Timebars Complete Reference Guide

Resource Scheduling & Traditional Project Management

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1. Getting Started

Welcome

Timebars Resource Scheduler is a browser-based tool for traditional resource management and project management. No installation required—launch it in your browser and start working immediately.

Product URL: tb.timebars.com

Prerequisites

Before getting started, we recommend:

- Reviewing the comprehensive presentation and functional benefits articles

How to Use for Free

Try Timebars 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 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 and select your subscription
4. **Log In:** Use your email/password in the app—the license downloads automatically
5. See the video on how to purchase and initialize your license

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 the Resources tab with your resource pool
3. Enter your project and task data in the Timebars tab
4. Drag and drop the spreadsheet onto the Canvas to import
5. Use the Resource Allocator to assign resources to tasks
6. Monitor supply vs. demand and generate reports

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2. Product Overview

What is Timebars?

Timebars Resource Scheduler is designed for Traditional (Waterfall) Resource Management and Project Management practitioners. It is built on top of Agilebars but features:

- A different scheduling engine for traditional methodologies
- More hierarchy levels (up to 5)
- Resource allocation and capacity planning
- Supply and demand management

Key Capabilities

Resource Management:

- Centralized Resource Pool
- Resource availability and rate definition
- Assign resources to projects and tasks
- Detect overallocated resources

- Calculate resource supply and demand
- Capacity planning with hiring indicators
- Monitor resource utilization

Traditional Project Scheduling:

- Project Planning and Scope Management with WBS
- Develop project schedules
- Project monitoring and control
- Estimate project duration and effort
- Analyze and share results

Why Timebars Over Gantt Charts?

The time-phased canvas offers advantages over traditional Gantt chart views:

- Drag and drop bars to any position (not locked to one row per bar)
- Stack multiple bars in parallel for better visibility
- More bars visible on screen
- Resource Allocation bars support drag-and-drop for front-loading or back-loading
- Improved personal productivity and screen real estate

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3. The Data Hierarchy

Overview

Timebars supports flexible hierarchies from 3 to 5 levels. Rules are built into the tool to prevent hierarchy violations during drag-and-drop operations. Each level is color-coded.

Color Coding

Level	Color	Purpose
L1	Brown/Dark Grey	Portfolio or Program
L2	Green	Project (always)
L3	Orange	Sub-Project or Work Package
L4	Blue	Task (including milestones and gates)
L5	Gold	Resource Allocation

5-Level Hierarchy (Maximum)

For enterprise portfolio management:

```
L1 - Portfolio/Program (Brown)
  └─ L2 - Project (Green)
       └─ L3 - Sub-Project (Orange)
```

```
            └ L4 - Task (Blue)
                 └ L5 - Allocation (Gold)
```

4-Level Hierarchy (Medium)

For most small and medium projects—same as 5-level but without L3 (Orange) bars:

```
L1 - Portfolio (Brown)
  └ L2 - Project (Green)
       └ L4 - Task (Blue)
            └ L5 - Allocation (Gold)
```

3-Level Hierarchy (Minimum)

For simple projects—same as above but without L1 (Brown) bars:

```
L2 - Project (Green)
  └ L4 - Task (Blue)
       └ L5 - Allocation (Gold)
```

Hierarchy Rules

- Tasks (L4) can only be dropped onto Projects (L2) or Sub-Projects (L3)
- Allocations (L5) can only be dropped onto Tasks (L4)
- Sub-Projects (L3) can only be dropped onto Projects (L2)
- Projects (L2) can only be dropped onto Portfolios (L1) or stand alone

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4. The User Interface

Top Menu

The top menu displays:

- Product icon and name
- Import/Export arrows
- Bar refresh icon
- Shopping cart icon
- Login icon (yellow)
- Current user (or license status if not logged in)

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
- **Publish:** Cloud publishing features

The Hamburger Menu

Click to access:

- Filter Menu
- Getting Started Page
- AI Search
- FAQ
- WBS Generator
- Data Actions (Import, Export, Backup)
- Guided Tour
- Intro Animation
- Download Spreadsheets (Excel or LibreOffice)

Canvas Settings

Access via Tools > Set Canvas or bottom-right canvas controls:

Setting	Purpose
Timescale	Weekly or monthly view
Zoom Factor	Zoom in/out (0.5, 1, 1.5, 2, etc.)
Start Date	Timeline starting point
Report Date	Status date for progress calculations
Baseline Bars	Show/hide thin baseline lines
Ghost Bars	Show/hide position reference bars
Visible Levels	Control which hierarchy levels display (L1-L5)
Light/Dark Mode	Visual theme toggle
Hide Completed	Hide finished Timebars from view

Filter Menu

Click the pink **FM** tab on the left side of the Canvas:

- Renders three levels: L1 (brown), L2 (green), L3 (orange)
- Click hyperlinks to drill down and filter
- Double-click FM tab to launch

- Click Filter Icon to remove filter completely
- Selected filter is saved for next session

Shortcut Menu

Right-click anywhere on the Canvas for quick access to:

- Canvas Settings
- Bulk Move
- Refresh Bars
- Filter Menu
- Main Bar Lines (show hierarchy)
- Task Bar Lines (show relationships)
- Toggle Bars vs. Text Boxes (Kanban mode)

Tools Menu

Use the wrench icon to launch the right-side Tools Menu:

- Set Canvas settings
- Page reload
- Toggle Light/Dark mode
- Toggle Bar Lines
- Filter Menu
- Complete recalculation and rollup
- Intro and Tour launchers

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5. Working Modes

Timebars offers two canvas modes. Switch between them with a single click.

Timescale Mode

A time-phased canvas showing bars on a timeline.

Best for:

- Project planning and scheduling
- Resource allocation visualization
- Long-term schedule management
- WBS-based project structure

Features:

- Drag and drop bars to any position
- Resize bars to change duration
- Stack parallel bars for better visibility
- View baseline comparisons
- See resource allocation bars (Gold/L5)

Kanban Mode

A visual board with swim lanes for tracking status.

Important Difference from Agilebars: In Timebars, Kanban mode **only updates start and finish dates** based on when bars are moved between lanes. It does NOT use the Earned Value progress calculations that Agilebars uses.

Best for:

- Status tracking
- Visual workflow management
- Team collaboration

How to Switch Modes

1. Locate the **Switch Modes** icon in the top center menu
2. Click to toggle between Timescale and Kanban views
3. Click again to switch back

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6. The Scheduling Engine

How It Differs from Agilebars

The Timebars scheduling engine uses a unique approach to calculating dates, durations, hours, costs, and percent complete. Unlike Agilebars (which uses Earned Value), Timebars:

- Calculates based on allocation duration and percentage
- Allows manual override of percent complete
- Focuses on resource hours and costs rather than Kanban lane progress

Core Calculation Formula

The scheduling engine uses this formula for hours:

```
Hours = % Allocated × Workday Hours × Duration (in days)
```

Example: If a resource is assigned at 50% allocation, works 8-hour days, and the task is 10 days long:

```
8 × 0.5 × 10 = 40 hours
```

How Dates, Duration, Hours, and Costs Calculate

Scenario 1: Task in the Future (Start date after Report Date)

- Computes forecast dates, duration, work, and cost
- No actuals recorded yet

Scenario 2: Task In Progress (Straddles Report Date)

- Start date becomes an actual date
- Finish date remains a forecast
- Remaining duration calculated from Report Date to finish
- Computes actual work, actual cost, and percentage complete
- You can manually override percent complete if needed

Scenario 3: Task Complete (Finish before Report Date)

- Start and finish dates become actual dates
- Remaining duration becomes zero
- Computes actual work, actual cost
- Sets percentage complete to 100%

Percent Allocated

- Set during the resource assignment process
- Determined by the **Percent Available** value in the Resource Pool
- Can be changed after assignment via the Hours Calculator popup

Cost Calculations

Costs are calculated as:

```
Cost = Calculated Hours × Pay Rate
```

The Pay Rate is defined per resource in the Resource Pool.

Automatic Rollup

Data automatically aggregates from lower to higher hierarchy levels:

- L5 (Allocations) roll up to L4 (Tasks)
- L4 (Tasks) roll up to L3 (Sub-Projects) or L2 (Projects)
- L3 (Sub-Projects) roll up to L2 (Projects)
- L2 (Projects) roll up to L1 (Portfolios)

This ensures reports, graphs, and charts always show accurate aggregated data.

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7. Resource Management

Overview

Resource scheduling is where Timebars shines. It involves assigning resources (people, equipment, facilities) to specific tasks within a given timeframe, ensuring efficient utilization and improved productivity.

The Resource Pool

A list of your resources (Human or Generic) who perform work on tasks. Maintained via Spreadsheet Sync.

Key Fields:

Field	Purpose
ResID	Unique identifier (mandatory)
Name	Resource name (mandatory)
Calendar/Workday	Hours per day (mandatory)
Name Short	Abbreviated name
Location	Where resource is based
Primary Skill	Main skill area
Primary Role	Job function
Department	Organizational unit
Pay Rate	Hourly/daily rate for cost calculations
Default Percent Available	Default allocation percentage
Qty Resources (Supply)	FTE count (for generic resources)

Populating the Resource Pool

1. **Download spreadsheet:** Hamburger > Download Excel or LibreOffice SS
2. **Open Resources Tab:** Enter your data or paste from enterprise system
3. **Drag and drop:** Drop spreadsheet on Canvas to import
4. **Verify:** Click Resources icon on main menu to see results

Example Resources Tab:

ResID	Workday	Qty	Pay Rate	Name	Primary Role	Primary Skill	Labour Type	Default % Available
700	8	1	50	Joe Invent	R&D	Testing	Human	50
701	8	1	50	Ally HR	HR SME	IT Architecture	Human	50
702	8	1	50	Julia Finance	Finance SME	Procurement	Human	50

The Resource Allocator

A movable popup displaying resources from the Resource Pool.

To Launch: Main Menu > Resources

Features:

- List of all resources with metadata
- Search box (not case-sensitive)
- Column sorting by clicking headers
- Width icon to show more metadata
- Checkboxes to filter: Generic only, Human only, or All
- Resource Demand Chart buttons at bottom

Creating Allocation Bars (Gold/L5)

1. Open Resource Allocator (Main Menu > Resources)
2. Select a resource name
3. Drag it out of the allocator
4. Drop it onto a Task (Blue bar)
5. A new Gold L5 Allocation bar appears
6. Drag the allocation bar to desired position (front-load or back-load)

Checking Resource Availability

Method 1: % Allocated Graph

1. Ensure Canvas is in weekly timescale mode
2. Double-click a resource name in Resource Allocator
3. Yellow vertical bars appear at top of Canvas
4. Bars show percent allocated by week
5. Visualize availability before assigning

Method 2: Resource Demand Charts

1. Click Refresh Data button at bottom of Resource Allocator
2. Click desired chart button
3. View detailed supply and demand visualization

Method 3: Resource Usage Reports

- Main Menu > Reports > Resource > Resource Usage
- See demand by hours or FTE
- Weekly or monthly view
- By resource name, project, or role

Hours Calculator Popup

For Gold Allocation bars only:

1. Click the Edit link at bottom left of an Allocation bar
2. Hours Calculator popup appears
3. View and modify:
    - Percent Allocated
    - Workday hours
    - Duration
4. See revised cost, hours, and dates dynamically

5. Changes save when you drop the bar

Cost Schedule Popup

Available on every bar at every level:

1. Click the bar ID (bottom left, e.g., "T:3773")
2. Popup shows:
    - Planned, Forecast, and Actual dates
    - Costs and Hours
    - Remaining work and percent complete
    - Links to Burndown Chart and Metadata View

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8. Supply and Demand Planning

Overview

The Supply vs. Demand grid is a strategic resource management tool providing visibility into resource capacity planning across projects.

Key Concepts

Supply: Available capacity of resources—total FTE or hours resources can work based on contracts, calendars, and availability.

Demand: Actual resource requirements from project allocations—capacity consumed by assigned tasks.

Variance: The difference (Supply minus Demand) revealing:

- **Over-allocation:** Demand exceeds supply (resources over-committed)
- **Under-utilization:** Supply exceeds demand (unused capacity)

Who Uses These Grids?

Role	Uses Grid To
Resource Managers	Balance workloads, identify hiring needs, resolve conflicts, optimize utilization
Project Managers	Check resource availability, plan schedules, request resources, adjust timelines
Portfolio Managers	Assess capacity for new work, make go/no-go decisions, prioritize projects
Executives	Make hiring/budget decisions, understand capacity, evaluate utilization

The Five Summary Rows

1. Supply (FTE) - Blue Background

- Total available capacity across all resources
- Sourced from tbResources store (tbResMonth1-24 fields)
- Factors in resource start/finish dates
- Example: 6 full-time resources = 6.0 FTE

2. Demand (FTE) - Green Background

- Total resource requirements from allocations
- Calculated from task allocations split into monthly buckets
- Respects groupBy filter selection
- Conversion: `FTE = Hours / (8 hours × 20 days) = Hours / 160`

3. Variance (S-D) - Yellow Background

- Supply minus Demand
- **Green text (positive):** Excess capacity
- **Red text (negative):** Capacity deficit

4. Month Header - Gray Background

- Calendar months (e.g., "Sep 2025", "Oct 2025")
- Starts at configured apStatusDate

5. Resource/Project/Role Header - White Background

- First column header changes based on groupBy selection

View Modes

FTE vs. Hours Toggle:

Mode	Best For
FTE	Strategic planning, executive reporting (1.0 FTE = one full-time resource/month)
Hours	Tactical planning, detailed scheduling (e.g., 160 hours/month for 1.0 FTE)

Weekly vs. Monthly Toggle:

Mode	Best For
Monthly	Long-term planning (6-24 months), portfolio decisions, hiring
Weekly	Short-term planning (1-3 months), identifying bottleneck weeks

Named vs. Generic Resources

Named Resources (Human):

- Specific individuals (e.g., "Joe Invent", "Ally HR")
- `tbResLabourType: "Human"`
- Track actual people doing work

Generic Resources:

- Role-based placeholders (e.g., "Developer", "Tester")
- `tbResLabourType: "Generic"`
- Quantity can be > 1 (e.g., "3 Developers" = 3.0 FTE)

- Used for early planning before specific assignments

Why Both?

- **Early Planning:** Use generic ("we need 2 developers")
- **Assignment Phase:** Replace generic with named resources
- **Gap Analysis:** Generic resources fill demand gap

Common Variance Patterns

Pattern	Meaning	Action
Supply = Demand	Optimal utilization	Monitor closely
Consistent negative	Structural under-capacity	Hire, contract, or reduce scope
Spiky negative	Temporary bottleneck	Shift tasks or bring temp help
Large positive	Under-utilization	Take new projects or reduce headcount
Positive → Negative	Project ramp-up consuming capacity	Verify schedules are achievable

Best Practices

For Accurate Supply:

- Keep resource pool current (update start/finish dates)
- Set realistic availability percentages
- Maintain generic resource quantities

For Accurate Demand:

- Assign resources to all tasks
- Set realistic task durations
- Review work hour estimates
- Assign Primary Roles to all resources

For Effective Analysis:

- Start with monthly FTE view
- Identify persistent negative variances
- Look ahead 3-6 months
- Compare different groupBy views

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9. Creating and Managing Bars

Bar Creator

The Bar Creator enables creating bars via drag-and-drop while enforcing hierarchy rules.

Creating Bars by Level:

To Create	Drop Creator Bar On
Portfolio (L1 Brown)	Empty area
Project (L2 Green)	Portfolio (L1) or empty area
Sub-Project (L3 Orange)	Project (L2)
Task (L4 Blue)	Project (L2) or Sub-Project (L3)
Allocation (L5 Gold)	Use Resource Allocator, drop on Task (L4)

Deleting Bars

Drop a bar on the **Trash Can** (left side of Canvas):

- The dropped bar and all child bars are deleted
- Deleting a Project deletes all Sub-Projects, Tasks, and Allocations under it
- **There is no undo**—make a backup first (Hamburger > Full Backup)

To keep child bars: Move them to another parent before deleting.

Editing Bars

Cost Schedule Form: Click on the bar ID (bottom left) to open:

- Planned, forecast, and actual dates
- Hours and costs
- Remaining work and percent complete
- Links to Metadata View and Burndown Chart

Slide Out Form: Click the bar title to invoke the slide-out for:

- Name editing
- Description
- Type (Task, Risk, Issue, CR)
- Status, State, Stage
- Metadata assignment

Bar Appearance

Bar Color	Meaning
Brown/Grey	Portfolio (L1)
Green	Project (L2)
Orange	Sub-Project (L3)
Blue	Task (L4)
Gold	Allocation (L5)
R or I prefix	Risk or Issue

Bar Color	Meaning
Red border	Concerned or Critical status

Baseline Management

Set baselines before work starts:

1. Open Cost Schedule Form (click bar ID)
2. Click **Set Baseline**
3. Baseline is created for this bar and all children
4. Compare forecast to baseline in reports

Adding Scope After Baseline:

- Click Set Baseline with checkmark off
- Adds new bars to baseline without overwriting existing

Show/Hide Hierarchy Lines

Right-click > Main Bar Lines to visualize:

- Gold bars linked to Blue bars
- Blue bars linked to Orange or Green bars
- Orange bars linked to Green bars
- Green bars linked to Brown bars

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10. Relationships and Constraints

Creating Relationships Between Tasks

Relationships instruct the scheduling engine to reschedule successors when predecessors move.

To Create:

1. Grab the beginning of the desired successor task
2. Drag it over the ending of the predecessor task
3. Wait for the red dashed box to appear
4. Drop

To Remove: Repeat the same operation.

Show/Hide Task Relationship Lines

Right-click > Task Bar Lines to visualize relationships

Managing Constraints

Constraints lock task dates regardless of predecessor relationships.

To Add a Constraint:

1. Find the red push pin on the left side of the Canvas
2. Drag and drop it near the end of the desired task
3. Task dates are now locked

Constraint Behavior:

- Dates won't change from predecessor moves
- Project start date changes WILL override the constraint

To Remove: Double-click on the pin.

Bulk Move Tasks

Reschedule multiple tasks at once:

1. Choose Tools Menu > Bulk Move Tasks
2. Click on two or more tasks to highlight them (blue dotted lines appear)
3. Drag and drop to reposition
4. Refresh the screen to confirm

Tip: When reaching the last bar, double-click it then drag.

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11. Spreadsheet Sync

Introduction

The Spreadsheet Sync feature enables seamless bidirectional data exchange between the app and spreadsheets (Excel or LibreOffice Calc).

Download Templates

- LibreOffice Calc (.ods)
- MS Office Excel (.xlsm)

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

Key Spreadsheet Tabs for Timebars

Tab	Purpose
Timebars	Projects, Sub-Projects, Tasks
Resources	Resource Pool (names, rates, skills, availability)
Tags	Picklist values
Fields	FOCD form field configuration
Core Report	Show/hide fields in Core Report
Metadata	Metadata assignments

How It Works

Export Cycle:

1. Export data from app (Data Actions > Export)
2. CSV files save to Downloads folder
3. Open spreadsheet and import CSVs via Setup page
4. Edit data in spreadsheet
5. Save spreadsheet
6. Drag and drop onto Canvas to import

Import Cycle:

1. Populate spreadsheet with project, task, and resource data
2. Save the spreadsheet
3. Drag and drop file onto Canvas top menu
4. Data loads into the app

Resource Pool via Spreadsheet

The Resource Pool is maintained primarily through the Resources Tab:

1. Download spreadsheet
2. Open Resources Tab
3. Enter resource data:
    - ResID, Name, Calendar (mandatory)
    - Location, Primary Skill, Primary Role
    - Department, Pay Rate
    - tbResMonth1-24 (monthly FTE availability)
4. Save and drag onto Canvas
5. Verify via Resources icon

Sync Best Practices

- Avoid editing data in both app and spreadsheet simultaneously
- Complete edits in one place before syncing
- Importing creates automatic backup
- Repeat sync cycle as needed (daily, weekly, monthly)

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12. Metadata and Tagging

What is Metadata?

Metadata coding organizes, breaks down, and enables reporting on project work. Over 100 metadata fields can be configured.

How to Assign Metadata

Via Slide Out Form:

1. Click the bar title

2. Slide-out form appears
3. Select values from picklists
4. Add/remove fields to suit needs

Via Core Report:

1. Open Cost Schedule Form (click bar ID)
2. Launch Core Report
3. Fields shown vary by hierarchy level

Picklist Configuration

Maintained in the Tags spreadsheet tab:

- Modify existing values
- Create new picklists
- Drag and drop spreadsheet to load changes

Key Picklists for Timebars

Picklist	Purpose
Timebar Status	New, In Progress, On Hold, Blocked, Closed
Timebar Priority	Immediate, High, Normal, Low
Health Indicators	Green, Yellow, Red, Not Assessed
Labour Type	Human, Generic, Other
Resource Class	Permanent, External, Seasonal
Primary Role	R&D, Engineer, Developer, Tester, etc.
Primary Skill	IT Architecture, Testing, Design, etc.
Department	Finance, IT, Operations, etc.

Slide Out Metadata Editor

Click any bar title to assign metadata using the coding structure. Add/remove fields via spreadsheet configuration.

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13. FOCD Forms Configuration

What is FOCD?

FOCD (Forms on Cached Data) allows adding and removing fields from forms without coding. Configure via spreadsheet.

Available Forms in Timebars

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:

Column	Purpose
ID	Unique identifier
Coord Top	Vertical position (pixels)
Coord Left	Horizontal position (pixels)
Width	Field width (pixels)
Name	Must match existing field name
Type	NoPicklist or With Picklist
Form Name	Target form (PF1, PJ1, SPJ1, TASK1, ALLOC1)
Label	Display text in UI

Adjusting Field Positions

FOCD Forms have 4 blue icons at top:

1. Click second icon to move one field at a time
2. Click third icon to move multiple fields
3. Dotted lines show moveable fields
4. Drag to new positions
5. Click blue Square icon to save

Picklist Configuration for Fields

If Type = "With Picklist":

1. Set Picklist Name column to match Tags spreadsheet value
2. Use existing picklist or create new one

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14. Risks, Issues & Change Requests

Creating Risks, Issues, or CRs

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

Visual Indicators

- **R** or **I** prefix on bar name
- Black letter by default
- Turns **red** if Status is Concerned
- Red border increases for Critical

Tracking and Managing

Launch the RIC Page: Main Menu > RIC

Features:

- Search box for keyword filtering
- Picklists for status, priority, etc.
- Click Risk or Issue button to edit
- Toggle between Tabular and Card views

Risk Metadata Fields

Field	Values
Risk Impact	Very Low, Low, Medium, High, Very High
Risk Probability	Very Unlikely, Unlikely, Likely, Very Likely, Certain
Mitigation Status	Identified, Assessed, In Progress, Mitigated, etc.
Category	Product, Financial, Operational, Technical, Schedule

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15. Reports and Dashboards

Reports Menu

Access via Main Menu > Reports

Available Reports:

Section	Report	Description
General	General Tabular View	Tabular with search and filtering
General	General Card View	Card view with search and filtering

Section	Report	Description
General	Print WBS	WBS in markdown format
Portfolio	Drilldown from Portfolio	Color hierarchy report
Portfolio	PPM Tabular Report	PPM with search and project selection
Portfolio	PPM Cards Report	PPM cards with filtering
Project	Project Status	All projects with G/Y/R indicators
Project	All Tabular	Complete data table
Task	Items Overdue	Past baseline milestones
Task	Milestone Horizon	Approaching milestones
Resource	Resource Usage	Supply and demand grids/charts
Resource	Shared Resource Pool	All resources in tbResources

Core Report

A dynamic form for viewing and editing metadata:

- Accessible from Cost Schedule Form on any bar
- Fields configured by hierarchy level
- Control visibility via Core Report spreadsheet tab

Local Dashboard

Access via Main Menu > Dashboard

Tabs for Timebars:

- Summary (L1 data)
- Resources (Demand charts from ResCalcs2)
- Project (L2 children of selected L1)
- Finance (L1 financial data)

Features:

- Filter by Portfolio (L1)
- FOCD forms—add/remove up to 150 fields
- Works offline (no cloud required)
- Quill Editor for rich text fields

Resource Usage Reports

Visualize resource allocation:

- Demand by hours or FTE
- Weekly or monthly views
- Grouped by resource name, project, or role

- Tabular grids or colorful bar graphs

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16. AI Project Generator

What It Does

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

Basic Usage

```
Create a project called Infrastructure Upgrade
```

AI Creates:

- 1 project
- 5 tasks (default)
- 2 milestones (default)
- 3 risks (default)
- Rich descriptions

Override Defaults

```
Create a project called Data Center Migration with 12 tasks, 5 milestones, and 6
risks
```

Provide Context

```
Create a project to upgrade 50 servers from Ubuntu 20.04 to 22.04 LTS.
Include testing phases, backup procedures, and rollback plans.
The project should span 8 weeks starting April 2025.
Create 10 tasks, 4 milestones, and 5 risks.
```

Tips for Best Results

- Be specific about domain
- Mention key phases
- State quantities explicitly
- Provide scale context
- Include constraints

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17. Cloud Publishing and Dashboard

What is the Cloud Dashboard?

An optional platform transforming your data into dynamic visualizations:

- Graphs and line charts
- Pie charts
- Bubble charts
- Tabular reports

Getting Access

1. Purchase subscription at timebars.com/dashboard
2. Log in via Main Menu > Publish > Login
3. Must be logged into app locally first

Publishing Your Data

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

Working with Pubsets

Actions:

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

Dashboard Pubset: Blue background—linked directly to Dashboard charts.

Cross-Device Workflow

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

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18. Data Management

Backup and Restore

Automatic Backups:

- App backs up to Downloads folder constantly
- Backup taken before major operations
- JSON format with all data tables

Manual Backup: Hamburger > Full Backup

Restore: Drag and drop backup file onto Canvas

Export Options

Export to CSV: Hamburger > Data Actions > Export

- All data stores as CSV files
- Use with Spreadsheet Sync

Export to JSON: Individual JSON files for custom integrations

Import Options

Drag and Drop:

- Spreadsheet files
- CSV files
- Backup JSON files

File Importer: Hamburger > File Importer for file picker

Demo Data Management

Clear Demo Data: Hamburger > Data Actions > Clear Demo Data

Load Demo Data:

- Small (S) or Large (L) demo set

Caution: Clearing removes all customizations.

Delete Database and Start Over

Use browser Developer Tools (F12):

1. Application tab > IndexedDB
2. Right-click stores > Clear
3. Refresh browser

Warning: No backup taken—export first!

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19. Security

Encryption

- **HTTPS/TLS:** End-to-end encryption (bank-level)
- All data transmitted securely

No Cookies

- No cookies stored on device
- Reduced security risks

Token-Based Authentication

- JSON Web Tokens (JWT) on login
- Server-side, encrypted with password
- Never stored in browser

Data Location

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

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20. Licensing and Support

Subscription Tiers

Three pricing tiers with increasing data limits:

- Features are the same across all tiers
- Higher tiers allow more projects, tasks, resources, Pubsets

What's Limited in Free Version

- Number of projects
- Number of tasks
- Number of resources
- Number of Pubsets

Contact Information

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- Technical support included with subscription

Learning Resources

- Timebars Presentation
- Timebars Features
- Knowledge Base

Third-Party Training

- Project Scheduling Training (Udemy)
- Resource Management Training (YouTube)

Quick Reference Card

Resource Assignment Workflow

1. Open Resource Allocator (Main Menu > Resources)
2. Drag resource name onto a Task (Blue bar)
3. Gold Allocation bar appears
4. Position allocation bar as needed
5. Double-click resource to check availability

Project Setup

1. Download spreadsheet template
2. Populate Resources tab
3. Enter projects/tasks in Timebars tab
4. Drag spreadsheet onto Canvas
5. Assign resources via Resource Allocator
6. Set baselines before work starts

Key Shortcuts

Action	How
Switch Modes	Click icon in top center menu
Launch Resource Allocator	Main Menu > Resources
Check Availability	Double-click resource name
View Cost/Schedule	Click bar ID (bottom left)
Edit Hours/% Allocated	Click Edit link on Allocation bar
Import Data	Drag spreadsheet onto Canvas
Filter Projects	Click pink FM tab
Show Hierarchy Lines	Right-click > Main Bar Lines
Quick Backup	Hamburger > Full Backup

Hours Calculation Formula

```
Hours = % Allocated × Workday Hours × Duration
```

Hierarchy Summary

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

For additional support, visit timebars.com or contact our support team.