



Costbars Complete Reference Guide

Project Portfolio Pipeline & Cost Management

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1. Costbars Product Overview & Getting Started

Source: Costbars User Guide

Costbars User Guide

Introduction

Costbars is the Project Portfolio Management (PPM) edition of the Timebars product family, designed specifically for portfolio managers, PMO leaders, and executives who need to make strategic decisions about project selection, resource allocation, and portfolio balance.

While Timebars focuses on project execution and Agilebars on sprint planning, Costbars provides the strategic layer above individual projects—helping you answer critical questions like:

- Which projects should we approve, delay, or kill?
 - How do we balance our portfolio across strategic objectives?
 - Are we investing in the right initiatives?
 - Do we have the resource capacity to deliver our committed projects?
 - How do we ensure our portfolio aligns with organizational strategy?
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What Makes Costbars Different

Costbars extends the core Timebars platform with specialized PPM capabilities:

Strategic Scoring and Prioritization

- **Strategic Value (SV) Scores** – Calculate 0-100 scores based on alignment with investment categories, initiatives, objectives, and strategies
- **Ability to Execute (AE) Scores** – Evaluate project feasibility based on risk, size, complexity, and organizational capacity
- **Automated Recommendations** – Data-driven guidance on which projects to approve, review, or reject

Portfolio-Level Views

- **Bubble Chart Selection** – Visual quadrant analysis showing SV Score vs. AE Score with bubble size representing budget/hours
- **Balanced Scorecard** – Portfolio balance analysis across strategic alignment, risk distribution, investment mix, and timeline spread
- **Tabular and Card Views** – Multiple viewing modes for analyzing project portfolios

Resource Capacity Management

- **Supply vs. Demand Grids** – See resource availability compared to project demand across time periods
- **Resource Leveling** – Optimize project schedules to align demand with available capacity
- **Multiple View Modes** – Switch between FTE/Hours, Monthly/Weekly, and various GroupBy options

Executive Reporting

- **Portfolio Status Reports** – Comprehensive portfolio health, balance, and strategic alignment reporting
 - **Notification and Escalation** – Configurable alerts when projects exceed defined thresholds
 - **Project Assessment Tool** – Standardized framework for evaluating project complexity and risk
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Getting Started with PPM

Before running the Costbars PPM process, you need to establish your data foundation.

Prerequisite: Configure Your Resource Pool

Download the spreadsheet template through the Hamburger Icon menu. Populate the Resources Tab with:

- Resource IDs and names
- Roles and skills
- Resource rates

Then drag and drop onto the Canvas to build your centralized resource pool.

Prerequisite: Allocate Resources to Tasks

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

Prerequisite: Set Strategic Metadata

Configure strategic metadata to determine Strategic Value (SV) Scores. Set values for each project:

- **Investment Category** – Functional area or business unit
- **Investment Initiative** – Type of initiative (Innovation, Growth, Maintenance, Compliance)
- **Investment Objective** – Run/Grow/Transform classification
- **Investment Strategy** – Strategic pillar alignment

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

Prerequisite: Complete Project Assessments

Fill in the Project Assessment form to capture critical project information:

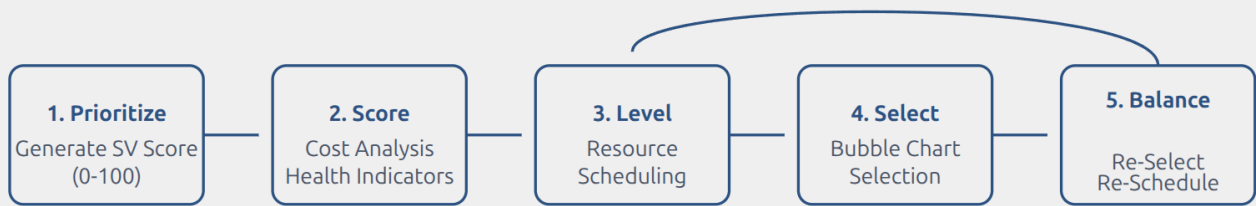
Field	Purpose
Risk vs Size and Complexity	0-100 scale rating of project complexity
Executive Level Commitment	Level of senior leadership support
Estimation Class	SWAG / Based on History / Resource Driven
ROM Estimate	Rough Order of Magnitude budget range
Health Indicators	Issues, Schedule, Scope status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

For detailed guidance on completing project assessments, see [Project Assessment Tool](#) below.

The Five-Step PPM Process

Costbars PPM Process

Iterate until strategy achieved



The Costbars PPM process helps you make data-driven decisions about project approval and termination through five sequential steps.

STEP 1: Prioritize Projects (Generate SV Scores)

Calculate Strategic Value based on custom Alignment Values and Order of Importance. The SV Score ranges from 0-100, where 100 indicates perfect alignment with operational strategy.

How to Access:

1. From the PPM Page, click **Prioritize** in the actions menu
2. The Prioritize popup opens

Process:

1. **Set Order of Importance** by dragging items in each list (most important at top):
 - Investment Categories
 - Investment Initiatives
 - Investment Objectives
 - Investment Strategies
2. Click "**Prioritize Test!**" to preview results without saving
3. Click "**Prioritize Finalize!**" to save scores to the database

Database Field Updated: **tbMDPriorityStrategic**

Scoring Methods:

- **Strategic + Financial (50/50):** Projects with ≥ 4 financial fields populated
- **Strategic Only (100%):** Projects with insufficient financial data (no penalty applied)

STEP 2: Score Projects (Generate AE Scores)

Evaluate projects using multiple data points including health indicators, costs, hours, and Size vs Complexity metrics. The Ability to Execute (AE) Score identifies potential challenges and resource requirements.

How to Access:

1. From the PPM Page, click **Score** in the actions menu
2. The Scoring popup opens

Process:

1. Review "Data Requirements & Formula Descriptions" section
2. Click **"Generate Ability to Execute Scores - Test"** to preview
3. Click **"Generate Ability to Execute Scores - Final"** to save

Database Fields Updated: **tbMDCostbarsScore**, **tbMDDecisionStrategic**

AE Score Recommendations:

Score	In-Flight Projects	New Projects
≥80	Continue	PROCEED: Strong scoring
60-79	Review	REVIEW: Moderate scoring
<60	Consider Terminating	REJECT: Weak scoring

Score Color Coding:

Color	Score Range	Meaning
Green	≥80	Strong
Yellow	60-79	Moderate
Red	<60	Weak

STEP 3: Level Resources

Optimize resource demand to align with resource supply by adjusting project start and finish dates. View in real-time the resource demand comparison across the timeline as projects are manually rescheduled on the Timebars Canvas.

How to Access:

1. From the PPM Page, click **Level** in the actions menu
2. The Leveling View opens on the Timebars Canvas

Process:

1. View total resource demand chart
2. Identify over-allocations (red areas)
3. Drag and drop project bars to adjust schedules
4. Monitor real-time demand updates
5. Continue until demand aligns with supply

For detailed resource capacity analysis, see [Resource Management](#) below.

STEP 4: Select Projects (Bubble Chart)

Utilize the bubble chart visualization to quickly identify which projects to approve or kill. Bubble size, color, and position are based on SV Score and AE Score ranges.

How to Access:

1. From the PPM Page, click **Select** or **Bubble Chart** in the actions menu
2. The Bubble Chart view opens

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	Meaning	Action
Top-Right (High SV + High AE)	Strategically aligned, likely to succeed	APPROVE – High-value, low-risk projects
Top-Left (Low SV + High AE)	Misaligned but low-risk projects	REVIEW – Easy to execute but questionable value
Bottom-Right (High SV + Low AE)	Strategically aligned, risky execution	MITIGATE – Important but needs risk reduction
Bottom-Left (Low SV + Low AE)	Misaligned and risky projects	KILL – Poor candidates for approval

Selection Process:

1. Enter SV Score threshold (e.g., 60)
2. Enter AE Score threshold (e.g., 70)
3. Click "**Select Test**" to preview
4. Click "**Select Final**" to save

Database Field Updated: `tbMDYesNoSelector` (Yes/No)

Selection Formula:

```
Final Score = (SV Score × 60%) + (AE Score × 40%)
If Final Score > Average Threshold → Selected: Yes
If Final Score ≤ Average Threshold → Selected: No
```

STEP 5: Balance the Portfolio

Review the Score Card to assess portfolio balance. Discover anomalies and perform project adjustments to optimize portfolio alignment across strategic dimensions.

How to Access:

1. From the PPM Page, click **Balance** or **Score Card** in the actions menu
2. The Portfolio Score Card view opens

Score Card KPI Sections:

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

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

For comprehensive portfolio balancing guidance, see [Portfolio Balancing with the Balanced Scorecard](#) below.

Resource Management (Supply vs. Demand)

Costbars provides powerful resource capacity planning through Supply and Demand grids that show resource availability compared to project demand across time periods.

Understanding the Supply vs. Demand Grid

The grid displays **5 summary rows** that help you identify over-allocation and resource constraints:

1. **Supply (FTE)** – Available resource capacity in Full-Time Equivalents

- 2. **Demand (FTE)** – Required resource capacity from all projects
- 3. **Variance (S-D)** – Supply minus Demand (negative = over-allocated)
- 4. **Month Header** – Time period labels (Monthly or Weekly view)
- 5. **Resource/Project/Role** – The dimension being analyzed

View Modes

FTE vs Hours:

- **FTE (Full-Time Equivalent)** – Shows capacity as decimal (e.g., 0.5 = half-time)
- **Hours** – Shows actual hours required/available

Monthly vs Weekly:

- **Monthly** – Aggregates capacity across entire months
- **Weekly** – Provides granular week-by-week analysis

GroupBy Options:

GroupBy	What It Shows
Project	Resource demand organized by project
Resource Name	Workload for each named resource
Role	Capacity and demand by role/skill

Named vs Generic Resources

Named Resources:

- Specific individuals (e.g., "John Smith, Senior Developer")
- Allocated by person
- Shows individual capacity and workload

Generic Resources:

- Role-based allocation (e.g., "Developer", "Business Analyst")
- Represents pools of similar resources
- Useful for planning before specific assignments

Interpreting Variance Values

Variance	Meaning	Action
Positive (e.g., +2.5)	Supply exceeds demand	Capacity available for new projects
Zero or Near-Zero	Balanced allocation	Optimal utilization
Negative (e.g., -1.5)	Over-allocated	Delay projects, hire resources, or reduce scope

Using Supply vs. Demand for Resource Leveling

1. **Identify Over-Allocations** – Look for negative variance (red) in any time period
2. **Adjust Project Schedules** – Drag project bars on the canvas to shift demand
3. **Monitor Real-Time Updates** – Watch variance recalculate as you move projects
4. **Balance Across Time** – Smooth resource demand to avoid peaks and valleys

Best Practice: Aim for slight under-allocation (positive variance) to allow for unexpected work and planning buffers.

Project Views (Tabular and Card)

Costbars provides two specialized views for analyzing your project portfolio: Tabular View and Card View.

Tabular View

A spreadsheet-style interface for data-intensive portfolio analysis.

How to Access:

1. From the PPM Page, click **Tabular View** in the actions menu
2. The spreadsheet-style grid opens

Key Columns:

Column	Description
ID	Project identifier (e.g., L2:PJ01)
Type	Project type classification
Name	Project name
Product	Timebars/Agilebars/Costbars
Status	In-Flight, Approved, Proposed, etc.
SV Score	Strategic Value Score (0-100)
AE Score	Ability to Execute Score (0-100)
F Score	Final Combined Score
Selected	Yes/No indicator from selection process
Decision	Approve/Review/Reject recommendation

Use Cases:

- Quickly sort and filter large project lists
- Export to Excel for further analysis
- Bulk edit project metadata
- Review scoring results across entire portfolio

Card View

A visual, card-based interface for intuitive portfolio review.

How to Access:

1. From the PPM Page, click **Cards View** in the actions menu
2. The card grid displays

Card Elements:

Each card displays:

- Project name and ID
- Product type (Costbars/Timebars/Agilebars)
- Status badge (color-coded)
- SV Score and AE Score (with color indicators)
- Budget/forecast information
- Selection status (Yes/No)
- Decision recommendation

Use Cases:

- Executive presentations and portfolio reviews
- Visual pattern recognition (e.g., many red scores)
- Quick scanning of portfolio health
- Stakeholder communication

Editing Metadata from Views

From Tabular View:

- Click the **Edit Metadata Icon** on any row
- Core Form launches with full project details
- Make changes and save

From Card View:

- Click any card to expand
- Access editing options
- Update fields and save

Portfolio Balancing with the Balanced Scorecard

The Balanced Scorecard helps you assess whether your portfolio is balanced across multiple strategic dimensions.

What is Portfolio Balance?

A balanced portfolio means:

- Investment is distributed appropriately across strategic objectives
- Risk is managed within organizational tolerance

- Resources are allocated to the right priorities
- Projects span appropriate time horizons

An **unbalanced portfolio** creates strategic risk, operational problems, and misalignment with organizational goals.

The Four Scorecard Quadrants

1. Strategic Alignment

Shows how portfolio budget is distributed across strategic pillars (e.g., "Increase market share", "Improve core products", "Ensure compliance").

What to Look For:

- Does budget allocation match strategic priorities?
- Are top strategic pillars adequately funded?
- Are low-priority areas consuming too many resources?

Example Problem:

- Strategic Pillar #1 receives only 15% of budget
- Strategic Pillar #5 receives 45% of budget
- **Action:** Reallocate budget to match stated priorities

2. Risk Balance

Displays portfolio distribution across risk categories (Very High, High, Medium, Low, Very Low).

What to Look For:

- Does risk distribution match organizational risk tolerance?
- Are you over-concentrated in high-risk projects?
- Do you have enough low-risk quick wins?

Example Problem:

- 60% of budget allocated to High/Very High risk projects
- Organization has conservative risk appetite
- **Action:** Kill or defer high-risk projects; approve safer alternatives

3. Investment Mix

Shows portfolio breakdown by initiative type:

Initiative Type	Typical Range
Maintenance & Operational	20-35%
Innovation & Transformation	20-40%
Growth & Enhancement	25-35%

Initiative Type	Typical Range
Mandatory & Compliance	10-20%

What to Look For:

- Over-investment in Maintenance (starving innovation)
- Under-investment in Compliance (regulatory risk)
- Appropriate balance for your organizational strategy

Example Problem:

- 50% of budget in Maintenance & Operational
- Only 15% in Innovation & Transformation
- **Action:** Defer low-value maintenance; approve innovation projects

4. Timeline Distribution

Evaluates balance across time horizons:

Time Horizon	Typical Range	Examples
Short-term (0-4 months)	20-30%	Quick wins, bug fixes
Medium-term (4-12 months)	40-50%	Standard projects
Long-term (12+ months)	20-30%	Strategic transformations

What to Look For:

- Zero long-term projects (no strategic positioning)
- Too many short-term projects (reactive mode)
- Balanced distribution across horizons

Example Problem:

- 0% long-term projects
- 80% medium-term projects
- **Action:** Approve strategic long-term initiatives

How to Use the Balanced Scorecard

Step 1: Review Each Quadrant

- Check KPI indicators (🟢 Green, 🟡 Yellow, 🔴 Red)
- Identify problem areas (red or yellow)

Step 2: Analyze Imbalances

- Understand why imbalances exist
- Consider organizational context
- Determine acceptable vs. problematic imbalances

Step 3: Take Rebalancing Actions

- **Kill Projects:** Remove low-priority projects in over-represented categories
- **Approve Projects:** Fast-track projects in under-represented categories
- **Reschedule Projects:** Shift timelines to smooth resource demand
- **Adjust Metadata:** Correct misclassified projects

Step 4: Re-Run the Five-Step Process

- Re-prioritize if strategic rankings changed
- Re-score if project complexity changed
- Re-select with new thresholds
- Review updated Balanced Scorecard

Step 5: Monitor Over Time

- Generate scorecard monthly
- Track progress toward target balance
- Adjust approval criteria to maintain balance

Advanced Features

The following advanced features provide additional depth for sophisticated portfolio management. Click the links below for detailed guides.

Project Assessment Tool

A comprehensive evaluation framework that helps you objectively evaluate project feasibility, complexity, and risk before committing resources.

What It Does:

- Analyzes projects across four dimensions: Technical Risk, Political Risk, Size, and Complexity
- Generates an Overall Feasibility Score (0-100)
- Provides tailored recommendations based on risk category
- Helps compare projects objectively using consistent criteria

When to Use:

- Before approving new projects
- During portfolio reviews
- When requesting additional resources
- To justify timeline or budget negotiations

Key Sections:

- Technology Assessment (maturity, team expertise, architecture complexity, integrations)
- Team & Resources Assessment (team size, stakeholder count, resource availability)
- Organizational & Political Factors (change impact, executive Commitment, stakeholder alignment)
- External Factors & Constraints (regulatory requirements, external dependencies, market timing)

- Project Scope & Scale (duration, budget magnitude)

Risk Categories:

Score	Risk Level	Recommended Action
0-25	LOW RISK (Green)	Proceed with standard project management
26-50	MEDIUM RISK (Yellow)	Enhanced monitoring and risk mitigation
51-75	HIGH RISK (Orange)	Consider phasing or scope reduction
76-100	CRITICAL RISK (Red)	Reconsider or start with proof-of-concept

For complete assessment guidance: See [Costbars PPM Project Assessment Tool How to Use](#)

Portfolio Status and Balancing Report

A comprehensive portfolio-wide report providing health indicators, financial analysis, strategic alignment assessment, and multi-dimensional balance evaluation.

What It Provides:

- Executive Summary with health indicators (Overall, Scope, Schedule, Cost, Hours, Risk, Issues)
- Financial Summary by category (In Progress, Approved, Proposals)
- Strategic Alignment Analysis (budget distribution across strategic pillars)
- In-Flight Projects Status (with critical projects requiring attention)
- Approved Projects Readiness Assessment
- New Proposals Evaluation
- Risk Score Portfolio Analysis (budget distribution by risk level)
- Initiative Type Balance Analysis (Maintenance, Innovation, Growth, Compliance)
- Time Horizon Balance Analysis (Short/Medium/Long-term mix)

When to Use:

- Before quarterly portfolio review meetings
- When evaluating new project proposals
- When needing to free up resources
- For executive leadership reporting
- To assess strategic alignment

Key Metrics:

Metric	Purpose
Portfolio Health Indicators	Quick overview of portfolio status
Budget Variance Analysis	Spending vs. planned budgets
Strategic Pillar Allocation %	Does spending match strategic priorities?
Risk Distribution %	Is portfolio within risk tolerance?

Metric	Purpose
Initiative Type Balance Score	Balanced across project types?
Time Horizon Balance Score	Appropriate short/medium/long-term mix?

For complete report guide: See [Costbars PPM Pf Detail Report for Balancing How To](#)

Configuring Notification Thresholds and Alerts

Configure automated notifications to alert stakeholders when projects exceed defined thresholds for schedule, budget, risk, or health indicators.

What It Does:

- Define threshold rules for triggering notifications
- Set delivery preferences (SMS, Push, Email)
- Configure escalation paths for critical projects
- Customize quiet hours and cooldown periods

Threshold Rules:

Rule	What It Monitors	Example
Days Overdue Threshold	Schedule slippage	Alert if >5 days late
Budget Overrun %	Cost variance	Notify if costs exceed budget by 15%
Overall Health	Project health status	Flag any project marked Red
Executive Commitment	Sponsor support level	Alert if Comittment drops
Strategic Value %	Strategic alignment	Flag high-value at-risk projects
Likelihood of Success %	Risk scoring	Alert if likelihood <40%

Configuration Steps:

1. Open Admin → Notifications
2. Add or Edit Notification Profile
3. Set contact details and delivery channels
4. Configure threshold values
5. Test configuration before activating
6. Enable automated alerts

For complete configuration guide: See [Costbars PPM Configuring Notification Thresholds and Alerts](#)

Five-Step Scoring Process (Technical Details)

Deep dive into the scoring methodology, data requirements, and formula specifications for both Strategic Value (SV) and Ability to Execute (AE) scoring.

SV Score Components:

- Investment Category alignment
- Investment Initiative alignment
- Investment Objective alignment
- Investment Strategy alignment
- Financial metrics (if sufficient data available)

AE Score Components:

- Risk vs. Size and Complexity assessment
- Executive Commitment level
- Estimation Class quality
- Health Indicators (for In-Flight projects)
- Budget and hours variance (for In-Flight projects)

Data Requirements:

- Minimum required fields for scoring
- Data quality thresholds
- Handling of missing data
- "Not Assessed" handling

For complete technical specifications: See [Costbars PPM Scoring Guide 5 Step Process](#)

Troubleshooting

Missing Data Warnings

Problem: Scoring fails with data requirement errors

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 Views

Problem: Expected projects don't show in Tabular/Card/Bubble Chart

Solutions:

- Confirm Status is not "Closed"
 - Check State is not "Spawned"
 - Verify project is within selected filter criteria
 - Refresh the view
-

Financial Score Shows Zero

Problem: SV Score shows 0 or projects not getting financial component

Solution:

- Need at least 4 of 7 financial fields populated
 - Values of "Not Assessed" don't count toward the 4-field minimum
 - Enter actual budget, baseline, forecast, or cost values
-

Resource Variance Always Negative

Problem: Supply vs. Demand grid shows constant over-allocation

Solutions:

- Verify resource supply is configured correctly
 - Check that resource pool includes all available resources
 - Consider whether project resource estimates are realistic
 - Use resource leveling to shift project timelines
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References to Common Guides

Costbars shares many features with Timebars and Agilebars. For guidance on these common capabilities, refer to these user guides:

Core Functionality

- [Common User Interface Guide](#) – Canvas navigation, filters, hierarchy display, bar creator, editing bars, baseline management, view controls
- [Common Data Structure User Guide](#) – How data is organized, IndexedDB details, data hierarchy, backup/restore procedures
- [Common Spreadsheet Sync User Guide](#) – 6-step sync cycle, CSV file export/import, template configuration, bidirectional data exchange

Project Management Features

- [Common Risks Issues Change Requests User Guide](#) – Creating and managing RIC items, visual indicators, card/tabular views, progress workflows

Reporting and Publishing

- [Common Local Reports and Graphs Guide](#) – General Reports, Portfolio Reports, Project Reports, Task Reports, Resource Reports
 - [Common Cloud Reports and Dashboard Guide](#) – Executive Portfolio Reports, Card-Based Drilldown, Interactive dashboards with 7-dimension health tracking
 - [Common Cloud Publishing Guide](#) – Publishing to Timebars Cloud, PubSets, Re-Publish, Re-Hydrate, cross-device sync
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Quick Reference

PPM Menu Actions

Button	Action
Prioritize	Generate SV Scores based on strategic alignment
Score	Generate AE Scores based on feasibility assessment
Level	Open resource leveling view for capacity optimization
Select / Bubble Chart	Run selection algorithm with visual quadrant analysis
Balance / Score Card	Review portfolio balance across multiple dimensions
Tabular View	Spreadsheet-style data view for analysis
Cards View	Visual card-based view for reviews
Process Help ?	Open PPM documentation

Score Interpretation

Score Range	Color	SV Score Meaning	AE Score Meaning
80-100	Green	Very High Strategic Value	Very High Ability to Execute
60-79	Yellow	High Strategic Value	High Ability to Execute
40-59	Orange	Moderate Strategic Value	Moderate Ability to Execute
0-39	Red	Low Strategic Value	Low Ability to Execute

Decision Matrix

SV Score	AE Score	Recommendation
High	High	APPROVE – Strategic and feasible
High	Low	MITIGATE – Important but risky; reduce scope or phase
Low	High	REVIEW – Easy to execute but questionable value
Low	Low	KILL – Neither strategic nor feasible

Getting Help

For additional assistance:

- **Process Help Button (?)** – Context-sensitive help within the PPM interface
- **Advanced Feature Guides** – See links in [Advanced Features](#) section above
- **Common Feature Guides** – See links in [References to Common Guides](#) section above
- **Support Contact** – Contact your Timebars administrator or support team

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

2. Costbars PPM Project Assessment Tool

Source: Costbars PPM Project Assessment Tool

Project Assessment Tool User Guide

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Introduction

The Project Assessment Tool is a comprehensive evaluation framework built into Costbars that helps you objectively evaluate project feasibility, complexity, and risk before committing resources. It analyzes your project across four critical dimensions—technical risk, political risk, size, and complexity—to generate an Overall Feasibility Score ranging from 0 (low risk) to 100 (critical risk).

This guide will walk you through how to complete an assessment, explain what to consider for each question, and show you how to use the results to make better project decisions.

Why Use the Project Assessment Tool

Before You Commit Resources

Complete an assessment when you're evaluating whether to green-light a new project or add it to your portfolio. The assessment helps you:

- **Identify hidden complexity** that isn't obvious from the project proposal
- **Surface risk factors** across technical, political, organizational, and market dimensions
- **Compare projects objectively** using consistent criteria rather than gut feelings
- **Generate talking points** for portfolio review meetings and gate reviews
- **Set realistic expectations** with stakeholders about project difficulty

During Portfolio Reviews

Use assessment scores to:

- **Balance your portfolio risk** by mixing low-risk and high-risk initiatives appropriately
- **Prioritize projects** based on both strategic value and feasibility
- **Justify decisions** with objective data when stakeholders challenge project selections
- **Identify projects** that need additional risk mitigation planning before launch

When Requesting Resources

Assessment results provide evidence when negotiating for:

- **Extended timelines** for complex projects
 - **Additional budget** to address high-risk technical components
 - **More experienced team members** when expertise gaps are identified
 - **Executive sponsorship** for politically complex initiatives
-

Understanding the Scoring System

The Four Risk Dimensions

Your project receives four component scores, each ranging from 0-100:

1. **Technical Risk Score** – Measures technology maturity, team expertise, architectural complexity, and integration challenges
2. **Political Risk Score** – Evaluates stakeholder alignment, decision-maker complexity, and organizational change impact
3. **Size Score** – Quantifies project duration, team size, budget, and number of integrations
4. **Complexity Score** – Assesses regulatory requirements, external dependencies, organizational experience, and market factors

Overall Feasibility Score

These four component scores are combined into a single Overall Feasibility Score (0-100) that determines your project's risk category:

- **0-25: LOW RISK** (Green) – "Very Small and Simple" to "Medium with Some Complexity"
 - Highly feasible with manageable complexity
 - Proceed with standard project management practices
 - Expected success rate is high
- **26-50: MEDIUM RISK** (Yellow) – "Large with Moderate Complexity" to "Complex but Manageable"
 - Moderate feasibility requiring careful planning
 - Enhanced monitoring and stakeholder communication needed
 - Success likely with proper risk management
- **51-75: HIGH RISK** (Orange) – "Significant Complexity" to "Very Large and Complex"
 - Significant feasibility challenges present
 - Consider phased approach or scope reassessment
 - Requires executive sponsorship and dedicated risk resources

- **76-100: CRITICAL RISK** (Red) – "Highly Complex and Risky" to "Extremely Complex and Risky"
 - Extremely challenging feasibility
 - Recommend reconsidering or significant scope reduction
 - If proceeding, consider proof-of-concept or pilot first

What Higher Scores Mean

Important: Higher scores indicate higher risk and lower feasibility. A project scoring 85 is significantly riskier than a project scoring 35. Don't confuse this with a "grade" where higher is better—in risk assessment, lower scores are more favorable.

How to Launch an Assessment

Step 1: Navigate to Your Project

Open your Costbars Project Pipeline view and locate the project you want to assess.

Step 2: Open the Assessment Tool

Click the actions menu for your project and select "**Project Assessment**" (or the assessment icon, depending on your interface configuration). The Project Assessment Tool modal will open.

Step 3: Review the Project Assessment Guide

At the top of the assessment form, you'll see a collapsible "**Project Assessment Guide**" section (green header). Click it to expand helpful context about:

- The purpose of the assessment
- Quick start tips
- How to approach each section honestly
- What to do with your results

Step 4: Verify Project Information

Confirm the project details shown at the top:

- **Project Name** – The project you're assessing
 - **tbID** – Your project's unique identifier
 - **Type/Sub-Type** – Project classification
 - **Duration** – Calculated project duration in months
-

Completing Each Section

The assessment form is organized into logical sections. For each question, select the option that most accurately reflects your current project reality—not what you hope will be true, but what you know today.

Section 1: Technology Assessment

This section evaluates technical risk factors.

Technology Maturity

"How mature and proven is the core technology?"

What to consider:

- Has this technology been used successfully in production environments?
- Are there established best practices and vendor support?
- Is the technology cutting-edge or bleeding-edge?

Scoring guidance:

- **Well-established and mature** – Choose this if you're using proven, widely-adopted technology with years of production use (e.g., standard relational databases, established web frameworks)
- **Mature but evolving** – Technology has been around but is still adding major features or undergoing significant updates
- **Relatively new but tested** – Technology has production users but limited track record (e.g., framework that's 2-3 years old)
- **Emerging/early adoption** – Very few production implementations, mostly early adopters
- **Cutting-edge/unproven** – Brand new technology, experimental, or still in beta

Why it matters: Unproven technology increases technical risk exponentially. You may encounter undocumented bugs, lack of community knowledge, and limited vendor support.

Team Technical Expertise

"Does your team have experience with this technology stack?"

What to consider:

- How many team members have hands-on production experience?
- Have they built similar systems before, or will they be learning?
- Is this a completely new technology area for your organization?

Scoring guidance:

- **Extensive expertise** – Multiple team members have 2+ years production experience
- **Solid understanding** – Team has worked with similar technologies and can adapt
- **Some experience** – 1-2 team members have experience, others will learn
- **Limited knowledge** – No one has significant experience, but fundamentals are understood
- **Learning on the job** – Completely new to everyone, requires extensive training

Why it matters: Even mature technology becomes risky when your team lacks experience. Learning curves delay projects and increase the probability of architectural mistakes.

System Architecture Complexity

"How complex is the technical architecture?"

What to consider:

- How many moving parts does the system have?
- Are you building microservices, monoliths, or distributed systems?
- How many different technologies need to work together?

Scoring guidance:

- **Simple/straightforward** – Single application, minimal components
- **Moderate complexity** – A few integrated components with clear boundaries
- **Multiple interconnected systems** – Several systems that need to coordinate
- **Complex distributed architecture** – Microservices, event-driven, multiple data stores
- **Highly complex/novel** – Cutting-edge architecture patterns, complex state management

Why it matters: Architectural complexity multiplies integration points, increases debugging difficulty, and makes changes ripple across systems.

Integration Requirements

"How many systems will this project need to integrate with?"

What to consider:

- Count both internal systems and external third-party services
- Include APIs, databases, authentication systems, and data pipelines
- Consider real-time vs. batch integrations

Scoring guidance:

- **None or 1-2** – Standalone or minimal integrations
- **3-5 integrations** – Multiple but manageable
- **6-10 integrations** – Significant integration effort required
- **11-15 integrations** – Complex integration landscape
- **More than 15** – Extremely complex integration requirements

Why it matters: Each integration point is a potential failure point. Testing complexity grows exponentially with integration count, and coordinating across teams becomes a project management challenge.

Section 2: Team & Resources Assessment

This section evaluates whether you have the right people and resources.

Project Team Size

"How many people will actively work on this project?"

What to consider:

- Count everyone who will contribute significant effort (developers, designers, analysts, etc.)
- Don't count occasional reviewers or advisors
- Consider both full-time and part-time contributors

Scoring guidance:

- **1-3 people** – Small, agile team
- **4-7 people** – Medium team size
- **8-15 people** – Large team requiring coordination
- **16-30 people** – Very large team with management overhead
- **More than 30** – Extremely large team, high coordination complexity

Why it matters: Larger teams require more communication, coordination meetings, and management overhead. Brooks' Law suggests that "adding people to a late project makes it later" due to communication complexity.

Decision-Maker/Stakeholder Count

"How many people have decision-making authority or significant input?"

What to consider:

- Include everyone who can veto decisions or require design changes
- Count executive sponsors, product owners, compliance officers, etc.
- Include external stakeholders like regulators or partners

Scoring guidance:

- **1-2 stakeholders** – Clear decision-making authority
- **3-5 stakeholders** – Manageable stakeholder group
- **6-10 stakeholders** – Requires active stakeholder management
- **11-20 stakeholders** – Complex stakeholder ecosystem
- **More than 20** – Extremely complex stakeholder coordination

Why it matters: More stakeholders means more opinions, longer approval cycles, and higher probability of conflicting requirements. This increases political risk dramatically.

Resource Availability

"How certain are you that resources will be available when needed?"

What to consider:

- Are team members dedicated to this project or splitting time?
- Do you have confirmed budget approvals?
- Are there competing priorities that could pull people away?

Scoring guidance:

- **Fully committed and secured** – Dedicated team, approved budget, no conflicts
- **Generally available** – Resources committed but some flexibility needed
- **Partially available** – Significant time-sharing with other projects
- **Uncertain/competing priorities** – Resources are in high demand across projects
- **Highly uncertain** – No confirmed commitments, speculative team

Why it matters: Resource uncertainty creates schedule risk. Projects with part-time team members take 2-3x longer than projects with dedicated resources due to context-switching and coordination delays.

Section 3: Organizational & Political Factors

This section assesses "soft" factors that often determine project success.

Organizational Change Impact

"How much organizational change will this project require?"

What to consider:

- Will people need to change how they work?
- Are you replacing existing systems that people are comfortable with?
- Does this affect organizational structure or reporting lines?

Scoring guidance:

- **Minimal/none** – Small improvement to existing processes
- **Some process adjustments** – Minor workflow changes
- **Moderate change** – Significant process changes, training required
- **Significant organizational change** – Major shifts in how work gets done
- **Transformational change** – Fundamental changes to business model or culture

Why it matters: Resistance to change is a leading cause of project failure. The more you disrupt existing workflows, the more change management effort is required.

Executive/Sponsor Commitment

"How committed is executive leadership to this project?"

What to consider:

- Is there an active executive sponsor who attends meetings?
- Has leadership allocated appropriate budget and resources?
- Is this a strategic priority or a nice-to-have?

Scoring guidance:

- **Strongly committed and visible** – Active sponsor, clear priority, visible support
- **Committed and supportive** – Sponsor engaged, project prioritized
- **Neutral/passive support** – Approved but not actively championed
- **Lukewarm interest** – Approved reluctantly, could be deprioritized
- **Minimal/unclear** – No clear sponsor, questionable Commitment

Why it matters: Projects without executive air cover stall when they hit obstacles. Strong sponsorship unblocks resources, resolves cross-functional conflicts, and protects the project during budget reviews.

Stakeholder Alignment

"How aligned are stakeholders on project goals and approach?"

What to consider:

- Do stakeholders agree on what success looks like?
- Are there competing visions for the project?
- Have major conflicts been resolved or are they still simmering?

Scoring guidance:

- **Fully aligned** – Clear shared vision, no significant disagreements
- **Mostly aligned** – General agreement with minor differences
- **Some disagreement** – Different priorities but willing to compromise
- **Significant conflicts** – Major unresolved disagreements
- **Highly conflicted** – Fundamental disagreements about goals or approach

Why it matters: Misaligned stakeholders create project whiplash—constant direction changes, rework, and scope creep as different factions push their agendas.

Section 4: External Factors & Constraints

This section evaluates factors outside your direct control.

Regulatory/Compliance Requirements

"What regulatory or compliance requirements apply?"

What to consider:

- Are there industry regulations (HIPAA, GDPR, SOX, etc.)?
- Do you need government approvals or certifications?
- Are there internal security/compliance requirements?

Scoring guidance:

- **None or minimal** – No significant regulatory requirements
- **Standard compliance** – Well-understood requirements, established processes
- **Moderate regulatory oversight** – Multiple requirements, some coordination needed
- **Significant regulatory burden** – Complex requirements, extensive documentation
- **Extensive and complex** – Heavy regulatory scrutiny, potential for delays

Why it matters: Regulatory requirements add time, cost, and risk. They often involve external parties (auditors, regulators) whose timelines you can't control.

External Dependencies

"How dependent is success on external parties?"

What to consider:

- Are you waiting on vendor deliveries or third-party integrations?
- Do you need approvals from partners or customers?

- Are external market conditions critical to success?

Scoring guidance:

- **Fully self-contained** – Everything needed is under your control
- **Minor external dependencies** – A few external factors, manageable
- **Moderate dependencies** – Success requires coordination with external parties
- **Significant external factors** – Heavy reliance on third parties
- **Critical external dependencies** – Success completely dependent on external parties

Why it matters: External dependencies introduce schedule risk you can't control. Vendor delays, partner priorities, or market timing can derail projects regardless of your team's execution.

Organizational Experience

"Has your organization done something like this before?"

What to consider:

- Have you delivered similar projects successfully?
- Is this a completely new type of initiative?
- Do you have established playbooks and processes?

Scoring guidance:

- **Highly experienced** – Done this many times, established processes
- **Experienced** – Several similar projects completed successfully
- **Some experience** – Attempted similar projects with mixed results
- **Limited experience** – Different from anything attempted recently
- **No experience** – Completely new territory for the organization

Why it matters: Organizations learn from experience. Your first e-commerce platform, first AI project, or first global rollout will encounter unknown challenges that experienced teams anticipate and mitigate.

Market/Timing Sensitivity

"How time-sensitive is this project?"

What to consider:

- Is there a narrow market window?
- Are competitors launching similar offerings?
- Are there regulatory deadlines or contractual commitments?

Scoring guidance:

- **Not time-sensitive** – Flexible timeline, no urgency
- **Moderate timing preference** – Better sooner but not critical
- **Important timing** – Significant advantage to hitting target date
- **Critical timing** – Missing deadline has major consequences
- **Extremely time-sensitive** – Narrow window, delay means failure

Why it matters: Time pressure increases risk by forcing shortcuts, reducing testing time, and preventing proper risk mitigation. Critical deadlines eliminate flexibility to address unexpected problems.

Section 5: Project Scope & Scale

This section quantifies the magnitude of your project.

Project Duration

This is automatically calculated based on your project's start and finish dates.

What it measures:

- Projects under 3 months are lower risk from a schedule management perspective
- Projects over 12 months face higher risk due to:
 - Team turnover during the project
 - Technology and market changes
 - Requirement drift over time
 - Sustained momentum and stakeholder engagement

Why it matters: Longer projects have more opportunities to go wrong. Requirements change, people leave, priorities shift, and technologies evolve.

Budget Magnitude

"What is the total project budget?"

What to consider:

- Include all costs: labor, software, hardware, consulting, training
- Consider fully-loaded costs including overhead
- Don't just count incremental expenses

Scoring guidance:

- **Under \$50K** – Small investment, low financial risk
- **\$50K-\$250K** – Moderate investment
- **\$250K-\$1M** – Significant investment, requires careful management
- **\$1M-\$5M** – Major investment, executive visibility
- **Over \$5M** – Strategic investment, board-level visibility

Why it matters: Larger budgets increase visibility and scrutiny, but also provide more resources to address problems. They also increase the consequence of failure.

Interpreting Your Results

After You Click "Calculate Scores"

Once you complete all sections and click "**Calculate Scores**", the tool processes your inputs and displays:

1. **Overall Feasibility Score** – The central risk score (0-100) with color-coded risk level

2. **Four Component Scores** – Individual scores for Technical Risk, Political Risk, Size, and Complexity
3. **Risk Level Badge** – Visual indicator (Green/Yellow/Orange/Red) showing your risk category
4. **Tailored Recommendations** – Specific guidance based on your project's risk profile

Understanding Component Scores

Look at which components are driving your overall score:

If Technical Risk is highest:

- Your challenges are primarily about technology execution
- Consider technical prototypes or proof-of-concept phases
- Allocate more time for R&D and technical validation
- Ensure you have the right technical expertise on the team

If Political Risk is highest:

- Your challenges are about people, alignment, and organizational dynamics
- Invest heavily in stakeholder management and communication
- Ensure strong executive sponsorship
- Create clear decision-making frameworks upfront

If Size Score is highest:

- Your challenges are about project management and coordination
- Consider phased delivery to reduce team size and duration
- Implement robust project management practices
- Plan for extensive communication and coordination

If Complexity Score is highest:

- Your challenges are about external factors and unknowns
- Plan for contingencies and longer timelines
- Engage experts early (regulatory, integration, etc.)
- Build in flexibility to adapt as you learn

Using the Recommendations

The tool generates specific recommendations based on your scores. Common recommendations include:

- **For projects with high technical risk:** Allocate extra time for R&D and consider technical pilots
- **For projects with high political risk:** Ensure strong executive sponsorship and stakeholder alignment
- **For large projects:** Consider phased approach and robust project management
- **For complex projects:** Plan for extensive integration testing and coordination
- **For cutting-edge technology:** Establish innovation labs and prototype early
- **For large teams:** Implement robust communication protocols and team coordination
- **For complex integrations:** Plan extensive testing phases and fallback strategies
- **For significant regulatory requirements:** Engage compliance experts from project start

Risk Level Interpretation

LOW RISK (0-25) – GREEN

- **What it means:** Straightforward project with manageable complexity
- **Typical action:** Approve with standard project management practices
- **Watch for:** Don't become complacent—even "easy" projects need proper execution

MEDIUM RISK (26-50) – YELLOW

- **What it means:** Feasible but requires careful attention to risk factors
- **Typical action:** Approve with enhanced monitoring and risk mitigation plans
- **Watch for:** Specific component scores that are elevated—address those areas specifically

HIGH RISK (51-75) – ORANGE

- **What it means:** Significant challenges that could jeopardize success
- **Typical action:** Consider scope reduction, phasing, or additional resources before approval
- **Watch for:** Whether you have the organizational appetite for this level of risk

CRITICAL RISK (76-100) – RED

- **What it means:** Extreme challenges with low probability of success as scoped
- **Typical action:** Seriously reconsider; if proceeding, start with proof-of-concept
- **Watch for:** Pressure to proceed anyway due to political factors—resist if possible

What to Do With Your Assessment

For Portfolio Managers

Document the Decision

- Save the assessment as part of your project intake documentation
- Reference scores when explaining portfolio decisions to stakeholders
- Use assessments to justify resource allocation recommendations

Balance Your Portfolio

- Track the risk distribution across your entire portfolio
- Avoid concentrating too many high-risk projects simultaneously
- Balance high-risk/high-reward projects with safer initiatives

Set Monitoring Thresholds

- Configure executive alerts based on assessment scores
- Schedule more frequent reviews for higher-risk projects
- Establish early warning indicators tied to the risk dimensions

Compare Projects

- Use assessment scores to rank competing projects for resource allocation
- Consider both strategic value AND feasibility when prioritizing
- Identify projects that may need descope to reduce risk scores

For Project Managers

Create Your Risk Management Plan

- Focus mitigation efforts on the highest-scoring risk dimensions
- Identify specific actions to address each elevated component
- Build contingency plans for the highest-risk areas

Negotiate for Resources

- Use assessment scores as evidence when requesting additional time or budget
- Show stakeholders why complex projects need more resources
- Push back on unrealistic timelines with objective risk data

Communicate with Stakeholders

- Share assessment results with your team and sponsors
- Ensure everyone understands the project's complexity
- Use scores to set realistic expectations about challenges ahead

Plan for Phases

- If your score is high, propose a phased approach
- Start with proof-of-concept or pilot to de-risk before full investment
- Use early phases to validate assumptions and reduce uncertainty

For Executive Sponsors

Make Informed Investment Decisions

- Consider both strategic value and feasibility when approving projects
- Understand what level of risk your organization can handle
- Don't approve projects where scores exceed your risk tolerance

Allocate Sponsorship Time Appropriately

- High-risk projects need more executive attention and intervention
- Plan to spend more time removing blockers for complex projects
- Schedule regular check-ins proportional to risk level

Set Portfolio Risk Limits

- Establish acceptable thresholds for aggregate portfolio risk
- Limit the number of critical-risk projects running simultaneously
- Ensure your organization has capacity to handle high-risk projects

Best Practices

Be Brutally Honest

The assessment is only as valuable as the honesty of your inputs. Don't let optimism bias or political pressure cause you to underestimate risk factors.

Common honesty pitfalls:

- "The team will learn quickly" (underestimating expertise gaps)
- "Stakeholders will align once we start" (ignoring current conflicts)
- "The technology should work fine" (hoping unproven tech magically succeeds)
- "We can probably get it done in 6 months" (ignoring historical data)

Instead, be realistic:

- "The team has never used this technology in production"
- "Stakeholders currently have conflicting requirements"
- "This technology has limited production track record"
- "Similar projects at our organization took 12-18 months"

Complete Assessments Early

Don't wait until you've already committed resources. The assessment is most valuable **before** you approve the project, not after you're already underway.

Ideal timing:

- During initial project proposal evaluation
- Before portfolio review meetings
- When comparing multiple project proposals
- Before making final go/no-go decisions

Involve Multiple Perspectives

Have several people complete the assessment independently, then compare and discuss differences. Different stakeholders often see different risk factors.

Who should provide input:

- Technical leads (for technology and architecture questions)
- Business owners (for stakeholder and organizational questions)
- Project managers (for resource and schedule questions)
- Compliance/legal (for regulatory questions)

Reassess Periodically

Risk profiles change as projects progress. Reassess at major milestones:

- After requirements are finalized
- When technology choices are locked in
- If key team members leave or join
- When major scope changes are proposed
- At phase-gate reviews

Don't Ignore Critical Risk Scores

If your project scores in the critical risk range (76-100), take it seriously. These scores indicate a very high probability of failure or major overruns.

Your options:

1. **Descope significantly** – Remove the highest-risk components to reduce score
2. **Start with a pilot** – Prove feasibility on a smaller scale first
3. **Wait for conditions to improve** – Delay until technology matures or expertise is acquired
4. **Accept the risk consciously** – Proceed knowing this is a high-risk bet

What you shouldn't do: Ignore the score and hope for the best.

Use Scores in Context

Assessment scores don't make decisions for you—they inform your decision-making. A high-risk project might still be worth pursuing if:

- The strategic value is extraordinarily high
- You have no alternative path to achieve the goal
- You're willing to invest heavily in risk mitigation
- Failure wouldn't be catastrophic to the organization

Conversely, a low-risk project might not be worth doing if:

- The strategic value is minimal
- Opportunity cost is high (you'd have to pass on better projects)
- Even "easy" execution doesn't justify the benefit

Document Your Assumptions

When completing the assessment, note any assumptions or uncertainties. This helps when reassessing later or explaining your reasoning.

Example notes to capture:

- "Assumed vendor delivers API on time (high uncertainty)"
- "Stakeholder count based on initial discussions, may increase"
- "Technology choice not final, could change to more mature option"
- "Resource availability depends on Project X completing on schedule"

Share Results Broadly

Don't keep assessment results in a drawer. Share them with:

- Your project team (so they understand the challenges)
- Executive sponsors (so they know what they're signing up for)
- Other stakeholders (to set realistic expectations)
- Portfolio reviewers (to support portfolio decisions)

Transparency about risk builds trust and alignment.

Conclusion

The Project Assessment Tool transforms subjective project evaluation into objective, data-driven analysis. By systematically evaluating technical, political, size, and complexity dimensions, you gain clear visibility into project feasibility before committing resources.

Remember: The goal isn't to only approve low-risk projects. Organizations need to take calculated risks to achieve strategic objectives. The goal is to **know** what risks you're taking, **choose** which risks are worth taking, and **plan** appropriately for the risks you accept.

Use the assessment tool early and often. Complete honest evaluations. Share results broadly. Make informed decisions. And build a portfolio that balances ambition with achievability.

Your future self (and your organization) will thank you for the time invested in thorough project assessment.

3. Costbars PPM Scoring Guide — 5 Step Process

Source: Costbars PPM Scoring Guide 5 Step Process

PPM Five-Step Process Help Guide

Introduction

This guide covers the Costbars Project Portfolio Management (PPM) module - a Five-Step Procedure for Project Approval or Termination.

What you will learn:

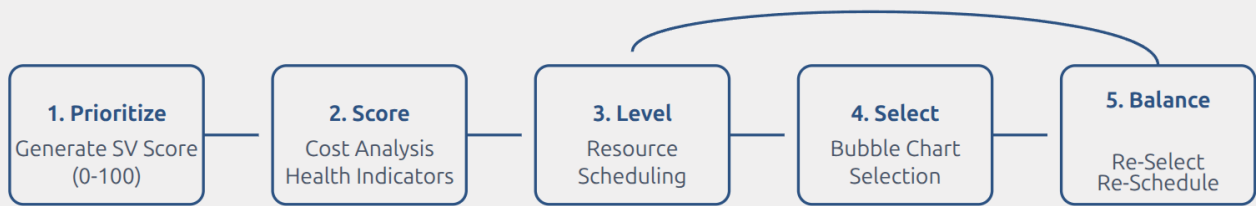
- **Prerequisite Workflow Process** - Prepare project metadata for project selection
 - **Project Selection Process** - How to use Costbars Project Pipeline Scheduler and prioritise, approve or kill projects
-

Costbars High-Level Process Diagram

The PPM (Project Portfolio Management) process can start once the Portfolio of Projects has been resource-loaded and is ready for analysis. If resource-loaded schedules are not feasible—which is often the case—ensure that Hours Estimates and/or Cost Estimates have been entered into each Project Bar within the Portfolio.

Costbars PPM Process

Iterate until strategy achieved



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.)

Project Selection Process: 5 Steps to Approve or Terminate Projects

STEP 1: Prioritize Projects (SV Score)

Calculate Strategic Value based on custom Alignment Values and Order of Importance. The SV Score ranges from 0-100, where 100 indicates perfect alignment with operational strategy. This score becomes the foundation for all prioritization decisions.

How to Access:

1. From the PPM Page, click **Prioritize** in the actions menu
2. The Prioritize popup opens

Process:

1. **Set Order of Importance** by dragging items in each list (most important at top):

- Investment Categories
- Investment Initiatives
- Investment Objectives
- Investment Strategies

2. Click **"Prioritize Test!"** to preview results without saving
3. Click **"Prioritize Finalize!"** to save scores to the database

Database Field Updated: `tbMDPriorityStrategic`

Scoring Methods:

- **Strategic + Financial (50/50):** Projects with ≥4 financial fields populated
- **Strategic Only (100%):** Projects with insufficient financial data (no penalty applied)

STEP 2: Score Projects (Risk/Complexity)

Evaluate projects using multiple data points including health indicators, costs, hours, and Size vs Complexity metrics. Incorporate additional project metadata to generate comprehensive risk scores that identify potential challenges and resource requirements.

How to Access:

1. From the PPM Page, click **Score** in the actions menu
2. The Scoring popup opens

Process:

1. Review "Data Requirements & Formula Descriptions" section
2. Click **"Generate Ability to Execute Scores - Test"** to preview
3. Click **"Generate Ability to Execute Scores - Final"** to save

Database Fields Updated: `tbMDCostbarsScore`, `tbMDDecisionStrategic`

AE Score Recommendations:

Score	In-Flight Projects	New Projects
≥80	Continue	PROCEED: Strong scoring
60-79	Review	REVIEW: Moderate scoring
<60	Consider Terminating	REJECT: Weak scoring

STEP 3: Level Resources

Optimize resource demand to align with resource supply by adjusting project start and finish dates. View in real-time the resource demand comparison across the timeline as projects are manually rescheduled on the Timebars Canvas.

How to Access:

1. From the PPM Page, click **Level** in the actions menu
2. The Leveling View opens on the Timebars Canvas

Process:

1. View total resource demand chart
2. Identify over-allocations (red areas)
3. Drag and drop project bars to adjust schedules
4. Monitor real-time demand updates
5. Continue until demand aligns with supply

STEP 4: Select Projects

Utilize the bubble chart visualization to quickly identify which projects to kill. Bubble size, color, and position are based on SV Score and Risk Score ranges. Enter your thresholds and run the selection algorithm for data-driven recommendations.

How to Access:

1. From the PPM Page, click **Select** or **Bubble Chart** in the actions menu
2. The Bubble Chart view opens

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	Meaning
Top-Right (High SV + High AE)	Strategically aligned, more likely to succeed
Top-Left (Low SV + High AE)	Misaligned low risk projects
Bottom-Right (High SV + Low AE)	Strategically aligned, less likely to succeed
Bottom-Left (Low SV + Low AE)	Misaligned and risky projects

Selection Process:

1. Enter SV Score threshold
2. Enter AE Score threshold
3. Click **"Select Test"** to preview
4. Click **"Select Final"** to save

Database Field Updated: `tbMDYesNoSelector` (Yes/No)

Selection Formula:

```
Final Score = (SV Score × 60%) + (AE Score × 40%)  
If Final Score > Average Threshold → Selected: Yes  
If Final Score ≤ Average Threshold → Selected: No
```

STEP 5: Balance the Portfolio

Review the Score Card—is it in balance? Discover anomalies and perform project adjustments as necessary to optimize portfolio balance. Re-select killed projects, kill other projects, or reschedule projects to achieve optimal alignment.

How to Access:

1. From the PPM Page, click **Balance** or **Score Card** in the actions menu
2. The Portfolio Score Card view opens

Score Card KPI Sections:

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

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

Quick Reference

Menu Actions

Button	Action
Prioritize	Generate SV Scores
Score	Generate AE Scores
Level	Open resource leveling view
Select/Bubble Chart	Run selection algorithm
Balance/Score Card	Review portfolio balance
Tabular View	Spreadsheet-style data view
Cards View	Visual card-based view
Process Help ?	Open PPM documentation

Score Color Coding

Color	Score Range	Meaning
Green	≥80	Strong
Yellow	60-79	Moderate
Red	<60	Weak

Troubleshooting

Missing Data Warnings:

- 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:

- Confirm Status is not "Closed"
- Check State is not "Spawned"

Financial Score Shows Zero:

- Need at least 4 of 7 financial fields populated
- Values of "Not Assessed" don't count toward the 4-field minimum

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

For technical details on scoring algorithms, see the Costbars PPM Technical Design Specification.

4. How to Use Ask AI

Source: *How To Use Ask AI*



AI Project Generator - User Guide

What This Feature Does

The AI Project Generator transforms your natural language descriptions into complete project structures with tasks, milestones, and risks. Simply describe what you want, and AI will create a fully-structured project ready to use in your PPM system.



Quick Start

Basic Usage

Just type what you want in the input box and press submit:

Create a project called Website Redesign

Result: AI creates:

- 1 project named "Website Redesign"
 - 5 tasks (default)
 - 2 milestones (default)
 - 3 risks (default)
 - Rich descriptions, objectives, and benefits
-



How to Write Effective Requests

1. Simple Project Creation

Minimal Input:

Create a project: Mobile App Development

What AI Does:

- Creates project with default quantities (5 tasks, 2 milestones, 3 risks)
 - Generates meaningful task names based on the project type
 - Writes 1-3 paragraph descriptions for each section
 - Sets dates starting next month
-

2. Override Default Quantities

Specify Your Own Numbers:

```
Create a project called Cloud Migration with 10 tasks, 4 milestones, and 5 risks
```

What AI Does:

- Creates exactly 10 tasks, 4 milestones, 5 risks
 - Names them appropriately for a cloud migration
 - Generates detailed content
-

3. Provide Context for Better Results

Rich Description:

```
Create a project to upgrade all Ubuntu servers from version 20.04 to 22.04 LTS.  
We have 50 production servers and 30 development servers.  
The project should include testing phases, backup procedures, and rollback plans.  
Create 8 tasks, 3 milestones, and 4 risks.
```

What AI Does:

- Creates highly specific, contextual tasks like:
 - "Backup all production server configurations"
 - "Test upgrade on development environment"
 - "Execute rolling upgrade on production servers"
- Writes detailed descriptions mentioning Ubuntu versions, server counts
- Identifies relevant risks like "Rollback complexity" or "Service downtime"

 **Rule:** More context = more relevant, specific content

Advanced Features

Project Positioning

Control Where the Project Appears:

```
Create a project called Q1 Planning placed 400 pixels from the top
```

Place the new project one-third down the page

Default: Projects appear at 300 pixels from top if not specified

Date Control

Specify Timeline:

Create a project starting in March 2025 and finishing in August 2025

Create a 3-month project beginning next quarter

Default: Starts 1 month from today, ends ~6 months later

Task Details

Be Specific About Work:

Create a product launch project with these phases:

- Design and prototyping (2 months)
- Development and testing (3 months)
- Marketing preparation (1 month)
- Launch execution (2 weeks)

Create 12 tasks and 5 milestones.

 What AI Automatically Generates

For every project, AI creates:

Rich Metadata Fields

Field	Content	Length
Description	Detailed overview of the work, scope, and deliverables	1-3 paragraphs
Executive Summary	High-level overview for stakeholders	1-3 paragraphs
Objectives & Scope	Goals, boundaries, and success criteria	1-3 paragraphs
Expected Benefits	Business value, ROI, and outcomes	1-3 paragraphs

More context in your input = more detailed, relevant content

Intelligent Naming

Tasks:

- ☒ "Upgrade production database servers"
- ☐ "Task 1"

Milestones:

- ☒ "All servers upgraded and validated"
- ☐ "Milestone Complete"

Risks:

- ☒ "Legacy application compatibility issues"
- ☐ "Risk 1"



Tips for Best Results

☒ DO:

1. Be specific about your domain:

Create a healthcare compliance project for HIPAA certification

2. Mention key phases or stages:

Include discovery, design, development, testing, and deployment phases

3. State numbers if you need specific quantities:

Create 15 tasks, 6 milestones, and 8 risks

4. Provide context about scale:

This affects 200 employees across 5 departments

5. Mention important constraints:

Must complete before end of Q2, budget is \$150K

× DON'T:

1. Be too vague:

Create a project

(AI will use defaults, but content will be generic)

2. Use unclear terminology:

Make some stuff for the thing

3. Forget to mention quantity overrides: (You'll get 5 tasks, 2 milestones, 3 risks by default)



Example Scenarios

Scenario 1: Software Development

Input:

Create an API development project for our new customer portal. We need to build RESTful endpoints, implement OAuth2 authentication, integrate with our legacy database, and create comprehensive API documentation. The project should span 4 months starting in February 2025. Create 10 tasks, 4 milestones, and 3 risks.

AI Creates:

- Project: "API Development - Customer Portal"
- 10 specific tasks (e.g., "Design RESTful API architecture", "Implement OAuth2 authentication flow")
- 4 milestones (e.g., "Authentication module complete", "All endpoints tested")
- 3 risks (e.g., "Legacy database schema incompatibility")
- Rich descriptions mentioning OAuth2, REST, portal integration

Scenario 2: Infrastructure Upgrade

Input:

Upgrade our data center network infrastructure. Replace aging switches, upgrade firewall firmware, implement new monitoring tools, and migrate to 10Gb network backbone. 8 tasks, 3 milestones, 5 risks.

AI Creates:

- Project: "Data Center Network Infrastructure Upgrade"
 - 8 tasks covering switch replacement, firmware updates, monitoring, migration
 - 3 milestones marking major completion points
 - 5 risks including downtime, compatibility, budget overruns
 - Technical descriptions with network terminology
-

Scenario 3: Business Process Improvement**Input:**

Create a project to streamline our invoice approval workflow. Currently takes 10 days, goal is 3 days. Involves finance, purchasing, and operations departments. Need workflow mapping, system configuration, training, and rollout phases. 12 tasks, 5 milestones, 4 risks.

AI Creates:

- Project: "Invoice Approval Workflow Optimization"
 - 12 tasks across mapping, configuration, training, rollout
 - 5 milestones for each major phase completion
 - 4 risks like resistance to change, system integration issues
 - Business-focused descriptions mentioning efficiency gains, stakeholders
-

Scenario 4: Marketing Campaign**Input:**

Q3 product launch campaign for our new SaaS platform. Includes content creation, social media strategy, email campaigns, webinar series, and paid advertising. 6-week timeline. 10 tasks, 4 milestones, 3 risks.

AI Creates:

- Project: "Q3 SaaS Platform Launch Campaign"
 - 10 marketing-specific tasks
 - 4 milestones for campaign phases
 - 3 risks (budget overrun, low engagement, timeline delays)
 - Marketing-focused descriptions with ROI, target audience, channels
-



Understanding Defaults

When you don't specify certain details, AI uses these defaults:

Element	Default Value	How to Override
Tasks	5	"Create 10 tasks"
Milestones	2	"Create 6 milestones"
Risks	3	"Create 8 risks"
Start Date	1 month from today	"Starting in March 2025"
End Date	~6 months from start	"Finishing in 6 months"
Project Position	300 pixels from top	"Place 400 pixels from top"
Content Detail	Moderate	Provide more context for richer content

Content Quality Scale

The amount of detail you provide directly affects the quality and specificity of AI-generated content:

Minimal Input

```
Create a project: Server Upgrade
```

AI Content: Generic descriptions about server upgrades

Moderate Input

```
Create a project to upgrade Ubuntu servers to version 22.04
```

AI Content: Mentions Ubuntu, version numbers, typical upgrade tasks

Rich Input

```
Create a project to upgrade 80 Ubuntu servers (50 production, 30 dev)
from 20.04 to 22.04 LTS. Must include backup procedures, testing phases,
rollback plans, and monitoring setup. Timeline is 8 weeks starting April
2025.
Create 12 tasks, 5 milestones, and 6 risks.
```

AI Content:

- Highly specific task names with server counts
- Detailed descriptions mentioning versions, environments, counts
- Risk assessment relevant to your specific scale

- Timeline-appropriate milestone placement

Tips for Complex Projects

Break Down Large Initiatives

Instead of:

```
Create our entire digital transformation program
```

Try sequential projects:

```
Create Phase 1: Infrastructure Assessment and Planning project  
with 8 tasks, 3 milestones, 4 risks
```

Then later:

```
Create Phase 2: Cloud Migration Execution project...
```

Use Hierarchical Thinking

AI understands project hierarchy:

- **Portfolio** → **Project** → **Sub-Project** → **Task** → **Allocation**

You can request:

```
Create a project with 3 sub-projects, each with 5 tasks
```

Troubleshooting

"Timeout Error"

Cause: Very complex requests might take too long

Solution:

- Break into smaller projects
- Reduce task/milestone/risk counts
- Simplify the description slightly

"Not Enough Detail in Descriptions"

Cause: Input too brief

Solution:

- Add more context about scope, stakeholders, technology
- Mention specific phases or activities
- Include scale information (how many, how long, how much)

"Tasks Don't Match My Needs"

Cause: AI misunderstood domain or context

Solution:

- Be more explicit about the type of work
- List key phases or activities you expect
- Mention specific deliverables

✨ Best Practices Summary

1. **Start with project name and basic description**
2. **Specify quantities if not using defaults** (5 tasks, 2 milestones, 3 risks)
3. **Add context for richer, more relevant content**
4. **Mention timeline if important**
5. **Include stakeholders, technology, or domain details**
6. **Be specific about phases or major activities**
7. **State positioning if you care** (otherwise defaults to 300px)

🎓 Example Progression

See how adding detail improves results:

Level 1: Basic

```
Create website project
```

Level 2: Named + Quantities

```
Create a Website Redesign project with 8 tasks and 3 milestones
```

Level 3: Contextual

```
Create a Website Redesign project for our e-commerce site.  
Need to update design, improve mobile experience, and add new payment
```

```
options.  
8 tasks, 3 milestones, 4 risks.
```

Level 4: Comprehensive

```
Create a Website Redesign project for our e-commerce platform serving 10K  
daily users.
```

```
Scope includes:
```

- Modern responsive design with mobile-first approach
- Integration of Apple Pay and Google Pay
- Performance optimization (target: <2s page load)
- A/B testing framework setup
- SEO improvements

```
Timeline: 12 weeks starting March 2025
```

```
Create 12 tasks, 5 milestones, and 6 risks
```

```
Place the project 350 pixels from top
```

The more detail you provide, the more valuable and actionable your project structure becomes!

Need Help?

If you're not getting the results you expect:

1. Try adding more context to your description
 2. Be explicit about numbers (tasks, milestones, risks)
 3. Mention the domain or industry for better task naming
 4. Break complex projects into phases
 5. Review the examples above for inspiration
-

Ready to create your first AI-generated project? Just type your request and let the AI do the heavy lifting! 🚀

5. User Interface Guide

Source: Common User Interface Guide

Product Help - Common Across Products

What You Should Know First

The following sub-section describes important Need to Know information First, before you can even get started. The following help topics describe how to use any Timebars Ltd. products. For help related to an individual product see other tabs in the knowledge base for each product (Timebars, Agilebars, Costbars)

How to Use for Free

You can try out our products for free without registering, but with data limitations based on the number of projects, tasks and Pubsets. see it for as long as you wish See sales site for limits. Could put table in here!! No software to install, see how much your productivity will increase. We implement data limits to keep the price down for users with small teams and portfolios.

Important Note: We don't install cookies on your device. Our management software products are secure web pages. Your data is stored in the browser cache, not on our servers (unless you choose to use the Pubset feature).

How to Get a License

After registering and purchasing a subscription you can begin using our Apps as a licensed user. See video: how to purchase a subscription. In summary, your new license will automatically install when you log into one of our Apps.

If you wish to purchase a subscription, use the Quick Buy button found through out the site. Subscriptions are single person monthly purchases. Register with an email and password, purchase your desired subscription, then use the email/password combination as your license to log in and use our products with the desired data limits.

Our monthly subscription model has three pricing tiers. Each tier increases the data limits to suit your needs. After you purchase a subscription and log in, it automatically alters the data limits imposed by the free version to suit your new subscription, your project and resource data remains unchanged. You can buy one month at a time or up to 12 months in one credit card transaction. Read the Pricing Table & Sales FAQ at the Sales Site!

How to Login/Logout

Click the Yellow Icon in the top most menu, right side, enter user name and password, same ones used when registering. That is it you are now logged in as a licensed user.

Switching Products

There are scenarios where you may be running agile bars product and you drag and drop a Time bars based spreadsheet onto the canvas and you will find you may get an error about the license not being valid or correct. this may be normal And it requires you to log in again with the username and password from the desired product subscription.

About Security and Product Limits

Data limits are enforced by product line and subscription tier. It calculates the number of days remaining until the license expires by comparing the current date with the expiration date store with the license. If the license is valid, it checks to determine the type of license and performs additional UI trimming based on the license type. For each product and license type, it checks if the bar count exceeds certain limits. If the limits are exceeded, it displays the appropriate user information message and re-establishes a demo license status so the user can continue with nag screens until a valid license is established.

About Demo Data

When the App is loaded for the first time, the demo data is populated as part of the page loading process. This is a one-time thing and it's done only the very first time you use the product you can and start new with fresh new demo data.

It is important to always start off with demo data because the mandatory seed data is installed. Seed data for the default pick lists (tags/metadata), timescale settings etc. The demo data consists of a demo license for free access to the product for life with data limits as stated in the sales site at www.Timebars.com.

There are two demo data sets, a small demo data set with a few Timebars and there is a large data set with over 350 bars. To load switch demo data, click on the hamburger icon on the top left of the screen to load the admin menu, click Data Actions, click clear demo data. Click either load demo data Small or load core demo data large defined by S or L in Brackets.

The population of demo data includes not only project data but all the seed data. If you make changes to your time Bars by dragging them around the screen and if you create custom fields and other operations you will lose them all when you clear demo data and restore demo data from scratch so you have to be careful.

Top Menu and the Main Menu

The top menu shows the product icon and name, import and export arrows, bar refresh icon, shopping cart icon and login icon. In the middle of the top menu is the currently logged in user, if the license is invalid or not downloaded yet it will show license status instead.

The Main Menu is a row of icons for launching core functionality of the application, an explanation of each follows within the Core Product Functionality section.

The Hamburger Icon

Click the hamburger icon in the Main Menu to access links to various features, including the Filter Menu, Getting Started Page, AI Search, FAQ, WBS Generator, and Data Actions (such as Import, Export, Backup, and more).

The Canvas

Our application comprises two key components: the Kanban and Timescale canvases. The Timescale canvas, featuring Timebars, offers distinct advantages over traditional Gantt charts. Unlike Gantt charts, Timebars on the Timescale canvas empower users to effortlessly drag and drop bars to any position they desire. In contrast to the rigid one-row-per-bar format of Gantt charts, Timebars allow for greater flexibility in bar placement.

This flexibility not only accommodates a larger number of bars on the screen but also enhances resource allocation and project scheduling, ultimately boosting the productivity of project management personnel.

About the Timescale Canvas

The first thing you encounter when logging in with fresh demo data is the Getting Started Page. Once closed, the Timescale Canvas becomes visible by default. The Switch Modes icon on the Main Menu offers a choice between the Timescale Canvas and the Kanban Canvas.

The Timescale Canvas comprises a series of vertical lines that can be separated by either weeks or months. You have the flexibility to select the timescale (weeks or months) from the canvas settings window. Click Tools > Set Canvas to load the window. A flyout menu will appear, with the Set Canvas icon at the top. Click on it to adjust your time scale preferences such as either a weekly or monthly view. Furthermore, you can zoom in and out by selecting a zoom factor. The default zoom factor is 1.5, but alternatives include 0.5, 1.5, 2, and so forth. Be sure to save and close to apply your chosen settings. The Canvas will automatically reload.

Numerous other Canvas settings await exploration, such as toggling between light and dark modes, displaying baseline bars or ghost bars, and adjusting levels. We will delve into these topics later, as they are somewhat more intricate and warrant further documentation immediately following the Kanban discussion.

About the Kanban Canvas

Kanban is a potent visual management tool that empowers teams to plan, track, and manage their work with exceptional efficiency. Its visual representation of project workflows fosters collaboration and transparency.

To switch to Kanban mode, simply locate the "Switch Modes" icon on the main menu at the top center of the screen. Clicking it again will return you to the Timescale mode.

The Kanban board is available in all our products, but each functions differently to cater to either Agile or Classic management processes. For more specific information, please refer to the dedicated help topics for the product you are interested in.

The Timebar Hierarchy

Timebars conforms to 3 different hierarchies. The minimum is a 3 level hierarchy, and maximum is a 5 level hierarchy with a 4 level hierarchy in the middle. The rules are built into the tool to not allow violation of these hierarchies as you drag and drop Timebars to create schedules. Each level is color coded to make it easy to remember the levels in the hierarchy and to allow choice as to what levels are needed.

L1 - Dark Grey L2 - Green (Always a Project for all 3 hierarchies) L3 - Orange L4 - Blue (Always a Task for all 3 hierarchies) L5 - Gold (Always an Allocation for all 3 hierarchies)

The maximum 5 Levels:

You can optionally look at the 5 level hierarchy as follows:

L1-Portfolio L2--Project/Program L3---SubProject L4----Task (incl milestones and gates) L5-----Resource Allocation

The medium is a L4 level hierarchy:

For most small and medium sized projects 4 levels is sufficient. This one is the same as the 5 level except it allows a user to not use the Orange bars.

L1-Portfolio L2--Project/Program L3----Task (incl milestones and gates) L4-----Resource Allocation

The minimum is a L3 level hierarchy:

For most small and medium sized projects 4 levels is sufficient. This one is the same as the 5 level and 4 level except it allows a user to not use the Dark Grey L1 bars.

L1--Project/Program L2---Task (incl milestones and gates) L3---Resource Allocation

Canvas Settings

Adjusting the Weekly/Monthly Settings:

- To switch to a weekly timescale:
 1. Click on the wrench icon on the Main Menu.
 2. Click on "Canvas Settings".
 3. Change the radio button to "weekly".
 4. Click "save and close".
- For optimal viewing, it's recommended to set the Zoom Factor to 1. Click and drag the slider icon and drop it to see the zoom factor.

Adjusting the Time Scale Start, Report Date The timescale must always start on a Monday so that the scheduling engine has a work week reference point. The Report Date is one of the most important settings for the automatic cost, hours and date calculations to be accurate. It must be set to a work week day, not a weekend to improve accuracy. When you change the Time Scale Start, Report Date, the settings stored in IndexedDB and reused when the page loads.

The general rule is that if a bar is visually behind the Report Date line on the Timescale canvas, it will automatically set actual dates, costs and hours based on the configurations. You will learn about how to configure this later.

Show Baseline, Ghost and Visible Levels Show Baseline Bars: Yes/No - If the user has set a baseline and this value is set to Yes, it will show Baseline Bars on the Canvas as thin bars below each timebar

Show Ghost Bars: Yes/No - If the user has this value is set to Yes, the dit will show Ghost Bars on the Canvas. This is useful to see the original position of the bar as a light ghostly bar.

Visible Levels, L1, L2, L3, L4 or L5 - The user can check off which levels in the hierarchy to hide on the Canvas. For example if L2 is checked, bars at levels L1 and L2 are shown, hiding the levels below. This is useful to reduce clutter on the screen for large data sets.

Hide Completed Bar True/False - If set to true, bars in the past (before the Report Date) are hidden.

Refresh the Canvas

Quickly refresh the Canvas and bars without a full browser page reload.

- Click the Refresh icon on the top menu (black)
- Will invoke a full cost schedule rollup

Reload the Canvas (Full Browser Page Reload)

Sometimes you may want a full browser page reload if the page seems to be rendering something unexpected.

- Right click on Canvas > Reload Page or
- Use the standard browser page reload that is available on all browsers, typically located to the left of the URL (e.g., tb.timebars.com)

Recalculate All System Generated Data

The System can perform a complete recalculation: hours/cost rollup, updates L1 to L5 hierarchy names, hierarchy numbers (WBS), and re-populates the tbMDJoined data store if you notice data anomalies.

- Right click on Canvas > Recalculate All
- There are other Recalculate All buttons, such as on the Reports Page, to ensure that the system data has complete and updated information

How to Manage your Data

Download Open Office Spreadsheet

This OpenOffice Calc spreadsheet is specially designed to sync with all Timebars products with the ability to optionally synchronize your data with OpenOffice Calc to move data in and out of our products in a fast, clean and simple manner. Click on the Hamburger icon to launch the Admin menu, near the bottom is the link to download the spreadsheet. See the Spreadsheet syncing topic below for further details on how to use it.

Download Excel Spreadsheet

This Excel spreadsheet is specially designed to sync with all Timebars products with the ability to optionally synchronize your data with Excel to move data in and out of our products in a fast, clean and simple manner. See the Spreadsheet syncing topic below for further details on how to use it.

Spreadsheet Syncing

tbClient Pre-configured Spreadsheet Syncing: How It Works

Licensed users will have access to our spreadsheet, which contains custom code that facilitates the synchronization of data between exported CSV files and the spreadsheet. To achieve this synchronization, the code inside the spreadsheet imports CSV files stored in a user-configurable location on the hard drive.

From the app, users should first click the export button to save CSV files to this designated location. Once saved, the data in these CSV files can be imported into the spreadsheet by clicking the "import all" button located on the setup page.

Below is a description of the setup page inside the spreadsheet (a screenshot would typically be here). Notably, both the import and export locations can be adjusted to fit any directory on your hard drive. On the setup page, you can utilize the "import all" button to pull data from all stores that have a "yes" marked in the "import yes/no" column. However, if you prefer to selectively import specific data, such as time bars and metadata, you can navigate to the respective tabs and use the individual import buttons.

Within the spreadsheet, users have the flexibility to manually edit data. This includes adding new tasks, modifying resources, changing tag data, and using common Excel functionalities like drag-and-drop, copy-paste, and fill-down.

When you've finished making your edits, ensure you save your changes. After saving, simply drag and drop the spreadsheet onto the application canvas, and the app will update to reflect the modifications. It's crucial to remember not to make edits in the app while the data is in the spreadsheet, as doing so could lead to overwriting and loss of your changes.

Export as CSV (multi-file)

Export all data stores to csv for import into spreadsheet

Database Backup and Restore

Drag and drop the spread sheets or the JSON backup file for full restore of all data

Data Management Grids and Edit Forms

Sometimes it is necessary to edit data quickly within the application and not have to use the spreadsheet. This is where the Data Management Grids come in handy. To launch the Grids go to the reports page by clicking on the reports iPhone in the main menu. From this page click Data Management Grids to launch all pages, Which will show the data from the stores in a tab based format. Click on each tab and see all the data that's inside the indexedDB In a tabular format for example click on tags tab and see all the tags I have been configured for your application then click on the pencil icon to launch a static edit form make your changes click save and close.

Data Actions Menu

On the Admin menu, which is available by clicking the Hamburger icon in the top left of the main menu, there is a Data Actions heading with many buttons available. As shown here. The functionality is described further down in the document.

Core Demo Data (S)

Click to import a small demo data set.

Core Demo Data (L)

Click to import a small demo data set.

Create Full Backup

Click to create a full backup of all data stores inside of one JSON text file.

Data Import

The best way to import your back up files or other files that are permitted is with drag and drop gestures. You can drag and drop a spreadsheet file or a CSV file on the canvas import that data. Another way to import data is from the admin panel which is available by clicking the hamburger icon in the top left of the main menu there are buttons available that allows to import the back up text files or CSV files without having to drag and drop, you can use the file picker.

File Importer

Import from spreadsheet

Delete Database

Deletes the browser based database and will automatically rebuild it with demo data small.

Data Export to CSV or JSON

Export all thirteen data stores as CSV file format which will create 13 files in the Downloads folder as per your browser settings. Use the tbClient Spreadsheet to automatically import these files in one click as part of Spreadsheet Sync feature.

On the Admin menu, which is available by clicking the hamburger icon in the top left of the main menu, there is a Data Actions heading with many buttons available. These allow users to export all the data stores to CSV files or to individual JSON files with a single click. These files can be useful for importing to the spreadsheet or to import into your own systems as required.

Manually clearing data stores

You may want to delete all bars that are on the screen without deleting any of the other application data such as resource list, reports, issues, documents, tags and fields. The browser has a set of tools for this. Hit F12 then choose the application tab in the browser tools and click on indexeddb, click on the Click on the thyme bar store right click then click clear you would have to do the same for the metadata store and the baseline store. Please note that it is possible to delete the entire database from the F 12 developer tools and if you do no back up will be taken first and when you refresh the screen or the browser a brand new database will be created with the default set of demo data. You can then drag and drop any one of your previous backup text files onto the canvas and you are right back to square one. This is an excellent feature in case something goes wrong with your computer.

Export as JSON (multi-file)

Export all data stores to JSON format to suit your own custom business processes.

Core Product Functionality

This section provides details about the user interface that enhances your productivity and serves as the core functionality across all our products.

Automatic Calculations

Scheduling Engine

The scheduling engine is at the heart of the application and it is proprietary. It is not something that you can see or hear but it is listening and running in the background. With its advanced algorithms, it can recalculate your schedule in a matter of seconds when you make any changes to your project such as when you drag and drop a bar, adding resources, changing the percent allocated or changing the time scale.

For example if you have a set of bars on the timescale and one bar is moved, this bar and the child bars will have new dates, costs and hours calculated by the scheduling Engine. Tasks with relationships to other tasks also calculate new dates for the successors in addition to the child bars. If a bar has a constraint on it it states will not be recalculated by the scheduling engine.

Automatic Cost and Schedule Rollup

In order for the reports graphs and charts to be accurate we have to continually roll up or sum up the data as it's being created or modified. The process of automatically rolling up data is to aggregate cost and hours data from lower levels of a hierarchy into higher levels. All products enforce a 5 tier hierarchy also known as levels which are abbreviated like this: L1, L2, L3, L4 and L5.

Switch Modes (Timescale/Kanban)

Switch to Kanban mode from the Main Menu by selecting the "Switch Modes" option.

Imagine a project represented as a green bar. In Kanban mode, this project is managed using swim lanes. The blue bars signify individual work items or tasks, representing the backlog items chosen for the current Sprint.

There's also a filter option which allows users to transition between different projects. Using this filter, one can view various work items in the project's backlog. The project team then decides which tasks they'll undertake. Once these are selected, a burn down chart can be plotted to visualize progress. As tasks shift between stages like 'doing' and 'done', progress is tracked automatically. The burn down chart can be revisited at any time to compare the initial plan with the ongoing progress.

Additionally, users have the option to toggle between viewing tasks as bars or text boxes in the Kanban view.

Filter Menu

The Filter Menu is derived from the underlying hierarchical data. Each row is a hyperlink that allows drill-down or filtering at specific levels of the bar hierarchy to reduce clutter. Double-click the pink FM tab to launch the Filter Menu. Click the Filter Icon to remove the filter completely and hide it.

The menu renders three levels: L1 (brown bars), L2 (green bars), and L3 (orange bars). Agilebars renders one level: Project. When a level is clicked, a filter is applied. The selected level is saved so that when the user returns it will show the filter menu and the filtered project by default.

Main Filter Panel

The Main Filter Panel helps users refine and focus on specific projects and tasks based on freeform search or metadata picklists.

- Choose Main Filters on the Main Menu
- Click button to Reset filters to get back to an unfiltered state
- Click the X to close the Filter Panel and go back to the Canvas with all bars loaded
- Notice that the bars are all shown on individual lines, not beside each other as shown when the Filter Panel is closed

How to Create Bars

Launch the **Creator Bars** popup to create new bars. Drag a bar from the popup and drop it onto an existing bar to establish a hierarchical structure.

- Choose **Main Menu > New Bar**

Steps to Create a New Bar

1. If there are no existing bars, a special step is required to create the first bar at the top of the hierarchy
2. Begin dragging a **Creator Bar**, and follow the instructions displayed in the **dashed box** before dropping it as instructed

Create new L1 Portfolios, L2 Projects, L3 Sub-projects, L4 Tasks and Milestones and L5 Allocations. Also create Gate Notes to link and show notes on the Canvas.

Bars are created by drag and drop that forces the hierarchy of L1 to L5. When you drag the L2 Project Creator Bar, instructions pop up on the right. If an L1 exists, drop it on top to create and link the L2 bar. Or you can decide not to link it to the L1, this could be considered as a standalone project, not belonging to a Portfolio L1 bar if you choose.

The Filter Menu will show it as such. We recommend always using an L1 bar as a scheduling best practice. L3 orange bars can only be created by dropping the Creator Bar on an L3 bar, dropping it anywhere else is not allowed and the user is notified. Task and Milestone Creator Bars can only be dropped on L2 or L3. Gate Notes can be dropped at any level, L1 to L5.

Example in Agilebars

- **Task bars** can only be created by **dropping the Task Creator Bar (blue) onto a Project Bar (green)**
- Dropping the Task Creator Bar elsewhere will trigger a **user notification** and prevent the action

Filter Menu

The filter allows the user to drill down into specific levels in the hierarchy. All products enforce a 5 tier hierarchy known as levels abbreviated like this: L1, L2, L3, L4 and L5. In the graphic above the pink FM tab, when its double clicked it opens the Filter Menu and the user can click to drill and filter. When they click, the "isFilteredFrom" value is stored in indexedDB, so the next page reload it will hit `drawBarsFromP3Menu(isFilteredFrom, tblID)` function more on this later. The graphic below shows the Filter Menu, it can only render L1, L2 and L3 items. In this case the brown bar indicates it is an L1, Green is L2 and Orange is an L3 (See the "L" at bottom left of all bars). For example If the user clicks on an orange bar, the filtering will look like this:

Shortcut Menu

The Shortcut Menu is standard "Right Click" functionality like in any app. Right click on the canvas and the shortcut menu will pop up. There is a different shortcut menu for the kanban View.

Right-click anywhere on the Canvas to bring up the Shortcut Menu for quick access to: Canvas Settings, Bulk Move, Refresh Bars, Filter Menu and Toggle Bars vs Time Boxes on the Kanban Board. Bulk Move allows moving many bars at once to a new position on the Canvas.

Toggle Light/Dark Mode

In software development, "dark mode" and "light mode" refer to two different color schemes or visual styles that can be applied to user interfaces.

1. **Dark Mode:** Dark mode, also known as night mode or dark theme, is a design option where the user interface predominantly uses dark or black backgrounds with lighter text and elements. This color scheme is intended to reduce the amount of light emitted by the screen, making it more comfortable to view in low-light environments. Dark mode is often preferred by users who find it easier on the eyes or who want to reduce eye strain, particularly in dimly lit conditions.
2. **Light Mode:** Light mode, on the other hand, is the default or traditional design option in many software applications. In light mode, the user interface typically uses light or white backgrounds with darker text and elements. This color scheme is more reminiscent of the classic paper-like appearance and is often the default choice for readability in well-lit environments. The choice between dark mode and light mode is largely a matter of personal preference and user experience. Some individuals may find dark mode more visually appealing or less intrusive, while others may prefer the traditional light mode. Many software applications and operating systems now provide the option to switch between these modes to accommodate different user preferences and environments.

Creating Relationships between Tasks

To create relationships between Tasks, this tells the scheduling engine to reschedule the successor bar as well, by the same amount of time. To create a relationship drag a task by grabbing the beginning of it and dragging it over the ending of the target bar and dropping it as shown below.

Show/Hide Hierarchy Lines

To show the hierarchy lines on the Canvas:

- Right click on the Canvas to show the Shortcut Menu and click "Hierarchy Lines" or
- Choose Tools > "Hierarchy Lines"

For example to see the hierarchy through the lines: The Gold Bar (L5) is linked to the Blue Bar (L4), the Blue Bars are linked to the Orange Bar (L3), Green Bar (L2) is linked to the Brown Bar at L1. The Brown bar is the top of the hierarchy.

How to Turn On/Off Bar Relationship Lines

To toggle relationship lines between tasks:

- Right click on the Canvas to show the Shortcut Menu and click "Bar Relationships" or
- Choose Tools > Bar Relationships

Task Bar Lines (Relationships)

To show the Task Lines on screen, turn on Task Bar lines as described above. Relationship lines visually connect predecessor and successor tasks, showing task dependencies in your schedule.

Drop to Delete Bar Lines

To remove a relationship, drag and drop the successor bar on the "Drop to Delete Task Lines" Pad.

Manage Constraints

Add constraints to tasks so they are not rescheduled ever. Click the Edit Menu button on the Main Menu then click on the Manage Constraints link. The pin now shows and the Canvas has been darkened. The pin can be dragged and dropped on a task to constrain it. Remove the constraint by clicking on the pin on the bar and dragging it off the bar and dropping it on the Canvas.

Popup Cost Schedule Form Off of Bar

To load the popup the user clicks on the lower portion of the bar e.g. T:3773... it will load the form below the bar associated with the bar, works at all levels.

How to Make Edits to Bar and Metadata

There are multiple ways to edit bars and metadata throughout the application:

Method 1: Flyout Form

- Click on the **bar Name** to open the right side flyout form
- Click on Name Field, make changes
- Data is saved automatically when you move off the field
- Close the form when done

Method 2: Freeze Bars for Quick Edits

- Click the **pink FZ Tab** on the left side of the Canvas to freeze the Bars so they cannot be moved
- Simply change the bar name directly on the Canvas
- Click on another bar to save your changes
- Click the **Refresh Icon** on top black menu to remove the freeze

Method 3: Core Report

Launch the Core Report from multiple locations:

- Click on a **bar ID** (bottom left of any bar) to launch the Cost Schedule popup, click "Core Report"
- Launch the Core Report from rows in the **Risk and Issues page**
- Launch the Core Report from rows in **Tabular and Card View reports** available from the Reports Menu

Method 4: Spreadsheet Sync Feature

- Use the Spreadsheet Sync Feature to change metadata in bulk
- Export data to spreadsheet, make changes, and load it back into the application
- See Data Management section above for details

Note: Edits are saved automatically when you move off a field throughout all editable fields in the applications.

Metadata Coding

Metadata coding is a flexible way to organize and break down a project into groups of activities. By establishing a coding structure and assigning codes to Timebars it will allow virtually any view or report of

your project information.

The metadata codes are maintained in the custom spreadsheet template and are updated in the Timebars Web App by drag and drop gestures on the Canvas. There is no complex code tables and look up tables to maintain, just spread sheet maintenance and Timebars does the rest saving you time.

Metadata View

Available from the Cost/Schedule Popup form.

How to Create a Baseline

When planning is complete and before work begins, create a baseline to generate your Planned data. Use the Planned data to compare with current data and actuals for variance reporting.

Easy Baseline Management: When Sprint planning is done and before the work starts, set a baseline or snapshot with one click. Compare current forecast to the baseline (original plan) with the burndown chart and other reports with one click. Unlimited baselines supported.

Steps to Create a Baseline

1. Click on a **Bar ID** (bottom left of any bar) to open the Cost Schedule popup
2. From the popup, click the **"Set Baseline"** button to create a baseline for this bar and all its child bars
3. The checkbox is enabled by default, so it will **overwrite an existing baseline**
4. You can set a baseline at the **L2 Project Level (green bar)** or any level below it, but **not at the L1 (brown bars) level**

When the Set Baseline button is clicked and the check mark is on, the previous baseline is lost. The baseline will be created at the current level and all child bars below it in the hierarchy.

How to Update a Baseline for Added Scope

If the checkbox is unchecked, this Timebar and any child Timebars without an existing baseline will not delete existing baseline data. This is necessary for scenarios where the baseline is initially set, and later a new bar and/or its children need to be added to the baseline.

Use Case: The Baseline is initially set at L1, then later, an individual bar and its children need to be re-baselined without affecting existing baselines.

How to Delete Bars

To delete a bar, **drag and drop it onto the Trash Can** located on the **left side of the Canvas**. This will remove the bar along with all of its child bars.

When a bar is dragged, the Edit Menu shows automatically, allowing you to delete one bar at a time or the dropped bar and all child bars, one level below. For example if you delete a Task, the Allocations will be deleted also, if you wish to delete just the Task and keep the Allocations, drop the bar on the Delete One pad.

Important Notes

- If you want to delete a bar and keep the child bars, first move the children to another bar in the hierarchy using **drag and drop**
- **There is no undo**, so if needed, **make a backup first**:
 - Select **Hamburger Icon > Full Backup**
 - To restore a backup, simply **drag and drop the backup file onto the Canvas**

Drop to Duplicate Bars

Below is the result of duplicating a project. After dragging and dropping the duplicate onto the L1 bar (brown), it shows in the Filter Menu as a new project. The child bars were not duplicated. There are other ways to do this such as the SpreadSheet. More on this later.

Bulk Move Tasks

To Bulk Move Tasks or to drag and drop many tasks at one time, click the Edit Menu button on the main menu then click on the Bulk Move Tasks link. Now click on each task that is to be moved, then click again and drag and drop to the right place on the timescale. Notice that selected bar are highlighted with blue dotted lines. When done, screen refreshes and bars have been rescheduled including child bars or Allocations.

- Tip: When you get to the last bar that you plan to move, double-click it then drag.

Bulk Move Projects (Costbars Only)

To bulk move Projects (green bars) in Costbars:

- Choose Tools Menu > Bulk Move Projects link to reschedule Projects (green Bars) in bulk
- Click on two or more projects to highlight them, then drag and drop to reposition them

Notice that selected bars are highlighted with green dotted lines. When done, refresh the screen and confirm they have been rescheduled including the child bars.

- Tip: When you get to the last bar that you plan to move, double-click it then drag.

Change Creator Bar Names

The names and descriptions of the six Creator bars as shown above are configurable in the Tags Store. To view and edit the Tags table click on the Reports Icon in the main menu and click the Editable Grids link as shown below. Search for the desired value and change its Short Name by clicking on the Pencil Icon to load the Editable Form as shown. Tag Purpose can be changed also (Instructions in Creator Bar popup). Do not change other values or the application will break. Please note that you can change these values in the Spreadsheet and sync it back to the App. Change the text then click save and Close (not shown)

Metadata View

The metadata view is available from several locations within the application such as the editable grids meta-data table and from each bar on the canvas. This view is a large collapsible report or form that allows for editing metadata based on business driven headings such as business case cost and schedule information etc.

Get Started Page

From the main menu click on the hamburger icon to launch the admin menu. The "Getting Started" menu graphic is shown below. From there you can fire up the getting started page. Below is a view of the getting started page which can be configured to fire up by default every time the application loads for the first time.

FAQ

The FAQ can be launched by the link on the Admin Menu similar to how the Getting Started page is set up and called. The graphic below shows the frequently asked questions page each question is in a drop-down when you click on another next question the current one collapses.

Intro

The intro can be launched from the right side tools menu. Each of the three applications has been configured so that the intro is launched whenever a new database is created in other words when a user first uses the app. Most users will read the intro once and click close don't show the intro again or if you click skip intro it will close and fire up the next time you relaunch the page.

Tour

The tour can be launched from the tools menu slide out right tools menu by clicking on the tour link when the tour is fired it starts at the hamburger icon and you just keep clicking next and the tour stops off at each of the visible UI portions of the application it's a nice little tool to inform the users quickly who are new about the usability and features.

Risk & Issues Features

Overview of Risks and Issues

The risk system has the same look and feel as the risks and issues system but data storage is different. Click on the Risks and Issues button on the main menu to launch the risk list. From the filter menu, find the project you want and click on it to view linked Risks and Issues.

Create New Risks and Issues

Risks and Issues are created by adding a task with the Bar Creator and launching the Slide Out Right Form. The SubType can be set as Risk or Issue, and additional metadata fields can be configured for filtering and grouping.

Filter Risks and Issues

Use the Risks/Issues page to track and manage lists of risks and issues. Filter by project and view the status of each item. Edit details of a Risk or Issue by launching the FOCD Form.

Edit Risks and Issues

Edit the status, title, and content of a Risk or Issue by clicking on the edit icon and entering data in markdown format.

Add fields to the Form

Use FOCD to add or remove fields in the form to customize it according to specific needs or methodologies.

Local Reports Menu

The Reports Menu gives access a multitude of tabular reports suited to common methodologies. Also get access the Editable Grids and Static Forms to filter and edit data.

Schedule Reports

Various reports for scheduling purposes, such as Editable Grids, All Timebars, Print WBS, Items Overdue, Milestone Horizon, and Project Status.

Resource Reports

Reports related to resource usage, including Resource Usage, Project Usage Simple, Project Usage w/Metadata, and Resource Listing.

Joining tbTimebars and tbMetaData Stores

The function in scripts/tbdatabase.js joins the tbTimebars store and the tbMetaData store, creating a new store called tbMDJoined. This combined data store is useful for reporting, dashboard code, and integration with other tools.

Burndown Chart

What is a Burndown Chart

Easily generate Burndown Charts with one click that are based on Agilebars data in the browser that was generated while using the Kanban Board canvas and/or the Timebars Timescale canvas. Switching lanes in Kanban mode updates the progress of sprint work based on internal rules. For example dropping an Agilebar in the Done lane, sets the work item to 100% complete which feeds the burndown chart.

To launch the burndown chart click on the Project ID, in this case Pj:40 and launch the Burndown Chart. Click the "Refresh Button" to calculate the graph, then click Run to launch it.

How to Calculate the Burndown Chart

The graphic below shows the core function that will timephase the data for the burndown chart. It calls many other functions, not shown. There are 2500 lines in kanvanv2.js file.

Local Dashboard

What is Local Dashboard

The Local Dashboard, (not to be confused with the Cloud Dashboard), is the place where your data is transformed into information. It has four tabs for the Agilebars and Timebars Apps (Summary, Resource Demand Charts, Project Status and Finance), and three additional tabs for the Costbars PPM functionality

(Programs, Priorities and Strategy). The filter menu drives the dashboard at the L1 level. Each page of the Dashboard is a FOCD form so the user can add and remove fields to suit, there are up to 150 different fields available.

Timebars Ltd. Products provides two dashboards because many customers will not be allowed to store their data in the cloud due to security reasons. Corporate data is often proprietary and if exposed to unwanted eyes it could pose serious threats to the organization. Therefore there is a local dashboard that is available on the main menu that pulls data from the index DB inside the browser.

In the example below the L1 title “Digital Works Space - Transformation” is available because there is one L1 in the data set. Each page of the Dashboard is a FOCD form so the user can add and remove fields to suit, there are up to 150 different fields available.

Summary Tab

Currently shows the following fields as part of the Demo Data. This form renders data from L1 rows only. User can add and remove fields as needed.

Resources Tab

Shows the same set of buttons as on the Resource Allocator to show Weekly Demand by various metadata. This form renders data from ResCalcs2 store.

Project Tab

Shows the projects which are children of the L1 (Digital Workspace - Transformation). Multiple L1 bars would be listed in the Filter Menu. This form renders data from L2 rows only in the tbTimebars store.

Financial Tab

This form renders data from L1 rows only. User can add and remove fields as needed. The Cost Analysis field can be edited using the Quill Editor.

Documents Features

Overview of Documents

The document system has a similar interface as the risks and issues system, but with different data storage and creation methods. Clicking on the Documents button in the main menu opens the document list.

Create New Documents

Clicking on the Create Documents button in the main menu allows users to create new documents.

Filter Documents

The filter menu allows users to select a project and view the documents associated with it. In the example graphic, the Private Cloud Phase 1 project is selected, showing two filtered documents.

Edit Documents

Users can edit document details such as status, title, and content. Clicking on the edit icon enables editing and allows users to enter data in markdown format.

Add fields to the Documents Form

FOCD (Field-Oriented Control Design) can be used to add or remove fields in the document form, providing customization options.

Cloud Publishing

Overview of Publishing

The Cloud Publishing feature is opt-in functionality with secure Cloud login and authentication. The Cloud Dashboard provides customizable and dynamic reports and graphs, for insightful visualizations. Also rehydrate the Cloud data on another device. e.g. work from your PC one minute and on your Ipad the next.

Cloud Login

Code location and details about the cloud login process.

Show License

Clicking on the Show License Button displays the license details, including the quantity of PubSets available and the expiry date.

Create Your Pubsets

Users need to activate PubSets themselves by clicking the activate PubSets button.

Publish to Update Cloud Dashboard

Publishing PubSets allows updating the cloud dashboard, rendering charts and reports.

6. Data Structure User Guide

Source: Common Data Structure User Guide

Common Data Structure User Guide

This guide explains how your project data is organized, stored, and managed in Agilebars, Timebars, and Costbars applications. Understanding the data structure will help you make the most of features like spreadsheet sync, backups, and cloud publishing.

Overview: Where Your Data Lives

The Timebars applications follow a **"client-first" architecture**, which means:

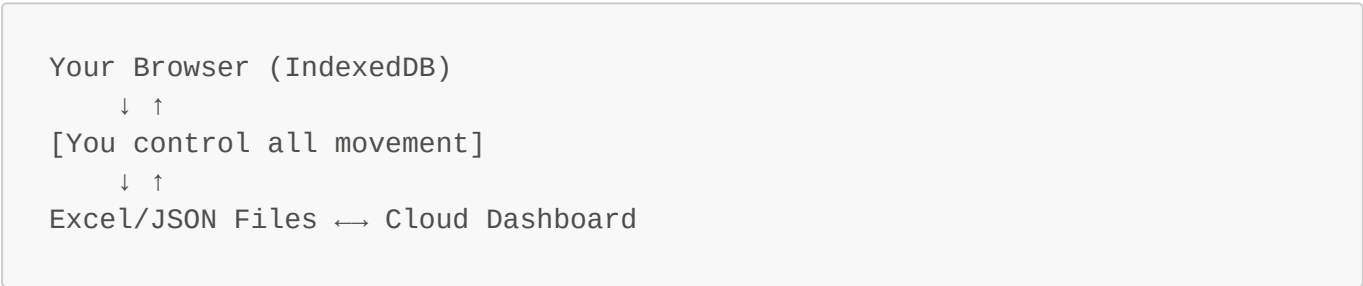
- **Your data lives in your browser** using IndexedDB technology
- **No internet required** for full functionality—work completely offline
- **You control your data** with multiple export/import options
- **Cloud publishing is optional**—you choose when to share or sync

Three Data Storage Layers

Your data exists in up to three places, depending on how you use the application:

Storage Layer	Location	Purpose	User Control
IndexedDB	Your browser	Real-time work, immediate edits	Direct (via UI)
Spreadsheet Files	Your computer	Bulk editing, backups, offline work	Complete
Cloud Storage	Timebars Cloud	Team sharing, cross-device sync	User-initiated

Data Flow:



Understanding the Data Hierarchy

Timebars and Costbars support flexible hierarchies, while Agilebars uses a simple 2-tier structure. The hierarchy is maintained automatically as you drag and drop bars on the Canvas.

Color-Coded Levels

Each hierarchy level has a distinct color to make it easy to recognize:

- **L1 - Dark Brown:** Portfolio (or Program)
- **L2 - Green:** Project (always a Project in all products)
- **L3 - Orange:** Sub-Project or Work Package
- **L4 - Blue:** Task (always a Task in all products, includes milestones)
- **L5 - Gold:** Resource Allocation (Timebars and Costbars only)

Hierarchy Options

The applications support three hierarchy configurations:

5-Level Hierarchy (Maximum Flexibility)

```
L1 - Portfolio (Dark Brown)
  L2 - Project (Green)
    L3 - Sub-Project (Orange)
      L4 - Task (Blue)
        L5 - Allocation (Gold)
```

Use When: Managing large portfolios with multiple programs and complex sub-projects.

4-Level Hierarchy (Medium)

```
L1 - Portfolio (Dark Brown)
  L2 - Project (Green)
    L3 - Task (Blue)
      L4 - Allocation (Gold)
```

Use When: Small to medium projects where sub-projects aren't needed.

3-Level Hierarchy (Minimum)

```
L1 - Project (Green)
  L2 - Task (Blue)
    L3 - Allocation (Gold)
```

Use When: Simple projects without portfolio management.

2-Level Hierarchy (Agilebars Only)

```
L1 - Project (Green)
  L2 - Task (Blue)
```

Use When: Agile sprint management where allocations are managed differently.

Note: Many built-in rules prevent violations of these hierarchies. For example, you cannot drop an L4 Task on an L3 Sub-Project in a 4-level hierarchy.

The Data Model: What's Stored

Your data is organized into **data stores** (similar to database tables). There are two categories:

User-Controlled Data Stores

These stores contain data you create and manage:

1. tbAdminPanel - Application Settings

- **What it stores:** Timescale settings, zoom levels, visible hierarchy levels, product license info
- **Examples:** Time Scale Start Date, Report Date, Weekly/Monthly view, Dark mode setting
- **User control:** Modified through Tools > Canvas Settings and other configuration dialogs

2. tbTimebars - Core Project Data

- **What it stores:** All bars on the Canvas—portfolios, projects, tasks, milestones, allocations
- **Examples:** Bar names, start/finish dates, costs, hours, owner, status, hierarchy
- **User control:** Created and edited via Canvas, Bar Creator, and flyout forms

3. tbMetaData - Extended Metadata

- **What it stores:** Over 100 additional fields for tagging and categorizing bars
- **Examples:** Priority, health indicators, risk scores, department, investment category
- **User control:** Edited via Core Report, Metadata View, and Spreadsheet Sync
- **Picklists:** Most fields use picklists defined in tbTags store

4. tbResources - Resource Pool

- **What it stores:** People or things that can be allocated to tasks
- **Examples:** Resource names, roles, skills, departments, locations, pay rates, availability
- **User control:** Managed via Spreadsheet Sync or Resource Listing report

5. tbTags - Picklists and Lookup Values

- **What it stores:** All dropdown list values (picklists) used throughout the application
- **Examples:** Status values (Active, On Hold, Complete), Priority levels (High, Medium, Low)
- **User control:** Edited via Editable Grids (Reports > Data Management Grids > Tags tab)
- **Purpose:** Provides consistent terminology and enables filtering/grouping

6. tbFields - Field Definitions

- **What it stores:** Metadata about all fields in the application
- **Examples:** Field names, data types, whether field is required, default values
- **User control:** Advanced users can add custom fields by editing this store
- **Purpose:** Enables dynamic form generation (FOCD - Field-Oriented Control Design)

7. tbCoreReport - Core Report Configuration

- **What it stores:** Which fields to show in the Core Report for each hierarchy level (L1-L5)
- **Examples:** Show "Cost" for L2 Projects, hide "Hours" for L1 Portfolios
- **User control:** Configured via Spreadsheet template (Core Report worksheet)

These stores are automatically calculated from your user-controlled data. You don't edit them directly—they're regenerated as needed.

1. tbBaseline - Baseline Snapshots

- **What it stores:** Copies of tbTimebars data when you set baselines
- **Purpose:** Compare current plan against original plan for variance reporting
- **Generated when:** You click "Set Baseline" button on any bar

2. tbMdJoined - Combined View

- **What it stores:** Joins tbTimebars + tbMetaData into single records (150 columns total)
- **Purpose:** Simplifies reporting—all data for one bar in one place
- **Generated when:** Canvas loads, or when you click "Recalculate All"

3. tbResCalcs - Burndown Chart Data

- **What it stores:** Time-phased hours and costs for burndown chart calculations
- **Purpose:** Powers Agilebars burndown charts
- **Generated when:** You run burndown chart calculation

4. tbResCalcs2 - Resource Demand Data

- **What it stores:** Weekly resource demand by role, skill, location, department, project
- **Purpose:** Powers resource allocation bar charts (stacked charts)
- **Generated when:** Canvas loads with allocations, or "Recalculate All"

5. tbResCalcsUsage - Resource Availability

- **What it stores:** Weekly availability of resources
- **Purpose:** Resource capacity planning
- **Generated when:** Resource data changes

6. tbCharts - Chart Post-Processing

- **What it stores:** Processed data optimized for chart rendering
- **Purpose:** Faster chart loading in Cloud Dashboard
- **Generated when:** You publish to Cloud Dashboard

How Data is Stored in Your Browser

IndexedDB Technology

What is IndexedDB?

- Built-in browser database (works in Chrome, Firefox, Edge, Safari)
- Stores structured data with indexes for fast searching
- Supports transactions (all-or-nothing operations)

- Persists data even when you close the browser
- Typically allows 50MB to 500MB+ per site

Database Details:

- **Database Name:** `timebarDB`
- **Current Version:** 7 (automatically upgrades when needed)
- **Storage Location:** Browser's IndexedDB partition
- **Typical Size:** ~5-20MB for 100-500 bars, up to 100MB for large portfolios

What This Means for You:

- Data survives browser restarts
 - Data is isolated per browser (Chrome data separate from Firefox data)
 - Data is specific to the domain (tb.timebars.com vs cb.timebars.com)
 - Clearing browser cache may delete data—**always backup first!**
-

Data Import and Export

Spreadsheet Sync

The most powerful way to bulk edit your data is with the **Spreadsheet Sync** feature.

How It Works

1. Export from App:

- Click Hamburger Icon > Export to CSV
- 13 CSV files download to your browser's Downloads folder
- Each file corresponds to one data store

2. Import to Spreadsheet:

- Open the **tbClientMaster.xlsm** template (download from Admin Menu)
- Click "Import All" button on Setup worksheet
- Data loads into worksheet tabs (Timebars, MetaData, Resources, etc.)

3. Edit in Spreadsheet:

- Use Excel features: formulas, copy-paste, fill-down, filters
- Add new rows (tasks, resources)
- Modify existing data
- Use dropdown lists for picklist fields

4. Export from Spreadsheet:

- Spreadsheet automatically exports CSVs to configured location
- Save the spreadsheet file

5. Import to App:

- Drag and drop the spreadsheet file onto the Canvas
- App reads data and updates IndexedDB
- Canvas refreshes with updated data

Spreadsheet Structure:

- **Row 1:** Database field names (e.g., `tbID`, `tbName`, `tbStart`)
- **Row 3:** User-friendly labels (e.g., "ID", "Name", "Start Date")
- **Row 4+:** Your data

Important Notes:

- System-generated stores (tbBaseline, tbMdJoined, etc.) are not in the spreadsheet—they regenerate automatically
 - Save spreadsheet before dragging back to app
 - App automatically creates backup before importing spreadsheet
-

JSON Backup Files

For complete system backups, use JSON format.

Full Backup

- Click **Hamburger Icon > Full Backup**
- Creates file: `tbFullBackup_2025-03-06_16-16-05.js`
- Includes ALL data stores (user-controlled AND system-generated)
- Timestamp in filename: `_YYYY-MM-DD_HH-MM-SS`

Restore from Backup

- Drag and drop backup file onto Canvas
- App loads all data and returns to exact state when backup was taken
- **Warning:** Overwrites current data—make a backup first if needed!

JSON Export (Individual Stores)

- Click **Hamburger Icon > Export to JSON**
 - Creates separate JSON files for each store
 - Useful for custom integrations, AI agents, or external tools
-

CSV File Import

You can import individual CSV files:

1. From Spreadsheet:

- Export single worksheet as CSV from Excel
- Drag and drop CSV onto Canvas
- App imports to corresponding store

2. From External Systems:

- Format CSV with Row 1 = field names
 - Match field names exactly to tbTimebars, tbMetaData, etc.
 - Drag and drop onto Canvas
-

Browser Download Location

Your exported files save to your browser's download folder. Here's how to find or change it:

Default Download Locations

- **Windows:** `C:\Users\<YourUsername>\Downloads`
- **Mac:** `/Users/<YourUsername>/Downloads`
- **Linux:** `/home/<YourUsername>/Downloads`

Changing Download Location

Google Chrome:

1. Settings > Advanced > Downloads
2. Click "Change" to set new folder
3. Optional: Enable "Ask where to save each file"

Mozilla Firefox:

1. Settings > Files and Applications
2. Under Downloads, choose folder or "Always ask"

Microsoft Edge:

1. Settings > Downloads
2. Click "Change" to set new folder

Safari (Mac):

1. Preferences (Cmd + ,)
 2. General tab > File download location
-

Advanced Data Operations

Duplicate Bars and Children

To copy a bar with all its children:

1. Choose **Hamburger Icon > Bulk Manage Bars**
2. Enter the **Bar ID** (find bottom-left of bar on Canvas)
3. Click **"Duplicate Bars and Children"**
4. Duplicates appear on Canvas near original
 - Names prefixed with "duplicate"

- IDs suffixed with "-d"

Use Cases:

- Template projects to reuse
 - Create multiple similar tasks
 - Testing "what-if" scenarios
-

Transfer Bars Between Products

Move bars from one product to another (e.g., Timebars to Agilebars):

1. Choose **Hamburger Icon > Bulk Manage Bars**
2. Enter the **Bar ID** to transfer
3. Enter optional **prefix** for bar ID (helps avoid duplicate IDs)
4. Click **"Transfer Bars and Children"**
5. Check Downloads folder for file: **transferBars20250307-112848.json**
6. Open the target product (e.g., Agilebars)
7. Drag and drop the transfer file onto Canvas

Use Cases:

- Waterfall project becomes Agile (Timebars → Agilebars)
 - Agile work package becomes portfolio item (Agilebars → Costbars)
 - Share project templates across products
-

Delete Database and Start Over

To completely reset the application:

1. Choose **Hamburger Icon > Delete Database**
2. **Warning:** This destroys ALL data permanently!
3. Browser history remains (page visits), but data is gone
4. Refresh browser to rebuild database with fresh Demo Data

When to Use:

- Starting completely fresh
- Troubleshooting corrupted data
- Switching to different project

Always backup first!

File Importer (Alternative to Drag-Drop)

If you don't like drag-and-drop, use the File Importer:

1. Choose **Hamburger Icon > File Importer**
2. Click **Browse** button

3. Select file(s) from your computer
4. App imports selected files

Supported Files:

- Spreadsheet (.xlsx, .xlsm)
- JSON backups (.js, .json)
- CSV files (.csv)

Automatic Backups

The application automatically creates backups before major operations:

- **Before Spreadsheet Sync:** Backup created in Downloads folder
- **Before Demo Data Load:** Backup created automatically
- **Before Delete Database:** Backup offered (optional)

Backup Naming: `tbFullBackup_YYYY-MM-DD_HH-MM-SS.js`

Tip: Keep recent backups organized in a "Timebars Backups" folder on your computer.

Data Validation and Integrity

Built-In Data Validation

The application validates data in multiple places:

1. User Interface:

- Required fields enforced
- Date pickers ensure valid dates
- Dropdown lists enforce picklist values
- Numeric fields reject non-numbers

2. Spreadsheet Import:

- Field names validated against schema
- Data types checked (dates, numbers, text)
- Foreign key references verified (e.g., resource exists)
- Unique constraints enforced (e.g., no duplicate bar IDs)
- Pre-import validation report shows errors before importing

3. Referential Integrity:

- Deleting a parent bar deletes all children (cascade delete)
- Orphaned records detected and cleaned up
- Foreign key relationships maintained

4. Transaction Atomicity:

- Multi-store operations are all-or-nothing
- If any error occurs, entire operation rolls back
- Ensures data consistency

Cloud Publishing and Synchronization

For team collaboration and cross-device access, you can optionally publish data to the Timebars Cloud.

How Cloud Publishing Works

Step 1: Publish to Cloud

1. Main Menu > Publish
2. Log in to cloud service (secondary login for security)
3. Click "Activate" (first time only)
4. Click "Re-Publish!" on PubSet with blue background
5. Data uploads to Strapi Cloud storage

Step 2: Access Cloud Dashboard

- Visit www.timebars.com/dashboard
- View reports, charts, visualizations
- Share with team members (same subscription)

Step 3: Re-Hydrate on Another Device

1. Open same app on different device (e.g., iPad)
2. Main Menu > Publish
3. Log in to cloud service
4. Click "Re-Hydrate!" on PubSet
5. Data downloads to device

Cloud Storage Details:

- **Technology:** Strapi CMS with PostgreSQL database
- **Security:** HTTPS encryption, JWT authentication
- **Control:** User-initiated only, never automatic
- **PubSets:** Up to 10 separate datasets (depends on subscription)
- **Dashboard PubSet:** Blue background—updates Cloud Dashboard

Data Flow:

```
Device A: Publish → Cloud Storage ← Re-Hydrate: Device B
                        ↓
                  Cloud Dashboard
                (Reports & Charts)
```

See [Cloud Publishing Guide](#) for complete details.

Data Ownership and Privacy

You Own Your Data

Complete Control:

- Data resides in YOUR browser by default
- No server storage unless YOU choose to publish
- Export anytime in standard formats (Excel, JSON)
- Delete anytime with full database wipe
- No vendor lock-in—standard file formats ensure portability

Privacy Guarantees:

- Application works fully offline—no internet required
- No cookies stored in your browser
- No automatic data collection or telemetry
- Cloud publishing is opt-in, not required

Security:

- HTTPS/TLS encryption for all cloud communication (bank-level)
 - JWT token authentication for cloud access
 - Passwords encrypted before storage
 - Cloud data isolated by user account
-

Troubleshooting Data Issues

Data Not Appearing After Browser Restart

Cause: Browser cache cleared or IndexedDB deleted

Solution:

1. Restore from most recent backup file
 2. Drag-drop backup onto Canvas
 3. Consider enabling browser setting to NOT clear cache on exit
-

Spreadsheet Import Fails with Validation Errors

Cause: Data doesn't match expected format or field names changed

Solution:

1. Check Row 1 field names match exactly (case-sensitive)
 2. Review validation error messages
 3. Fix errors in spreadsheet
 4. Use "Partial Import" option to import only valid rows
-

Cloud Re-Hydrate Overwrites Recent Local Changes

Cause: Re-Hydrate replaces ALL local data with cloud data

Solution:

1. **Before Re-Hydrate:** Always backup local data first
 2. Compare timestamps: Check "Last Published" date on PubSet
 3. If local data is newer, publish first, then re-hydrate
-

Browser Shows "Storage Quota Exceeded" Error

Cause: IndexedDB storage limit reached (rare, usually 50MB+)

Solution:

1. Export data to spreadsheet or JSON
 2. Delete database to free space
 3. Import only essential data back
 4. Consider splitting large portfolios across multiple products
-

Data Appears Corrupted or Inconsistent

Cause: Browser crash during write operation, or manual editing of IndexedDB

Solution:

1. Click **Recalculate All** (Right-click Canvas > Recalculate All)
 2. Regenerates all system-generated stores
 3. If still broken, restore from backup
-

Best Practices

Regular Backups

Recommended Schedule:

- **Daily:** If actively working on critical projects
- **Weekly:** For stable, ongoing work
- **Before Major Changes:** Always backup before:
 - Spreadsheet sync
 - Bulk operations
 - Demo data loads
 - Version upgrades

Backup Strategy:

1. Create "Timebars Backups" folder on your computer
2. Organize by date: `2025-03-06_ProjectName_Backup.js`

3. Keep at least 3-5 recent backups
 4. Archive older backups monthly
-

Spreadsheet Sync Workflow

Best Practice:

1. Export CSV files from app
 2. Import to spreadsheet, make changes
 3. Save spreadsheet with descriptive name
 4. **Test import on demo data first** (if major changes)
 5. Backup before importing to production data
 6. Drag spreadsheet to Canvas
 7. Verify data looks correct
 8. Keep spreadsheet file as documentation
-

Multi-Device Usage

Best Practice:

1. Designate one device as "primary"
 2. Always publish from primary after changes
 3. Always re-hydrate on secondary before working
 4. Avoid editing on multiple devices simultaneously
 5. Establish team convention: "Last person to edit publishes"
-

Data Hygiene

Keep Data Clean:

- Delete test/demo bars before production use
 - Archive completed projects (or delete if not needed for historical reference)
 - Maintain consistent naming conventions
 - Use tags/metadata consistently across team
 - Periodically review and clean up unused resources
-

Related Help Topics

- [User Interface Guide](#) - How to create, edit, and manage bars
 - [Cloud Publishing Guide](#) - Publishing to Timebars Cloud
 - [Cloud Reports Guide](#) - Using Cloud Dashboard
 - [Local Reports Guide](#) - Reports in the app
-

Summary

Key Takeaways:

1. **Data Lives in Your Browser** - IndexedDB stores everything locally
2. **You Control Movement** - Nothing syncs automatically; you decide
3. **Three Storage Options** - Browser, Spreadsheet, Cloud (all optional)
4. **Flexible Hierarchies** - 2-5 levels depending on your needs
5. **Two Store Types** - User-controlled (you edit) and System-generated (automatic)
6. **Multiple Import/Export** - Spreadsheet, JSON, CSV—choose what works
7. **Always Backup** - No undo, so backup before major operations
8. **Offline-First** - Full functionality without internet

Your data, your control, your way.

7. Picklists and Tagging Help

Source: Picklists And Tagging Help

Picklist Documentation

This document provides information about the picklists available in the Timebars Applications their default tag values.

Benefit Cost Ratio - tbMDBenefitCostRatio

Purpose: Financial scoring value used at the project level.

Current Values: > 5:1, 3:1 - 5:1, 2:1 - 3:1, 1.5:1 - 2:1, 1:1 - 1.5:1, Not Assessed

Budget Estimate - tbMDROMEstimate

Purpose: Fixed ranges for sizing a project budget

Current Values: 0 to 100K, 101K to 300K, 301K to 1000K, 1001K to 5000K, 5000K Plus

Business Advisor - tbMDBusinessAdvisor

Purpose: Project Tagging

Current Values: Mike Ba, Joe Ba, Sally Ba, Joe Ba, Sally Ba

CR Category - tbMDCategory

Purpose: Metadata to categorize Change Requests. Used at Task level if Sub-Type is CR

Current Values: Strategic, Financial, Operational, Technical, Organizational

CR Requestor - tbMDContact

Purpose: List of people who can request CR's

Current Values: Jim Soda, Allyson Soda

Calendar - tbResResourceCalendar

Purpose: Workday hours, used for calculating work on an Allocation

Current Values: 4, 7.5, 8, 24

Cost Code - tbResCostCode

Purpose: Custom Cost Code Metadata for reporting costs, mainly used at Task or Allocation level

Current Values: A26, B44, C99, D11, E11, E112

Cost Type - tbResCostCode

Purpose: Cost Type Metadata to separate costs e.g. Software, Equipment . Mainly used at Task or Allocation level

Current Values: Equipment, Hardware, Software

Cross Team Collaboration - tbPASCrossTeamCollaboration

Purpose: Helps determine the Project Assessment Score.

Current Values: Single team, 2-3 teams, 4-6 teams, 7-10 teams, Many teams/departments

Delivery Manager - tbMDDeliveryManager

Purpose: Project Tagging

Current Values: Manager of Engineering, Manager of Integration, Manager of IT

Department - tbMDDepartment

Purpose: Task or Allocation Level tagging identifying what department is responsible

Current Values: Sales and Marketing, Operations, Finance, Procurement, Business Development, Research and Development

Domain Experience - tbPASDomainExperience

Purpose: Helps determine the Project Assessment Score.

Current Values: Extensive experience, Good experience, Some experience, Limited experience, New domain

Escalation Level - tbMDEscalationLevel

Purpose: Metadata to support the Escalation process, mainly for Projects but can be used at any level.

Current Values: Executives, Directors, Project Office, Not Assessed

Estimation Class - tbMDEstimationClass

Purpose: Project Tagging for the quality of the Estimate

Current Values: SWAG, Based on History, Resource Driven

Executive Commitment - tbMDSeniorLevelCommitment

Purpose: Project Tagging for degree of management Commitment.

Current Values: Full, Strong, Moderate, Limited, Not Clear, Not Assessed

Executive Sponsor - tbMDExSponsor

Purpose: Project Tagging of who is providing the funding or sponsoring the project

Current Values: Sally Exec

ExtSystemResID - tbResExtSystemResID

Purpose: Use to tie into or integrate other systems in the organization

Current Values: 456M23, 456M24

External Integrations - tbPASExternalIntegrations

Purpose: Helps determine the Project Assessment Score.

Current Values: 1-2 simple integrations, 3-5 moderate integrations, 5+ complex integrations, Many critical integrations

Gate - tbMDGate

Purpose: Project Level tagging identifying a project gating process

Current Values: 1 Approved to Design, 2 Approved to Develop, 3 Approved to Implement, Not Applicable

Health Cost - tbMDHealthCost

Purpose: Core Health Indicators mainly used at Portfolio and Project and Sub-Project/Work Pckage Level

Current Values: Green, Yellow, Not Assessed, Red

Health Hours - tbMDHealthHours

Purpose: Core Health Indicators mainly used at Portfolio and Project and Sub-Project/Work Pckage Level

Current Values: Green, Yellow, Not Assessed, Red

Health Issues - tbMDHealthIssues

Purpose: Core Health Indicators mainly used at Portfolio and Project and Sub-Project/Work Pckage Level

Current Values: Green, Yellow, Not Assessed, Red

Health Overall - tbMDHealthOverall

Purpose: Core Health Indicators mainly used at Portfolio and Project and Sub-Project/Work Pckage Level

Current Values: Green, Yellow, Not Assessed, Red

Health Risk - tbMDHealthRisk

Purpose: Core Health Indicators mainly used at Portfolio and Project and Sub-Project/Work Pckage Level

Current Values: Green, Yellow, Not Assessed, Red

Health Schedule - tbMDHealthSchedule

Purpose: Core Health Indicators mainly used at Portfolio and Project and Sub-Project/Work Pckage Level

Current Values: Green, Yellow, Not Assessed, Red

Health Scope - tbMDHealthScope

Purpose: Core Health Indicators mainly used at Portfolio and Project and Sub-Project/Work Pckage Level

Current Values: Green, Yellow, Not Assessed, Red

Internal Rate of Return - tbMDInternalRateOfReturn

Purpose: Tagging financial values at project level.

Current Values: > 50%, 25% - 50%, 15% - 25%, 5% - 15%, < 5%, Not Assessed

Investment Category - tbMDInvestmentCategory

Purpose: Project Portfolio Balancing – Product/System Focus

Current Values: Not Assessed, Business Systems, Our Core Products, Productivity Tools, Innovation, Digital Transformation, Infrastructure and Security, Data and Analytics

Investment Initiative - tbMDInvestmentInitiative

Purpose: Project Portfolio Balancing – Capability Building

Current Values: Not Assessed, Strengthen Cybersecurity Infrastructure, Build AI/ML Capabilities, Faster response to new business opportunities, Improve employee skills, Improve product reliability, Improve productivity with Agile Teams, Source Cloud services for our Core products, Support modern digital workplace

Investment Objective - tbMDInvestmentObjective

Purpose: Project Portfolio Balancing – Business Impact

Current Values: Not Assessed, Grow the Business, Run the Business, Modernize the Business, Transform the Business

Investment Strategy - tbMDInvestmentStrategy

Purpose: Project Portfolio Balancing – Specific Business Goals

Current Values: Not Assessed, Attract and retain the best people, Improve our core products, Ensure compliance, Accelerate Time-to-Market, Improve customer service, Build Recurring Revenue Streams, Increase share of market, Reduce waste, Drive Contract Renewals, Server more customers

Issue Category - tbMDCategory

Purpose: Metadata to categorize Issues. Used at Task level if Sub-Type is Issue

Current Values: Product, Financial, Operational, Technical, Schedule

Labour Type - tbResLabourType

Purpose: Type of Resource Generic, Human or other

Current Values: Generic, Human, Other

Location - tbResLocation

Purpose: Where is resource located

Current Values: Edmonton, Halifax, Ottawa

Manager - tbResManager

Purpose: The Resources Manager

Current Values: George Bush, John Cougar, Sally Res

Market Timing - tbPASMarketTiming

Purpose: Helps determine the Project Assessment Score.

Current Values: Perfect timing, Good timing, Acceptable timing, Challenging timing, Poor timing

Mitigation Status - tbMDMitigationStatus

Purpose: Identify the status if ongoing mitigation for a Risk

Current Values: Identified, Assessed, Mitigation Planned, In Progress, Mitigated, Under Review, Accepted, Transferred, Escalated, Closed, Deferred

Net Present Value - tbMDNetPresentValue

Purpose: Tagging financial values at project level.

Current Values: > \$5M, \$1M - \$5M, \$250K - \$1M, \$50K - \$250K, < \$50K, Not Assessed

Owner - tbOwner

Purpose: Defines who owns the bar, used at every level

Current Values: Jim, Julia, Allyson, Kyle

Part-time Full-time - tbResPartTimeFullTime

Purpose: Is the Resource Full time employee or part time

Current Values: Full Time, Part Time

Payback Period - tbMDPaybackPeriod

Purpose: Set financial values at the Project Level

Current Values: < 1 year, 1 - 2 years, 2 - 3 years, 3 - 5 years, > 5 years, Not Assessed

Percent Available - tbResPercentGeneralAvailability

Purpose: Default Percent Available for the allocation.

Current Values: 10, 25, 50, 75, 100

PercentTimeAllocated - tbPercentTimeOn

Purpose: Can be used to override the percent allocated on the Allocation

Current Values: 10, 25, 50, 75, 100

Phase - tbMDPhase

Purpose: High-level Phase of Project or Program

Current Values: Closing, Executing, Initiating, Planning

Portfolios - tbMDPortfolio

Purpose: Optional field to tag a project with another Portfolio Scheme

Current Values: Building Services, Business Support Systems, Core Product Delivery, IT Platform, R&D New Technology

Primary LOB - tbMDPrimaryLineOfBusiness

Purpose: Optional field to tag a project with a Business Owner

Current Values: Business Development, Business Technology Solutions, Corporate Affairs, Engineering and Product Delivery, Human Resources, Research and Development

Primary Role - tbResPrimaryRole

Purpose: Tag resources for resource supply demand calculations

Current Values: R&D, Engineer, Developer, Tester, HR SME, Finance SME

Primary Skill - tbResPrimarySkill

Purpose: Tag resources for resource for skill visibility

Current Values: IT Architecture, Testing, Design, Project Management, Procurement, Catch All Skill, na

Product - tbMDProduct

Purpose: If this timebar is for creating a product, use this tag for reporting by Product

Current Values: Access Point, Analyzers, Antenna, Billing System, CEP, DM System, Hot spot, HR System

Project Assessment Status - tbPASStatus

Purpose: Helps determine the Project Assessment Score.

Current Values: Draft, Completed, Approved, Rejected, On Hold

Project Assessment Type - tbPASProjectType

Purpose: Helps determine the Project Assessment Score.

Current Values: Incremental Improvement, Enhancement, New Feature, New Product, Breakthrough Innovation

Project Manager - tbMDPM

Purpose: Identify a CR requester

Current Values: Jim Soda, Allyson Soda

Project Similarity - tbPASProjectSimilarity

Purpose: Helps determine the Project Assessment Score.

Current Values: Very Similar, Somewhat Similar, Moderately Different, Quite Different, Completely New

Project Status - tbStatus

Purpose: Matches OpenProject not used for now

Current Values: at_risk, off_track, on_track, discontinued, finished, not_started

Regulatory Approvals - tbPASRegulatoryApprovals

Purpose: Helps determine the Project Assessment Score.

Current Values: None required, Internal approvals, Industry standards, Government approvals, Multiple regulatory bodies

Resource Class - tbResResourceClass

Purpose: Resource Class External, Seasonal etc

Current Values: External, Permanent, Seasonal

Resource Department - tbResDepartment

Purpose: Resource belongs to what department

Current Values: Finance, Information Technology, Legal Compliance

Resource Type - tbResResourceType

Purpose: Resource type equipment, labour, material etc.

Current Values: Equipment, Labour, Material

Responsible Person - tbMDResponsibility

Purpose: Define who is responsible for Timebar when in trouble

Current Values: from tbResources table

Responsible Team - tbMDResponsibleTeam

Purpose: Project Tagging

Current Values: Product Engineering, Information Technology, Accounting, Finance, Procurement

Risk Impact - tbMDImpact

Purpose: Tagging risks for the risk score result

Current Values: Very Low, Low, Medium, High, Very High, Not Assessed

Risk Probability - tbMDProbability

Purpose: Tagging risks for the risk score result

Current Values: Very Unlikely, Unlikely, Likely, Very Likely, Certain, Not Assessed

Risk Vs Size - tbMDRiskVsSizeAndComplexity

Purpose: Supports bubble charts

Current Values: Not Assessed, 0-10 Very Small and Simple, 11-20 Small and Straightforward, 21-30 Medium with Some Complexity, 31-40 Large with Moderate Complexity, 41-50 Complex but Manageable, 51-60 Significant Complexity, 61-70 Large and Complex, 71-80 Very Large and Complex, 81-90 Highly Complex and Risky, 91-100 Extremely Complex and Risky

Schedule Status - tbMDHealth

Purpose: For Reporting Color indicators

Current Values: Completed, Early, Late, On schedule, Slipping, Not Assessed

Selected - tbMDSelectedYesNo

Purpose: For PPM Selected yns no indicators

Current Values: Yes, No, Not Assessed

Show In Reports - tbMDShowIn

Purpose: Manly used at Task, Issue, Risk, CR levels to ensure the bar shows in specific system report

Current Values: Investment Plan, Milestone Horizon, Business Case, Forward Look, Resource Requirements, Approved Budget, Launch Schedule, High-Level Timeline, Key Deliverables, Key Dates, Key Milestones, Key Risks, Key Issues

Sponsoring Department - tbMDSponsoringDepartment

Purpose: Project Tagging

Current Values: Finance, IT Department, Presidents Office, Communications Public Relations, Legal Compliance, Operations

Stage - tbMDStage

Purpose: Controlling project life-cycle workflow

Current Values: 1 Proposed, 2 Triaged, 3 Prioritized, 4 Selected, 5 Assigned, 6 Delivering, 7 Delivered, 8 Closed

Stakeholder Count - tbPASStakeholderCount

Purpose: Helps determine the Project Aessment Score.

Current Values: 1-5 stakeholders, 6-10 stakeholders, 11-20 stakeholders, 21-50 stakeholders, Over 50 stakeholders

Strategic Priority - tbMDPriorityStrategic

Purpose: Project Tagging

Current Values: High, Low, Medium

Supervisor - tbResSupervisor

Purpose: Resources supervisor, not Manager

Current Values: John Hammond, Jim Key, Helen Hunt

Team Leader - tbResTeamLeader

Purpose: Resources Team Leader

Current Values: App Team, CRM Team, Desktop Team

Team Size - tbPASTeamSize

Purpose: Helps determine the Project Assessment Score.

Current Values: 1-3 people, 4-8 people, 9-15 people, 16-30 people, Over 30 people

Team Tech Experience - tbPASTeamTechExperience

Purpose: Helps determine the Project Assessment Score.

Current Values: Expert level, Advanced, Intermediate, Basic, No experience

Technology Novelty - tbPASTechnologyNovelty

Purpose: Helps determine the Project Assessment Score.

Current Values: Proven/Mature, Established, Emerging, Cutting-edge, Experimental

Timebar Priority - tbMDPriority

Purpose: Set timebar priority

Current Values: High, Immediate, Low, Normal, Not Assessed

Timebar Status - tbMDStatus

Purpose: Mandatory values for enabling reporting.

Current Values: Rejected, In progress, New, Closed, On Hold

Type Of Initiative - tbMDProjectType

Purpose: Project Type Tagging for Portfolio Balancing

Current Values: Innovation Transformation, Mandatory Compliance, Maintenance Operational, Growth Enhancement

Vendor Dependencies - tbPASVendorDependencies

Purpose: Helps determine the Project Assessment Score.

Current Values: No vendors, 1 reliable vendor, 2-3 known vendors, Multiple/new vendors, Critical unknown vendors

WF State - tbMDState

Purpose: Workflow Life-cycle tag

Current Values: Spawned, Awaiting Input, Requested Approval, Awaiting Approval, Approved, Awaiting Review

WP Health - tbMDHealth

Purpose: For Dashboard indicators

Current Values: Not Assessed, Completed, Early, Late, On schedule, Slipping

YesNo - tbMDYesNo

Purpose: for tagging a time bar for true or false on unknown

Current Values: No, Yes

tbType - tbMDTypes

Purpose: System Internal element that defines the bar type. E.g. Task, Project etc.

Current Values: Portfolio, Project, Sub-Project, Milestone, Task, Allocation

tbTypeInternal - tbType

Purpose: System Internal element that defines the bar type. E.g. Task, Project etc.

Current Values: Portfolio, Project, Sub-Project, Task, Milestone, Allocation

8. Spreadsheet Sync User Guide

Source: Common Spreadsheet Sync User Guide

Common Spreadsheet Sync User Guide

The Spreadsheet Sync feature provides seamless data synchronization between Agilebars, Timebars, or Costbars applications and Microsoft Excel or LibreOffice Calc spreadsheets. This powerful feature enables bulk editing, advanced analysis, and efficient data management using familiar spreadsheet tools.

What is Spreadsheet Sync?

Spreadsheet Sync is an **optional feature** that allows you to move data in and out of the application quickly and efficiently. It provides **bidirectional synchronization** between the browser-based application and specially designed spreadsheets.

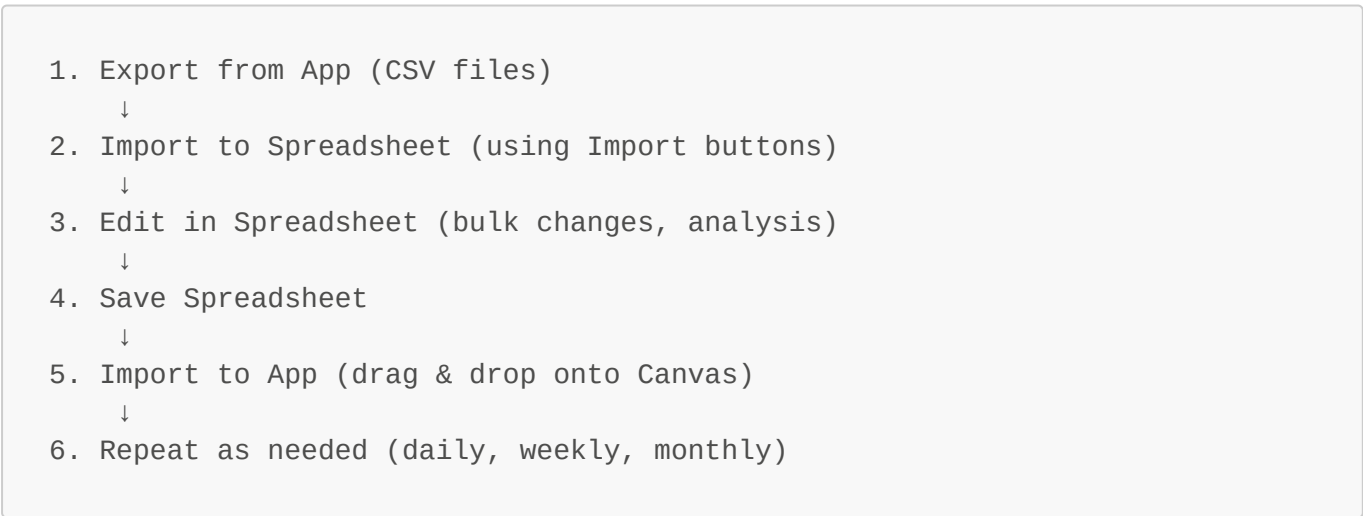
Key Benefits:

- **Bulk Data Operations:** Create, Read, Update, and Delete (CRUD) multiple items at once
- **Spreadsheet Power:** Use copy-paste, fill-down, formulas, filtering, sorting, and conditional formatting
- **Data Validation:** Built-in spreadsheet validators highlight data quality issues
- **Offline Editing:** Work on data offline in your preferred spreadsheet application
- **No Vendor Lock-In:** Standard Excel/LibreOffice formats ensure data portability
- **Backup and Recovery:** Spreadsheet serves as an additional backup of your data
- **Available to All Users:** Works with both licensed and free accounts

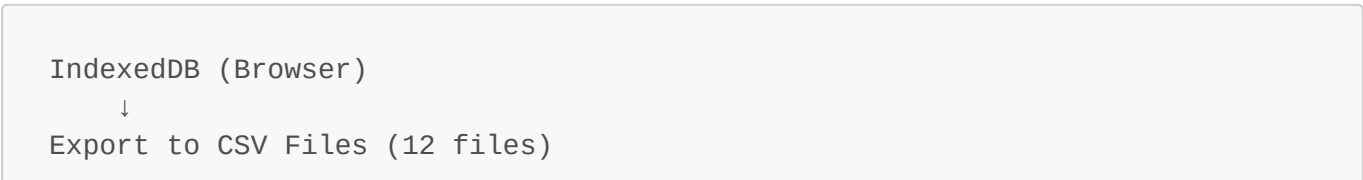
How Spreadsheet Sync Works

Spreadsheet Sync operates through a simple cycle that leverages CSV file exports and custom spreadsheet code:

The Sync Cycle



Data Flow Pattern



```
↓  
Spreadsheet Import (configurable location)  
↓  
[Edit in Excel/LibreOffice Calc]  
↓  
Save Spreadsheet  
↓  
Drag & Drop onto Canvas  
↓  
IndexedDB Updated
```

Spreadsheet Template Files

Two template files are available, both specially designed to sync with all Timebars products:

Download Options

Excel Template:

- Choose **Hamburger Icon > Download Excel SS**
- File: **tbClientMaster.xlsm** (macro-enabled workbook)
- Format: XLSX (Office Open XML)
- Download URL: <https://cdn.timebars.com/common/tbClient2023v1.xlsm.removeMe>
- Compatible with: Microsoft Excel

LibreOffice Calc Template:

- Choose **Hamburger Icon > Download Libre Office Calc SS**
- File: **tbClientAllSheetsMasterDec30.ods**
- Format: ODS (OpenDocument Spreadsheet)
- Download URL: <https://cdn.timebars.com/common/tbClientAllSheetsMasterDec30.ods>
- Compatible with: LibreOffice Calc, OpenOffice Calc

Important File Naming Rule: The filename must begin with "**tbClient**" for the import to function correctly. Do not rename the downloaded file to something that doesn't start with "tbClient".

File Location

Downloaded files save to your browser's download folder:

- **Windows:** **C:\Users\<YourUsername>\Downloads**
- **Mac:** **/Users/<YourUsername>/Downloads**
- **Linux:** **/home/<YourUsername>/Downloads**

Step-by-Step: Complete Sync Workflow

Step 1: Export Data from App

Export your application data as CSV files:

1. Click **Hamburger Icon > Export to CSV**
2. **12 CSV files** are created in your browser's download folder
3. Wait for all files to finish downloading

CSV Files Generated:

File Name	Data Store	Description
tbTimebars.csv	tbTimebars	Core scheduling data (bars, dates, hierarchy)
tbMetaData.csv	tbMetaData	Core metadata fields for tagging bars
tbResources.csv	tbResources	Resource Pool (people, skills, roles)
tbTags.csv	tbTags	Picklist data (dropdown values)
tbFields.csv	tbFields	FOCD form field configuration
tbCoreReport.csv	tbCoreReport	Metadata field visibility control
tbAdminPanel.csv	tbAdminPanel	Canvas settings and holiday exceptions
tbBaseline.csv	tbBaseline	Baseline for core scheduling data
tbMdJoined.csv	tbMdJoined	System-generated for reports and graphs
tbResCalcs.csv	tbResCalcs	System-generated for reports and graphs
tbResCalcs2.csv	tbResCalcs2	System-generated for reports and graphs
tbDocuments.csv	tbDocuments	Not currently used

Note: System-generated CSV files (tbBaseline, tbMdJoined, tbResCalcs, tbResCalcs2) are included for reference but should not be edited. These regenerate automatically from source data.

Step 2: Configure Spreadsheet Import Location

Before importing CSV files into the spreadsheet, configure the import location:

1. **Open the Spreadsheet** template file you downloaded
2. **Navigate to Setup Tab** (first tab in workbook)
3. **Find the "Import / Export Configuration Sheet"** section
4. **Set the Location column** to match your browser's download directory

Examples:

- Windows: C:\Users\jcox\Downloads
- Mac: /Users/jcox/Downloads
- Linux: /home/jcox/Downloads

Important: Use the exact path to your Downloads folder where the CSV files were saved.

Step 3: Import CSV Files into Spreadsheet

Import the CSV data into the spreadsheet worksheets:

Option 1: Import All Data (Recommended)

1. On the **Setup Tab**, click the **"Import All"** button
2. Spreadsheet code reads all CSV files from configured location
3. Data populates across multiple worksheet tabs
4. Wait for import to complete

Option 2: Import Individual Stores

1. Navigate to specific worksheet tab (e.g., **Timebars** tab, **MetaData** tab)
2. Click the individual **Import** button on that tab
3. Data from corresponding CSV file imports to that worksheet only

Import Control: The Setup page includes an "Import Yes/No" column that controls which stores import when using "Import All". Only stores marked "Yes" will import.

Step 4: Edit Data in Spreadsheet

Now you have full spreadsheet power to manage your data:

Spreadsheet Structure

Each worksheet mirrors an IndexedDB data store:

- **Row 1:** Database field names (e.g., **tbID**, **tbName**, **tbStart**)
- **Row 3:** User-friendly labels (e.g., "ID", "Name", "Start Date")
- **Row 4+:** Your data rows

Do not modify Row 1 or Row 3—these headers are required for import validation.

Powerful Editing Capabilities

Copy and Paste:

- Copy data from other sources
- Copy rows to create similar items
- Paste multiple values at once

Fill-Down:

- Select a cell and drag down to fill multiple rows
- Quickly assign same value to many items

Formulas and Calculations:

- Use Excel/Calc formulas for calculations
- Derive values from other columns
- Aggregate data with SUM, AVERAGE, etc.

Filtering and Sorting:

- Filter to show specific items (e.g., only "High Priority" tasks)
- Sort by any column to organize data
- Multi-level sorting supported

Conditional Formatting:

- Highlight rows based on criteria
- Color-code by status, priority, or health
- Visual identification of problem areas

Data Validation:

- Built-in dropdown lists for picklist fields
- Date pickers for date fields
- Numeric constraints prevent invalid entries

Bulk Edits:

- Change status for multiple items at once
- Reassign owner across many tasks
- Update dates for entire project

Add New Rows:

- Create new tasks, resources, or metadata entries
- Add new picklist values to Tags tab
- Define new custom fields in Fields tab

Delete Rows:

- Remove unwanted items by deleting rows
- Clean up old data quickly

Step 5: Save Spreadsheet

After making edits:

1. **Save the spreadsheet file** using your spreadsheet application's Save function
 - Excel: File > Save or Ctrl+S (Cmd+S on Mac)
 - LibreOffice: File > Save or Ctrl+S
2. **Keep the filename** starting with "tbClient"

Important Note: The spreadsheet automatically exports updated CSVs to your configured location when you save (if macros are enabled). This prepares the data for import back into the application.

Step 6: Import Spreadsheet Back to Application

Return your edited data to the application:

1. Open your Timebars application in the browser
2. **Drag and drop** the saved spreadsheet file onto the **Canvas**
3. Application processes the file
4. **Automatic backup** is created before import
5. IndexedDB updates with new data
6. Canvas refreshes to display updated bars
7. All changes are now live in the application

Alternative Import Method: If you prefer not to drag-and-drop:

1. Click **Hamburger Icon > File Importer**
 2. Click **Browse** button
 3. Select the spreadsheet file
 4. Click import
-

Data Validation and Quality

Built-In Validators

The spreadsheet includes **macro-based validators** that check data quality:

Validation Checks:

- **Required fields present:** Ensures mandatory columns have values
- **Data types match:** Verifies dates are dates, numbers are numbers
- **Foreign key references exist:** Checks that referenced items (e.g., resources, tags) exist
- **Unique constraints satisfied:** Prevents duplicate IDs
- **Business rule validation:** Validates date ranges, hierarchy rules

Visual Indicators:

- **Red highlighting:** Indicates potential issues or missing mandatory columns
- **Dropdown lists:** Ensure valid picklist values
- **Conditional formatting:** Shows data quality problems

Validation Range Reference: The spreadsheet includes a **BulkOperations** worksheet containing validation metadata:

- Location: **BulkOperations!\$A\$1:\$H\$374**
 - Contains: Field names, data types, mandatory flags, validation rules
 - Purpose: Ensures data integrity during import operations
 - Note: BulkOperations worksheet is reference data, not a data store to edit
-

Important Rules and Warnings

Critical Rules

Rule 1: Do Not Edit in Both Places Simultaneously

 **Warning:** Do not make edits in the application while data is in the spreadsheet. This could lead to **overwriting and loss of changes**.

Best Practice:

- Export to spreadsheet
 - Close or don't use the application
 - Edit in spreadsheet
 - Save spreadsheet
 - Import back to application
 - Resume using application
-

Rule 2: Always Backup Before Major Changes

Importing a spreadsheet overwrites existing application data. The application **automatically creates a backup** before import, but you can manually backup too:

- Click **Hamburger Icon > Full Backup** before exporting to spreadsheet
 - Backup file: **tbFullBackup_YYYY-MM-DD_HH-MM-SS.js**
 - Restore by dragging backup file onto Canvas
-

Rule 3: Preserve Row 1 and Row 3 Headers

- **Row 1:** Database field names (must match exactly for import to work)
 - **Row 3:** User-friendly labels (for your reference)
 - **Do not modify** these rows or import will fail
-

Rule 4: System-Generated Stores Are Read-Only

Do not edit these worksheets—they regenerate automatically:

- tbBaseline (regenerated when you set baselines)
 - tbMdJoined (joined view of tbTimebars + tbMetaData)
 - tbResCalcs (burndown chart calculations)
 - tbResCalcs2 (resource demand calculations)
-

Common Use Cases

Use Case 1: Bulk Create Tasks

Scenario: You need to add 50 tasks to a project

Steps:

1. Export to CSV
2. Import to spreadsheet

3. Go to **Timebars** tab
4. Copy an existing task row
5. Paste 50 times
6. Edit task names using Fill-Down and manual changes
7. Update dates, owners, status
8. Save spreadsheet
9. Import to app

Result: 50 tasks created in minutes instead of hours of manual entry.

Use Case 2: Resource Pool Management (Timebars & Costbars)

Scenario: Maintain your organization's resource pool

The resource pool is managed in the **Resources** tab of the spreadsheet.

Add Resources:

1. Export to CSV, import to spreadsheet
2. Go to **Resources** tab
3. Add rows with resource data:
 - Name, Email
 - Primary Role (Developer, Architect, PM, QA, etc.)
 - Primary Skill (Java, Python, Cloud, Database, etc.)
 - Location/Office
 - Department
 - Pay Rate, Cost Code
 - Availability, Capacity
 - Manager, Team Leader
4. Save and import back

Update Resources:

- Bulk update pay rates
- Change departments for multiple resources
- Update skills and roles
- Adjust availability calendars

Result: Efficient resource pool maintenance for allocation to tasks.

Use Case 3: Metadata Coding and Tagging

Scenario: Assign custom metadata tags to categorize and report on project work

Metadata Coding Structure: There are over 100 metadata fields that can be configured for tagging bars at various levels, enabling flexible reporting and organization.

Steps:

1. Export to CSV, import to spreadsheet
2. Go to **MetaData** tab
3. Edit metadata columns:
 - Status, Priority, Health indicators
 - Category, Department, Investment Type
 - Custom fields specific to your organization
4. Use Fill-Down to assign same value to multiple items
5. Use formulas to derive values
6. Save and import back

Maintain Picklist Values:

1. Go to **Tags** tab
2. Add or modify picklist values
3. Tags are pre-determined within the application but can be changed to suit your needs
4. No complex code tables—just spreadsheet maintenance

Result: Organize and break down project work by any structure. Assign codes to bars enabling virtually any view or report of your project information.

Use Case 4: Seed Data and Custom Configuration

Scenario: Configure custom picklists and field settings

Seed Data Included: The spreadsheets come preloaded with seed data allowing the app to function. You can change this data to customize the application:

Custom Picklist Data:

1. Edit **Tags** tab
2. Add custom status values, priorities, categories
3. Define organization-specific terminology
4. Save and import to see custom metadata in action

Field Configuration:

1. Edit **Fields** tab (tbFields)
2. Add or remove fields from FOCD forms
3. Configure field visibility, types, positions
4. Customize Core Report field visibility per hierarchy level

Core Report Configuration:

1. Edit **CoreReport** tab
2. Control which metadata fields show at each hierarchy level (L1-L5)
3. Example: Show "Project Number" at L2 (Project) but not at L4 (Task)

Result: Application customized to your organization's terminology and processes.

Use Case 5: Data Analysis and Reporting

Scenario: Analyze project data using advanced spreadsheet features

Analysis Capabilities:

- Create pivot tables to summarize data
- Build custom charts and graphs
- Use formulas to calculate KPIs
- Conditional formatting for visual dashboards
- Export to PDF for distribution

Portfolio Tab (Macros Enabled): The spreadsheet includes a Portfolio tab that enables further analysis and custom reporting when macros are enabled.

Result: Leverage spreadsheet power for analysis beyond application's built-in reports.

Use Case 6: Offline Editing

Scenario: Work on project data without internet connection

Steps:

1. Export to CSV while online
2. Import to spreadsheet
3. Work offline on airplane, remote location, etc.
4. Make all changes in spreadsheet
5. Save spreadsheet
6. When back online, import to application

Result: Productivity continues even without internet access.

Use Case 7: Data Migration and Integration

Scenario: Import project data from other systems

Steps:

1. Export data from other system as CSV
2. Open Timebars spreadsheet template
3. Map other system's columns to Timebars columns
4. Paste data into appropriate worksheets
5. Adjust data to match Timebars format (dates, IDs, hierarchy)
6. Validate data using built-in validators
7. Save and import to Timebars application

Result: Migrate project data from legacy systems or integrate with other tools.

Data Transformations During Sync

Understanding how data transforms during export/import helps troubleshoot issues:

Export Transformations (App → Spreadsheet)

When exporting from application to CSV/spreadsheet:

- **Date Objects** → Excel date serial numbers
- **Boolean Values** → "Yes"/"No" text
- **Null Values** → Empty cells
- **Foreign Keys** → Human-readable lookup values (where applicable)

Import Transformations (Spreadsheet → App)

When importing spreadsheet back to application:

- **Excel Date Serial Numbers** → Date objects
- **"Yes"/"No" Text** → Boolean values
- **Empty Cells** → Null values
- **Human-Readable Values** → Foreign key IDs (where applicable)

Technical Details

Spreadsheet Technology

Export Engine:

- Client-side JavaScript using SheetJS/xlsx library
- Generates XLSX file structure in browser
- No server processing required

Import Engine:

- SheetJS library parses XLSX file structure
- Each worksheet mapped to corresponding IndexedDB store
- Validation occurs before data writes to database

Custom Code: The spreadsheet template includes embedded custom code (macros) that:

- Imports CSV files when Import buttons are clicked
- Exports updated CSVs when spreadsheet is saved
- Validates data quality
- Highlights errors in red

Encoding and Compatibility

Character Encoding:

- UTF-8 encoding for international character support
- Supports all languages and special characters

File Format Compatibility:

- XLSX: Office Open XML format (Microsoft Excel)
- ODS: OpenDocument Spreadsheet (LibreOffice Calc)
- Both formats fully supported

Data Store Mapping

The spreadsheet worksheets directly mirror IndexedDB data stores:

Worksheet Tab	IndexedDB Store	Editable	Purpose
AdminPanel	tbAdminPanel	Yes	Canvas settings, holidays
Timebars	tbTimebars	Yes	Core bars (portfolios, projects, tasks)
MetaData	tbMetaData	Yes	100+ metadata fields
Resources	tbResources	Yes	Resource pool
Tags	tbTags	Yes	Picklist dropdown values
Fields	tbFields	Yes	FOCD form field configuration
CoreReport	tbCoreReport	Yes	Core Report field visibility
Baseline	tbBaseline	No	Baseline snapshot (system-generated)
MdJoined	tbMdJoined	No	Joined view (system-generated)
ResCalcs	tbResCalcs	No	Burndown data (system-generated)
ResCalcs2	tbResCalcs2	No	Resource demand data (system-generated)
Documents	tbDocuments	No	Not currently used

Troubleshooting

Import Fails with Validation Errors

Problem: Spreadsheet won't import, shows validation errors

Possible Causes:

- Modified Row 1 field names
- Data type mismatch (text in date field, etc.)
- Foreign key references don't exist (e.g., assigned non-existent resource)
- Unique constraint violation (duplicate IDs)

Solutions:

1. Check validation error messages in import dialog
2. Verify Row 1 field names match exactly (case-sensitive)
3. Ensure dates are formatted correctly

4. Check that referenced items exist (resources in tbResources, tags in tbTags)
 5. Verify no duplicate IDs in tbID column
 6. Check red-highlighted cells in spreadsheet for issues
-

Spreadsheet File Won't Import

Problem: Drag-drop does nothing or shows error

Possible Causes:

- Filename doesn't start with "tbClient"
- File is not .xlsx or .ods format
- File is corrupted

Solutions:

1. Verify filename starts with "**tbClient**" (e.g., **tbClientMaster.xlsx**)
 2. Ensure file extension is .xlsx or .ods
 3. Try re-downloading template and re-importing CSV data
 4. Use File Importer instead of drag-drop: Hamburger Icon > File Importer
-

Changes Not Appearing After Import

Problem: Imported spreadsheet but changes don't show on Canvas

Possible Causes:

- Edited system-generated worksheets instead of user-controlled ones
- Forgot to save spreadsheet before import
- Canvas needs refresh

Solutions:

1. Verify you edited the correct worksheets (Timebars, MetaData, Resources, Tags, Fields, CoreReport, AdminPanel)
 2. Ensure you saved spreadsheet before drag-drop
 3. Click **Refresh** button on top menu
 4. If still not appearing, click **Recalculate All** (Right-click Canvas > Recalculate All)
-

Import Overwrote Recent Changes

Problem: Imported spreadsheet but lost recent work done in application

Possible Causes:

- Edited in both places (application and spreadsheet) simultaneously
- Imported old spreadsheet instead of current one

Solutions:

1. Restore from automatic backup created before import:
 - Check Downloads folder for `tbFullBackup_YYYY-MM-DD_HH-MM-SS.js`
 - Drag backup file onto Canvas to restore
 2. Next time: Follow Rule 1 (don't edit in both places)
-

CSV Files Not Found During Spreadsheet Import

Problem: Click "Import All" in spreadsheet but no data imports

Possible Causes:

- Setup Tab location path is incorrect
- CSV files not in the specified location
- Permission issues accessing folder

Solutions:

1. Verify **Setup Tab > Location** column matches your Downloads folder exactly
 2. Check that 12 CSV files are in that folder
 3. Use full absolute path (e.g., `C:\Users\jcox\Downloads` not `Downloads`)
 4. On Mac/Linux, ensure correct path format: `/Users/jcox/Downloads`
 5. Try copying CSV files to a simpler location (e.g., `C:\Temp`) and update Setup Tab
-

Macros Not Working in Spreadsheet

Problem: Import/Export buttons don't work in spreadsheet

Possible Causes:

- Macros disabled in Excel/LibreOffice
- Opened spreadsheet in "Protected View"

Solutions:

1. **Excel:** Enable macros when prompted, or go to File > Options > Trust Center > Trust Center Settings > Macro Settings > Enable all macros
 2. **Excel:** If in Protected View, click "Enable Editing" banner at top
 3. **LibreOffice:** Tools > Options > Security > Macro Security > Medium or Low
 4. Close and reopen spreadsheet after changing settings
-

Best Practices

Regular Sync Schedule

Establish a regular sync schedule based on your needs:

Daily Sync:

- For active projects with frequent changes

- At end of each workday
- Ensures spreadsheet backup is recent

Weekly Sync:

- For stable, ongoing projects
- Every Friday afternoon
- Balances effort and data freshness

Monthly Sync:

- For portfolio-level analysis
 - Before executive reviews
 - Resource capacity planning updates
-

Safe Editing Workflow

Recommended Workflow:

1. **Backup:** Manually backup first (Hamburger Icon > Full Backup)
 2. **Export:** Export to CSV
 3. **Import:** Import CSVs to spreadsheet
 4. **Close App:** Close browser tab or don't use application
 5. **Edit:** Make changes in spreadsheet
 6. **Save:** Save spreadsheet
 7. **Verify:** Check automatic backup exists in Downloads folder
 8. **Import:** Drag spreadsheet to Canvas
 9. **Verify:** Check changes appear correctly
 10. **Resume:** Continue using application
-

Version Control

Maintain spreadsheet versions for tracking changes:

Naming Convention:

- `tbClient_ProjectName_2025-03-06.xlsm`
- Include date in filename
- Keep recent 3-5 versions

Benefits:

- Track changes over time
 - Restore previous state if needed
 - Historical record of project evolution
-

Collaborative Editing

If multiple people need to edit data:

Option 1: Serial Editing

- Person A exports, edits, imports
- Person A notifies Person B
- Person B exports, edits, imports

Option 2: Divide by Data Store

- Person A edits Timebars and MetaData
- Person B edits Resources and Tags
- Export, edit, import separately

Option 3: Use Cloud Publishing

- For real-time collaboration, use Cloud Publishing feature
- See [Cloud Publishing Guide](#)

Data Hygiene

Keep spreadsheet data clean:

Before Import:

- Remove test data rows
- Delete unused picklist values
- Verify dates are in correct format
- Check for duplicate IDs

During Edit:

- Use consistent naming conventions
- Maintain hierarchy rules (L1-L5)
- Validate foreign key references
- Fill mandatory fields

Summary

Key Takeaways:

1. **Bidirectional Sync:** Export to spreadsheet, edit, import back—repeat as needed
2. **Bulk Power:** Use spreadsheet features for efficient data management (copy-paste, fill-down, formulas)
3. **Two Templates:** Excel (.xlsm) and LibreOffice Calc (.ods) both supported
4. **12 CSV Files:** Export generates 12 files; 7 are user-editable, 5 are system-generated
5. **Configure Location:** Set import path in Setup Tab to your Downloads folder
6. **Automatic Backup:** Application backs up before import for safety
7. **Rule #1:** Don't edit in both places simultaneously—prevents overwrites
8. **Filename Matters:** Must start with "tbClient" for import to work
9. **Validation Built-In:** Spreadsheet validators highlight data issues in red

10. **Flexible Schedule:** Sync daily, weekly, or monthly based on needs

Spreadsheet Sync transforms data management from tedious form entry into efficient bulk operations, leveraging the full power of spreadsheet tools while maintaining data integrity.

Related Help Topics

- [Data Structure Guide](#) - Understanding data stores and hierarchy
 - [User Interface Guide](#) - Creating and editing bars on Canvas
 - [Cloud Publishing Guide](#) - Publishing to Timebars Cloud
 - [Local Reports Guide](#) - Reports and analysis
-

Template Download Links

- **Excel Template:** <https://cdn.timebars.com/common/tbClient2023v1.xlsm.removeMe>
- **LibreOffice Calc Template:** <https://cdn.timebars.com/common/tbClientAllSheetsMasterDec30.ods>

Support:

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

9. FOCD Forms User Guide

Source: FOCD Forms User Guide

Introduction to FOCD Forms

FOCD (Forms on Cached Data) is a technology developed by Timebars Ltd. These forms utilize IndexedDB for storing data locally in the user's browser and integrate with the Spreadsheet sync feature.

FOCD Forms allows users to add and remove fields from forms within our applications without writing code or requiring assistance from IT administrators. Users configure forms by entering data into a spreadsheet and synchronizing it with the application. This users to quickly adapt to business needs while reducing costs associated with software development.

Key Concepts

Configuration Method

FOCD Forms are configured primarily through a spreadsheet interface, which interacts with the forms via pre-configured JavaScript. The forms and their fields are dynamically generated based on the data entered in the spreadsheet, allowing for a high degree of customization.

Technology Foundation

- **IndexedDB:** Utilized for offline storage of form data, enabling fast and secure data handling directly within the user's browser.
- **Spreadsheet Configuration:** Users configure forms by modifying a provided Spreadsheet file, which details the field names, types, and other attributes necessary for field creation.
- **No-code GUI:** The user-friendly GUI supports field positioning and testing without writing any code, directly through drag-and-drop interfaces and simple button actions.

Application Structure

The application includes several built-in forms where users can add or remove fields. However, the number of available forms is fixed—users cannot create new forms but can configure existing ones to suit their business processes, including customizing field labels in the UI.

Form Configuration Process

Understanding Form Names

Each form in the system has a specific identifier. You must use the correct form name when configuring fields in the spreadsheet. Below are the available forms:

Sure! Here's that table converted into a simple list with headings, no horizontal lines:

Spreadsheet Form Name List

- **PF1**
L1 Flyout Right Form
- **PJ1**
L2 Flyout Right Form
- **SPJ1**
L3 Flyout Right Form
- **TASK1**
L4 Flyout Right Form
- **ALLOC1**
L5 Flyout Right Form
- **dfRisk**
Risk Form
- **dfIssue**
Issues Form

Dynamic Fields Spreadsheet Configuration

The spreadsheet is the primary tool for configuring FOCD Forms. Here's an example of how the spreadsheet is structured:

ID	Coord Top	Coord Left	Width	Name	Type	Form Name	Label
1	192.43	289.95	75	tbID	NoPicklist	ALLOC1	UID
2	46	8	567	pfBand	Band	ALLOC1	Allocation Key Metadata
3	100	8	225	tbName	NoPicklist	ALLOC1	Allocation Name

Key Spreadsheet Columns Explained:

- **ID:** Unique identifier for the field in the data store
- **Coord Top** and **Coord Left:** Estimated position of the field on the form in pixels
- **Width:** The width of the field in pixels
- **Name:** Must match an existing field name in the data store
- **Type:** Indicates whether the field has a picklist or not (e.g., "NoPicklist" or "With Picklist")
- **Form Name:** Specifies which form the field appears on (e.g., "ALLOC1")
- **Label:** The text that will display in the UI for this field

Step-by-Step Configuration

1. Form Identification:

- Determine which form you need to customize
- Note the correct SS Form Name from the table above

2. Adding Fields:

- Open the provided Spreadsheet spreadsheet
- Navigate to the Fields tab
- Add a new row for each field you want to add
- Fill in all required columns as described above
- Save your changes to the spreadsheet

3. Synchronization:

- Upload the updated spreadsheet to your currently running application (Agilebars, Timebars or Costbars)
- The system will process your configurations and update the field configurations accordingly

4. Testing and Adjustment:

- Visit the target form to test your changes
- You may need to adjust the estimated field positions for better alignment by using the blue buttons at the top of the form.

Field Positioning and Layout

Adjusting Fields Position

FOCD Forms provide four blue icons/buttons at the top of the interface for moving and resizing fields:

1. Click the second icon from the left to move one field at a time
2. Click the third icon from the left to move multiple fields at once

When these tools are activated, dotted lines will appear around the fields to indicate they can be moved. Simply:

- Click and drag fields to new positions
- When finished, click the blue Square icon to save your sizing and positioning changes

This visual interface makes it easy to fine-tune the form layout without editing the spreadsheet directly.

Advanced Configuration

Picklist Configuration

If your fields require dropdown options (picklists), follow these steps:

1. In the Fields spreadsheet tab, set the "Type" column to "With Picklist"
2. In the "Picklist Name" column, enter a value that exists in the Tags spreadsheet
3. You can either:
 - Use an existing picklist name from the Tags Spreadsheet Tab
 - Create a new picklist by adding entries to the Tags table

Quill Text Editor Integration

A rich text editor (Quill) is available for certain fields, allowing users to enter and format text with options like bold, italics, and more. The Quill editor is an open-source framework that has been integrated into the application but is only available on specific fields (TBD to be determined).

Testing Your Configuration

- **Field Behavior:** Enter test data into each field to ensure it behaves as configured
- **Data Validation:** Check that validation rules in the spreadsheet work as expected
- **Field Visibility:** Test any conditional display logic you've configured
- **Layout:** Confirm that the visual layout meets your requirements

Support and Additional Resources

For additional support, consult the detailed help documentation available online or contact our technical support team. Training videos and FAQs are also available to guide you through more complex configurations and troubleshooting.

This user guide serves as a comprehensive framework to start using FOCD Forms effectively, emphasizing the ease with which forms can be customized and managed without coding skills.

10. Supply and Demand Grids User Guide

Source: Common Supply and Demand Grids User Guide

Common Supply and Demand Grids User Guide

Overview

The Supply vs Demand grid is a strategic resource management tool that provides visibility into resource capacity planning and allocation across projects. It enables resource managers and project managers to identify capacity gaps, prevent over-allocation, and make informed decisions about resource assignments and hiring needs.

Purpose and Use Cases

What Are Supply and Demand Grids?

Supply represents the available capacity of resources in your organization - the total FTE (Full-Time Equivalent) or hours that resources can work based on their employment contracts, calendars, and availability.

Demand represents the actual resource requirements from project allocations - how much capacity is being consumed by tasks and projects that resources are assigned to.

Why Do We Need These Grids?

The gap between supply and demand reveals critical resource management issues:

- **Over-allocation:** When demand exceeds supply, resources are over-committed and projects are at risk
- **Under-utilization:** When supply exceeds demand, you have unused capacity that could be deployed
- **Future capacity planning:** Identifying when you'll need to hire, train, or contract additional resources
- **Portfolio decisions:** Understanding if you have capacity to take on new projects

Who Uses These Grids?

Resource Managers use these grids to:

- Balance workloads across the organization
- Identify hiring needs 3-6 months in advance
- Resolve resource conflicts and over-allocations
- Optimize resource utilization rates

Project Managers use these grids to:

- Understand if sufficient resources are available for their projects
- Plan project schedules based on resource availability
- Request additional resources when gaps are identified
- Adjust project timelines when resources are over-committed

Portfolio Managers use these grids to:

- Assess organizational capacity for new work
- Make go/no-go decisions on project proposals
- Prioritize projects based on resource constraints
- Plan strategic initiatives around resource availability

Executive Leadership uses these grids to:

- Make hiring and budgeting decisions
- Understand organizational capacity at a high level
- Evaluate departmental utilization and productivity
- Align business strategy with resource capacity

The Five Summary Rows

At the top of the grid, five critical rows provide aggregated metrics:

1. Supply (FTE) Row - Blue Background

What it shows: Total available resource capacity across all resources in the pool

Data source:

- Sourced from the **tbResources** store (resource pool)
- Fields: **tbResMonth1** through **tbResMonth24**
- Each resource has monthly FTE availability defined (typically 1.0 for full-time)
- Sums ALL resources regardless of the groupBy selection

Example: If you have 6 full-time resources (1.0 FTE each), the supply shows 6.0 FTE per month

Timing considerations:

- Resource start dates (**tbResStart**) are factored in - new hires only contribute from their start month
- Resource finish dates (**tbResFinish**) are factored in - departing resources stop contributing
- This allows forward planning for known hiring or departures

2. Demand (FTE) Row - Green Background

What it shows: Total resource requirements from all project allocations

Data source:

- Calculated from the **tbResCalcsUsage** store
- Generated by aggregating task allocations across all projects
- Fields: **tbResCalcMonth1** through **tbResCalcMonth32**
- Respects the groupBy filter - only sums demand for the filtered resources/projects/roles

Calculation process:

1. Task allocations are split into monthly buckets (via **splitAllocHoursMonthly**)
2. Each task's total work is distributed across its duration
3. Work hours per day are calculated: **totalWork / numberOfWorkDays**
4. Monthly hours are summed for each resource

5. Converted to FTE: $\text{monthlyHours} / (8 \text{ hours/day} \times 20 \text{ work days/month})$

3. Variance (S-D) Row - Yellow Background

What it shows: The difference between Supply and Demand (Supply minus Demand)

Color coding:

- **Green text** (positive variance): You have excess capacity - resources are under-utilized
- **Red text** (negative variance): You have a capacity deficit - resources are over-allocated

Strategic interpretation:

- Small negative variance (< 0.2 FTE): Minor over-allocation, manageable with overtime
- Large negative variance (> 0.5 FTE): Serious capacity problem, need to hire or delay projects
- Consistent positive variance: Opportunity to take on more work or reduce headcount

4. Month Header Row - Gray Background

What it shows: The calendar months for each column

Format: "MMM YYYY" (e.g., "Sep 2025", "Oct 2025")

Start date: Begins with the **apStatusDate** from the Admin Panel configuration

- This is typically set to the current month or the project baseline date
- Allows historical analysis by setting status date in the past
- Enables future planning by projecting 24+ months forward

5. Resource/Project/Role Header Row - White Background

What it shows: The first column header, which changes based on groupBy:

- "Resource ID/Owner" when grouping by ResourceName
- "Project Name" when grouping by Project
- "Role" when grouping by Role

View Modes and Configurations

FTE vs Hours Toggle

FTE (Full-Time Equivalent):

- Standard view for strategic planning
- 1.0 FTE = one full-time resource for one month
- Easier to understand capacity at a glance
- Recommended for executive reporting and high-level planning

Hours:

- Detailed view for tactical planning
- Shows actual work hours (e.g., 160 hours/month for 1.0 FTE)
- Useful for detailed project scheduling

- Helps with billing and time-tracking analysis

Conversion formula:
$$\text{FTE} = \text{Hours} / (\text{Calendar hours per day} \times \text{Working days per period})$$

For monthly:

$$\text{FTE} = \text{Hours} / (8 \text{ hours/day} \times 20 \text{ days/month}) = \text{Hours} / 160$$

For weekly:

$$\text{FTE} = \text{Hours} / (8 \text{ hours/day} \times 5 \text{ days/week}) = \text{Hours} / 40$$

Note: Supply totals are always calculated in FTE from the resource pool, then converted to hours if needed. The conversion uses: $\text{Hours} = \text{FTE} \times 8 \times 21$ (assuming 21 working days per month).

Weekly vs Monthly Toggle

Monthly View:

- Displays resource capacity and demand by calendar month
- Better for long-term strategic planning (6-24 months out)
- Smooths out weekly variations
- Recommended for portfolio planning and hiring decisions
- Supply and demand totals are shown

Weekly View:

- Displays resource capacity and demand by work week (Monday-Friday)
- Better for short-term tactical planning (1-3 months out)
- Shows week-to-week fluctuations
- Useful for identifying specific bottleneck weeks
- Currently does NOT show supply/demand totals (demand data only)

Why monthly is preferred for supply/demand analysis:

- Resource supply data is typically managed monthly (hiring, contracts)
- Weekly granularity creates noise in capacity planning
- Monthly aligns with financial planning and reporting cycles

Group By Options

The groupBy selection controls how demand rows are organized, but does NOT affect supply totals.

Group By: Project

Use case: Understanding capacity allocated to each project

What you see:

- One row per project showing demand

- Supply row shows total capacity across ALL resources
- Variance shows if organization has capacity for all projects combined

Strategic questions answered:

- Which projects are consuming the most resources?
- Do we have enough capacity for all active projects?
- Can we take on a new project without hiring?

Example scenario: You have 3 projects (CRM Migration, ERP Upgrade, Website Redesign). The grid shows how much FTE each project demands per month, and whether your total resource pool can support all three simultaneously.

Group By: Resource Name

Use case: Monitoring individual resource utilization

What you see:

- One row per named resource (e.g., "Joe Invent", "Ally HR")
- Each row shows that resource's project allocations
- Supply row still shows organizational total (all resources)

Strategic questions answered:

- Which individuals are over-allocated?
- Who has available capacity for new work?
- Are workloads balanced across the team?

Example scenario: Joe Invent shows 1.2 FTE demand in March (over-allocated by 20%), while Julia Finance shows 0.6 FTE (has 40% available capacity). You can rebalance by moving some of Joe's work to Julia.

Group By: Role

Use case: Understanding capacity by job function or skillset

What you see:

- One row per role (e.g., "Developer", "Engineer", "Finance SME")
- Shows aggregated demand for all resources in that role
- Critical for skills-based capacity planning

Strategic questions answered:

- Do we have enough developers vs. testers?
- Which role is the bottleneck in our organization?
- Should we hire for a specific skillset?

Example scenario: Your "Developer" role shows 3.5 FTE demand but you only have 3.0 FTE supply of developers. You need to hire an additional 0.5 FTE developer (potentially a contractor) or delay some development work.

Primary Roles: Named and Generic Resources

The system supports two types of resources that work together for flexible capacity planning:

Named Resources (Humans)

What they are: Individual people with specific identities

Characteristics:

- **tbResLabourType:** "Human"
- Unique identifier: **tbResID** (e.g., "700", "701", "702")
- Named individuals: "Joe Invent", "Ally HR", "Julia Finance"
- Assigned a Primary Role: "R&D", "HR SME", "Finance SME"
- Quantity is typically 1

Why we need them:

- Track specific people's workloads and allocations
- Manage vacation, training, and individual availability
- Support performance management and utilization reporting
- Enable skills-based assignment to tasks

Primary Role assignment: Each named resource is assigned one Primary Role (e.g., Joe Invent has Primary Role = "R&D"). This:

- Categorizes the resource by function for reporting
- Enables role-based filtering and grouping
- Supports career development and succession planning
- Allows comparison of individuals within the same role

Generic Resources

What they are: Placeholder resources representing a pool of similar workers

Characteristics:

- **tbResLabourType:** "Generic"
- Role-based identifier: **tbResID** (e.g., "800", "818", "830")
- Generic names matching the role: "R&D", "HR SME", "Finance SME"
- Assigned a Primary Role that matches the resource name
- Quantity can be > 1 (e.g., "2" means 2 FTE of this role)

Why we need them:

- Early project planning before specific people are assigned
- Representing contractor pools or offshore teams
- Capacity planning when you don't know who specifically will do the work
- Future hiring - you know you need "3 developers" but haven't hired them yet

How quantity works: If Generic Resource "Developer" has **tbResQuantity:** "2" and **tbResMonth1:** "2.00", this means:

- You have 2.0 FTE of developer capacity available
- This could represent 2 full-time developers
- Or 4 half-time developers
- Or any combination totaling 2.0 FTE

Why Have Both Named and Generic?

This dual approach supports the full project lifecycle:

Early Planning Phase:

- Use generic resources ("we need 2 developers and 1 tester")
- Estimate capacity needs without knowing specific people
- Justify hiring or budget requests

Assignment Phase:

- Replace generic allocations with named resources
- Assign Joe, Chris, and John to specific tasks
- Track actual people doing the work

Capacity Planning:

- Generic resources fill the gap between demand and available named resources
- If named resources show 4.5 FTE demand but only 4.0 FTE supply, the 0.5 FTE gap might be filled by generic "Developer" resource (representing a contractor)

Reporting Flexibility:

- Group by Resource Name: See named resources only
- Group by Role: See combined named + generic resources by function
- Supply totals: Includes both named and generic for total capacity

Primary Role in Generic Resources

Generic resources have their Primary Role set to match their name:

- Resource Name: "Developer" → Primary Role: "Developer"
- Resource Name: "R&D" → Primary Role: "R&D"

This ensures that when grouping by Role, both named resources with that role AND the generic resource pool for that role are aggregated together, giving a complete picture of capacity for that function.

11. Risks, Issues & Change Requests User Guide

Source: Risks Issues Change Requests User Guide

Risks, Issues & Change Requests User Guide

This guide explains how to track and manage Risks, Issues, and Change Requests (RIC) in Agilebars, Timebars, and Costbars applications. The RIC system helps you identify potential problems, log current issues, and manage proposed changes—all directly on your project timeline.

Overview: What is the RIC System?

The **RIC (Risks, Issues, Change Requests) system** allows you to:

- **Track Risks:** Potential problems that might occur in the future
- **Manage Issues:** Problems that are happening right now
- **Handle Change Requests:** Proposed changes to project scope, schedule, or budget

Key Concepts:

- RIC items are created as regular tasks using the Bar Creator
 - Each item is classified by changing the **SubType** field (Risk, Issue, or CR)
 - Visual indicators appear automatically on the Canvas (R, I, or CR prefix)
 - Dedicated views provide filtering, searching, and detailed tracking
 - Customize forms to match your organization's methodology
-

Quick Start: Creating Your First RIC Item

Step-by-Step Creation

1. Create a Task Bar:

- Click **Main Menu > New Bar**
- Drag the Task Creator Bar (blue) onto a Project Bar (green)
- Drop to create the task

2. Open the Form:

- Click on the **bar name** to open the Slide Out Right Form

3. Change Name:

- Update the task name to describe your Risk, Issue, or CR
- Examples:
 - "R-Database Migration Failure Risk"
 - "I-Server Outage on Production"
 - "CR-Add Mobile App Support"

4. Set SubType:

- Find the **SubType** field in the form
- Change from "Task" to "**Risk**", "**Issue**", or "**CR**"

5. Visual Indicator Appears:

- **Risk:** Bold **R** prefix appears before bar name
- **Issue:** Bold **I** prefix appears before bar name

- **Change Request:** Bold **CR** prefix appears before bar name

6. **Save and Close:**

- Data saves automatically
- Close the form

That's it! You've created a RIC item. Now let's explore how to track and manage it.

Visual Indicators on the Canvas

RIC items display with automatic visual indicators to help you quickly identify them:

Prefix Letters

- **R** = Risk
- **I** = Issue
- **CR** = Change Request

Color Coding by Status

When you set the **Status** field to specific values, the visual indicator changes:

Status	Visual Effect	When to Use
Normal	Black bold letter	Standard priority
Concerned	Red letter with thin red border	Needs attention
Critical	RED letter with thick red border	Urgent action required

Example:

- Normal Risk: **R** Database Migration Failure (black)
- Concerned Issue: **I** Server Outage on Production (red letter, thin border)
- Critical Risk: **R** Security Vulnerability Discovered (red letter, thick border)

Accessing the RIC Management Page

To view and manage all your Risks, Issues, and Change Requests in one place:

1. Choose **Main Menu > RIC** (or **Main Menu > Risks/Issues**)
2. The RIC page opens with **Card View** as the default

Two View Options:

- **Card View:** Visual cards with expandable details (recommended for viewing)
- **Tabular View:** Sortable table with all fields (recommended for bulk analysis)

Card View: Visual Management

Card View displays your RIC items as color-coded, expandable cards in a two-column responsive grid.

Card Colors by Type

- **Risk Cards:** Blue gradient background
- **Issue Cards:** Red gradient background
- **Change Request Cards:** Pink/Purple gradient background

Card Structure

Each card shows:

1. Header Section:

- **Breadcrumb:** Project hierarchy (Portfolio > Program > Project)
- **SubType Chip:** Colored badge (Risk/Issue/CR)
- **ID and Name:** Item identifier and title
- **Action Buttons:**
 - **Edit** (pencil icon) - Opens full FOCD form
 - **Print** (printer icon) - Prints this card

2. Metadata Section (Always visible):

- **Parent Project:** Which project this belongs to
- **Dates:** Start/Finish (planned) and Actual dates (if started/completed)
- **Schedule Health:** Color-coded indicator (Green/Yellow/Red)
- **Risk-Specific:**
 - **Probability:** Likelihood rating
 - **Impact:** Severity rating
 - **Score:** Auto-calculated (Probability × Impact) with color coding
 - **Mitigation Status:** Current mitigation progress
- **Escalation Level:** Color-coded (e.g., red for Executives)
- **Owner:** Person responsible
- **Status:** Current status (New, In Progress, Closed, etc.)
- **State:** Workflow state (Awaiting Approval, Approved, etc.)
- **Category:** Classification type
- **Priority:** Color-coded (Immediate, High, Normal, Low)

3. Details Section (Expandable - Click "Show Details"):

For Risks:

- Description
- Executive Summary
- Notes
- Risk Response Strategy (rich text)
- Mitigation Plan (rich text)
- Contingency Plan (rich text)

For Issues:

- Description
- Executive Summary
- Notes

For Change Requests:

- **Tabbed Interface** with 4 tabs:
 - **Overview:** Description, Executive Summary, Problem/Opportunity
 - **Impact Assessment:** Schedule, Budget, Scope, Resource Commentary
 - **Benefits & Justification:** Expected Benefits, Cost-Benefit Analysis, Options Analysis
 - **Notes:** Implementation Approach, Next Steps, Dependencies

Inline Editing in Cards

You can edit text fields directly in the cards:

1. Click "Show Details" to expand the card
2. Click on any text field
3. Edit the content
4. Click outside the field to save automatically
5. Rich text editors (Quill) available for Risk strategy/plan fields

Note: Some fields require opening the full FOCD form to edit.

Tabular View: Data Analysis

Tabular View displays all RIC items in a sortable, scrollable table—ideal for analysis and reporting.

Features

- **Sortable Columns:** Click any column header to sort ascending/descending
- **Fixed Actions Column:** Edit button always visible on the left
- **Horizontal Scrolling:** Scroll right to see all columns
- **Compact View:** See many items at once
- **Quick Access:** Click Edit button to open FOCD form

Available Columns

The table includes columns for:

- Actions (Edit button)
- Hierarchy (L1, L2, L3)
- ID, Name, SubType
- Start Date, Finish Date, Actual Start, Actual Finish
- Owner, Status, State, Priority
- **Risk Fields:** Probability, Impact, Score, Category, Mitigation Status, Escalation Level
- **Health Indicators:** Schedule Health (color-coded)
- Description, Executive Summary, Notes

Sorting Data

1. Click any column header (e.g., "Priority")
 2. Data sorts ascending
 3. Click again to sort descending
 4. Default sort: Hierarchy Order (top to bottom as on Canvas)
-

Search and Filter

Both Card View and Tabular View include powerful search and filter tools at the top of the page.

Free-Text Search

Search Box (top of page):

- Type any text to search across all fields
- Results filter in real-time as you type
- Searches: Names, Descriptions, Notes, all text content

Example:

- Type "database" to find all items mentioning database
- Type "migration" to find migration-related items

Picklist Filters

Filter Dropdowns:

- Multiple dropdown filters available
- Filter by any picklist field:
 - **SubType**: Show only Risks, Issues, or CRs
 - **Status**: Active, Closed, On Hold, etc.
 - **Priority**: Immediate, High, Normal, Low
 - **Owner**: Filter by responsible person
 - **Category**: Filter by classification
 - **Escalation Level**: Show only escalated items
 - **State**: Filter by workflow state

Combining Filters:

- Select multiple filters to narrow results
- Example: Show only "High Priority Risks" with "Critical Status"

Recalculate All Button

Click "**Recalculate All**" to:

- Refresh all calculated fields
 - Update Risk Scores based on current Probability/Impact
 - Ensure data consistency across views
 - Rebuild system-generated data
-

Editing with FOCD Forms

FOCD (Field-Oriented Control Design) forms provide detailed editing of all RIC metadata.

Opening a FOCD Form

Three Ways to Open:

1. Click **Edit button** (pencil icon) on any card
2. Click **Edit button** in Tabular View row
3. Click on a bar on the Canvas, then click **Edit** in the popup

Two Form Types:

- **Risk Edit Form (dfRisk)**: For Risks and Change Requests
- **Issue Edit Form (dfIssue)**: For Issues

Form Features

Auto-Save:

- Changes save automatically to the database when you move off a field
- No "Save" button needed for most edits

Rich Text Editors (Risks Only): Three fields use Quill rich text editors:

- **Risk Response Strategy**: Formatted text with bold, italic, lists
- **Mitigation Plan**: Detailed action plans with formatting
- **Contingency Plan**: Backup plans with formatting

Risk Score Calculator:

- When you change **Probability** or **Impact**, the **Score** field updates automatically
- Formula: $\text{Score} = \text{Probability} \times \text{Impact}$

Field Types:

- **Text Inputs**: Standard single-line text
- **Dropdowns**: Picklist selections
- **Text Areas**: Multi-line text with auto-resize
- **Rich Editors**: Formatted text (Risks only)
- **Date Pickers**: Calendar date selection
- **Section Headers**: Organize fields into groups

Form Actions

Save Button:

- Click to explicitly save all changes
- Returns to Card or Tabular View

Move/Resize Fields Button:

- Click to enter customization mode
- Drag fields to reposition
- Resize using edge handles
- Click "Stop" to save layout

Close Button (X):

- Saves changes and closes form
 - Reloads application with updated data
-

Managing Risks

Risks are potential problems that might occur in the future. Effective risk management helps you prevent issues before they happen.

Core Risk Fields

When managing a Risk, you'll work with these key fields:

1. Probability (Likelihood)

How likely is this risk to occur?

Default Values:

- Very Unlikely
- Unlikely
- Likely
- Very Likely
- Certain
- Not Assessed

Tip: Your organization may customize these values to match your methodology.

2. Impact (Severity)

How severe would the consequences be if this risk occurs?

Default Values:

- Very Low
- Low
- Medium
- High
- Very High
- Not Assessed

Tip: Consider impact to schedule, budget, scope, and quality.

3. Score (Auto-Calculated)

Formula: Score = Probability × Impact

The system automatically calculates the Risk Score when you set Probability and Impact. This score helps prioritize which risks need the most attention.

Color Coding:

- Scores display with color coding (e.g., green for low, red for high)
 - Your organization defines the color thresholds
-

4. Category

Classify the type of risk:

Default Values for Risks:

- Strategic: Alignment with business goals
 - Financial: Budget and funding risks
 - Operational: Day-to-day operations
 - Technical: Technology and system risks
 - Organizational: People and structure risks
-

5. Risk Response Strategy

Your written approach to handling the risk.

Common Strategies:

- **Avoid:** Change plans to eliminate the risk
- **Mitigate:** Reduce likelihood or impact
- **Transfer:** Shift risk to third party (insurance, vendor)
- **Accept:** Acknowledge risk and prepare to deal with it

Field Type: Rich text editor (supports formatting)

6. Mitigation Plan

Detailed actions to reduce the risk.

What to Include:

- Specific steps to take
- Who is responsible for each step
- Timeline for completion
- Resources needed
- Success metrics

Field Type: Rich text editor (supports formatting)

7. Mitigation Status

Track progress of your mitigation efforts.

Default Values:

- Identified: Risk recognized but not yet assessed
 - Assessed: Analysis complete
 - Mitigation Planned: Plan created
 - In Progress: Executing mitigation
 - Mitigated: Risk reduced to acceptable level
 - Under Review: Evaluating effectiveness
 - Accepted: Acknowledged without mitigation
 - Transferred: Shifted to third party
 - Escalated: Raised to higher management
 - Closed: Risk no longer relevant
 - Deferred: Postponed to later
-

8. Contingency Plan

Backup plan if the risk occurs despite mitigation.

What to Include:

- Fallback actions
- Resources reserved for response
- Decision triggers
- Communication plan

Field Type: Rich text editor (supports formatting)

9. Escalation Level

Who needs to be informed if this risk materializes?

Default Values:

- Executives: C-level notification
- Directors: Department heads
- Project Office: PMO oversight
- Not Assessed

Display: Color-coded based on level

10. Trigger Event

What event or condition signals this risk is occurring?

Examples:

- "Server CPU usage exceeds 80% for 24 hours"
- "Project spend reaches 90% of budget with 40% work remaining"
- "Key vendor misses two consecutive delivery dates"

Field Type: Plain text area

11. Early Warning Indicators

Metrics or signals to detect the risk early.

Examples:

- Weekly defect trend increasing
- Resource availability dropping below threshold
- Velocity declining for two sprints
- Stakeholder engagement score decreasing

Field Type: Plain text area

Risk Management Workflow

Step 1: Identify

1. Create Risk item on Canvas (SubType = Risk)
2. Give it a clear, descriptive name
3. Set Category for classification

Step 2: Assess

1. Open RIC page (Main Menu > RIC)
2. Find your risk and click Edit
3. Set **Probability** and **Impact**
4. Review calculated **Score**
5. Set **Escalation Level** if needed

Step 3: Plan Response

1. Write **Risk Response Strategy** (Avoid/Mitigate/Transfer/Accept)
2. Detail **Mitigation Plan** with specific actions
3. Write **Contingency Plan** as backup
4. Set **Trigger Event** and **Early Warning Indicators**
5. Assign **Owner**
6. Set **Mitigation Status** to "Mitigation Planned"

Step 4: Execute Mitigation

1. Update **Mitigation Status** to "In Progress"
2. Add progress **Notes** regularly
3. Monitor early warning indicators
4. Update **Status** to "Concerned" or "Critical" if risk increases

Step 5: Monitor and Close

1. Review risk regularly (weekly/monthly)
2. Update Probability/Impact if conditions change
3. When risk is addressed:
 - Set **Mitigation Status** to "Mitigated" or "Closed"
 - Set **Status** to "Closed"
 - Document outcome in **Notes**

Managing Issues

Issues are problems that are happening right now and require immediate attention.

Core Issue Fields

Issues use simpler fields than Risks since the problem has already occurred:

Key Fields:

- **Description:** What is the problem?
- **Executive Summary:** High-level summary for management
- **Notes:** Updates on resolution progress
- **Status:** Current state (New, In Progress, Closed, etc.)
- **State:** Workflow tracking (Awaiting Input, Under Review, etc.)
- **Priority:** Urgency level (Immediate, High, Normal, Low)
- **Owner:** Person responsible for resolving
- **Escalation Level:** Who needs to know (Executives, Directors, Project Office)
- **Category:** Type of issue

Category Values for Issues:

- Product: Product defects or problems
- Financial: Budget or cost issues
- Operational: Process or operational problems
- Technical: Technical failures or bugs
- Schedule: Timeline delays

Issue Management Workflow

Step 1: Log the Issue

1. Create Issue item on Canvas (SubType = Issue)
2. Give it a clear name describing the problem
3. Set **Priority** based on urgency

4. Set **Category** for classification

Step 2: Assess

1. Open RIC page and click Edit
2. Write detailed **Description** of the problem
3. Write **Executive Summary** for stakeholders
4. Set **Escalation Level** if critical
5. Assign **Owner** to resolve

Step 3: Resolve

1. Update **Status** to "In Progress"
2. If urgent: Set Status to "Concerned" or "Critical" (triggers red visual indicator)
3. Add **Notes** with resolution activities
4. Update **State** as it moves through workflow (e.g., "Awaiting Approval")

Step 4: Close

1. When resolved:
 - Set **Status** to "Closed"
 - Document resolution in **Notes**
 - Set **Actual Finish** date
 2. Review **Notes** to capture lessons learned
-

Managing Change Requests

Change Requests (CRs) track proposed changes to project scope, schedule, budget, or resources.

Core CR Fields

CRs have extensive fields to justify and analyze the proposed change:

Overview Tab:

- **Description:** What is the change?
- **Executive Summary:** High-level summary
- **Problem/Opportunity:** What drives this change?

Impact Assessment Tab:

- **Schedule Commentary:** How does this affect timeline?
- **Budget Commentary:** Cost impact
- **Scope Commentary:** How does scope change?
- **Resource Commentary:** Resource needs

Benefits & Justification Tab:

- **Expected Benefits:** What do we gain? (Rich text editor)
- **Cost-Benefit Analysis:** Is it worth the investment?

- **Options Analysis:** What alternatives were considered?

Notes Tab:

- **Implementation Approach:** How will we execute?
- **Next Steps:** Immediate actions
- **Key Dependencies:** What's needed to proceed?

Common Fields:

- **Owner:** CR sponsor/requestor
- **Status:** Approval status
- **State:** Workflow state (Awaiting Approval, Approved, etc.)
- **Priority:** Importance level

Change Request Workflow

Step 1: Submit CR

1. Create CR item (SubType = CR)
2. Name it clearly (e.g., "CR-Add Mobile App Support")
3. Open RIC page, find CR, click Edit

Step 2: Document Justification

1. **Overview Tab:**
 - Write detailed **Description**
 - Write **Executive Summary**
 - Explain **Problem/Opportunity**
2. **Benefits Tab:**
 - Document **Expected Benefits** (use rich text formatting)
 - Complete **Cost-Benefit Analysis**
 - Describe **Options Analysis** (alternatives considered)

Step 3: Assess Impact

1. **Impact Assessment Tab:**
 - **Schedule Commentary:** Add X weeks? Delay milestone?
 - **Budget Commentary:** Cost increase? Source of funds?
 - **Scope Commentary:** What's added/removed?
 - **Resource Commentary:** Need additional people/skills?

Step 4: Plan Implementation

1. **Notes Tab:**
 - **Implementation Approach:** How will we execute?
 - **Key Dependencies:** What must happen first?
 - **Next Steps:** Immediate actions
2. Set **Owner** (requestor)
3. Set **Priority**

Step 5: Approval Process

1. Set **State** to "Requested Approval"
2. Update **Status** and **State** as it moves through workflow:
 - Awaiting Approval
 - Approved / Rejected
 - Awaiting Implementation
3. Add **Notes** with decision rationale

Step 6: Implementation or Closure

- If Approved: Create tasks to implement, link to CR
 - If Rejected: Set **Status** to "Rejected", document reason
 - If Complete: Set **Status** to "Closed"
-

Customizing Forms

You can customize the Risk Edit Form and Issue Edit Form to match your organization's methodology.

Show/Hide Fields

Not all fields are relevant to every organization:

To Hide a Field:

1. Navigate to **Reports > Data Management Grids**
2. Click **Fields** tab
3. Find the field (search by name, e.g., "Contingency Plan")
4. Click **Edit** (pencil icon)
5. Change **dfShowYN** to "No"
6. Click Save

To Show a Field:

- Follow same steps but set **dfShowYN** to "Yes"

Move and Resize Fields

Arrange fields to match your workflow:

1. Open any FOCD form (Risk or Issue)
2. Click **"Move/Resize Fields"** button
3. **To Move:** Click and drag field to new position
4. **To Resize:** Click field edge and drag to resize width
5. Click **"Stop"** button to save layout
6. Layout saves permanently for your user/organization

Tip: Arrange most important fields at the top for quick access.

Add Custom Fields

Advanced users can add new fields:

1. Navigate to **Reports > Data Management Grids > Fields**
 2. Click **Add New** (or import via spreadsheet)
 3. Set these properties:
 - **dfName**: Field database name (e.g., "tbMDCustomField")
 - **dfFormName**: "dfRisk" or "dfIssue"
 - **dfType**: NoPicklist, WithPicklist, TextArea, Editor, Band
 - **dfShowYN**: "Yes"
 - **dfCoordLeft**: X position (pixels)
 - **dfCoordTop**: Y position (pixels)
 - **dfWidth**: Width (pixels)
 4. Save
 5. Field appears in form
-

Customizing Picklists

Tailor dropdown values to match your organization's terminology.

How to Edit Picklist Values

1. Navigate to **Reports > Data Management Grids**
2. Click **Tags** tab
3. Search for the picklist name (e.g., "Probability")
4. Click **Edit** (pencil icon) on each value
5. Change the **Short Name** (display text)
6. Save

Risk-Related Picklists

Probability:

- Default: Very Unlikely, Unlikely, Likely, Very Likely, Certain, Not Assessed
- Customize to your scale: (e.g., 0-20%, 21-40%, 41-60%, 61-80%, 81-100%)

Impact:

- Default: Very Low, Low, Medium, High, Very High, Not Assessed
- Customize to your scale or dollar ranges

Category (Risks):

- Default: Strategic, Financial, Operational, Technical, Organizational
- Add custom categories (e.g., Regulatory, Environmental)

Mitigation Status:

- Default: Identified, Assessed, Mitigation Planned, In Progress, Mitigated, Under Review, Accepted, Transferred, Escalated, Closed, Deferred
- Customize to your process stages

Issue-Related Picklists

Category (Issues):

- Default: Product, Financial, Operational, Technical, Schedule
- Add custom categories for your domain

Common Picklists (All Types)

Escalation Level:

- Default: Executives, Directors, Project Office, Not Assessed
- Customize to your org structure

Status:

- Default: New, In progress, Closed, On Hold, Rejected
- Add custom: Concerned, Critical (for visual indicators)

State (Workflow):

- Default: Spawned, Awaiting Input, Requested Approval, Awaiting Approval, Approved, Awaiting Review
- Customize to your approval workflow

Priority:

- Default: Immediate, High, Normal, Low, Not Assessed
- Customize importance levels

Tips and Best Practices

Risk Management

1. **Regular Reviews:** Review risks weekly or bi-weekly
2. **Update Probability/Impact:** Reassess as conditions change
3. **Monitor Early Warnings:** Track indicators proactively
4. **Document Triggers:** Define clear conditions that signal risk is occurring
5. **Keep Plans Current:** Update mitigation plans as you learn more
6. **Use Visual Indicators:** Set Status to "Concerned" or "Critical" for urgent risks

Issue Management

1. **Log Immediately:** Create issues as soon as problems occur
2. **Escalate Appropriately:** Set Escalation Level for critical issues
3. **Update Progress:** Add Notes regularly with resolution activities
4. **Set Clear Ownership:** Always assign an Owner
5. **Close Properly:** Document resolution and lessons learned
6. **Use Red Indicators:** Set Status to "Critical" for urgent issues to trigger visual alerts

Change Request Management

1. **Complete Justification:** Fill all Impact Assessment fields
2. **Quantify Benefits:** Use specific metrics in Expected Benefits
3. **Consider Alternatives:** Document Options Analysis thoroughly
4. **Track Through Workflow:** Update State as approval progresses
5. **Link to Implementation:** Create implementation tasks and link to CR

General Best Practices

1. **Consistent Naming:** Use prefixes (R-, I-, CR-) in names
 2. **Use Categories:** Classify items for better filtering
 3. **Set Priorities:** Helps sort and filter critical items
 4. **Leverage Search:** Use search box to find items quickly
 5. **Print Cards:** Print individual cards for meetings or reviews
 6. **Regular Recalculation:** Click "Recalculate All" periodically to ensure data accuracy
 7. **Customize Forms:** Remove unused fields to simplify forms
 8. **Standardize Picklists:** Ensure team uses consistent terminology
-

Troubleshooting

Visual Indicator Not Appearing

Problem: R, I, or CR prefix doesn't show on Canvas

Solution:

1. Verify **SubType** field is set to "Risk", "Issue", or "CR" (exact spelling)
 2. Refresh Canvas (click Refresh icon on top menu)
 3. If still missing, Right-click Canvas > Recalculate All
-

Status Not Turning Red

Problem: Set Status to "Concerned" but letter doesn't turn red

Solution:

1. Ensure exact spelling: "Concerned" or "Critical"
 2. Check tbTags store has these values defined
 3. Refresh Canvas after changing Status
-

Risk Score Not Calculating

Problem: Score field shows 0 or doesn't update

Solution:

1. Ensure you're using the **FOCD form** (not inline editing)
2. Set both **Probability** AND **Impact** fields
3. Values must be numeric (e.g., 1-5 scale)

4. Click "Recalculate All" on RIC page

Fields Missing in Form

Problem: Expected fields don't appear in Risk or Issue form

Solution:

1. Go to **Reports > Data Management Grids > Fields**
 2. Search for field name
 3. Check **dfShowYN** = "Yes"
 4. Verify **dfFormName** = "dfRisk" or "dfIssue"
 5. Refresh application after changes
-

Cannot Edit in Card View

Problem: Click on field in card but can't edit

Solution:

1. Click **"Show Details"** to expand card first
 2. Some fields require full FOCD form—click **Edit button**
 3. Ensure you're not in read-only mode
-

Filters Not Working

Problem: Select filter but no results appear

Solution:

1. Check that items exist with selected filter value
 2. Clear other filters—they may be combining to exclude all results
 3. Try Search box to verify items exist
 4. Click "Recalculate All" to refresh data
-

Data Storage

Understanding where RIC data is stored helps with backups, spreadsheet sync, and troubleshooting.

IndexedDB Stores

tbTimebars Store:

- Contains all RIC items as task records
- Key field: **tbSubType** = "Risk", "Issue", or "CR"
- Includes: ID, Name, Type, Start/Finish dates, Hierarchy (L1-L5), Owner

tbMetaData Store:

- Contains all metadata fields (100+ fields)
- Links to tbTimebars via **tbMDID = tbID**
- Includes: Probability, Impact, Score, Status, Priority, Description, Plans, Commentary

tbFields Store:

- Defines FOCD form layouts
- Contains field positions (dfCoordLeft, dfCoordTop)
- Controls field visibility (dfShowYN)
- Filter by **dfFormName** = "dfRisk" or "dfIssue"

Spreadsheet Sync

RIC items can be exported/imported via spreadsheet:

Export:

1. Click **Hamburger Icon > Export to CSV**
2. Files created: **Timebars.csv** and **MetaData.csv**
3. Open tbClientMaster.xlsm spreadsheet
4. Click "Import All" to load data

Edit in Spreadsheet:

- Timebars worksheet: ID, Name, SubType, Dates, Hierarchy
- MetaData worksheet: All 100+ metadata fields
- Edit, add rows, copy-paste as needed

Import:

- Save spreadsheet
- Drag and drop onto Canvas
- RIC items update from spreadsheet data

Related Help Topics

- [User Interface Guide](#) - Creating and editing bars
- [Data Structure Guide](#) - Understanding data stores
- [Local Reports Guide](#) - Risk and Issue reports
- [FOCD Forms Guide](#) - Form customization

Summary

Key Takeaways:

1. **Three Item Types:** Risks (potential problems), Issues (current problems), Change Requests (proposed changes)
2. **Create as Tasks:** Use Bar Creator, then change SubType field
3. **Visual Indicators:** R, I, CR prefixes appear automatically; turn red for Concerned/Critical status

4. **Two Views:** Card View (visual) and Tabular View (analytical)
5. **Powerful Search:** Free-text search plus multiple picklist filters
6. **FOCD Forms:** Detailed editing with auto-save and rich text editors
7. **Risk Management:** Assess Probability/Impact, calculate Score, plan Mitigation
8. **Customizable:** Show/hide fields, move/resize layout, customize picklists
9. **Track Workflows:** Use Status and State fields to track approval and resolution
10. **Regular Reviews:** Update items frequently; use visual indicators for urgency

Effective RIC management helps you prevent problems, resolve issues quickly, and manage changes systematically.

12. Local Reports and Graphs Guide

Source: Common Local Reports and Graphs Guide

Local Reports and Graphs Guide

The Reports and Graphs page transforms your project data into actionable insights. Access comprehensive reports, interactive visualizations, and dynamic card views designed for portfolio managers, project leaders, resource planners, and executives across Agilebars, Timebars, and Costbars applications.

How to Access Reports

- Choose **Main Menu > Reports** to launch the Reports menu
- The Reports menu is organized into 5 main categories: General, Portfolio, Project, Task, and Resource
- All reports feature search, filtering, sorting, and export capabilities
- Reports can be published to the Timebars Cloud Dashboard with one click

Report Categories

General Reports

General Tabular View

- Comprehensive data table displaying all projects, tasks, milestones, and allocations
- Powerful search, filter, and sort capabilities across all fields
- Multiple column presets available:
 - Default Fields: Essential project information
 - Common Fields: Frequently accessed metadata
 - Notes & Descriptions: Detailed project narratives
 - Allocation Fields: Resource assignment details
 - KPI Fields: Key performance indicators
 - Variance Fields: Baseline comparison metrics
 - Investment Fields: Strategic alignment (Costbars)
 - Business Case Fields: Comprehensive investment analysis
- Export to Excel/CSV with one click

- Color-coded rows by type (Portfolio, Project, Task, Milestone)
- Click any row to open the edit form

General Card View

- Visual card layout showing projects and tasks
- Each card displays health indicators, status, priority, and key metadata
- Expandable sections for descriptions and notes
- Filter and search across all visible cards
- Color-coded by hierarchy level (Portfolio, Project, Sub-Project, Task)

Print WBS (Work Breakdown Structure)

- Professional WBS reports organized by hierarchy
- Shows parent-child relationships with indentation
- Includes WBS number, name, and description
- Copy and paste into markdown editors for sharing
- Export as documentation for project charters or scope baselines

All Drilldown (Portfolio Hierarchy)

- Interactive 5-tier hierarchy visualization
- Shows complete structure: Portfolio → Program → Project → Task/Milestone → Allocation
- Collapse and expand any level to focus on specific areas
- Color-coded levels for instant recognition
- Validates parent-child relationships and identifies orphaned items
- Export hierarchy as diagrams (Mermaid or GraphViz formats)

Portfolio Reports

PPM Tabular Report

- Strategic portfolio analysis with dual scoring dimensions
- **Strategic Value (SV) Score:** Alignment with organizational objectives
- **Ability to Execute (AE) Score:** Resource availability and capability
- **Final Decision Score:** Weighted combination for prioritization
- Weekly resource demand grid (32 weeks visibility)
- Investment category, objective, strategy, and initiative fields
- System-generated decision notes
- Search and filter by project selection criteria
- Export for portfolio review meetings

PPM Cards Report

- Card-based view of portfolio projects with visual indicators
- Expandable tabs for Benefits, Impact Analysis, and Notes
- Health dashboard with 7 dimensions
- Filter by investment category, status, priority
- Ideal for executive briefings and portfolio planning

Drilldown from Portfolio

- Portfolio report with color hierarchy showing all levels
- Visual representation of portfolio structure
- Click to drill down into specific portfolios or programs
- Shows relationships between portfolios, programs, and projects

PPM Stop Light Report

- Visual health dashboard with color-coded status indicators
- Red/Yellow/Green indicators across all portfolio dimensions
- Quickly identify projects requiring attention
- Exception-based management view
- Perfect for executive briefings and status meetings

Project Reports

Project Status

- High-level summary of all projects
- Green, yellow, and red health indicators
- Key metrics: schedule variance, cost variance, budget utilization
- Resource allocation status
- Risk and issue counts
- Escalation flags
- Sortable by any column
- Export for weekly status reporting

Project Core Report

- Command center for project data in customizable card layout
- **7-Dimension Health Dashboard:** Overall, Scope, Schedule, Cost, Hours, Risk, Issues
- Expandable rich text sections: Executive summaries, descriptions, notes
- Inline editing: Update project fields without leaving the report
- Print-ready layouts for stakeholder distribution
- Real-time health monitoring
- Color-coded cards by project status

All Tabular

- One large table showing all columns and all rows available
- Complete dataset with every field in the system
- Advanced filtering across 100+ fields
- Export entire dataset to Excel or CSV
- Useful for comprehensive data analysis

Project Stop Light Report

- Individual project health metrics with color indicators
- Drill-down into specific performance areas

- Track trends over time
- Early warning system for project issues
- Ideal for project review meetings

Baseline Variance Report

- Compare actual performance against approved baselines
- Variance calculations for:
 - Start Date Variance (days early/late)
 - Finish Date Variance (days early/late)
 - Duration Variance (work days)
 - Work Variance (hours)
 - Cost Variance (budget units)
- Advanced filtering with operators (>, <, =, >=, <=)
- Filter by hierarchy level (L1-L5)
- Type, status, priority, owner filters
- Earned value analysis support

Business Case Document

- Comprehensive investment analysis report
- Strategic alignment (category, objective, strategy, initiative)
- Risk and complexity scoring with automated calculations
- Financial metrics (cost, hours, ROI indicators)
- Baseline comparison metrics
- Health indicators (7 dimensions)
- Resource demand by role and project
- Timeline visualization
- Export to PDF for board presentations

Task Reports

Items Overdue

- Automatic identification of overdue tasks and milestones
- Shows items with:
 - Planned finish dates in the past
 - No actual completion date recorded
- Filter by owner, priority, or project
- Sort by days overdue
- Accountability tracking for status meetings
- Escalation identification

Milestone Horizon

- Timeline visualization of approaching milestones
- Shows planned completion dates across your portfolio
- Filter by date range, priority, or hierarchy level
- Visual timeline representation

- Dependency planning support
- Critical path visibility
- Delivery forecasting

Resource Reports

Resource Usage

- Comprehensive resource demand visualization
- Multiple rollup options available
- Stacked bar charts showing allocation over time
- 32-week visibility window
- Identify over/under allocation patterns
- Forecast hiring needs
- Balance workloads across teams

Resource Usage Stacked Charts By:

- **Resource Name:** Individual allocation patterns
- **Primary Role:** Developer, Architect, PM, Tester, etc.
- **Primary Skill:** Technical skills distribution
- **Location/Office:** Geographic resource distribution
- **Department:** Organizational unit allocation
- **Project:** Project-based resource demand
- **Initials:** Condensed view for large teams

Resource Usage Detail Table

- Tabular view with 32-week visibility
- Weekly hours breakdown
- Resource metadata (location, role, skill, department)
- Sortable and exportable
- Supports capacity planning analysis

Shared Resource Pool

- Complete resource pool management view
- All resources in the tbResources store
- Shows all resources added by Administrator
- Typically managed via Spreadsheet integration
- Includes:
 - Skills, roles, and competencies
 - Department, location, organizational structure
 - Pay rates, cost codes, financial attributes
 - Availability calendars and capacity
 - Manager, team leader, reporting relationships
- Click any resource to open full resource form for updates
- Skills gap analysis support
- Organization chart maintenance

Special Reports

Risk, Issue & Change Management Reports

Risks and Issues Report (Card View)

Risk Cards (Blue):

- Probability × Impact scoring matrix
- Automated risk score calculation
- Mitigation status and plans
- Escalation tracking
- Assign owners and track mitigation activities

Issue Cards (Red):

- Priority and severity classification
- Assignment and ownership
- Resolution tracking
- Impact assessment

Change Request Cards (Gradient Blue):

- Requestor and department
- Impact assessment (cost, hours, schedule)
- Benefits and justification
- Options analysis
- Version tracking

All cards support:

- Rich text editor (Quill) for detailed descriptions
- Expandable sections for plans and strategies
- Filter by status, priority, owner
- Search across all text fields
- Export for audit trails

Risks and Issues Report (Tabular View)

- Same data as card view in table format
- Sortable columns
- Multi-row selection
- Bulk export capabilities

Timeline Visualizations

Horizontal Timeline Report

- Interactive timeline with draggable event cards
- Events positioned along horizontal date axis
- Persistent positioning (saved in browser)

- Filter and search by name, type, status
- Connector lines from timeline to event details
- Reset positions for fresh layouts
- Perfect for presentations and stakeholder communications

Vertical Timeline Report

- Similar to horizontal but oriented vertically
- Project chronologies and milestone sequences flow downward
- Ideal for project storytelling
- Milestone planning visualization
- Dependency relationships

Common Report Features

All reports in the system share these capabilities:

Search & Filter

- Free text search across names and descriptions
- Filter by hierarchy level (L1-L5)
- Filter by type (Portfolio, Project, Sub-Project, Task, Milestone, Allocation)
- Filter by status (Active, On Hold, Cancelled, Complete)
- Filter by priority (High, Medium, Low)
- Filter by owner (Resource names)
- Multiple filters can be combined

Data Export

- **Excel:** Full data export with formatting
- **CSV:** Raw data for external analysis
- **Print:** Print-ready layouts with proper page breaks
- **Copy:** Copy to clipboard for quick sharing

Visual Indicators

- **Color Coding:** By type, status, priority, health
- **Health Indicators:** Red/Yellow/Green status
- **Icons:** Visual markers for risks, issues, milestones
- **Progress Bars:** Completion percentage visualization

Direct Editing

- Click any row or card to open edit form
- Inline editing for quick updates
- Changes reflected immediately after saving
- No need to switch between screens

Report Persistence

- Last viewed report is remembered
- Filter settings saved per report
- Return to your exact view next session

Technical Details

Data Sources

Reports query data from IndexedDB stores:

- **tbTimebars**: Core scheduling items (projects, tasks, milestones)
- **tbMetaData**: Extended metadata (status, priority, health, descriptions)
- **tbMdJoined**: Cached join of tbTimebars + tbMetaData for performance
- **tbBaseline**: Baseline snapshots for variance analysis
- **tbResCalcs2**: Weekly/monthly resource demand calculations
- **tbResources**: Resource pool with skills and attributes

Report Types

1. **Card Reports**: Visual card layouts with health dashboards and expandable sections
2. **DataTable Reports**: Sortable, filterable tabular views using DataTables.net
3. **Chart Reports**: Visualizations using Chart.js and C3.js libraries
4. **Timeline Reports**: Interactive timeline views with drag-and-drop positioning
5. **Hierarchy Reports**: Tree structures with collapse/expand navigation

Performance

- Reports load asynchronously for smooth user experience
- Data is cached locally for fast subsequent access
- Large datasets are paginated automatically
- Export operations run in background

Integration with Cloud Dashboard

One-Click Publishing: All reports can be published to the Timebars Cloud Dashboard:

- No configuration required
- Customize graph types and filter data sets
- Share with stakeholders via secure links
- Access from any device with internet connection
- Real-time updates when you publish new data

Learn more in the [Cloud Dashboard Guide](#).

Tips for Effective Report Use

1. **Use Filters**: Start with filters to narrow down large datasets
2. **Bookmark Views**: Save filter combinations for recurring reports
3. **Export Regularly**: Create Excel exports for offline analysis
4. **Leverage Cards**: Use card views for executive presentations

5. **Monitor Health:** Check stop light reports daily for early warnings
6. **Track Variance:** Review baseline variance weekly to maintain control
7. **Resource Planning:** Use stacked charts for capacity planning meetings
8. **Combine Reports:** Use multiple reports together for comprehensive analysis

Troubleshooting

Report is Empty or Shows No Data:

- Check that you have data loaded in the application
- Verify filters are not excluding all results
- Click "Reset Filters" to clear all filter settings
- Ensure you're logged in if using licensed features

Export Not Working:

- Check browser pop-up blocker settings
- Verify sufficient disk space for downloads
- Try a different export format (Excel vs CSV)
- Check browser download folder location

Report Loads Slowly:

- Large datasets may take time to process
- Close other browser tabs to free memory
- Clear browser cache if persistent
- Consider filtering data before loading report

Cannot Edit from Report:

- Ensure you have edit permissions
- Check that the item isn't locked or archived
- Verify browser JavaScript is enabled
- Try refreshing the page

Related Help Topics

- [How to Use the Spreadsheet Sync](#) - Import/export data for bulk editing
- [Cloud Dashboard Guide](#) - Publish reports to the cloud
- [User Interface Guide](#) - Navigate the application
- [Data Structure Guide](#) - Understand the data model

The Reports and Graphs system gives you the power to transform raw project data into strategic intelligence—where information meets action.

13. Cloud Publishing Guide

Source: Common Cloud Publishing Guide

Cloud Publishing and Bulk Operations Guide

Applies to: Agilebars, Timebars, Costbars **Version:** 2.0 **Last Updated:** 2026-04-04

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1. Overview

Cloud Publishing is an **optional feature** that allows you to securely upload your project data from the client applications (Agilebars, Timebars, or Costbars) to the Timebars Cloud. The Cloud Publishing page is the central hub for managing data between your local browser (IndexedDB) and the Timebars Cloud. From here you can:

- **Publish** your local project data to the cloud for sharing and dashboards
- **Download** a published dataset back into your local browser
- **Clear** published data from the cloud
- **Bulk Update** specific fields across multiple published datasets at once
- **Re-Publish** datasets with recalculated scheduling engine data
- **Sync** with OpenProject (external PM system)

Published datasets are called **Pubsets**. Each pubset is a complete snapshot of your project data stored in the cloud. The active pubset feeds your Personal Cloud Dashboard.

Key Benefits:

- **Cloud Dashboard Access:** View interactive reports and charts from any device
- **Cross-Device Sync:** Work on one device, continue on another
- **Data Backup:** Secure cloud storage for your project data
- **Team Collaboration:** Share data with stakeholders (requires individual licenses)
- **Real-Time Updates:** Publish changes instantly to the cloud

Important Notes:

- Publishing is entirely optional—client apps work fully offline
 - Your local data remains in the browser unless you choose to publish
 - Cloud Publishing requires an active subscription
 - Data is encrypted during transmission (HTTPS/TLS)
 - You must log in each session — credentials are not saved or persisted
-

2. Account Registration & Subscription

Create an Account

1. **Register:** Visit www.timebars.com/register, provide your email address and create a secure password, then click "Register"
2. **Verify Email:** Check your email for the verification link and click it to confirm your account

Choose a Subscription Plan

1. Navigate to www.timebars.com/pricing and review available subscription tiers
2. Select a plan based on your needs — you can purchase up to 10 PubSets depending on tier
3. Complete the credit card transaction; your license activates automatically
4. Log in at www.timebars.com/login to view subscription details and manage PubSets

Subscription Includes:

- Client application license (Agilebars, Timebars, or Costbars)
 - Cloud Publishing capabilities
 - Cloud Dashboard access
 - Number of PubSets based on tier
 - Technical support
-

3. Logging In to Timebars Cloud

Steps

1. Navigate to the publishing page from the main menu (**Main Menu > Publish**)
2. You will land on the **Login** tab
3. Enter your **Email** and **Password**
4. Click **Cloud Login!**

What Happens

- Your credentials are validated against the Timebars Cloud authentication service
- On success, a green message appears: *"Login successful! Your pubsets are loaded."*
- After 1 second the page switches to the **Pubsets** tab showing your datasets
- The Pubsets (Cards) and Pubsets (Table) tabs become visible

Note: The cloud login is a **secondary login** separate from your local app login, providing an additional security layer. Your data requires both local app login AND cloud login to access.

Important Notes

- You must log in each session — credentials are not saved or persisted
- No cookies or tokens are stored between sessions
- If you try to access other tabs before logging in, you will be redirected back to the Login tab

4. Publishing Page Interface

Tab Navigation

The publishing page has six tabs:

Tab	Visible	Purpose
Login	Always	Cloud authentication
Pubsets (Cards)	After login	Card-style view of your pubsets
Pubsets	After login	Table view with sorting and filtering
OpenProject	Always	Sync with external OpenProject system
Bulk Update	Always	Bulk data operations across pubsets
Re-Publish	Always	Download, recalculate, and republish

Click any tab button to switch. The active tab is highlighted with a blue underline.

Top Navigation Bar

The blue navigation bar at the top of the publishing page provides quick actions:

Button	Action
Show License	Displays your current license tier, product code, and expiration date
Recalculate All	Runs all system calculations (hierarchy names, rollups) to ensure data accuracy before publishing
Dashboard	Opens your Personal Cloud Dashboard in a new browser tab
Purchase	Opens the Timebars pricing page to buy or upgrade a license
Activate	One-time setup to create your pubset containers (Tier-2 and Tier-3 only)
Sync Users	Admin-only: syncs resource pool data to portal user accounts
Close (X icon)	Closes the publishing page and returns to the main application

5. Viewing Pubsets

After logging in, your pubsets are displayed in two views:

Card View

- Shows each pubset as a card with its name and action buttons
- The **active pubset** (the one feeding your Cloud Dashboard) has a **blue background**
- Use this view for a quick visual overview

Table View

- Shows all pubsets in a sortable, searchable table
- Columns: Active status, Pubset Name, ID, Published Date, Published By, Customer ID, Actions
- Click column headers to sort; use the search box to filter by name, owner, or customer ID
- The active pubset is highlighted in blue
- Action buttons for each pubset: **Download**, **Publish**, **Clear**

6. Publishing to the Cloud

Publishing takes all your local project data and uploads it to a pubset in the cloud.

Prerequisites

- Active Timebars Ltd. subscription
- Client application installed and running
- Project data created in the client application
- Internet connection
- Logged into the client app locally (gold icon, top right) AND the cloud (see Section 3)

Steps

1. Go to the **Pubsets** tab after logging in
2. Click the **Publish** button next to the target pubset
3. Enter a name for the pubset when prompted (or keep the existing name)
4. Wait 3–5 seconds for publishing to complete

What Gets Published

All six data stores are uploaded:

Store	Content
tbTimebars	Tasks, projects, milestones, allocations (scheduling data)
tbMetaData	Extended metadata: descriptions, status, priority, assessments
tbResources	Resource definitions (people, roles, teams)
tbTags	Picklist tag definitions with colours and groupings
tbFields	Dynamic form field configurations
tbCoreReport	Report configurations and settings

After the stores are published, the system also updates RBAC fields (role-based access control) and enterprise metadata (customer ID, access grants).

Dashboard PubSet vs Storage PubSets

- **Blue Background PubSet** — your **Dashboard PubSet**: directly connected to the Cloud Dashboard. Publishing here updates all dashboard reports and charts immediately.
- **White Background PubSets** — **Storage PubSets**: used for backup and cross-device synchronization. Publishing here does **not** update the dashboard.

Best Practice: Use the blue Dashboard PubSet for day-to-day work. Use white PubSets for backups and snapshots.

After Publishing

- A green toast notification confirms: *"Publishing complete, go to dashboard to see results!"*
- Your data is immediately available in the Personal Cloud Dashboard

7. Downloading from Cloud to Local (Re-Hydrate)

Downloading restores a published dataset from the cloud into your local browser.

Steps

1. Go to the **Pubsets** tab
2. Click the **Download** button next to the pubset you want to restore
3. Confirm by entering **y** when prompted: *"Over-write local data?"*
4. Wait for the download to complete

Important

- **This overwrites all your local data** with the cloud pubset's data
- If you cancel (enter **n**), your local data is not affected
- All six stores are replaced with the downloaded data
- The tbMdJoined table is automatically rebuilt after download
- No page reload is required — views update automatically
- Ensure you have published any unsaved local work before re-hydrating

8. Clearing a Published Dataset

Clearing removes all data content from a pubset in the cloud while keeping the pubset container.

Steps

1. Go to the **Pubsets** tab
2. Click the **Clear/Delete** button next to the pubset
3. Confirm the action when prompted

What Happens

- All six store fields are set to empty arrays
- The pubset container (name, owner, dates) is preserved

- You can publish new data to the same pubset later
- Your local IndexedDB data is **not affected**
- If the cleared pubset was the active pubset, the Cloud Dashboard will show empty data

9. License and Activation

License Tiers

Tier	Products	Pubsets	Features
Tier-1	ABT01, TBT01, CBT01	0	Local only, no cloud publishing
Tier-2	ABT02, TBT02, CBT02	2	Cloud publishing with 2 pubsets
Tier-3	ABT03, TBT03, CBT03	5–8	Full cloud features with multiple pubsets

Activation (One-Time Setup)

Tier-2 and Tier-3 users must activate pubsets before first use:

1. Click **Activate** in the top navigation bar
2. The system creates your pubset containers based on your tier
3. One pubset is marked as active (feeds the Cloud Dashboard)
4. Remaining pubsets are inactive (for backup or testing)
5. Tier-1 users will see an alert that activation is not available

You only need to activate once. After activation, your PubSets are permanent until you manually clear them.

Viewing Your License

Click **Show License** to see your product code, expiration date, and tier information.

```
License Type: TBT03
Expires: December 31, 2025
PubSets Available: 5
PubSets Used: 3
```

10. Cross-Device Synchronization

The Timebars Cloud enables seamless work across multiple devices.

Scenario: Work on PC, Continue on iPad

On Your PC (Primary Device):

1. Work on your project data normally
2. Choose **Main Menu > Publish** and log in to cloud service

3. Click **Publish** on your Dashboard PubSet (blue background)

On Your iPad (Secondary Device):

1. Open the same client app and log in locally (gold icon, top right)
2. Choose **Main Menu > Publish** and log in to cloud service
3. Click **Download** on the Dashboard PubSet — your project data loads
4. Continue working where you left off

Syncing Changes Back:

- After making changes on the iPad, click **Publish** to sync back to the cloud
- Back on the PC, click **Download** to get the latest changes

Key Rules:

- Always publish after making changes
- Always download before starting work on a different device
- Downloading will overwrite local data — save any local work first

Real-Time Dashboard Access

After publishing, click the **Dashboard** button in the top nav bar, or visit www.timebars.com/dashboard from any browser. The dashboard is touch-optimized and works on tablets and phones.

11. OpenProject Sync

The OpenProject tab provides bidirectional synchronization between Timebars and OpenProject.

Scenario A: Timebars is Master (sync to OpenProject)

- **A1:** Create projects and work packages in OpenProject from Timebars data
- **A2:** Update OpenProject when Timebars data changes
- **A3:** Bulk create work packages in OpenProject
- **A4:** Create OpenProject work packages after manual edits in OpenProject

Scenario B: OpenProject is Master (sync from OpenProject)

- **B1:** Create Timebars projects/tasks from OpenProject (fresh start)
- **B2:** Update Timebars when OpenProject data changes
- **B3:** Create Timebars items for OpenProject items not yet in Timebars
- **B4:** Create OpenProject work packages to match Timebars items

Each scenario has numbered steps with hover-over instructions. Follow the steps in order and check the feedback messages after each operation.

12. Bulk Update

The Bulk Update tab lets you modify data across multiple pubsets simultaneously without downloading and re-publishing each one individually.

Getting Started

1. Go to the **Bulk Update** tab
 2. Choose an **Update Mode** (see modes below)
 3. Select the **Target Store** you want to update
 4. Optionally set a **Published Since** date to filter which pubsets are shown
 5. Click **Load Pubsets** to fetch your available pubsets from the cloud
 6. Check the boxes next to the pubsets you want to update (or use Select All)
 7. Configure the mode-specific options (see below)
 8. Click **Apply Bulk Update**
 9. Confirm the operation in the dialog
-

Mode 1: Complete Replacement (JSON File)

Use case: Replace the entire contents of a store with data from a prepared JSON file.

Steps:

1. Select **Complete Replacement (JSON file)** mode
2. Choose the target store from the dropdown
3. Click **Load Pubsets** and select which pubsets to update
4. Upload a JSON file containing the replacement data
5. The preview shows: file name, size, and record count
6. Click **Apply Bulk Update** and confirm

JSON file format:

```
[
  { "tbID": "A001", "tbName": "Task One", "tbWork": 40 },
  { "tbID": "A002", "tbName": "Task Two", "tbWork": 80 }
]
```

The file must contain a JSON array of objects. The entire store content on each selected pubset is replaced with this array.

Mode 2: Filter and Set

Use case: Find records matching a specific value in a field and change that field to a new value. Ideal for bulk metadata updates like changing status, priority, or category across many pubsets at once.

Available stores: tbMetaData and tbResources only.

Steps:

1. Select **Filter & Set (no file needed)** mode
2. The **Target Store** defaults to tbMetaData
3. The **Published Since** date defaults to one month ago

- Click **Load Pubsets** and select which pubsets to update
- If tbMetaData is selected, a **Set Values by Type** filter appears — choose All Types or a specific type (Portfolio, Project, Sub-Project, Task, Milestone, or Allocation)
- Select a **Field Name** from the dropdown (populated from your Tags definitions in the local database)
- Select the current value in **Where Value Equals**
- Select the replacement value in **Set To New Value**
- Click **Apply Bulk Update** and confirm

Example: Change the priority of all Tasks from "Low" to "Medium" across 5 pubsets:

- Store: tbMetaData | Type filter: Task | Field Name: tbMDPriority | Where Value Equals: Low | Set To New Value: Medium

How the dropdowns are populated:

Dropdown	Data Source
Field Name	Local tbTags store, filtered by prefix (tbMD for tbMetaData, tbRes for tbResources)
Where Value Equals	Unique values found in the actual pubset data for the selected field. Includes (Blank) for empty/null values. Respects the type filter.
Set To New Value	Tag values from the local tbTags store where tbTagTbInternalName matches the selected field

Mode 3: Row-Level Patch (CSV File)

Use case: Update specific rows identified by their unique ID, changing one or more fields per row.

Steps:

- Select **Row-Level Patch (CSV file)** mode
- Choose the target store from the dropdown
- Click **Load Pubsets** and select which pubsets to update
- Upload a CSV file with your updates
- The preview shows: file name, size, row count, column names, and a sample row
- Click **Apply Bulk Update** and confirm

CSV file format:

```
tbMDID,tbMDStatus,tbMDPriority
A001,Complete,High
A002,In Progress,Medium
A003,Not Started,Low
```

Rules:

- The first column must be the store's unique key (tbID for tbTimebars, tbMDID for tbMetaData, tbResID for tbResources, etc.)

- Only the fields listed in the CSV are changed; all other fields on the record are preserved
- Rows in the pubset that don't match any CSV key are left unchanged

Bulk Update Results

After execution, a results table appears:

Column	Content
Pubset Name	Name of the pubset
ID	Strapi record ID
Status	success or failed
Detail	"Replaced" (Mode 1), "X rows matched" (Mode 2), "X rows patched" (Mode 3), or error message

- Green background: all pubsets succeeded
- Red background: one or more pubsets failed (check Detail column for error)

13. Re-Publish with Scheduling Engine

The Re-Publish feature downloads pubsets from the cloud, runs the PM scheduling engine to recalculate all derived data (dates, hours, costs, percent complete, rollups, resource demand), then publishes the refreshed data back to the cloud.

When to Use

- After a bulk update that changed fields affecting calculations (e.g. status, work hours, dates)
- To refresh derived data across many pubsets without manually opening each one
- When the scheduling engine or rollup logic has been updated and you want all pubsets recalculated

Steps

1. Go to the **Re-Publish** tab
2. Optionally set a **Published Since** date filter
3. Click **Load Pubsets**
4. Select the pubsets you want to re-publish (checkboxes or Select All)
5. Choose which calculation steps to run (all checked by default):
 - **Scheduling Engine** — recalculates dates, hours, costs, and percent complete for allocations
 - **Rollups & Hierarchy** — rolls up costs and hours from children to parents, rebuilds L1–L5 hierarchy names, regenerates the tbMdJoined table
 - **Resource Calculations** — regenerates weekly and monthly resource demand data (tbResCalcs2, tbResCalcsUsage)
6. Click **Execute Re-Publish**
7. Confirm the operation in the dialog
8. Watch the progress log as each pubset is processed

The 5-Step Pipeline (per pubset)

Step	Operation	Description
1	Download to IDB	Fetches the pubset from cloud and loads all stores into local IndexedDB
2	Scheduling Engine	Runs <code>calcCostWorkTBCB()</code> on allocations to recalculate dates, hours, costs, and percent complete
3	Rollups & Hierarchy	Runs <code>performFullSystemUpdate()</code> to roll up values through the hierarchy and rebuild joined tables
4	Resource Calculations	Runs <code>createUnifiedWeeklyUsageData()</code> to regenerate weekly/monthly resource demand splits
5	Publish Back	Runs <code>publishToTimebarsCloud()</code> to upload all stores, then updates RBAC and enterprise metadata

Steps 2, 3, and 4 can be individually enabled or disabled via the checkboxes.

Progress Log

A dark terminal-style log panel shows timestamped entries as each step executes:

```
[14:23:45] --- Starting pubset: Project Q4 (ID: 123) ---
[14:23:46] Step 1: Downloading pubset data to IndexedDB...
[14:23:48] Step 1 complete: Data loaded into IDB
[14:23:50] Step 2: Running scheduling engine on allocations...
[14:23:53] Step 2 complete: Scheduling engine finished
[14:23:54] Step 3: Running rollups, hierarchy, and joined table rebuild...
[14:23:56] Step 3 complete: Rollups and hierarchy rebuilt
[14:23:57] Step 4: Regenerating resource calculations...
[14:23:59] Step 4 complete: Resource calculations regenerated
[14:24:00] Step 5: Publishing all stores back to cloud...
[14:24:04] Step 5b: Updating RBAC and enterprise metadata...
[14:24:05] Pubset "Project Q4" re-published successfully!
```

- **Blue text:** Start/end markers | **Green text:** Successful step | **Orange text:** Warnings | **Gray text:** Skipped steps | **Red text:** Fatal errors

Processing Notes

- Pubsets are processed **one at a time** (sequential) to avoid database conflicts
- Typical time per pubset: 20–25 seconds with all calculation options enabled
- Your local IndexedDB will contain the data from the last processed pubset when complete
- Toast notifications confirm each pubset as it completes

14. Support Resources

Knowledge Base

- Browse articles at www.timebars.com/knowledgebase
- Search for specific topics or error messages
- View step-by-step tutorials and videos

Customer Support

- **Email:** jcox@tbcox.com
- **Support Tickets:** www.timebars.com/support
- **Response Time:** 24–48 hours (varies by subscription level)
- **Phone:** (613) 255-5374

Feature Requests

- Email: jcox@tbcox.com with a detailed description and use case
- All requests are reviewed for the product roadmap

15. Quick Reference

Publishing Workflow

1. Log in to client app (gold icon, top right)
2. Main Menu > Publish
3. Cloud Login (email + password)
4. Activate PubSets (first time only)
5. Click Publish next to blue PubSet (Dashboard PubSet)
6. View Dashboard button or www.timebars.com/dashboard

Cross-Device Workflow

Device A:

1. Make changes
2. Main Menu > Publish → Publish (to save to cloud)

Device B:

1. Main Menu > Publish → Download (to get latest from cloud)
2. Make changes
3. Main Menu > Publish → Publish (to save changes back)

Device A:

1. Main Menu > Publish → Download (to get Device B's changes)

Troubleshooting Quick Reference

Problem	Solution
Cannot log in to cloud	Check email/password; verify subscription at www.timebars.com/login
Publishing hangs	Wait 10+ seconds; check browser console for errors
Data not in dashboard	Ensure you published to the active pubset (blue highlight)
Re-Hydrate fails	Check "Last Published" date on pubset — if empty, pubset has no data
"No pubsets found" (Bulk Update)	Adjust or clear the Published Since date filter
Field Name dropdown empty (Bulk Update)	Ensure local tbTags store has definitions with matching tbTagTbInternalName prefix
Pubset is empty (Re-Publish)	Pubset has been cleared — publish data to it first

Cloud Publishing and Bulk Operations Guide v2.0 — Timebars Ltd.

14. Personal Dashboard Guide

Source: Common Personal Dashboard Guide

Personal Dashboard Guide

The Timebars Personal Dashboard delivers a focused suite of interactive reports, visualizations, and data management tools for individual project managers and team leads. It connects directly and automatically to your **single active pubset** — the pubset you have marked as Active (or "connected") in your Timebars, Agilebars, or Costbars client application. No additional configuration is needed; publish your data and the Personal Dashboard reflects it immediately.

Personal Dashboard vs. Enterprise Dashboard The Personal Dashboard (</personaldashboard>) is designed for a single-pubset workflow: one user, one active data source, instant access. If your organisation needs to combine data from multiple pubsets across projects or teams into a shared portfolio view, see the [Enterprise Dashboard Guide \(/dashboard\)](/dashboard).

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What is the Personal Dashboard?

The Personal Dashboard is a web-based platform that transforms data from your Agilebars, Timebars, or Costbars application into dynamic visualizations — graphs, line charts, pie charts, bar charts, and tabular reports. It is powered by the **one pubset you have set as Active** in your client application. Unlike the client apps, which work offline, the Personal Dashboard requires an internet connection and an active subscription.

Key Benefits:

- **Zero Configuration:** No dashboard sources to create or manage — your Active pubset is the data source
- **Real-Time Updates:** Changes sync automatically when you re-publish from your client app
- **Anywhere Access:** View reports from any device with a modern web browser
- **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

Prerequisites:

- Active Timebars Ltd. Cloud subscription
- Published data from Agilebars, Timebars, or Costbars client application
- An **Active pubset** set in the client app (the one flagged as connected)
- Internet connection

Two Ways to Access:

1. From Client Applications:

- After publishing your data, click the **Dashboard** button in the client app
- You will be automatically logged in and directed to the Personal Dashboard

2. Direct Web Access:

- Visit www.timebars.com/personaldashboard
- Log in with your credentials

How Publishing Connects to Your Dashboard

The Personal Dashboard is powered exclusively by your **Active pubset** — the pubset you have designated as active (connected) in the Publish panel of your client application. This is the key difference from the Enterprise Dashboard, which lets you combine multiple pubsets.

Workflow:

1. Open your Timebars, Agilebars, or Costbars client
2. Navigate to **Main Menu** → **Publish**
3. Log in to the cloud service
4. Identify the pubset with a blue background (your Dashboard/Active pubset)
5. Click **Re-Publish!** to send updated data to the cloud
6. Your Personal Dashboard reflects the new data automatically

For full details on the publishing process, see the [Cloud Publishing Guide](#).

Dashboard Navigation

The Personal Dashboard uses a **left sidebar navigation** to browse available reports.

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

Project Status Report (Dashboard Home)

Location: [/personaldashboard](#)

Your command center for portfolio-wide visibility. This comprehensive tabular report displays all portfolios, projects, work packages, tasks, and resource allocations from your active pubset 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 a 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: [/personaldashboard/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:** 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 the 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
- Forecasting final project outcomes

Note: Baselines must be set in the client application before publishing for this report to show variance data. The [Enterprise Dashboard](#) offers an equivalent Variance Report across combined pubset sources.

Interactive Card-Based Drilldown

Project Status Cards — Hierarchical Navigation

Location: [/personaldashboard/tabular/cardtop](#)

Navigate 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
- 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 the 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 the selected project
- 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 the hierarchy

Hide/Show Controls:

- Toggle visibility of card levels as needed
- Collapse levels to focus on specific areas

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
- 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)

Agilebars Burndown Chart

Location: [/personaldashboard/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): Planned work burn rate based on sprint timeline
- **Actual Line** (Red/Green): 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
- Sprint performance evaluation and team velocity assessment
- Forecast completion dates

Prerequisites:

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

When to Use:

- Sprint retrospectives and planning
- Daily standup reference
- Velocity trend analysis across sprints

Resource Cost & Usage — Pie Charts

Location: [/personaldashboard/charts](#)

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

Four Pie Charts Displayed (2×2 grid):

1. **By Project (L2):** Which projects consume the most resources
2. **By Resource Role:** Cost distribution across Developer, Manager, QA, Architect, etc.
3. **By Resource Location:** Geographic cost analysis (Office locations, Remote, Offshore)
4. **By Department:** Departmental resource allocation and spend

Indicator Cards (Top of Page):

- **Total Cost Cards:** Prominent cards showing total costs for each dimension
- **Currency Formatting:** Professional \$USD formatting with thousands separators

Interactive Features:

- **Hover Details:** Hover over pie slices for exact values and percentages

- **Legend:** Color-coded legend with labels
- **Percentage Labels:** Show percentage on larger slices

When to Use:

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

For cross-pubset resource cost analysis combining multiple projects or teams, see [Resource Cost Charts](#) in the Enterprise Dashboard.

Resource Usage — Bar Charts

Location: </personaldashboard/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
2. **By Project (L2):** Project-level resource consumption
3. **By Resource Role:** Role-based allocation analysis (PM, Dev, QA, Architect, BA, etc.)
4. **By Primary Skill:** Skill-based resource distribution (Java, Python, Cloud, Database, etc.)
5. **By Resource Location:** Geographic resource allocation
6. **By Department:** Departmental resource usage

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
- **Legend Toggle:** Show/hide hours or cost bars independently
- **Configurable Metadata:** Works with your custom metadata fields from the Timebars client

When to Use:

- Resource capacity planning meetings
- Skill gap identification for hiring
- Utilization rate analysis
- Workforce planning decisions

Common Features Across All Reports

Search & Filter

Text Search:

- Search by project name or description, or by unique ID

- Instant filtering as you type (case-insensitive)

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 a 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 to sort ascending/descending
- Arrow indicators show current sort direction
- Maintains filter state during sort operations

Inline Editing

- Click the row action button (pencil icon) to open the edit dialog
- Full CRUD operations directly from reports
- Built-in field validation prevents data errors
- Changes sync immediately to the backend

Health Indicators

Seven-Dimensional Health Tracking — all cards and detail views display:

Dimension	Green	Red
Overall Health	On track	Critical
Cost Health	Under budget	Over budget
Hours Health	On track	Over hours
Risk Health	Low risk	High risk
Schedule Health	On schedule	Late
Scope Health	Stable	Scope creep
Issues Health	No critical issues	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

- Touch-optimized controls for tablets and phones
- Adaptive column display on smaller screens
- Fixed headers during scroll on desktop

Performance

- **SWR Caching:** Client-side data caching for instant navigation
- **Automatic Revalidation:** Data stays fresh with background updates
- **Loading States:** Professional loading indicators during data fetch
- **Error Handling:** Graceful error messages with retry options

Data Export & Integration

Export Options

Available on all tabular reports:

- **Excel Export:** Full data export with formatting
- **CSV Export:** Raw data for external analysis tools
- **Maintains Filters:** Export only filtered/sorted data
- **One-Click Download:** Simple download button

Cloud Integration

Seamless Data Flow:

1. **Publish from Client:** One-click publish from the Timebars/Agilebars/Costbars desktop client selects the Active subset and sends data to the cloud
2. **Real-Time Sync:** Changes reflect in the dashboard within seconds of publishing
3. **Secure Authentication:** Enterprise-grade JWT security, encrypted data transmission (HTTPS/TLS)
4. **Multi-User Viewing:** Multiple users can view the dashboard simultaneously

See the [Cloud Publishing Guide](#) for full publishing instructions.

License Tiers & Report Availability

Report	Basic (T01)	Standard (T02)	Professional (T03)
Project Status Report	✓	✓	✓
Export to Excel/CSV	✓	✓	✓
Project Variance Report	—	✓	✓
Resource Pie Charts	—	✓	✓

Report	Basic (T01)	Standard (T02)	Professional (T03)
Resource Bar Charts	—	✓	✓
Card-Based Drilldown	—	✓	✓
Burndown Charts (Agilebars)	—	—	✓
Advanced analytics	—	—	✓

Check Your License:

- View license details in the client app: **Main Menu** → **Publish** → **Show License**
- Upgrade at www.timebars.com/pricing

Getting Started with the Personal Dashboard

Step-by-Step:

1. Publish Your Data:

- Open your Timebars, Agilebars, or Costbars client
- Navigate to **Main Menu** → **Publish**
- Log in to the cloud service
- Click **Activate** if this is your first time (one-time setup)
- Identify the pubset with a blue background (your Active/Dashboard pubset)
- Click **Re-Publish!** to send data to the cloud

2. Access the Personal Dashboard:

- Visit www.timebars.com/personaldashboard
- Sign in with your credentials

3. Explore Reports:

- Use the sidebar navigation to browse reports
- Start with the Dashboard Home for a 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. 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 Use

1. **Regular Publishing:** Publish data daily or weekly to keep the dashboard current
 2. **Consistent Metadata:** Use consistent tagging and naming for better filtering
 3. **Baseline First:** Set baselines in the client before using the 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. **Check License:** Ensure your license is current for uninterrupted access
 8. **Need Multi-Pubset Views?:** If you need to combine multiple pubsets (e.g., across teams or products), use the [Enterprise Dashboard](#) instead
-

Troubleshooting

Dashboard Not Loading

Possible Causes: Internet connection issue, subscription expired, or no data published yet.

Solutions:

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

Reports Show No Data

Possible Causes: Data not published from client, filters excluding all data, or wrong pubset published.

Solutions:

- Publish from the client using the Active pubset (blue background)
 - Click **All** to clear all filters
 - Verify data exists in the client before publishing
-

Visualization Not Updating

Possible Causes: Browser cache, old SWR cache, or publishing to the wrong pubset.

Solutions:

- Refresh the browser page (F5 or Ctrl+R)
 - Clear the browser cache
 - Re-publish from the client to the Active pubset
-

Cannot Edit Data

Possible Causes: Network connectivity issue or session expired.

Solutions:

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

Related Help Topics

- [Enterprise Dashboard Guide](#) — Combine multiple pubsets into shared portfolio views with RBAC
- [Cloud Publishing Guide](#) — How to publish data to the cloud and manage pubsets
- [Local Reports Guide](#) — Reports available within client applications
- [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 Personal Dashboard transforms your active project data into strategic intelligence — accessible anytime, anywhere, on any device.

15. Enterprise Dashboard Guide

Source: Common Enterprise Dashboard Guide

Enterprise Dashboard Guide

The Timebars Enterprise Dashboard provides a consolidated, organisation-wide view of your project portfolio. It draws data from one or more published datasets (pubsets) — from Agilebars, Timebars, or Costbars — that are combined into a **Dashboard Source**: a single, unified snapshot that powers all reports, charts, and visualizations in the enterprise view.

Enterprise Dashboard vs. Personal Dashboard The Enterprise Dashboard ([/dashboard](#)) is designed for teams and organisations that need to combine data across multiple pubsets — for example, rolling up projects from different teams, products, or time periods into one portfolio view. Role-based access control (RBAC) governs who can see which pubsets and sources.

If you work with a single active pubset and want an instant, zero-configuration view of your own data, see the [Personal Dashboard Guide](#) ([/personaldashboard](#)).

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Getting Started

To access the Enterprise Dashboard, sign in and navigate to **Dashboard** in the main navigation menu. You will land on the Executive Dashboard home page at </dashboard>.

If you see a message saying you have no access, contact your **Administrator** to have your role assigned or a pubset shared with you (see [RBAC](#) below).

What you need before using the Enterprise Dashboard

1. A user account with a role of **Administrator**, **Project Manager**, or **Team Member**
2. At least one **pubset** published from Timebars, Agilebars, or Costbars (see the [Cloud Publishing Guide](#))
3. At least one **Dashboard Source** created from your pubsets (see [Creating and Managing Dashboard Sources](#))

Coming from the Personal Dashboard? The Enterprise Dashboard requires an extra step — you must create a Dashboard Source before reports will display data. This is because the Enterprise Dashboard lets you combine multiple pubsets, and you choose which combination to activate. The [Personal Dashboard](#) skips this step by automatically connecting to your single active pubset.

Understanding Dashboard Sources

A **Dashboard Source** is the data backbone of the Enterprise Dashboard. It is a consolidated snapshot built from one or more pubsets and stored in the system. All reports, charts, and visualizations draw from the currently active source.

Key facts

- Each source has a **name**, creation date, and an **isActive** flag
- Only **one source can be active at a time** for your organisation
- Sources are created by selecting pubsets at </dashboard/pubsets>

- You can switch the active source at </dashboard/sources>
- Sources are **snapshots** — they do not update automatically; create a new source each time your data changes

How this differs from the Personal Dashboard

	Personal Dashboard	Enterprise Dashboard
Data source	Your single Active pubset (auto-connected)	One or more pubsets combined into a Dashboard Source
Source creation	None required	Must create a Dashboard Source
Pubset selection	Automatic (flagged as Active in client)	Manual — choose which pubsets to combine
Multi-pubset support	No	Yes
Access control	Per-user	RBAC (Admin, PM, Team Member)

Source naming convention

When a source is generated, the system proposes a name in this format:

```
{Product} – {PubsetNames} [{IDs}] – MMM DD, YYYY HH:MM
```

Example:

```
Timebars – Q1 Portfolio, Infrastructure Refresh [12-14] – Apr 06, 2026 09:30
```

Edit this name before saving to choose something meaningful that lets you identify snapshots later.

Role-Based Access Control (RBAC)

The Enterprise Dashboard uses RBAC to control which pubsets and dashboard sources each user can see.

Roles

Role	What they can see
Administrator	All pubsets and sources in the organisation
Project Manager	Their own pubsets + any pubsets where they have been granted PM access
Team Member	Their own pubsets + any pubsets where they have been granted TM access
(No role)	No access to the Enterprise Dashboard

How access is granted

- **Ownership:** If you created (own) a pubset, you always have access to it
- **Admin grant:** An Administrator can see all org pubsets by default
- **Explicit grant:** In Timebars/Agilebars/Costbars, the pubset owner can add a user's email to the `grant_pm_access_to` or `grant_tm_access_to` fields when publishing

Changing a user's role

Roles are managed in **Strapi** (the backend CMS) by an Administrator:

1. Log in to the Strapi admin panel
2. Navigate to **Content Manager** → **Users**
3. Find the user and edit their `primary_role` field
4. Set to **Administrator**, **Project Manager**, or **Team Member**
5. Save — the change takes effect on the user's next page load

Creating and Managing Dashboard Sources

Step 1 — Publish your data

Before creating a dashboard source, project data must be **published as a pubset** from within Timebars, Agilebars, or Costbars. See the [Cloud Publishing Guide](#) for full publishing instructions. Each publish creates a new pubset record.

Step 2 — Browse and select pubsets

Navigate to **Dashboard** → **Manage Pubsets** (`/dashboard/pubsets`). You will see all pubsets your RBAC role grants you access to. Use the checkboxes to select one or more pubsets to consolidate.

Step 3 — Generate a dashboard source

With pubsets selected, click **Generate Dashboard Source**. You will be taken to the consolidation page (`/dashboard/pubsets/consolidated`) where you can:

- Review which pubsets are included
- Edit the auto-generated source name
- Click **Save Dashboard Source** to create the source

Step 4 — Set the active source

Navigate to **Dashboard** → **Manage Sources** (`/dashboard/sources`). You will see a list of all sources accessible to you. Click **Set Active** on the source you want to use. All reports will now draw from this source.

Managing existing sources

From the Sources page you can:

- **View** source details (which pubsets are included, creation date)
- **Set active** to switch which source powers the dashboard

- **Delete** sources you no longer need
-

Managing Pubsets

Navigate to **Dashboard** → **Manage Pubsets** (</dashboard/pubsets>) to manage your enterprise pubsets.

What you can do here

- Browse all pubsets you have access to (RBAC-filtered)
- See pubset status, product, owner, and creation date
- Select multiple pubsets and generate a consolidated dashboard source
- View an individual pubset report

Pubset report

Click **View Report** on any pubset to open a read-only report for that single dataset at </dashboard/pubsets/report/{id}>.

The Executive Dashboard Home

Route: </dashboard>

The home page provides an executive-level summary of your active dashboard source. It shows:

- Key portfolio metrics and health indicators
- Summary cards with quick-access links to reports
- Status of the currently active dashboard source

If no source is active, you will be guided to create one via the Manage Pubsets page.

Reports

Navigate to **Dashboard** → **Reports** (</dashboard/reports>) to access the full report catalogue.

Project Status Report

Route: </dashboard/reports/projects>

Detailed project and portfolio status drawn from the active dashboard source. Shows timelines, budgets, and health indicators for every project in the portfolio — spanning all pubsets included in the active source. Use this report for regular project review meetings.

Portfolio Status Report

Route: </dashboard/reports/portfolio>

Portfolio-level insights and strategic analysis across all projects in the active source. Provides cross-project comparisons and helps identify which projects are on track, at risk, or in trouble. Ideal for portfolio review

sessions.

Variance Report

Route: </dashboard/reports/variance>

Compares current project data against baseline plans to identify schedule and cost deviations across all pubsets in the active source. Quickly highlights where projects are running ahead or behind plan, and by how much.

This report is unique to the Enterprise Dashboard in that it covers all pubsets in your Dashboard Source. The [Personal Dashboard](#) offers an equivalent report scoped to your single active pubset.

Risk Register

Route: </dashboard/reports/risks>

A consolidated view of all identified risks across the entire portfolio (all pubsets in the active source). Each risk is scored for probability and impact. Includes mitigation plans and escalation tracking so risk owners can take action before issues materialise.

Issues Log

Route: </dashboard/reports/issues>

Tracked issues across the entire portfolio, including impact assessment, mitigation status, and escalation levels. Use this log to ensure open issues are being actively managed and resolved.

Change Requests

Route: </dashboard/reports/change-requests>

Formal change requests affecting project scope, schedule, or budget. Tracks approval status and the financial or schedule impact of each change. Useful for governance and audit purposes.

Resource Pool Report

Route: </dashboard/reports/resources>

Comprehensive resource capacity and allocation data drawn from all pubsets in the active source. Shows availability by role, location, and department alongside current assignments. Use this report to understand where your resource capacity sits across the organisation.

Capacity vs Demand

Route: </dashboard/reports/capacity-demand>

Side-by-side view of resource supply and demand by week and role, consolidated across all included pubsets. Highlights overloaded or underutilised resource pools so you can rebalance allocations or plan hiring decisions proactively.

Executive Portfolio Summary

Route: </dashboard/reports/executive-summary>

An at-a-glance summary built for executive audiences. Presents portfolio health across seven key dimensions and includes a financial summary. Designed to be shared in board-level or steering committee meetings with minimal preparation.

Project Prioritization Matrix

Route: </dashboard/reports/prioritization>

Composite scoring of every project based on health, cost performance, schedule performance, and risk level. Helps leadership decide which projects to continue as-is, restructure, or terminate. Output is a ranked list with a recommended action for each project.

Project Selection Bubble Chart

Route: </dashboard/reports/bubble-chart>

A strategic scatter plot of **Strategic Value** vs **Ability to Execute** with bubble size representing project cost. Includes a selection algorithm and quadrant analysis to guide portfolio optimisation decisions. Adjust weights and thresholds interactively to simulate different selection scenarios.

Balanced Scorecard

Route: </dashboard/reports/balanced-scorecard>

Assesses portfolio balance across eight KPI dimensions including investment strategy alignment, objectives coverage, risk distribution, resource mix, and project duration spread. Surfaces imbalances that may not be visible from individual project views.

Portfolio Financial Summary

Route: </dashboard/reports/financial-summary>

Aggregates financial data across the entire portfolio including NPV, IRR, Payback Period, and ROM Estimates. Provides a single source of truth for portfolio cost analysis and investment return tracking across all included pubsets.

Strategic Alignment Heatmap

Route: </dashboard/reports/strategic-alignment>

A heatmap of **Investment Objective vs Category** showing where portfolio spend is concentrated. Quickly reveals whether the portfolio is aligned to your organisation's strategic priorities or skewed towards certain objectives.

What-If Scenario Dashboard

Route: </dashboard/reports/what-if>

An interactive simulation tool. Adjust Strategic Value and Ability to Execute weights and scoring thresholds to model different portfolio decisions and see the financial and health impact of each scenario. Useful for pre-planning workshops and scenario analysis.

Visualizations

Navigate to **Dashboard** → **Visualizations** (</dashboard/visualizations>) to access interactive chart views. All visualization data is drawn from the active Dashboard Source.

Resource Cost Charts

Route: </dashboard/visualizations/cost-charts>

Interactive pie charts showing resource cost distribution across four dimensions: by project, by role, by location, and by department. Drill into any segment to see the contributing detail. Covers all pubsets in the active source.

Prerequisite: Resource data must be preprocessed before these charts will display. See [Preprocessing Resource Data](#).

Resource Usage Charts

Route: </dashboard/visualizations/usage-charts>

Bar charts showing resource utilization across six dimensions with weekly breakdowns. Use these alongside the Resource Pool Report and Capacity vs Demand report to understand allocation patterns across the organisation.

Prerequisite: Resource data must be preprocessed. See [Preprocessing Resource Data](#).

Burndown Charts

Route: </dashboard/visualizations/burndown>

Sprint burndown charts comparing planned vs forecast progress over time. Includes both computed project burndown from Timebars data and sprint-level charts from Agilebars. Covers all included pubsets in the active source.

Drilldown

Navigate to **Dashboard** → **Drilldown** (</dashboard/drilldown>) to explore the portfolio hierarchy interactively.

Project Cards Drilldown

Route: </dashboard/drilldown/cards>

Navigate through your combined portfolio in four levels: **Portfolio** → **Project** → **Work Package** → **Task**. Each card displays health indicators, status, and key metrics. At the task level, tabbed sections show related risks and issues. This view covers all pubsets consolidated in the active Dashboard Source.

The [Personal Dashboard](#) offers an equivalent drilldown scoped to your single active pubset.

Analytics

Route: </dashboard/analytics>

The Analytics section is planned for a future phase. It will provide performance and cost analytics for data-driven project decisions. Check this section for updates as new capabilities are released.

Shop Schedule (Gantt)

Route: </dashboard/facilities>

The Shop Schedule presents facility and shop tasks as a Gantt chart. Filter by schedule type and task status to focus on specific workstreams. Use this view for operational planning when projects involve physical facilities, workshops, or lab schedules.

Preprocessing Resource Data

Route: </dashboard/settings/preprocess>

Before the Resource Cost Charts and Resource Usage Charts can display data, the allocation rows in your active dashboard source must be extracted and reshaped into the resource calculations format ([tbrescalcs2](#)).

When to preprocess

- After setting a new active dashboard source
- If resource charts show no data or stale data

How to preprocess

1. Navigate to **Dashboard** → **Settings** → **Preprocess Resource Data**
2. Confirm the active dashboard source shown is the correct one
3. Click **Run Preprocess**
4. Wait for the operation to complete (a confirmation message will appear)

5. Return to the visualization pages — charts should now display updated data

Note: Preprocessing overwrites the previous resource calculations data for your organisation. If you switch the active source, run preprocess again before viewing resource charts.

Quick Reference

Task	Where to go
View executive summary	/dashboard
Browse all reports	/dashboard/reports
Create a dashboard source	/dashboard/pubsets
Switch active source	/dashboard/sources
View resource cost charts	/dashboard/visualizations/cost-charts
View resource usage charts	/dashboard/visualizations/usage-charts
View burndown charts	/dashboard/visualizations/burndown
Explore project hierarchy	/dashboard/drilldown/cards
View shop/Gantt schedule	/dashboard/facilities
Refresh resource chart data	/dashboard/settings/preprocess
Manage user roles	Strapi Admin → Content Manager → Users

Roles at a glance

Role	Create Sources	See All Pubsets	See Own Pubsets	See Granted Pubsets
Administrator	✓	✓	✓	✓
Project Manager	✓	—	✓	✓
Team Member	—	—	✓	✓
No role	—	—	—	—

Related Help Topics

- [Personal Dashboard Guide](#) — Single-pubset dashboard with zero configuration
- [Cloud Publishing Guide](#) — How to publish data to the cloud and manage pubsets
- [Local Reports Guide](#) — Reports available within client applications
- [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
- Phone: (613) 255-5374

For technical issues, contact your system administrator or the Timebars support team.

16. Text Notifications

Source: Common Text Notifications Guide

Text Notifications Guide

Timebars Ltd. products — Agilebars, Timebars, and Costbars — include an automated notification system that alerts portfolio and project managers when projects require attention. Notifications are delivered to your phone via the **Pushover** app. An optional SMS escalation channel (Costbars only) is available via Twilio for executive-level alerts.

The system evaluates your in-progress projects automatically every four hours and sends a push notification when your configured thresholds are met. You can also trigger a notification at any time from the admin panel — for example, immediately after publishing a new dataset.

Which products support notifications? All three products — Agilebars (AB), Timebars (TB), and Costbars (CB) — support push notifications. The number of conditions evaluated and the available threshold settings differ by product. Costbars includes the full five-scenario evaluation and optional SMS escalation. See [How the System Evaluates Projects](#) for details.

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Overview

The notification system works in three stages:

1. **Evaluate** — The system reads your in-progress projects and checks them against the thresholds you have configured.
2. **Gate** — Before sending, the system checks timing rules: business hours, quiet hours, cooldown period, and daily send limits.
3. **Send** — If at least one project triggers an alert and all timing gates pass, a push notification is sent to the manager's phone via Pushover.

You manage all of this from the **Notifications** page in the admin panel at </admin/notifications>.

Setting Up Pushover on Your Phone

Pushover is a third-party push notification service used to deliver alerts to your phone. It has a one-time cost of approximately \$5 USD and includes a free 30-day trial.

Step 1 — Install and create an account

1. Install **Pushover** from the App Store (iOS) or Google Play (Android).
2. Create an account at pushover.net or directly within the app.

Step 2 — Get your User Key

After logging in to pushover.net, your **User Key** is displayed on the home dashboard in the top section. Copy it — this is your **PUSHOVER_USER_KEY**.

Step 3 — Create an App Token

1. In pushover.net, go to **Your Applications** → **Create an Application / API Token**.
2. Give it a name such as **Timebars PPM**.
3. Copy the **API Token** — this is your **PUSHOVER_APP_TOKEN**.

Step 4 — Confirm the keys are in your environment

Your system administrator will have added these two values to the server's environment configuration file:

```
PUSHOVER_APP_TOKEN=    ← From pushover.net → Your Applications → API Token
PUSHOVER_USER_KEY=     ← From pushover.net → Home dashboard, top section
```

Once these are in place, notifications can be sent. You can verify the connection is working from the [Testing](#) section before creating your first configuration.

Creating a Notification Configuration

Navigate to </admin/notifications> and click **Add Notification** (or the + button). The form has four tabs.

Tab 1 — Basic

Field	Description
Manager Name	The name of the person who will receive this notification
Phone	Manager's phone number (used for SMS escalation if enabled)
Email	Manager's email address
Timezone	The manager's local timezone — used for business hours and quiet hours calculations
Order	Select the product licence order this config belongs to
Active	Toggle to ON to enable this notification config

Tab 2 — Preferences

Field	Description
Primary Channel	Set to push to use Pushover. (SMS is the escalation channel, not the primary channel.)
Business Hours Only	If enabled, notifications are only sent between 09:00 and 17:00 in the manager's timezone
Send on Weekends	If disabled, notifications are skipped on Saturday and Sunday
Quiet Hours Start / End	Times during which notifications are suppressed (e.g., 22:00–07:00)
Cooldown (hours)	Minimum hours between notifications for this manager. Set to a low value (e.g., 1 hour) during initial testing.
Daily Limit	Maximum number of notifications per day for this manager

Tab 3 — Thresholds

The fields shown on this tab depend on your product licence. See [How the System Evaluates Projects](#) for a full explanation of each threshold.

Agilebars (AB) — 2 fields:

Field	Options	Default
Overall Health Threshold	Green, Yellow, Red	Red
Senior Level Commitment Threshold	Full, Strong, Moderate, Limited, Not Clear, Not Assessed	Moderate

Timebars (TB) — 3 fields:

Field	Options	Default
Overall Health Threshold	Green, Yellow, Red	Red
Senior Level Commitment Threshold	Full, Strong, Moderate, Limited, Not Clear, Not Assessed	Moderate
Risk / Size / Complexity Threshold	0–10 Very Small and Simple ... 91–100 Extremely Complex and Risky	51–60 Significant Complexity

Costbars (CB) — 5 fields:

Field	Options	Default
Overall Health Threshold	Green, Yellow, Red	Red
Senior Level Commitment Threshold	Full, Strong, Moderate, Limited, Not Clear, Not Assessed	Moderate
Risk / Size / Complexity Threshold	0–10 Very Small and Simple ... 91–100 Extremely Complex and Risky	51–60 Significant Complexity
Strategic Value Threshold	Numeric (e.g., 50)	50
Budget Overrun % Threshold	Numeric percentage (e.g., 10)	10
Work Hours Overrun % Threshold	Numeric percentage (e.g., 20)	20

Tab 4 — Escalation

Escalation is a Costbars-only feature that sends an SMS via Twilio in addition to the Pushover notification. See [Escalation — SMS for Costbars](#). For Agilebars and Timebars, leave escalation off.

How the System Evaluates Projects

The system reads all projects in your published dataset where **Status = In progress** and evaluates each one against your notification configuration. The logic applied depends on your product licence.

The Chain-of-Values Rule

All categorical threshold comparisons use a **chain-of-values** model. Rather than checking for an exact match, the system checks whether a project's value is **at or beyond the threshold you set**, climbing toward the most critical end of the scale.

Overall Health — climbs toward Red (worst):

Threshold you set	Fires for these project health values
Green	Green, Yellow, Red
Yellow	Yellow, Red
Red	Red only

An empty health field on a project is treated as **Red**.

Senior Level Commitment — climbs toward Full (strongest):

Threshold you set	Fires for these project commitment values
Not Assessed	Not Assessed, Not Clear, Limited, Moderate, Strong, Full
Not Clear	Not Clear, Limited, Moderate, Strong, Full
Limited	Limited, Moderate, Strong, Full
Moderate	Moderate, Strong, Full
Strong	Strong, Full
Full	Full only

An empty commitment field on a project is treated as **Moderate**.

Risk / Size / Complexity — climbs toward higher complexity:

Each label maps to a numeric score. The system fires when a project's score is **greater than or equal to** the score of your configured threshold.

Label	Score
Not Assessed	0
0–10 Very Small and Simple	10
11–20 Small and Straightforward	20
21–30 Medium with Some Complexity	30
31–40 Large with Moderate Complexity	40
41–50 Complex but Manageable	50
51–60 Significant Complexity	60
61–70 Large and Complex	70
71–80 Very Large and Complex	80
81–90 Highly Complex and Risky	90
91–100 Extremely Complex and Risky	100

An empty risk field on a project is treated as triggering (score 51+).

Agilebars — 2-Condition Check

A notification fires when **both** conditions are true for the same in-progress project:

1. The project's **Overall Health** is at or beyond your configured health threshold (climbing toward Red).
2. The project's **Senior Level Commitment** is at or above your configured commitment threshold (climbing toward Full).

Example: You configure Health = Yellow and Commitment = Moderate. The system will send a notification for any in-progress project where health is Yellow **or** Red, **and** commitment is Moderate, Strong, **or** Full — both must be true simultaneously.

Timebars — 3-Condition Check

A notification fires when **all three** conditions are true for the same in-progress project:

1. The project's **Overall Health** is at or beyond your configured health threshold.
2. The project's **Senior Level Commitment** is at or above your configured commitment threshold.
3. The project's **Risk / Size / Complexity** score is greater than or equal to the score of your configured risk threshold.

Example: You configure Health = Yellow, Commitment = Moderate, Risk = 51–60 Significant Complexity (score 60). A notification fires for any in-progress project where health is Yellow or Red, **and** commitment is Moderate or higher, **and** risk score is ≥ 60 .

Costbars — 5-Scenario Check

Costbars evaluates five independent scenarios against every in-progress project. A notification fires if **any one** scenario triggers.

#	Scenario	Fires when
1	Critical High-Value Project	Health is at or beyond your health threshold AND strategic value exceeds your strategic value threshold
2	Missing Strategic Data	Health is at or beyond threshold AND strategic value field is blank AND risk score $\geq$ your risk threshold
3	Missing Health Status	Health field is blank AND commitment is at or above your commitment threshold AND risk score $\geq$ your risk threshold
4	Budget Overrun	Actual cost exceeds budget by more than your budget overrun % AND the project is high-value (strategic value $\geq$ threshold)
5	Work Hours Overrun	Actual hours exceed baseline hours by more than your work overrun % AND the project is high-value

The notification message you receive identifies which scenario(s) triggered and which project(s) were flagged.

SMS escalation note: If escalation is enabled on your configuration and a flagged project has its **Escalation Level** field set to **Executives**, an SMS is sent in addition to the Pushover notification. See [Escalation — SMS for Costbars](#).

When Notifications Are Sent

Automated Schedule

The system runs an automated check every **four hours**, around the clock. Each run evaluates all active notification configurations against your published dataset. If a configuration's timing gates pass and projects are flagged, a notification is sent.

On-Publish Notifications

When you publish a dataset from any of the three client apps, the system can trigger an **immediate** notification check — bypassing the four-hour schedule. This is useful for ensuring managers are alerted as soon as new data is available.

On-publish notifications bypass business hours and quiet hours checks. Cooldown and daily limit rules still apply to prevent duplicate sends on rapid re-publishes.

Note: On-publish notifications require no additional configuration. They are triggered automatically when you publish, provided you have an active notification configuration set up.

Timing Gates

Before any notification is sent during an automated run, the system checks each manager's configuration against the following gates in order:

Gate	What it checks
Active	The notification config must have Active set to ON
Business hours	If enabled, the current time must be between 09:00 and 17:00 in the manager's timezone
Weekend block	If weekends are disabled, the current day must be Monday–Friday
Quiet hours	The current time must be outside the configured quiet hours window
Cooldown	Sufficient hours must have passed since the last notification was sent to this manager
Daily limit	The manager must not have reached their configured maximum notifications for the current day

If any gate fails, the notification is skipped for that run. Manual sends from the admin panel bypass all timing gates and send immediately.

Escalation — SMS for Costbars

To configure escalation:

- Important:** SMS escalation only fires when the flagged project's `tbMDEscalationLevel` field is set to `Executives`. Projects with other escalation level values receive the Pushover notification only. Agilebars and Timebars projects always receive Pushover only — the escalation level field is not used in those products.

Manual Dry Run

- How many in-progress projects were found
- Which projects were flagged and which scenario or condition triggered
- The full notification message that would be sent
- Debug logs for each condition checked (click **Show Debug Logs**)

Sending a Test Notification

Tip: If you want to force a flagged result during testing, temporarily set permissive threshold values — for example, Health = Green (fires for all health values), Commitment = Not Assessed (fires for all), and a low risk or strategic value threshold. Remember to restore your intended thresholds after testing.

```
curl -s \
  --form-string "token=YOUR_PUSHOVER_APP_TOKEN" \
  --form-string "user=YOUR_PUSHOVER_USER_KEY" \
```

```
--form-string "message=Test from Timebars!" \
--form-string "title=PPM Test" \
https://api.pushover.net/1/messages.json
```

A successful response looks like: `{"status":1,"request":"..."}` and a push notification arrives on the phone within seconds.

Managing Notifications

All notification configurations for your licences are listed on [/admin/notifications](#). From this page you can:

- **Add** a new notification configuration with the **+** button
- **Edit** an existing configuration by clicking on it
- **Toggle Active** on or off directly from the list to temporarily pause a configuration without deleting it
- **View the threshold summary** for each configuration at a glance — the list shows the key configured values by product

Multiple configurations can exist for the same order (for example, one per portfolio manager). Each fires independently based on its own thresholds and timing settings.

Troubleshooting

Symptom	What to check
No push notification received	Run the curl test in Low-Level API Test to verify your Pushover token and user key are valid
Pushover returns <code>status:0</code>	Your <code>PUSHOVER_APP_TOKEN</code> or <code>PUSHOVER_USER_KEY</code> is incorrect — check for typos or placeholder values
Dry run shows "No flagged projects"	Lower your thresholds temporarily (e.g., Health = Green) to verify the evaluator runs at all. Also confirm your projects have <code>Status = In progress</code> .
Notification was expected but not sent during automated run	Check Active = ON, verify the manager's timezone is correct, and review business hours / quiet hours / cooldown / daily limit settings
SMS not received (Costbars)	Confirm escalation is enabled on the config and that the flagged project's <code>Escalation Level</code> field is set to <code>Executives</code>
On-publish notification not received	Confirm cooldown has elapsed since the last send — on-publish sends still respect the cooldown setting
Admin panel shows a 500 error on the notifications page	Contact your system administrator — this typically indicates a missing server-side environment variable

Quick Reference — Fields by Product

Field	Agilebars (AB)	Timebars (TB)	Costbars (CB)
Overall Health Threshold	✓	✓	✓
Senior Level Commitment Threshold	✓	✓	✓
Risk / Size / Complexity Threshold	—	✓	✓
Strategic Value Threshold	—	—	✓
Budget Overrun % Threshold	—	—	✓
Work Hours Overrun % Threshold	—	—	✓
SMS Escalation	—	—	✓
Conditions evaluated	2	3	5 scenarios
Automated check frequency	Every 4 hours	Every 4 hours	Every 4 hours
On-publish notification	✓	✓	✓

For configuration of the notification server environment, cron scheduling, or Strapi integration, refer to the internal technical reference in [/docsOther/Pushover Notifications config.md](#).

17. Products Installation For On-Premises

Source: *Products Installation For On Prem*

Timebars Solution Deployment Guide

This guide outlines the two deployment scenarios available for the Timebars solution, including system requirements, necessary expertise, and ongoing maintenance considerations.

Deployment Scenarios Overview

Timebars Ltd. offers two deployment options to meet different organizational needs:

- **Scenario 1: Docker Container Deployment** - Pre-built Docker images for rapid deployment
- **Scenario 2: Source Code Deployment** - Full source code access for custom builds and modifications

Scenario 1: Docker Container Deployment

Overview

The entire Timebars solution is containerized and deployed using **Docker**, with all images hosted on Docker Hub. This modern deployment approach simplifies installation, ensures consistency across environments, and enables rapid scaling. The complete solution requires just **5 Docker containers**:

- **jimecox807/tbrun** - Frontend client application (Timebars/Agilebars/Costbars)
- **jimecox807/tbwwwp** - Sales and support website with Cloud Dashboard
- **jimecox807/tbbe** - Strapi backend services
- **jimecox807/tbfm** - File management and CMS system
- **jimecox807/tbcdn** - CDN services for media delivery

All containers are orchestrated together to provide a complete, production-ready Timebars solution that can be deployed in minutes.

Access Credentials

Upon purchase, you will receive:

- Docker Hub username and password, or
- Docker Hub access token/key for secure image downloads
- Docker Compose configuration files
- Environment configuration templates
- Initial setup documentation

System Requirements

Hardware (Minimum for Production)

- 4 CPU cores
- 16 GB RAM
- 100 GB SSD storage
- Stable internet connection for initial download

Software

- Docker Engine 20.10 or higher
- Docker Compose 2.0 or higher
- Linux (Ubuntu 20.04+, CentOS 8+, or RHEL 8+), Windows Server 2019+, or macOS 11+
- PostgreSQL 13+ (can be deployed as separate container or managed service)

Network

- Open ports: 80 (HTTP), 443 (HTTPS), and custom ports as configured
- Domain name(s) configured with DNS
- SSL/TLS certificates (recommended: Let's Encrypt)

Required Personnel & Skills

For Initial Deployment (1-2 people)

DevOps Engineer or System Administrator

- **Required Skills:**
 - Docker and Docker Compose proficiency
 - Basic networking (DNS, SSL/TLS, port forwarding)
 - Linux/Windows server administration

- Environment variable configuration
- Reverse proxy setup (Nginx, Apache, or Traefik)
- **Estimated Time:** 4-8 hours for initial setup

Database Administrator (Optional but Recommended)

- **Required Skills:**
 - PostgreSQL installation and configuration
 - Database backup and recovery procedures
 - Performance tuning
- **Estimated Time:** 2-4 hours for database setup

For Ongoing Maintenance

System Administrator (Part-time)

- **Responsibilities:**
 - Monitor container health and logs
 - Apply Docker image updates
 - Manage backups and disaster recovery
 - Monitor system resources and scaling
 - Security patch management
- **Time Commitment:** 2-5 hours per week

Database Administrator (Part-time)

- **Responsibilities:**
 - Database backups and maintenance
 - Performance monitoring and optimization
 - Data integrity checks
- **Time Commitment:** 1-3 hours per week

Deployment Steps (High-Level)

1. Authenticate with Docker Hub using provided credentials
2. Download Docker images for all 5 containers
3. Configure environment variables and secrets
4. Set up PostgreSQL database
5. Deploy containers using Docker Compose
6. Configure reverse proxy and SSL certificates
7. Verify all services are running and communicating
8. Perform initial system configuration
9. Set up monitoring and backup procedures

Advantages

- **Fast deployment** - Production ready in hours, not days
- **Lower technical barrier** - Minimal configuration required
- **Consistent environments** - Same configuration across dev, staging, and production
- **Easy updates** - Pull new images and restart containers

- **Simplified troubleshooting** - Standardized container configurations

Considerations

- Limited ability to customize application code
 - Dependent on Docker Hub for image access
 - Requires Docker expertise for troubleshooting
 - Updates managed by Timebars Ltd. release schedule
-

Scenario 2: Source Code Deployment

Overview

For organizations requiring full control and customization capabilities, the complete Timebars source code is available through Bitbucket private repositories. This option allows you to build, modify, and deploy the solution according to your specific requirements.

Access Credentials

Upon purchase, you will receive:

- Bitbucket account credentials or SSH keys
- Access to private repositories
- Build and deployment documentation
- API keys and configuration guides

Bitbucket Repository Structure

The Timebars solution consists of six repositories:

1. **cdn** - Plain HTML/CSS/JS website for static content delivery
2. **dockeretc** - Docker Compose files, deployment scripts, and technical documentation
3. **tbwwwp2** - Next.js 14 sales website and Cloud Dashboard
4. **tbbe** - Strapi v4 CMS backend
5. **tbrunp** - Timebars client applications (Timebars/Agilebars/Costbars)
6. **filemanager** - Optional component for uploading files to the CDN

System Requirements

Hardware (Minimum for Production)

- 4 CPU cores
- 16 GB RAM
- 150 GB SSD storage (additional space for source code and builds)
- Stable internet connection

Software

- Node.js 18.x or higher
- NPM 9.x or higher

- Git 2.30 or higher
- Docker Engine 20.10+ and Docker Compose 2.0+ (optional, for containerized deployment)
- PostgreSQL 13+
- Linux (Ubuntu 20.04+, CentOS 8+, or RHEL 8+), Windows Server 2019+, or macOS 11+

Build Tools

- Parcel.js (for tbrunp)
- Next.js build tools (for tbwwwp2)
- Strapi build dependencies (for tbbe)

Network

- Same requirements as Scenario 1
- May require additional ports for development environments

Required Personnel & Skills

For Initial Deployment (2-4 people)

Full-Stack Developer

- **Required Skills:**
 - JavaScript/Node.js expertise
 - React and Next.js framework knowledge
 - Understanding of Strapi CMS architecture
 - jQuery and jQuery UI experience (for client apps)
 - Package management (NPM/Yarn)
 - Build tools (Parcel.js, Webpack)
 - Git version control
- **Estimated Time:** 16-32 hours for initial build and deployment

DevOps Engineer

- **Required Skills:**
 - Server provisioning and configuration
 - CI/CD pipeline setup
 - Reverse proxy configuration
 - SSL/TLS certificate management
 - Environment management
 - Deployment automation
 - Docker (if containerizing custom builds)
- **Estimated Time:** 12-24 hours for infrastructure setup

Database Administrator

- **Required Skills:**
 - PostgreSQL installation and configuration
 - Database schema management
 - Migration scripts

- Backup and recovery procedures
- Performance tuning and optimization
- **Estimated Time:** 8-16 hours for database setup and configuration

QA/Testing Specialist (Recommended)

- **Required Skills:**
 - Web application testing
 - API testing
 - Integration testing
 - Browser compatibility testing
- **Estimated Time:** 16-24 hours for comprehensive testing

For Ongoing Maintenance

Full-Stack Developer (Part-time to Full-time)

- **Responsibilities:**
 - Custom feature development
 - Bug fixes and troubleshooting
 - Code maintenance and refactoring
 - Integration with internal systems
 - Dependency updates and security patches
 - Build process maintenance
- **Time Commitment:** 10-40 hours per week (depending on customization needs)

DevOps Engineer (Part-time)

- **Responsibilities:**
 - Deployment pipeline maintenance
 - Infrastructure monitoring and optimization
 - Security updates and patches
 - Scaling and performance optimization
 - Disaster recovery planning and testing
- **Time Commitment:** 5-15 hours per week

Database Administrator (Part-time)

- **Responsibilities:**
 - Database maintenance and optimization
 - Backup verification and recovery testing
 - Schema updates and migrations
 - Performance monitoring and tuning
 - Data integrity and security
- **Time Commitment:** 3-8 hours per week

Deployment Steps (High-Level)

1. Clone all repositories from Bitbucket
2. Install Node.js, NPM, and required dependencies

3. Configure environment variables for each component
4. Set up and configure PostgreSQL database
5. Build each component:
 - Build **tbrunp** using Parcel.js
 - Build **tbwwwp2** using Next.js build commands
 - Build **tbbe** Strapi backend
 - Configure **cdn** static site
 - Configure **filemanager** (if using)
6. Deploy built applications to web servers or containers
7. Configure reverse proxy and SSL certificates
8. Set up CI/CD pipelines for automated builds and deployments
9. Perform comprehensive testing
10. Configure monitoring, logging, and backup systems

Advantages

- **Full customization** - Modify any aspect of the application
- **Complete control** - Own the entire codebase and deployment process
- **Independent updates** - Update on your own schedule
- **Integration flexibility** - Integrate with existing systems and workflows
- **No vendor lock-in** - Deploy and maintain without ongoing dependencies

Considerations

- **Higher technical complexity** - Requires skilled development team
- **Longer deployment time** - Initial setup takes significantly longer
- **Ongoing maintenance burden** - Responsible for all updates and security patches
- **Build expertise required** - Must understand build processes for all components
- **Dependency management** - Must manage NPM packages and security vulnerabilities

Deployment Scenario Comparison

Aspect	Scenario 1: Docker	Scenario 2: Source Code
Deployment Time	4-8 hours	24-48 hours
Technical Expertise	DevOps/SysAdmin	Full-Stack Dev + DevOps + DBA
Initial Team Size	1-2 people	2-4 people
Customization	Limited	Full
Maintenance Effort	Low	Medium to High
Update Control	Vendor-managed	Self-managed
Cost (Personnel)	Lower	Higher
Time to Production	Days	Weeks

Recommended Deployment Path

Choose Scenario 1 (Docker) if:

- You need rapid deployment
- You have limited development resources
- Standard functionality meets your needs
- You prefer managed updates
- You want lower ongoing maintenance overhead

Choose Scenario 2 (Source Code) if:

- You require custom features or modifications
- You have in-house development expertise
- You need to integrate with proprietary systems
- You want complete control over the codebase
- You have strict compliance or security requirements that necessitate code review

Support and Documentation

Regardless of deployment scenario, Timebars Ltd. provides:

- Comprehensive deployment documentation
- Configuration templates and examples
- Technical support during initial setup
- Access to knowledge base and community forums
- Regular security updates and patches (Scenario 1)
- Migration assistance between scenarios (if needed)

For additional assistance, contact Timebars Ltd. support at [support@timebarssolutions.com].

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18. Costbars PPM Portfolio Status and Balancing Report

Source: Costbars PPM Portfolio Status And Balancing Report

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Portfolio Status and Balancing Report: User Guide

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Introduction

The Portfolio Status and Balancing Report is your comprehensive tool for understanding portfolio health, strategic alignment, and balance across multiple dimensions. Unlike project-level reports that focus on individual initiative status, this report provides the portfolio-wide intelligence you need to make strategic decisions about what to start, what to continue, what to delay, and what to kill.

When to use this report:

- Before quarterly portfolio review meetings
- When evaluating new project proposals for approval
- When you need to free up resources and must identify projects to kill or delay
- When assessing whether your portfolio aligns with organizational strategy
- When reporting portfolio status to executive leadership
- When determining whether portfolio risk exposure is acceptable

What you'll learn from this report:

- Where your investment dollars are allocated (by strategic pillar, benefit type, initiative type, risk level)
 - Whether your portfolio is balanced across time horizons and initiative types
 - Which projects need immediate attention
 - How your portfolio risk exposure compares to your organizational risk tolerance
 - Specific recommendations for rebalancing your portfolio
-

Generating the Report

Step 1: Ensure Your Data is Current

Before generating the report, make sure your project data is up-to-date:

- Project health indicators (scope, schedule, cost, hours, risk, issues) have been updated
- Budget, baseline, and forecast values are current
- Strategic priority scores are assigned to all active projects
- Risk scores have been calculated (ideally using the Project Assessment Tool)
- Project phases and states are accurate (Planning, Executing, Closing, etc.)

- Strategic pillar assignments are complete

Why this matters: The report's analysis is only as good as the underlying data. Outdated information leads to incorrect conclusions and poor decisions.

Step 2: Navigate to the Report

Access the Portfolio Status and Balancing Report through:

- The Reports menu in Costbars
- The dashboard view, if configured
- The main navigation under "Portfolio Reports"

Step 3: Configure Report Parameters (if applicable)

Depending on your Costbars configuration, you may be able to filter the report by:

- **Date range** – Focus on a specific quarter or fiscal year
- **Portfolio** – If you manage multiple portfolios, select which to analyze
- **Project states** – Include or exclude certain project states
- **Include proposals** – Choose whether to include new project proposals in the analysis

Step 4: Generate and Export

- Click "Generate Report" to create the current portfolio analysis
- Export to PDF for executive distribution or meeting materials
- Export to Excel if you want to perform additional custom analysis
- Save a timestamped version for historical comparison

Best practice: Generate the report at consistent intervals (e.g., start of each month) so you can track how portfolio balance evolves over time.

Understanding the Executive Summary

The report opens with an Executive Summary designed to give you an immediate sense of overall portfolio health without requiring you to read the entire document.

Portfolio Performance Summary

You'll see a table with health indicators for:

Overall – Composite indicator synthesizing all other dimensions **Scope** – Are projects delivering their planned scope? **Schedule** – Are projects meeting their timeline commitments? **Cost** – Is spending aligned with budgets? **Hours** – Is work effort tracking to estimates? **Risk** – What's the aggregate portfolio risk profile? **Issues** – Are active issues impacting delivery?

Each indicator shows a color-coded status:

-  **Green** – Performing well, no significant concerns
-  **Yellow** – Some concerns, requires monitoring
-  **Red** – Significant problems requiring immediate attention

-  **White/Gray** – Not assessed or insufficient data

How to Interpret Health Indicators

If Overall is Red: Your portfolio has systemic problems affecting multiple dimensions. This requires executive attention and likely a portfolio review meeting to identify root causes and corrective actions.

If Schedule is Red but Cost is Green: Projects are running late but not over budget. This suggests schedule pressure, potentially due to optimistic planning, resource constraints, or underestimated complexity. Consider whether deadlines are realistic or need adjustment.

If Cost is Red but Scope is Green: You're spending more than planned but delivering planned scope. This could indicate poor initial estimates, scope creep that wasn't captured in scope metrics, or inefficient execution. Dig into individual project cost overruns.

If Risk is Red: Your portfolio contains too many high-risk projects or individual projects with extreme risk levels. This may be acceptable if it aligns with organizational strategy (e.g., transformation initiatives), but if it's unintentional, you need to de-risk the portfolio.

If Issues is Red: Active issues are accumulating across projects. This suggests inadequate issue resolution processes, resource constraints preventing issue closure, or systemic organizational problems creating issues faster than they can be resolved.

What to Do With Red Indicators

1. **Read the detailed section** for that dimension later in the report
2. **Prepare discussion topics** for your next portfolio review meeting
3. **Identify specific projects** contributing most to the red status
4. **Develop action plans** to address the root causes
5. **Set a timeline** for when you expect the indicator to return to yellow or green

Reading Financial Summary Sections

The Financial Summary provides three critical views into portfolio spending:

Portfolio Investment by Category

This table shows spending across three project categories:

"In Progress" Projects – Currently executing **"New and Approved" Projects** – Approved but not yet started **"New and Not Approved" Projects** – Proposals under evaluation

For each category, you see:

Budget – Original planned investment **Baseline** – Committed investment after planning (often \$0 if not baselined) **Forecast** – Current expected total cost **Budget Variance** – How much forecast differs from budget **Forecast Variance** – How much forecast differs from baseline **Status** – Whether the category is on track

How to Read the Numbers

Let's use an example:

"In Progress" Projects Budget: \$1.4M
Baseline: \$0.0M
Forecast: \$0.4M
Budget Variance: \$-0.9M (-68.6%)

What this tells you:

You originally budgeted \$1.4M for in-progress projects, but your current forecast shows you'll only spend \$0.4M—a \$900K underspend. This massive variance (-68.6%) suggests:

- Projects were cancelled or descoped after budget approval
- Initial budgets were extremely optimistic
- Projects are delayed and costs are being deferred
- Some "in progress" projects haven't actually consumed significant resources yet

Action required: Investigate why actual spending is so far below budget. If projects were cancelled, ensure those budget dollars are reallocated. If projects are delayed, update schedules accordingly.

Example: Healthy Variance

"New and Approved" Projects Budget: \$3.3M
Forecast: \$3.1M
Budget Variance: \$-0.2M (-6.1%)
Status: 

This shows a small favorable variance (-6.1%), indicating your approved projects are forecast to come in slightly under budget—a healthy outcome suggesting good planning and execution.

Example: Concerning Variance

"In Progress" Projects Budget: \$2.0M
Forecast: \$2.8M
Budget Variance: \$+0.8M (+40%)
Status: 

This shows significant cost overruns. Your in-progress projects were budgeted at \$2.0M but are now forecast to cost \$2.8M—a 40% overrun. This requires immediate investigation and corrective action.

Financial-Benefits Forecast

This section shows expected benefits by category, such as:

- Source cloud services for core products
- Improve product reliability

- Improve productivity with Agile teams
- Strengthen cybersecurity infrastructure
- Build AI/ML capabilities

For each benefit type, you see budget, baseline, forecast, variances, and status.

Why this matters: It's not enough to track costs—you must also verify that your portfolio is delivering the strategic benefits that justified the investment. If "Build AI/ML Capabilities" shows a large negative variance, you're underinvesting in an area that may be strategically critical.

How to use this section:

1. **Identify benefit categories with large negative variances** – These are areas where you're delivering less benefit than planned
2. **Investigate why benefits are not materializing** – Are projects cancelled? Descoped? Not delivering expected value?
3. **Reallocate budget if needed** – If a benefit category is strategic, consider approving more projects in that area
4. **Question benefit assumptions** – If benefits consistently exceed forecasts across all categories, your benefit estimation methodology may be flawed

Financial-Strategic Alignment

This critical section shows how portfolio budget is distributed across your strategic pillars, such as:

- Increase share of market
- Build recurring revenue streams
- Improve our core products
- Improve customer service
- Reduce waste
- Ensure compliance
- Serve more customers

For each strategic pillar:

Budget – Total budget allocated to projects supporting this pillar **% Budget Allocated** – What percentage of total portfolio budget goes to this pillar **Baseline, Forecast, Variances** – Standard financial tracking **Status** – Whether the pillar is adequately funded

The Critical Metric: % Budget Allocated

This percentage reveals whether your portfolio spending matches your strategic priorities. Let's interpret an example:

Strategic Pillar: "Increase share of market"
Budget: \$5.0M
% Budget Allocated: 82.1%
Status: 

This says that 82.1% of your portfolio budget is allocated to projects supporting "Increase share of market." If this is your #1 strategic priority, that might be appropriate. But if it's one of seven equal priorities, this is a massive over-allocation that starves other strategic areas.

Common problems revealed by this section:

Problem: Over-concentration in one pillar

- One strategic pillar receives 70%+ of budget
- Other pillars are starved for resources
- Portfolio is not balanced across strategic objectives

Action: Identify lower-priority projects in the over-funded pillar and reallocate budget to under-funded pillars.

Problem: Strategic priority mismatch

- Your #1 strategic priority receives only 15% of budget
- Your #3 strategic priority receives 45% of budget
- Portfolio spending doesn't reflect stated strategy

Action: Either adjust portfolio composition to match strategy, or acknowledge that your actual strategy differs from your stated strategy and update strategic communications accordingly.

Problem: Red status on critical pillars

- Strategic pillars marked  indicate problems
- May indicate large variances between budget and forecast
- Suggests projects in that strategic area are struggling

Action: Investigate projects supporting that strategic pillar to understand root causes of variance or performance issues.

Strategic Alignment Analysis

(This section is covered above in Financial-Strategic Alignment)

In-Flight Projects Section

This section focuses on projects currently in execution, providing both overall status and specific project details.

Status Summary

You'll see a breakdown like:

-  GREEN: 7 projects (54%)
-  YELLOW: 1 project (8%)
-  RED: 2 projects (15%)

● NOT ASSESSED: 3 projects (23%)
TOTAL PROJECTS: 13

How to Interpret Status Distribution

Healthy Portfolio:

- 60-80% of projects in Green status
- 15-25% in Yellow status (some challenges are normal)
- 0-10% in Red status
- 0-15% not assessed

Concerning Portfolio:

- Less than 50% Green
- More than 20% Red
- More than 25% not assessed (suggests inadequate monitoring)

Critical Projects Requiring Attention

The report automatically identifies projects that meet specific risk criteria. The standard criterion is:

"Project Priority is Immediate, and Overall Health is not Green"

These are your fires that need fighting—high-priority projects that are struggling. The report lists them explicitly so you don't have to search for them in the full project list.

If you see "No Projects are requiring attention at this time": This is good news. It doesn't mean you have no struggling projects—it means your highest-priority projects are on track. You may still have lower-priority red projects, but they're not mission-critical.

If you see multiple critical projects listed: This requires executive intervention. High-priority projects that are red need one of:

- Additional resources to get them back on track
- Scope reduction to make them achievable
- Risk mitigation plans and executive sponsorship
- Possible termination if they can't be rescued

Key Project Milestones

This table shows major milestones across all in-flight projects, with:

Milestone – Name of the milestone **Baseline** – Original committed date **Forecast** – Current expected completion date **Status** – Whether milestone is on track

Pay attention to:

● **No Baseline** – Milestone has no committed date yet

- If this is early in the project, that's normal

- If the project is well underway, this suggests poor planning

Forecast significantly later than Baseline:

- Indicates schedule slippage
- May signal broader project problems
- Could cascade delays to downstream projects

Best practice: For critical path milestones, investigate any forecast date that's more than 2 weeks later than baseline.

Approved Projects Analysis

This section covers projects that have been approved but not yet started—your launch pipeline.

Readiness Status Categories

✓ **READY TO START** – All prerequisites met

- Status is New, State is Approved, Awaiting Approval, or Requested Approval
- In Planning Phase
- Can launch as soon as resources become available

⚠ **AWAITING INFORMATION** – Need inputs before launch

- Missing key requirements, dependencies, or decisions
- Cannot proceed until information is provided
- May require stakeholder engagement or additional analysis

✗ **BLOCKED** – Cannot proceed due to unresolved issues

- Formal blockers preventing launch
- May be technical, political, or resource-related
- Requires active intervention to unblock

◆ **INITIATING PHASE** – In early planning

- Still in PMI Initiating Phase
- Not yet ready for launch
- Expected to move to Planning Phase soon

Project Inventory & Readiness Assessment Table

For each approved project, the table shows:

Project Name – The approved initiative **State** – Current approval state (Approved, Awaiting Approval, etc.)

PMI Phase – Project management phase (Initiating, Planning, Executing, etc.) **Strategic Priority** – Priority score (0-100 scale) **Est. Duration** – Expected project length in months **Budget/Forecast** – Budgeted amount and current forecast **Readiness Status** – Visual indicator of launch readiness **Earliest Start** – First possible start date based on dependencies **Key Dependencies** – Predecessor projects that must complete first

How to Use This Table

Scenario 1: Selecting next projects to launch

1. Filter for "✅ READY TO START" projects
2. Sort by Strategic Priority (highest first)
3. Check Earliest Start dates for any in the past or near-term
4. Verify no blocking dependencies
5. Confirm resources will be available (check Resource Capacity Analysis)
6. Approve launch for highest-priority ready projects

Scenario 2: Unblocking projects

1. Identify "⚠️ AWAITING INFORMATION" and "× BLOCKED" projects
2. For each project, identify what's missing or what's blocking it
3. Assign ownership for resolving each blocker
4. Set target dates for unblocking
5. Follow up until projects move to "✅ READY" status

Scenario 3: Sequencing projects with dependencies

Some projects show "Predecessor ID: A030" or similar in the Key Dependencies column. This means:

- The project cannot start until another project (ID A030) completes
- Launching it before its predecessor would create problems
- You need to respect this sequencing in your launch plan

How to handle dependencies:

1. Find the predecessor project in your portfolio
2. Check its forecast completion date
3. Set the dependent project's start date after the predecessor completes
4. Add buffer time for any handoff or knowledge transfer needed

Recommended Start Sequence

The report provides a prioritized launch sequence like:

1. L2:PJ13 Private Cloud Phase 1
2. L2:PJ06 Constant Internal Delivery Enablement
3. L2:PJ04 Digital Desktop - Transformation
4. L2:PJ12 Partner Portal Platform

This sequence is calculated based on:

- Strategic priority scores
- Project dependencies
- Readiness status
- Earliest start dates

How to use this:

- Treat this as a suggested sequence, not a mandate
- Override the sequence if you have reasons (e.g., resource availability, stakeholder pressure, changing priorities)
- Use it as a starting point for discussion in portfolio planning meetings
- Validate that resource capacity supports this sequence (check Resource Capacity Analysis)

Resource Capacity Analysis

This table shows monthly resource demand (in FTE or hours) for each approved project across future months. It's presented as a grid:

Project Name	Sep 2025	Oct 2025	Nov 2025	...
-----	-----	-----	-----	-
Project A	0.5	0.5	0.5	
Project B	0	0	1.0	

Numbers represent required FTE (full-time equivalent) resources in each month.

How to interpret:

0.5 FTE = Half of one person's time for that month **1.0 FTE** = One full person for that month **2.5 FTE** = Two and a half people for that month

Sum the columns to see total demand in each month. If total demand exceeds your available capacity, you have an over-allocation problem.

Example interpretation:

Total Demand:
 Sep 2025: 3.5 FTE
 Oct 2025: 5.0 FTE
 Nov 2025: 7.5 FTE
 Dec 2025: 8.0 FTE

Available Capacity: 5.0 FTE

This shows you'll be over-allocated starting in November (7.5 FTE demand with 5.0 FTE capacity). You need to either:

- Delay some project starts
- Hire additional resources
- Reduce scope to lower resource demand
- Accept that some projects will take longer than planned

Smoothing resource demand:

If you see sharp spikes in demand followed by valleys, consider:

- Shifting lower-priority project starts to fill the valleys
- Spreading project work more evenly over time
- Staggering project starts rather than launching many simultaneously

New Proposals Evaluation

This section covers project proposals that haven't been approved yet—your intake pipeline.

Proposal Status Categories

✅ **READY for Planning Phase** – Approved to move forward ⚠️ **AWAITING INPUT** – Need more information before decision ⚠️ **AWAITING REVIEW** – Pending evaluation by decision-makers ✖ **BLOCKED** – Cannot proceed for identified reasons 💠 **Spawned State** – Initial creation, no progress in workflow

Proposal Inventory & Assessment Table

Similar to approved projects table, but shows proposals with:

Proposal Status – Visual indicator of where it stands in approval process **Estimated values** – Since these aren't approved, budget/duration are estimates

How to Evaluate Proposals

Step 1: Review proposals in "⚠️ AWAITING REVIEW" status

These are proposals waiting for your decision. For each:

1. Check Strategic Priority score – Does this align with current priorities?
2. Review Budget/Forecast – Is this investment level appropriate?
3. Check Est. Duration – Does timeline fit portfolio capacity?
4. Look for Key Dependencies – Will this create sequencing problems?
5. Consider portfolio balance – Will approving this improve or worsen portfolio balance?

Step 2: Use portfolio context for go/no-go decisions

Don't evaluate proposals in isolation. Consider:

Risk balance: If your portfolio is already 40% high-risk projects, do you want to approve another high-risk proposal?

Initiative type balance: If you're under-invested in Innovation & Transformation and this proposal falls in that category, it's more valuable than a similar Maintenance project.

Time horizon balance: If you have zero long-term projects, approve some long-duration proposals even if they're not the highest priority.

Strategic alignment: If a strategic pillar is under-funded, prioritize proposals supporting that pillar.

Resource capacity: If your resource capacity analysis shows over-allocation, don't approve resource-intensive proposals until capacity becomes available.

Step 3: Request additional information for "⚠️ AWAITING INPUT" proposals

These proposals need more details before you can decide. Common missing information:

- Detailed cost breakdown
- Resource requirements by month
- Strategic benefit quantification
- Risk assessment
- Technical feasibility study
- Regulatory impact analysis

Assign someone to gather this information and move the proposal to "AWAITING REVIEW" status.

Step 4: Address "× BLOCKED" proposals

Proposals may be blocked for reasons like:

- Budget not available
- Required resources not available
- Technology dependency not yet available
- Organizational readiness not sufficient
- Strategic priority conflicts with other initiatives

For each blocked proposal:

- Confirm the blocker is still valid
- Determine whether the blocker can be resolved
- Set a timeline for resolution or formally reject the proposal
- Don't let proposals languish in blocked status indefinitely

Risk Score Portfolio Analysis

This is one of the most valuable sections for portfolio rebalancing. It shows how risk is distributed across your portfolio.

Overall Risk Metrics

Average Risk Score: Mean risk score across all projects

- 0-25: Very low average risk (conservative portfolio)
- 26-50: Low to moderate average risk (balanced portfolio)
- 51-75: High average risk (aggressive portfolio)
- 76-100: Very high average risk (extremely risky portfolio)

Projects Without Risk Score: Number of projects missing risk assessments

- Ideally this should be 0
- High numbers indicate inadequate risk assessment

- Use Project Assessment Tool to score these projects

Projects With Very High Score: Count of projects in 80-100 range

- These are your highest-risk initiatives
- Monitor closely and consider enhanced governance

Budget Distribution by Risk Score

This shows what percentage of your total portfolio budget is allocated to each risk category:

```
Very High (80-100): 24.4% ($1.5M)
High (60-79): 17.9% ($1.1M)
Medium (40-59): 20.3% ($1.25M)
Low (20-39): 30.9% ($1.9M)
Very Low (0-19): 6.5% ($400K)
```

Interpreting Risk Distribution

Question 1: What's your organizational risk tolerance?

Different organizations should have different risk distributions based on their strategy and risk appetite:

Conservative Organization (risk-averse, regulated industry, limited resources):

- Target: 10-15% in Very High/High risk
- Target: 60-70% in Low/Very Low risk
- Accept fewer but safer projects

Balanced Organization (typical mid-size company):

- Target: 20-30% in Very High/High risk
- Target: 30-40% in Medium risk
- Target: 30-40% in Low/Very Low risk
- Mix of innovation and safe bets

Aggressive Organization (growth-focused startup, transformation initiative):

- Target: 40-50% in Very High/High risk
- Target: 30-40% in Medium risk
- Target: 10-20% in Low/Very Low risk
- Taking calculated risks for high rewards

Question 2: Does your actual distribution match your target?

Compare your actual distribution to your organizational target. If they don't match, you need to rebalance.

Example problem:

Your organization says it's conservative, but analysis shows:

- 42% in Very High/High risk
- 20% in Medium risk
- 38% in Low/Very Low risk

This mismatch means either:

1. Your portfolio is riskier than your risk appetite allows (fix: kill or delay high-risk projects)
2. Your stated risk tolerance doesn't match reality (fix: acknowledge you're actually risk-seeking)

Top Risk Score Projects

The report lists your highest-risk projects:

```
Public Cloud Phase 1: 100.0
Database Upgrade Market Datamart: 93.0
Private Cloud Phase 1: 93.0
```

Why this matters: These projects have the highest probability of failure, delays, or cost overruns. They require:

- **Enhanced governance** – More frequent status reviews
- **Executive sponsorship** – Remove blockers quickly
- **Risk mitigation resources** – Extra budget and time
- **Contingency plans** – What happens if they fail?
- **Possible kill decisions** – If risk is unacceptable

Questions to ask about each top-risk project:

1. **Is this risk score accurate?** – Should we reassess using the Project Assessment Tool?
2. **Is this risk acceptable?** – Does the strategic value justify this level of risk?
3. **Can we de-risk it?** – Can we reduce scope, phase it, or add resources to lower risk?
4. **Do we have the right team?** – Are we staffing high-risk projects with our best people?
5. **Should we kill it?** – Would organizational resources be better deployed elsewhere?

Risk Score by Project Characteristics

This analysis shows whether risk correlates with project size:

By Project Size:

```
Large (>$500K): 7 projects, Avg Risk Score 54.7, $4.0M (65% of budget)
Medium ($100K-$500K): 6 projects, Avg Risk Score 63.8, $2.15M (35% of budget)
Small ($10K-$100K): 0 projects
```

What this tells you:

Your medium-sized projects (63.8 avg risk) are riskier on average than your large projects (54.7 avg risk). This is unusual—typically larger projects are riskier. This could mean:

- You're managing large projects well but struggling with medium ones
- Medium projects are in unfamiliar territory (new technologies, new markets)
- Large projects have more resources and oversight, reducing risk
- Your risk assessment methodology may under-score large project risks

By Risk Level (Project Health Status):

This shows actual project health status (green/yellow/red) vs. risk scores, helping you identify:

- High-risk projects that are currently green (still risky, just performing well so far)
- Low-risk projects that are red (something unexpected is going wrong)

Risk Score Distribution Table

This provides the detailed breakdown:

Risk Score Range	Projects	% of Projects	Total Budget	% of Budget
Very High (80-100)	4	30.8%	\$1.5M	24.4%
High (60-79)	2	15.4%	\$1.1M	17.9%
Medium (40-59)	3	23.1%	\$1.25M	20.3%
Low (20-39)	3	23.1%	\$1.9M	30.9%
Very Low (0-19)	1	7.7%	\$400K	6.5%

Use this to calculate:

Combined High Risk Exposure: Very High + High = 30.8% + 15.4% = 46.2% of projects **Combined High Risk Budget:** Very High + High = 24.4% + 17.9% = 42.3% of budget

If your target is 25% high-risk budget, you're substantially over-allocated (42.3% vs. 25%).

Risk Score Balance Analysis & Recommendations

The report automatically generates insights and recommendations, such as:

Key Insights:

- "Strong portfolio with 4 projects in the very high Risk Score range"
- "3 large budget projects have low Risk Scores (below 40)"

Recommendations:

- "Review and potentially restructure large projects with low Risk Scores to improve their viability"
- "Aim for a more balanced Risk Score distribution with most projects in the 40-79 range"
- "Regularly review Risk Score calculation methodology to ensure it accurately reflects project characteristics"

How to act on recommendations:

1. **If told to reduce high-risk projects:** Identify lowest-priority high-risk projects for kill or delay decisions
 2. **If told to add more risk:** Consider whether you're being too conservative and missing strategic opportunities
 3. **If told large projects have low scores:** Reassess those projects—are you under-estimating risks on important initiatives?
 4. **If told to balance distribution:** Adjust approval criteria to favor projects that balance out your current distribution
-

Initiative Type Balance Analysis

This section evaluates whether your portfolio has the right mix of project types.

The Four Initiative Types

Maintenance & Operational – Keep-the-lights-on projects

- System upgrades, bug fixes, operational improvements
- Necessary but not strategic
- Low risk, low reward
- Examples: Server upgrades, license renewals, routine maintenance

Innovation & Transformation – Game-changing initiatives

- New business models, major process changes, emerging technologies
- High risk, high reward
- Strategic importance
- Examples: Digital transformation, AI implementation, new product lines

Growth & Enhancement – Expand capabilities

- New markets, new features, incremental improvements
- Moderate risk, moderate reward
- Strategic execution
- Examples: Market expansion, feature development, capability building

Mandatory & Compliance – Required by regulation or policy

- Can't be avoided regardless of strategic value
- Risk of non-compliance
- Must-do projects
- Examples: GDPR compliance, security upgrades, regulatory reporting

Initiative Balance Score

The report calculates an overall balance score (0-100) with sub-scores:

Project Count Balance (93.7%) – How evenly projects are distributed **Budget Allocation Balance (96.0%)** – How evenly budget is distributed **Strategic Priority Balance (93.4%)** – How evenly priority is distributed

Interpretation:

- **90-100%** – Well balanced, no significant imbalances
- **70-89%** – Moderately balanced, some imbalances present
- **50-69%** – Imbalanced, needs attention
- **Below 50%** – Severely imbalanced, requires immediate correction

A score of 94.8/100 indicates your portfolio is very well balanced across initiative types.

Distribution by Initiative Type

For each initiative type, the report shows:

Projects: Count and percentage of total **Budget:** Dollar amount and percentage **Cost:** Actual spending to date **Priority Score:** Sum of strategic priorities

Example:

```
Maintenance Operational  
Projects: 5 (38.5%)  
Budget: $2,100,000 (34.1%)  
Cost: $1,115,500  
Priority Score: 184.0
```

Interpreting Initiative Type Distribution**Ideal distribution (varies by organization):****Growth-Stage Company:**

- Maintenance: 20-25%
- Innovation: 35-45%
- Growth: 30-40%
- Compliance: 5-10%

Mature Enterprise:

- Maintenance: 30-40%
- Innovation: 20-30%
- Growth: 20-30%
- Compliance: 10-20%

Regulated Industry:

- Maintenance: 25-35%
- Innovation: 15-25%
- Growth: 20-30%
- Compliance: 20-30%

Common Problems Identified:

Problem: Over-invested in Maintenance (40%+ of budget)

- Consuming resources on operational work
- Under-investing in strategic initiatives
- Risk of competitive decline

Action: Identify lower-value maintenance projects to defer or eliminate. Redirect freed resources to Innovation and Growth initiatives.

Problem: Under-invested in Compliance (< 5% when it should be 15%)

- Regulatory risk exposure
- Potential fines or operational disruptions
- Audit findings will force corrective action

Action: Identify mandatory compliance projects that aren't in the portfolio. Assess regulatory risk. Add compliance projects or accept documented risk.

Problem: Too much Innovation (50%+ of budget)

- High portfolio risk
- Neglecting operational stability
- Potential for many projects to fail

Action: Be realistic about organizational change capacity. Defer some innovation projects to future periods. Ensure adequate maintenance to keep operations stable.

Visualizations

The report includes pie charts showing:

- **Project Count Distribution** – How many projects in each category
- **Budget Allocation Distribution** – How budget is distributed
- **Cost Distribution** – How actual spending is distributed
- **Strategic Priority Distribution** – How priority points are allocated

Compare these charts:

If Project Count and Budget Allocation are misaligned:

- Example: 40% of projects are Maintenance, but only 20% of budget
- This means Maintenance projects are smaller on average
- May indicate you're running too many small Maintenance projects

If Budget Allocation and Priority Distribution are misaligned:

- Example: 30% of budget to Innovation, but only 10% of priority points
- This means you're spending money on Innovation but not prioritizing it
- Suggests strategic confusion

Initiative Type Analysis Recommendations

The report provides insights like:

Key Insights:

- "Low representation of Mandatory Compliance initiatives in the portfolio"

Recommendations:

- "Establish target allocation percentages for each initiative type based on organizational strategy"
- "Regularly review initiative type balance during portfolio planning sessions"

How to implement recommendations:**1. Establish targets:**

- Work with leadership to define ideal initiative type distribution
- Document target percentages for each category
- Get executive agreement on targets

2. Review regularly:

- Add initiative type balance to portfolio review meeting agendas
- Track trends over time (are you improving or worsening?)
- Adjust approval criteria to maintain balance

3. Use as decision filter:

- When evaluating new proposals, consider current balance
- If over-invested in Maintenance, defer new Maintenance proposals
- If under-invested in Compliance, fast-track Compliance proposals

Time Horizon Balance Analysis

This section evaluates whether your portfolio has appropriate short-term, medium-term, and long-term balance.

The Three Time Horizons**Short-term (0-4 months) – Quick wins**

- Fast delivery, immediate value
- Low risk of scope creep or changing requirements
- High visibility and momentum
- Examples: Bug fixes, small enhancements, quick deployments

Medium-term (4-12 months) – Standard projects

- Typical project duration for most organizations
- Manageable scope and risk
- Deliver meaningful capabilities
- Examples: System implementations, process improvements, new features

Long-term (12+ months) – Strategic initiatives

- Major transformations, large-scale programs
- High complexity and coordination requirements
- Strategic positioning for the future
- Examples: Platform migrations, market expansions, organizational transformations

Time Horizon Balance Score

Similar to Initiative Type Balance, this shows:

Overall Score (67.0/100) – How balanced your time horizon mix is **Project Count Balance (70.0%)** – Distribution of project counts **Budget Allocation Balance (65.4%)** – Distribution of budget **Strategic Priority Balance (70.0%)** – Distribution of priority

A score of 67/100 indicates moderate imbalance requiring attention.

Ideal vs. Actual Distribution

The report shows recommended vs. actual mix:

Recommended Portfolio Mix:

- Short-term: 20%
- Medium-term: 50%
- Long-term: 30%

Your Current Portfolio Mix:

- Short-term: 23.1%
- Medium-term: 76.9%
- Long-term: 0%

Interpreting Time Horizon Imbalances

Your Example Problem:

You have zero long-term projects. This is a significant strategic risk because:

- You're not building future capabilities
- No projects positioning you for 2-3 years out
- Over-focused on tactical execution
- Competitors investing in long-term may leap ahead

Additionally, you're over-weighted in medium-term (76.9% vs. recommended 50%), which means:

- Too many projects in the 4-12 month range
- May be breaking up what should be long-term initiatives into smaller chunks
- Missing both quick wins and strategic bets

Common Time Horizon Problems:

Problem: No long-term projects (0% when should be 30%)

- **Why it happens:** Long-term projects are risky and don't show immediate results
- **Consequence:** Competitive decline, strategic drift, future capability gaps
- **Action:** Approve strategic initiatives even if ROI is distant

Problem: Too many short-term projects (40% when should be 20%)

- **Why it happens:** Quick wins are appealing, easy to justify
- **Consequence:** Constantly reacting, never building transformational capabilities
- **Action:** Consolidate fragmented short-term work into fewer, more substantial projects

Problem: Too many medium-term projects (80% when should be 50%)

- **Why it happens:** This is the "safe" duration—not too short, not too long
- **Consequence:** Missing both quick wins and strategic positioning
- **Action:** Break some medium-term projects into quick wins; extend others into strategic initiatives

Problem: Only long-term projects (60% when should be 30%)

- **Why it happens:** Large transformation programs, limited project count
- **Consequence:** No near-term value delivery, stakeholder patience wears thin
- **Action:** Add short-term projects to show progress and momentum

Project Timeline Overview

The report includes a visual timeline showing when projects are scheduled across future months. Use this to:

Identify gaps:

- Months with no project completions
- Periods where nothing is delivering
- Stakeholders see no value for extended periods

Identify congestion:

- Too many projects completing simultaneously
- Resource bottlenecks for deployment/rollout
- Risk of quality issues from rushing

Validate sequencing:

- Ensure dependencies are respected
- Check that project order makes sense
- Verify no impossible overlaps

Time Horizon Analysis Recommendations

Key Insights from your example:

- "Portfolio lacks long-term projects (12+ months), which may affect strategic future positioning"
- "Portfolio is heavily weighted toward Medium-term (4-12 months) projects (76.9% of total projects)"
- "Budget allocation is concentrated in Medium-term (4-12 months) projects (84.6% of total budget)"

Recommendations:

- "Consider reducing focus on Medium-term projects from current 76.9% toward the recommended 50% of portfolio"
- "Increase the number of Long-term projects to approach the recommended 30% of portfolio (currently at 0%)"
- "Include long-term projects to support strategic objectives and future positioning"

How to act on these recommendations:**1. Identify potential long-term projects:**

- Review new proposals for long-duration initiatives
- Consider whether some approved medium-term projects could be extended into long-term strategic initiatives
- Brainstorm strategic capabilities needed 2-3 years out

2. Reassess medium-term projects:

- Can any be accelerated into short-term quick wins?
- Should any be expanded into long-term strategic initiatives?
- Are any actually delivering less value than their cost, making them candidates for cancellation?

3. Set time horizon targets:

- Establish organizational targets for time horizon distribution
- Create approval criteria that favor projects balancing toward targets
- Track progress toward targets over multiple quarters

Using the Report for Portfolio Decisions

Scenario 1: Quarterly Portfolio Review Meeting**Before the meeting:**

1. Generate the most current Portfolio Status and Balancing Report
2. Distribute to all attendees 24-48 hours in advance
3. Ask attendees to review and come prepared with questions

During the meeting:**Agenda Item 1: Executive Summary Review (10 min)**

- Review health indicators
- Discuss any red or yellow indicators
- Identify which detailed sections need deep discussion

Agenda Item 2: Financial Performance (15 min)

- Review portfolio investment vs. budget
- Discuss significant variances

- Assess whether spending aligns with expectations

Agenda Item 3: Strategic Alignment Check (15 min)

- Review strategic pillar budget distribution
- Confirm spending matches priorities
- Identify any strategic misalignments

Agenda Item 4: In-Flight Project Status (15 min)

- Review critical projects requiring attention
- Discuss red and yellow projects
- Decide on interventions needed

Agenda Item 5: Portfolio Balance Review (20 min)

- Review Risk Score Distribution
- Review Initiative Type Balance
- Review Time Horizon Balance
- Identify specific imbalances requiring correction

Agenda Item 6: New Project Approvals (20 min)

- Review proposals awaiting decision
- Consider portfolio context (balance, capacity, risk)
- Make approval decisions

Agenda Item 7: Rebalancing Decisions (15 min)

- Based on balance analysis, what needs to change?
- Identify projects to delay, descope, or kill
- Commit to specific actions

Agenda Item 8: Action Items and Next Steps (10 min)

- Document decisions made
- Assign action item owners
- Set follow-up timelines

Scenario 2: Approving a New High-Risk Project

Question: Should we approve this new AI/ML project with a risk score of 85?

Step 1: Check current risk exposure

Look at Risk Score Portfolio Analysis:

- Current High + Very High Risk budget: 42% of portfolio
- Organizational target: 30% max

Step 2: Calculate impact of approval

If this project is budgeted at \$500K and portfolio is \$6M:

- Adding it: $(\$2.6M + \$500K) / (\$6M + \$500K) = 47.7\%$ high-risk
- This exceeds target even more

Step 3: Make context-informed decision

Option A: Reject the project

- "We're already over-allocated in high-risk projects at 42% vs. our 30% target. Adding another high-risk project would push us to 48%, which is unacceptable."

Option B: Approve with risk mitigation

- "We'll approve this project, but only after implementing these risk mitigation actions: [specific actions]. We expect these to reduce the risk score from 85 to 65."

Option C: Approve and kill a different high-risk project

- "We'll approve this project because it's strategically critical. To maintain portfolio balance, we'll kill Project X (risk score 92, budget \$600K), which is lower priority."

Option D: Defer approval

- "This project has merit, but our portfolio can't absorb more risk right now. We'll revisit approval in Q3 after some current high-risk projects complete."

Scenario 3: Forced Budget Cut of 20%

Question: Executive leadership mandates 20% portfolio budget reduction. How do we decide what to cut?

Step 1: Calculate total reduction needed

Portfolio budget: \$6.2M Required cut: 20% = \$1.24M

Step 2: Use portfolio analysis to identify candidates

First, protect critical projects:

- Mandatory Compliance projects (regulatory requirement)
- Critical Projects identified in the report
- Projects with high strategic priority AND low risk

Second, identify kill candidates:

Low-hanging fruit:

- Projects with low strategic priority scores (<30)
- Projects with high risk scores (>80) AND low strategic value
- Projects in red health status that are struggling anyway
- Projects where benefits are not materializing (large negative variance)

Look at Initiative Type Balance:

- If over-invested in Maintenance & Operational (38.5% vs. target 25%), cut there first
- Protect under-represented categories

Look at Time Horizon Balance:

- If over-invested in medium-term (76.9% vs. target 50%), cut medium-term projects
- Protect the few long-term strategic initiatives you have

Step 3: Create cut scenarios**Scenario A: Kill 4 low-priority maintenance projects**

- Total savings: \$1.2M
- Impact: Reduces Maintenance category to 28% (closer to target 25%)
- Risk: Some operational debt accumulates

Scenario B: Kill 1 large high-risk project + 2 small projects

- Total savings: \$1.3M
- Impact: Reduces high-risk exposure from 42% to 35%
- Risk: May affect strategic initiative

Scenario C: Descope 6 projects by 20% each

- Total savings: \$1.25M
- Impact: All projects continue but with reduced scope
- Risk: May reduce delivered value, create scope creep pressure

Step 4: Model the impact

For each scenario, calculate the resulting:

- Risk score distribution
- Initiative type balance
- Time horizon balance
- Strategic alignment

Choose the scenario that maintains best overall portfolio balance.

Scenario 4: Rebalancing for Strategic Shift

Question: Leadership announces new strategy emphasizing Innovation & Transformation. How do we rebalance the portfolio?

Step 1: Understand current state

Current Initiative Type Distribution:

- Maintenance: 38.5% of projects, 34.1% of budget
- Innovation: 30.8% of projects, 26.8% of budget
- Growth: 23.1% of projects, 26.0% of budget
- Compliance: 7.7% of projects, 13.0% of budget

Step 2: Define target state

New strategy targets:

- Maintenance: 25% of budget
- Innovation: 40% of budget
- Growth: 25% of budget
- Compliance: 10% of budget

Step 3: Calculate required changes

Current Innovation budget: \$1.65M (26.8%) Target Innovation budget: \$2.48M (40%) Gap: Need +\$830K in Innovation projects

Current Maintenance budget: \$2.1M (34.1%) Target Maintenance budget: \$1.55M (25%) Excess: Need -\$550K in Maintenance projects

Step 4: Take rebalancing actions

Over next two quarters:

1. **Defer or kill lower-priority Maintenance projects** worth \$550K
2. **Fast-track Innovation proposals** currently in intake pipeline
3. **Approve new Innovation projects** to reach \$830K additional investment
4. **Adjust approval criteria** to favor Innovation over Maintenance going forward

Step 5: Monitor progress

- Generate Portfolio Status and Balancing Report monthly
- Track Initiative Type Balance Score
- Confirm moving toward 40% Innovation target
- Adjust approvals as needed to maintain trajectory

Portfolio Rebalancing Actions

When the report identifies imbalances, here are specific actions you can take:

Action 1: Kill Projects

When to use: Severe imbalances, forced budget cuts, portfolio risk too high

Process:

1. Identify kill candidates using report analysis
2. Calculate impact of killing each candidate on portfolio balance
3. Notify stakeholders and project teams
4. Execute orderly wind-down
5. Reallocate freed resources to higher-priority work

Selection criteria:

- Low strategic priority + High risk = Top kill candidate
- Red health status + Low priority = Project is failing anyway
- Projects not aligned with strategic pillars = Misaligned with strategy
- Projects in over-represented categories = Helps rebalance

Action 2: Delay Projects

When to use: Resource capacity constraints, temporary imbalances, sequencing issues

Process:

1. Identify approved-not-started projects that could be delayed
2. Check dependencies—don't delay if other projects depend on it
3. Set new target start date (e.g., delay by one quarter)
4. Communicate to stakeholders
5. Use freed near-term capacity for higher-priority work

Selection criteria:

- Projects with flexible timelines (not time-sensitive)
- Projects in categories you're over-invested in
- Projects waiting on dependencies that aren't ready yet
- Projects that could benefit from more planning time

Action 3: Descope Projects

When to use: Need to reduce budget/risk but want to keep project alive

Process:

1. Identify projects that could deliver value with reduced scope
2. Work with project teams to identify nice-to-have vs. must-have features
3. Remove nice-to-have features to reduce cost/duration/risk
4. Update project budgets and timelines
5. Recalculate portfolio balance with new numbers

Selection criteria:

- Projects with "gold-plating" or unnecessary complexity
- Projects where 80% of value comes from 50% of scope
- High-risk projects that could become medium-risk with reduced scope
- Large projects that could be broken into phases

Action 4: Accelerate Projects

When to use: Categories are under-represented, need near-term wins

Process:

1. Identify approved-not-started projects that could launch earlier
2. Verify resources are available
3. Confirm readiness to start
4. Fast-track through any remaining approval gates
5. Launch project

Selection criteria:

- Projects in under-represented initiative types
- Projects that improve time horizon balance (add long-term if missing)
- Projects that could be quick wins (short-term)
- Projects supporting under-funded strategic pillars

Action 5: Phase Projects

When to use: Large projects, high-risk projects, long-duration projects

Process:

1. Identify large or high-risk projects
2. Break into phases (e.g., Phase 1: Pilot, Phase 2: Rollout)
3. Approve Phase 1 only
4. Gate Phase 2 approval on Phase 1 success
5. Reduces committed budget and risk exposure

Benefits:

- Reduces risk by proving feasibility in Phase 1
- Allows learning before full Commitment
- Spreads cost over longer time period
- Provides natural kill points if project doesn't prove value

Action 6: Adjust Approval Criteria

When to use: Preventing future imbalances, guiding intake decisions

Process:

1. Based on current imbalances, create weighted approval criteria
2. Give extra weight to proposals in under-represented categories
3. Give negative weight to proposals in over-represented categories
4. Use criteria consistently in approval decisions

Example criteria:

Base Score = Strategic Priority Score

Adjustments:

- +10 points if project is Innovation (currently under-invested)
- +10 points if project is Long-term duration (currently 0%)
- 10 points if project is Maintenance (currently over-invested)
- 10 points if project is Medium-term (currently 76.9%)
- +15 points if project supports under-funded strategic pillar
- 5 points if risk score > 80 (already over-exposed to high risk)

Final Score = Base Score + Adjustments

Approve projects with highest Final Scores until budget/capacity exhausted.

Best Practices

Generate Reports Consistently

Monthly generation: Create report at start of each month

- Track trends over time
- Identify emerging imbalances before they become severe
- Document portfolio evolution

Before key decisions: Always generate fresh report before:

- Quarterly portfolio reviews
- New project approval decisions
- Budget planning cycles
- Strategic planning sessions

Save historical versions: Archive each report with date stamp

- Compare current to past quarters
- Show stakeholders how portfolio has evolved
- Demonstrate that rebalancing actions are working

Ensure Data Quality

The report is only as good as your underlying data. Maintain quality by:

Regular project updates:

- Update health indicators monthly (minimum)
- Keep budgets, forecasts, and schedules current
- Record actual costs and hours

Complete risk assessments:

- Use Project Assessment Tool for all active projects
- Reassess risk when project circumstances change
- Don't leave projects un-assessed

Accurate strategic tagging:

- Assign correct initiative types (Maintenance, Innovation, etc.)
- Tag projects with supported strategic pillars
- Maintain consistent strategic priority scores

Proper project phasing:

- Keep PMI phase current (Initiating, Planning, Executing, etc.)
- Update project states (Approved, Blocked, etc.)
- Don't let project status become stale

Share Widely

Don't keep the report in portfolio management only:

Executive leadership: Provides portfolio-level visibility they need for strategic decisions

Project sponsors: Shows portfolio context for their projects

Resource managers: Helps understand upcoming demand

Project managers: Understand where their project fits in the bigger picture

Finance: Aligns financial planning with portfolio reality

Use as Discussion Tool, Not Mandate

The report provides data and recommendations, but humans make decisions:

- Don't blindly follow recommendations without considering context
- Use recommendations as starting point for discussion
- Override recommendations when you have good reasons
- Document why you chose to override (for future reference)

Act on Insights

Generating the report without acting on it wastes time:

- Identify top 3 imbalances from each report
- Create action plans to address imbalances
- Assign ownership for each action
- Follow up on action completion in next portfolio review
- Verify next month's report shows improvement

Establish Portfolio Targets

Define organizational targets for:

Risk exposure:

- Maximum % of budget in High + Very High risk: ____%
- Minimum % of budget in Low + Very Low risk: ____%

Initiative type distribution:

- Target % for Maintenance: ____%
- Target % for Innovation: ____%
- Target % for Growth: ____%
- Target % for Compliance: ____%

Time horizon distribution:

- Target % for Short-term: ____%
- Target % for Medium-term: ____%

- Target % for Long-term: ____%

Document these targets and reference them when reviewing reports.

Calibrate Your Methodology

Periodically validate that your assessment methodologies are accurate:

Risk score validation:

- Do projects with high risk scores actually experience more problems?
- Do low-risk projects typically succeed as expected?
- Adjust assessment criteria if scores don't predict reality

Strategic priority calibration:

- Do high-priority projects actually deliver more strategic value?
- Are priority scores consistent across different evaluators?
- Adjust priority methodology if scores don't reflect true importance

Initiative type classification:

- Are projects properly categorized?
- Do team members agree on classifications?
- Update classification guidelines if confusion exists

Conclusion

The Portfolio Status and Balancing Report is your most powerful tool for strategic portfolio management. It transforms raw project data into actionable intelligence about portfolio health, strategic alignment, and balance across multiple dimensions.

Use this report to:

- Make informed approval decisions that consider portfolio context
- Identify and correct dangerous imbalances before they cause problems
- Defend difficult kill decisions with objective data
- Communicate portfolio status clearly to executives
- Maintain portfolio alignment with organizational strategy and risk tolerance

Remember the key principles:

1. **Generate regularly** – Monthly minimum, before key decisions always
2. **Ensure data quality** – Report is only as good as underlying data
3. **Share widely** – Portfolio management is a team sport
4. **Act on insights** – Reports without action are wasted effort
5. **Track progress** – Compare over time to verify improvements
6. **Balance competing priorities** – Use the report to make explicit trade-offs

Your portfolio represents your organization's future. This report ensures that future is balanced, strategic, and aligned with your objectives.

19. Costbars Writing a Business Case

Source: Costbars Writing A Business Case

Business case data entry is at the Project Level (Green Bars), click on the bar ID, bottom left, click on Form button, scroll down to Business Case section and enter data in the fields as needed per your organization. If you wish to hide some of the fields to your users, configure entries in the Core Report spreadsheet tab per instructions in the Spreadsheet. You can paste directly into the fields as formatted data. Data is save when you leave a field. To view and print the Business Case, launch the Cards view on the PPM Page or the Portfolio Reports Menu.

Sample Business Case: CRM System Cloud Migration

The following example was generated by Grok.

Metadata

Attribute	Value	Attribute	Value	Attribute	Value
Status	New	Sponsor	Jim Cox	Primary Line of Business	IT Department
Workflow State	Awaiting Approval	PMI Phase	Initiating	Business Owner	Jim Cox
Stage	Prioritized	Business Advisor	Joe Blow	Sponsoring Department	Sales
Investment Portfolio	xxx	Type of Initiative	Project	Primary Contact	null
Contact Info	xxx				

Project Name/Title

CloudSync CRM Migration

Background Information

The organization currently relies on an on-premises CRM system (LegacyCRM v5.2) that is over a decade old. The system struggles with frequent downtime, slow performance, and limited scalability, impacting sales team productivity. Maintenance costs have risen by 15% annually, totaling \$120,000 in 2024. A cloud-based CRM solution offers scalability, enhanced security, and integration with modern tools like mobile apps and AI analytics.

Stakeholders

Name	Role	Department	Contact Info
Jim Cox	Sponsor/Business Owner	Sales	jim.cox@company.com
Joe Blow	Business Advisor	IT	joe.blow@company.com
Sarah Lee	IT Project Manager	IT	sarah.lee@company.com
Sales Team	End Users	Sales	sales.team@company.com
Finance Department	Budget Approver	Finance	finance@company.com

Problem/Opportunity

The current on-premises CRM system cannot support the organization’s growth, with a 20% increase in customer data annually. It lacks real-time analytics, mobile access, and integration with marketing platforms, leading to missed sales opportunities estimated at \$200,000 annually. Migrating to a cloud-based CRM (e.g., Salesforce or HubSpot) provides scalability, real-time insights, and improved user experience.

Consequence of Inaction

- **Financial Impact:** Continued maintenance costs of \$120,000/year and lost revenue of \$200,000/year due to inefficiencies.
- **Operational Impact:** Increased system downtime (currently 10 hours/month) disrupts sales workflows.
- **Competitive Risk:** Competitors using modern CRMs gain market share through faster customer response times.

Objectives and Scope

Objectives

- Migrate the CRM system to a cloud platform by Q4 2025.
- Reduce system downtime to under 1 hour/month.
- Enable mobile access and real-time analytics for the sales team.
- Achieve 20% improvement in sales team productivity within 6 months post-migration.

Scope

- **Inclusions:** Data migration, cloud CRM setup, user training, and integration with email and marketing tools.
- **Exclusions:** Hardware upgrades for on-premises servers, custom feature development beyond standard CRM capabilities.

Expected Benefits

- **Financial:** \$150,000/year savings from reduced maintenance and \$250,000/year in additional revenue from improved sales efficiency.
- **Operational:** 90% reduction in downtime and 20% faster data access.
- **Strategic:** Enhanced customer insights through AI analytics, supporting 25% faster decision-making.

Capabilities Needed

- Cloud infrastructure (e.g., AWS or Azure).
- CRM platform expertise (e.g., Salesforce-certified administrators).
- Data migration tools (e.g., Informatica or Talend).
- Training program for 50+ sales staff on cloud CRM usage.

Senior Level Commitment

- **Sponsor:** Jim Cox (VP of Sales) will champion the project, securing budget and aligning with strategic goals.
- **IT Director:** Maria Gomez will oversee technical implementation and resource allocation.

Constraints & Assumptions

Constraints

- Budget capped at \$300,000 for migration and first-year licensing.
- Project completion required by Q4 2025 to align with sales cycle.

Assumptions

- Existing data can be migrated without significant cleansing (80% clean).
- Staff training will be completed within 2 months post-migration.

Cost Benefit Analysis

Item	Cost	Benefit	Value
Cloud CRM Licensing (Year 1)	\$100,000	Maintenance Cost Savings	\$150,000/year
Data Migration & Setup	\$150,000	Increased Revenue	\$250,000/year
Training Program	\$50,000	Productivity Gains	\$100,000/year
Total	\$300,000	Total (Year 1)	\$500,000

ROI: 66.7% in Year 1 (\$500,000 benefits - \$300,000 costs / \$300,000).

Risk Assessment

Risk	Likelihood	Impact	Mitigation
Data migration errors	Medium	High	Conduct pre-migration testing and backups.
Staff resistance to new system	High	Medium	Implement change management and training.
Budget overrun	Low	High	Lock in vendor contracts early.

Timeline and Milestones

Milestone	Date
Vendor Selection	Q2 2025
Data Migration Completion	Q3 2025
System Testing	Q3 2025
User Training	Q4 2025
Go-Live	Q4 2025

Resource Requirements

- **Personnel:** 1 Project Manager, 2 CRM Developers, 1 Data Analyst, 1 Trainer (6-month contracts).
- **Tools:** Cloud CRM subscription, migration software, training materials.
- **Budget:** \$300,000 (including licensing, migration, and training).
- **Gaps:** Need to hire external CRM consultant for 3 months.

Workflow Status

- **Current Status:** Awaiting Approval (as of April 29, 2025).
- **Next Steps:** Present to Finance Committee in May 2025 for budget approval.

Written By

- **Author:** Sarah Lee, IT Project Manager
- **Role:** Project Lead
- **Date:** April 29, 2025

The following Business Case was generated by Claude AI

CRM Cloud Migration Business Case

Project ID: CLD-CRM-2025-Q2
Project Name: Enterprise CRM Cloud Migration
Department: Information Technology
Project Sponsor: Sarah Chen, Chief Information Officer
Project Manager: Michael Rodriguez
Date Created: April 29, 2025
Version: 1.0
Status: Draft - Pending Executive Approval
Priority: High
Estimated Budget: \$675,000
Expected Duration: 8 months

Executive Summary

Global Dynamics Inc. currently relies on a legacy on-premises CRM system that is approaching end-of-life with vendor support ending in December 2025. This business case proposes migrating our CRM infrastructure to a cloud-based solution to enhance customer engagement capabilities, improve operational efficiency, and reduce long-term IT maintenance costs. The initiative aligns with our 2025 digital transformation strategy and is expected to generate an ROI of 127% over three years with a payback period of 17 months. Implementation would begin in Q3 2025 with full deployment by Q1 2026.

Background Information

Global Dynamics has been using the current on-premises Salesforce Enterprise v9.2 CRM system for over seven years, with significant customizations developed for our specific sales and customer service processes. System performance has degraded over time, and our current architecture lacks integration capabilities with modern cloud tools our teams increasingly rely on. IT maintenance costs have risen 18% annually for the past three years, while system availability has declined to 97.2% against our target of 99.5%.

Our 2025-2027 strategic plan emphasizes customer-centric digital transformation, requiring more robust analytics and omnichannel engagement capabilities that our current system cannot efficiently deliver. Recent competitive analysis reveals that 78% of our industry peers have already transitioned to cloud-based CRM infrastructure, potentially gaining market advantages through improved customer insights and engagement capabilities.

Stakeholders

- **Executive Leadership Team:** Requires improved business intelligence and ROI from customer relationship management
- **Sales Department (120 users):** Primary system users needing reliable mobile access and integrated communication tools
- **Customer Service Team (85 users):** Requires enhanced case management and customer journey tracking
- **IT Department:** Responsible for implementation, integration, and ongoing support
- **Finance Department:** Concerned with cost management and accurate revenue forecasting
- **Marketing Team (45 users):** Needs better campaign attribution and customer segmentation tools
- **Compliance & Legal:** Must ensure data governance and privacy regulations are maintained
- **External Customers:** Will experience improved service delivery and communication channels

Problem Opportunity & Options Analysis

The current on-premises CRM system presents several challenges:

- Limited mobile functionality hampering field sales effectiveness (productivity loss estimated at \$325,000 annually)
- Siloed data preventing unified customer view across touchpoints
- Manual reporting processes requiring 25+ hours weekly of analyst time
- Limited scalability during peak seasons causing system slowdowns
- Rising maintenance costs (currently \$420,000 annually)

Three options were evaluated:

1. Maintain Current System with Upgrades

- Lowest initial investment (\$125,000)
- Does not address fundamental architecture limitations
- Continues high maintenance costs and technical debt
- Risk of unsupported system after December 2025

2. Build Custom Hybrid Solution

- Preserves some existing customizations
- Higher development complexity and risk
- Medium initial cost (\$900,000) but higher long-term maintenance
- 14-month implementation timeline

3. Full Cloud Migration (Recommended)

- Higher initial investment (\$675,000)
- Eliminates on-premises infrastructure costs
- Provides immediate access to new capabilities and regular updates
- 8-month implementation timeline with phased approach
- Supports strategic goals for data-driven customer engagement

Consequence of Inaction

Failing to address our CRM infrastructure limitations will likely result in:

- Potential system failure after vendor support ends in December 2025
- Continued productivity loss estimated at \$520,000 annually across departments
- Growing competitive disadvantage as competitors leverage advanced cloud CRM capabilities
- Inability to implement planned customer experience initiatives in our strategic roadmap
- Increasing technical debt and maintenance costs projected to rise 20% annually
- Growing security vulnerabilities as security patches become unavailable
- Employee dissatisfaction and potential retention issues among sales and service teams

Expected Benefits

The cloud CRM migration is expected to deliver:

- Reduction in IT infrastructure costs of \$275,000 annually starting in year 2
- 15% increase in sales team productivity through improved mobile access and automation
- 30% reduction in reporting time through enhanced analytics capabilities
- Improved system availability from current 97.2% to 99.9%
- Enhanced customer satisfaction through unified communication channels and faster response times
- Scalability to support planned company growth of 20% over next two years
- Annual software license cost reduction of \$120,000 through SaaS subscription model
- Improved data security and compliance with automatic security updates

Capabilities Needed & Implementation Approach

Required capabilities:

- Cloud CRM platform with strong mobile support and API ecosystem
- Data migration tools and expertise
- Integration capabilities with ERP and marketing automation tools
- Enhanced analytics and reporting functionality
- Training resources for all user groups

Implementation approach:

- Phase 1 (Months 1-2): Requirements validation and vendor selection
- Phase 2 (Months 3-4): System configuration and data migration planning
- Phase 3 (Months 5-6): Integration development and testing
- Phase 4 (Month 7): User acceptance testing and training
- Phase 5 (Month 8): Go-live and hypercare support
- Cross-functional implementation team with dedicated resources from IT, Sales, and Customer Service
- Change management program including executive sponsorship and department champions

Risk Assessment

Risk	Probability	Impact	Mitigation Strategy
Data migration errors	Medium	High	Comprehensive data audit, multiple test migrations, validation protocols
User adoption resistance	High	Medium	Early stakeholder engagement, phased training approach, identified champions in each department
Integration failures with legacy systems	Medium	High	Detailed integration mapping, API testing framework, contingency interfaces
Budget overruns	Medium	Medium	15% contingency buffer, fixed-price vendor contracts where possible, bi-weekly financial reviews
Timeline delays	Medium	Medium	Agile implementation methodology, critical path monitoring, resource redundancy for key roles
Business disruption during cutover	Low	High	Weekend deployment window, rollback plan, parallel systems during transition

Performance Measurement

Success of the CRM cloud migration will be measured through:

- System availability metrics (target: 99.9% uptime)
- User adoption rates across departments (target: 95% within 60 days)
- Average case resolution time (target: 20% improvement by 6 months post-implementation)
- Sales cycle length (target: 15% reduction by 9 months post-implementation)
- Customer satisfaction scores (target: 8% improvement within first year)
- Report generation time (target: reduction from current 25+ hours weekly to under 8 hours)
- Monthly tracking of actual vs. projected cost savings
- Quarterly executive dashboards showing ROI and KPI progress

Constraints & Assumptions

Constraints:

- Implementation must complete before current vendor support ends (December 2025)
- Total project budget cannot exceed \$700,000 (including contingency)
- System must maintain all current compliance certifications (SOC2, GDPR, CCPA)
- Core business operations cannot be disrupted during business hours
- All customizations must be thoroughly documented for future maintenance

Assumptions:

- Vendor selection can be completed within 45 days
- IT resources will be available as scheduled without competing priorities
- Department SMEs will be allocated 25% time to the project during critical phases
- Current data quality is sufficient for migration without major cleansing efforts
- Network infrastructure can support increased cloud traffic without upgrades

Cost Benefit Analysis

Investment costs:

- Software licensing: \$325,000 (year 1), \$275,000 annually thereafter
- Implementation services: \$220,000
- Data migration: \$85,000
- Training and change management: \$45,000
- Contingency (15%): \$101,250
- **Total Year 1 Investment: \$675,000**

Annual benefits (steady state):

- Infrastructure cost reduction: \$275,000
- License cost savings: \$120,000
- Productivity improvements: \$325,000
- Reduced maintenance effort: \$180,000
- **Total Annual Benefits: \$900,000**

Financial analysis:

- Year 1 net benefit: \$225,000
- 3-year ROI: 127%
- Payback period: 17 months
- NPV (3 years, 12% discount rate): \$1.12M

Senior Level Commitment & Next Steps

Executive sponsorship has been secured from:

- Sarah Chen, CIO (Primary Sponsor)
- David Takahashi, VP of Sales
- Elena Rodriguez, Chief Customer Officer

Next steps:

1. Present business case to Executive Committee for approval by May 15, 2025
2. Form project steering committee with biweekly meeting cadence
3. Initiate procurement process for vendor selection by June 1, 2025
4. Allocate required IT resources and finalize project team by June 15, 2025
5. Begin requirements validation and system design by July 1, 2025

Decision requested: Executive approval to proceed with project initiation and \$675,000 budget allocation from FY2025 IT transformation fund.