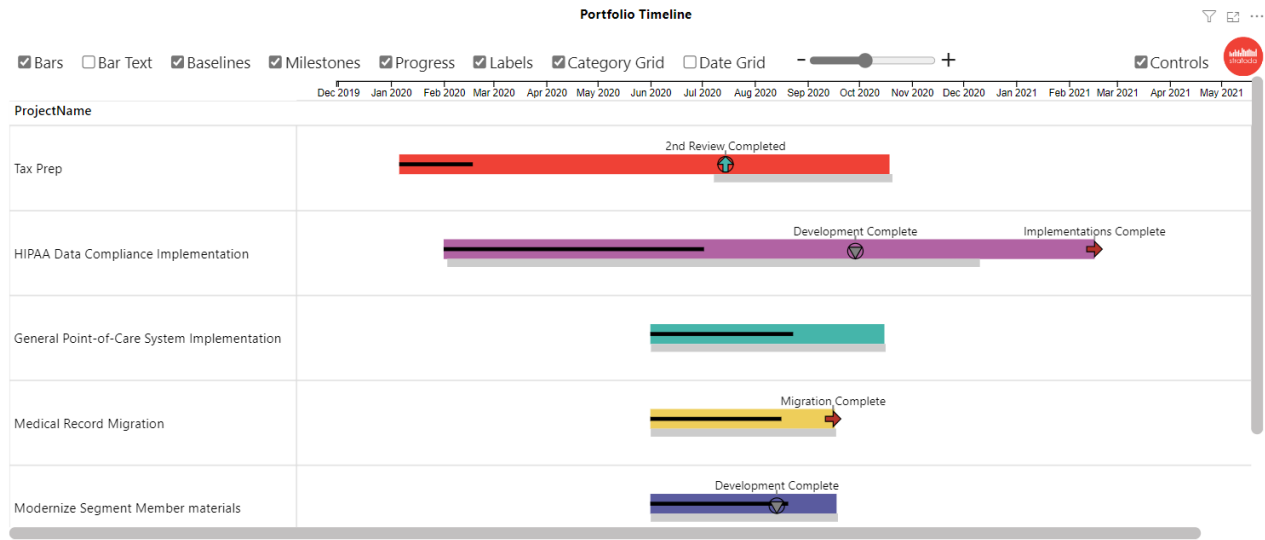


Portfolio Timeline

Here, we will show how to configure the “Portfolio Timeline” report included in the Sample Reports (download a pdf of this guide here)

In the Power BI sample report on the **Timeline** tab, click on the **Portfolio** button.



Here are the fields in the order they appear

Parent Category (required)

Parent Category defines the rows in the Timeline visual. Multiple fields can be used to display a hierarchy. Our example shows: Project Name

From the Excel data file on the **Portfolio-Timeline** table, we will use Project Name.

ProjectName
Tax Prep
Tax Prep
Tax Prep
HIPAA Data Compliance Implementation
HIPAA Data Compliance Implementation
HIPAA Data Compliance Implementation
HIPAA Data Compliance Implementation
General Point-of-Care System Implementation
General Point-of-Care System Implementation
Medical Record Migration
Medical Record Migration
Medical Record Migration
Modernize Segment Member materials
Modernize Segment Member materials
Modernize Segment Member materials
Enhanced Encounter Submission Capability
Enhanced Encounter Submission Capability

Here is the field in the Parent Category field well:

Parent Category

ProjectName

In the visual the result is:

ProjectName
Tax Prep
HIPAA Data Compliance Implementation
General Point-of-Care System Implementation
Medical Record Migration
Modernize Segment Member materials

Timeline Category (required)

Timeline Category is used to categorize both the Timeline Bars and Milestones and enables the ability to set Timeline Bar color by category, and Milestone color and shape by category. From our sample data we will use the Program Timeline Category field.

Program Timeline Category
Tax Prep
Analysis Complete
HIPAA Data Compliance Implementation
Deployment Complete
Development Complete
General Point-of-Care System Implementation
Medical Record Migration
Deployment Complete
Modernize Segment Member materials
Development Complete
Enhanced Encounter Submission Capability

Here is the field in the Timeline Category field well:

Timeline Category

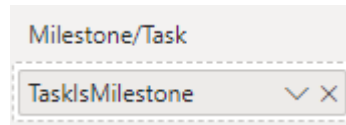
Program Timeline Cat... ▼ ✕

Milestone/Task (required)

This is a True/False field that delineates between Tasks and Milestones in the data. From our sample data:

ProjectName	TasksMilestone
Tax Prep	False
Tax Prep	True
Tax Prep	True
HIPAA Data Compliance Implementation	False
HIPAA Data Compliance Implementation	True
HIPAA Data Compliance Implementation	True
HIPAA Data Compliance Implementation	True
General Point-of-Care System Implementation	False
General Point-of-Care System Implementation	True
Medical Record Migration	False
Medical Record Migration	True
Medical Record Migration	True
Modernize Segment Member materials	False
Modernize Segment Member materials	True
Modernize Segment Member materials	True
Enhanced Encounter Submission Capability	False
Enhanced Encounter Submission Capability	True

Here is the field in the Milestone/Task field well:



A screenshot of a field well labeled "Milestone/Task". Inside the field well is a dropdown menu with "TasksMilestone" selected. The dropdown menu has a downward arrow and a close button (X).

Timeline Bar (required)

This field supplies the name for each Timeline bar. In many cases this will be the field used for the lowest level of the Parent Category – as in this case, we will use Project Name. Note that the visual will only use the data from the Project Name field when the Milestone/Task field is False:

ProjectName	TasksMilestone
Enhanced Encounter Submission Capability	False
Modernize Segment Member materials	False
Medical Record Migration	False
General Point-of-Care System Implementation	False
HIPAA Data Compliance Implementation	False
Tax Prep	False

Here is the field in the Timeline Bar field well:



A screenshot of a field well labeled "Timeline Bar". Inside the field well is a dropdown menu with "ProjectName" selected. The dropdown menu has a downward arrow and a close button (X).

Timeline Bar Text (optional)

The Timeline Bar Text field enables the display of text in the Timeline Bar. For this example, we will use Project Name:

ProjectName
Tax Prep
Tax Prep
Tax Prep
HIPAA Data Compliance Implementation
HIPAA Data Compliance Implementation
HIPAA Data Compliance Implementation
HIPAA Data Compliance Implementation
General Point-of-Care System Implementation
General Point-of-Care System Implementation
Medical Record Migration
Medical Record Migration
Medical Record Migration
Modernize Segment Member materials
Modernize Segment Member materials
Modernize Segment Member materials
Enhanced Encounter Submission Capability
Enhanced Encounter Submission Capability

Here is the field in the Timeline Bar Text field well:

Timeline Bar Text

ProjectName

The text can now be rendered in the Timeline bars:



Timeline Bar Start Date, Timeline Bar Finish Date (optional)

The Timeline Bar Start and Finish dates are used by the Timeline visual to define the Timeline bar display. From the sample data we will use Project Start Date and Earliest Finish Date:

ProjectName	ProjectStartDate	Earliest Finish Date
Tax Prep	1/6/2020 12:00:00 AM	10/19/2020 12:00:00 AM
Tax Prep	1/6/2020 12:00:00 AM	10/19/2020 12:00:00 AM
Tax Prep	1/6/2020 12:00:00 AM	10/19/2020 12:00:00 AM
HIPAA Data Compliance Implementation	2/1/2020 12:00:00 AM	2/16/2021 12:00:00 AM
HIPAA Data Compliance Implementation	2/1/2020 12:00:00 AM	2/16/2021 12:00:00 AM
HIPAA Data Compliance Implementation	2/1/2020 12:00:00 AM	2/16/2021 12:00:00 AM
HIPAA Data Compliance Implementation	2/1/2020 12:00:00 AM	2/16/2021 12:00:00 AM
General Point-of-Care System Implementation	6/1/2020 12:00:00 AM	10/16/2020 12:00:00 AM
General Point-of-Care System Implementation	6/1/2020 12:00:00 AM	10/16/2020 12:00:00 AM
Medical Record Migration	6/1/2020 12:00:00 AM	9/17/2020 12:00:00 AM
Medical Record Migration	6/1/2020 12:00:00 AM	9/17/2020 12:00:00 AM
Medical Record Migration	6/1/2020 12:00:00 AM	9/17/2020 12:00:00 AM
Modernize Segment Member materials	6/1/2020 12:00:00 AM	9/18/2020 12:00:00 AM
Modernize Segment Member materials	6/1/2020 12:00:00 AM	9/18/2020 12:00:00 AM
Modernize Segment Member materials	6/1/2020 12:00:00 AM	9/18/2020 12:00:00 AM
Enhanced Encounter Submission Capability	8/3/2020 12:00:00 AM	12/18/2020 12:00:00 AM
Enhanced Encounter Submission Capability	8/3/2020 12:00:00 AM	12/18/2020 12:00:00 AM

Here is the field in the Timeline Bar Start and Finish Date field wells:

The image shows a vertical stack of four field wells. The top well is labeled 'Timeline Bar Start Date' and contains a dropdown menu with 'ProjectStartDate' selected. The second well is labeled 'Timeline Bar Finish Date' and contains a dropdown menu with 'Earliest Earliest Finish ...' selected. The third and fourth wells are empty.

Baseline Bar Start and Finish Dates (optional)

If you have baseline date, these can be used to show baseline bars. From the sample data, we will use Project Baseline Start Date and Project Baseline Finish Date.

ProjectName	ProjectBaselineStartDate	ProjectBaselineFinishDate
Tax Prep	7/8/2020 8:00:00 AM	10/20/2020 5:00:00 PM
Tax Prep	7/8/2020 8:00:00 AM	10/20/2020 5:00:00 PM
Tax Prep	7/8/2020 8:00:00 AM	10/20/2020 5:00:00 PM
HIPAA Data Compliance Implementation	2/3/2020 8:00:00 AM	12/10/2020 5:00:00 PM
HIPAA Data Compliance Implementation	2/3/2020 8:00:00 AM	12/10/2020 5:00:00 PM
HIPAA Data Compliance Implementation	2/3/2020 8:00:00 AM	12/10/2020 5:00:00 PM
HIPAA Data Compliance Implementation	2/3/2020 8:00:00 AM	12/10/2020 5:00:00 PM
General Point-of-Care System Implementation	6/1/2020 8:00:00 AM	10/16/2020 5:00:00 PM
General Point-of-Care System Implementation	6/1/2020 8:00:00 AM	10/16/2020 5:00:00 PM
Medical Record Migration	6/1/2020 8:00:00 AM	9/17/2020 3:00:00 PM
Medical Record Migration	6/1/2020 8:00:00 AM	9/17/2020 3:00:00 PM
Medical Record Migration	6/1/2020 8:00:00 AM	9/17/2020 3:00:00 PM
Modernize Segment Member materials	6/1/2020 8:00:00 AM	9/18/2020 5:00:00 PM
Modernize Segment Member materials	6/1/2020 8:00:00 AM	9/18/2020 5:00:00 PM
Modernize Segment Member materials	6/1/2020 8:00:00 AM	9/18/2020 5:00:00 PM
Enhanced Encounter Submission Capability	8/3/2020 8:00:00 AM	12/18/2020 12:00:00 PM
Enhanced Encounter Submission Capability	8/3/2020 8:00:00 AM	12/18/2020 12:00:00 PM

Here is the field in the Baseline Bar Start and Finish Date field wells:

Baseline Bar Start Date

ProjectBaselineStartD... ▾ ×

Baseline Bar Finish Date

ProjectBaselineFinish... ▾ ×

Milestone

Much like the Timeline Bar field, Milestone is used to name the milestones. Again, in many cases the field in the lowest Parent Category position will be used – as in this case, we use Timeline Milestone. Note that the visual will only use the data from the Task field when the Milestone/Task field is True:

ProjectName	Timeline Milestone
Modernize Segment Member materials	Development Complete
Medical Record Migration	Migration Complete
HIPAA Data Compliance Implementation	Development Complete
HIPAA Data Compliance Implementation	Implementations Complete
Tax Prep	2nd Review Completed

Here is the field in the Milestone field wells:

Milestone

Timeline Milestone ▾ ×

Milestone Date

Milestones only need one date, and this is where it's needed. We will use Start Date for this field well:

Milestone Date

Earliest Earliest Timeli... ▾ ×

Data Label

Data labels can be displayed on milestones, timeline bars or both. For this example, we only want to display labels on milestones. Our data has a field called Timeline Milestone which has data for milestones but not for timeline bars (this could also be accomplished through simple DAX):

ProjectName ▾	Timeline Milestone ▾
Modernize Segment Member materials	Development Complete
Medical Record Migration	Migration Complete
HIPAA Data Compliance Implementation	Development Complete
HIPAA Data Compliance Implementation	Implementations Complete
Tax Prep	2nd Review Completed

Here is the field in the Data Label field well:

Data Label

Timeline Milestone ▾ ×

Sort By

Sort By allows for custom sorting of your data. In the example we will not use a custom sort, so we leave that field well blank:

Sort By

Add data fields here

% Completion

Percent completion will display a progress bar inside a timeline bar. From our sample data we will use the P_% Complete field:

ProjectName ▾	P_% Complete ▾
Modernize Segment Member materials	0.74
Medical Record Migration	0.71
HIPAA Data Compliance Implementation	0.4
HIPAA Data Compliance Implementation	0.4
Tax Prep	0.15

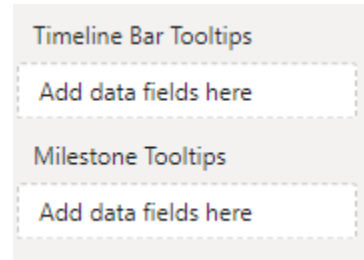
Here is the field in the % Completion field well:

% Completion

P_% Complete ▾ ×

Timeline Bar and Milestone Tooltips

The Tooltips field wells allow you to add one or more fields to be displayed for either Timeline Bars or Milestones. For this example, we will leave them blank:



The image shows two stacked configuration boxes. The top box is titled "Timeline Bar Tooltips" and contains a dashed-line rectangular field with the text "Add data fields here". The bottom box is titled "Milestone Tooltips" and also contains a dashed-line rectangular field with the text "Add data fields here".