

Phase 9: Reports & Dashboards

TaskFlow Pro Project Management System

Reports Created

1. Project Status Report

- Format: Summary (grouped by Status)
- Shows: Name, Manager, Budget, Completion, Health

2. Task Assignment Report

- Format: Matrix (Project × Assigned To)
- Shows workload distribution

3. Time Entry Report

- Format: Summary (grouped by Resource and Date)
- Calculates billable vs non-billable hours

4. Overdue Tasks Report

- Filter: Due Date < TODAY AND Status != Completed
- Shows: Task, Assignee, Due Date, Days Overdue

Custom Report Type

Projects with Tasks and Time Entries

- Primary: TFP_Project__c
- Related: TFP_Task__c, TFP_Time_Entry__c, Contact

Dashboards Created

Executive Summary Dashboard

- Pie Chart: Projects by Status
- Bar Chart: Tasks by Priority
- Metric: Total Active Projects
- Gauge: Resource Utilization

Project Manager Dashboard

- Table: My Projects Status
- Line Chart: Task Completion Trend
- Funnel: Milestone Progress
- Metric: Hours Logged This Week

Team Dashboard

- Bar Chart: My Tasks by Status
- Table: Time Entries This Week
- Metric: Tasks Due Today
- Stacked Bar: Hours by Project

Dynamic Dashboards

View Dashboard As → The viewer

Each user sees their own data