visit [costbars.com](https://costbars.com) or contact our support team.*