

Project Health

Here, we will show how to configure the “Project Health 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 **Project Health** 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 **Project-Health-Timeline** table, we will use Project Name.

ProjectName
Standardize Group Enrollment
Standardize Group Enrollment
HIPAA Data Compliance Implementation
HIPAA Data Compliance Implementation
HIPAA Data Compliance Implementation
HIPAA Data Compliance Implementation
Information Exchange with Encounter Service
General Point-of-Care System Implementation
General Point-of-Care System Implementation
Enhanced Encounter Submission Capability
Enhanced Encounter Submission Capability
Cardiology Equipment Upgrade
Cardiology Equipment Upgrade
Cardiology Equipment Upgrade
Cardiology Equipment Upgrade

Here is the field in the Parent Category field well:

Parent Category

ProjectName

In the visual the result is:

ProjectName
Standardize Group Enrollment
HIPAA Data Compliance Implementation
Information Exchange with Encounter Service
General Point-of-Care System Implementation
Enhanced Encounter Submission Capability

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 Project Health Timeline Category field.

ProjectName	Project Health Timeline Category
Standardize Group Enrollment	Yellow
Standardize Group Enrollment	
HIPAA Data Compliance Implementation	Red
HIPAA Data Compliance Implementation	
HIPAA Data Compliance Implementation	Deployment Complete
HIPAA Data Compliance Implementation	Development Complete
Information Exchange with Encounter Service	Green
General Point-of-Care System Implementation	Green
General Point-of-Care System Implementation	
Enhanced Encounter Submission Capability	Yellow
Enhanced Encounter Submission Capability	
Cardiology Equipment Upgrade	Green
Cardiology Equipment Upgrade	
Cardiology Equipment Upgrade	Deployment Complete
Cardiology Equipment Upgrade	Planning Complete

Here is the field in the Timeline Category field well:

Timeline Category

Project Health Timeline Category

Milestone/Task (required)

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

ProjectName	TasksMilestone
Standardize Group Enrollment	False
Standardize Group Enrollment	True
HIPAA Data Compliance Implementation	False
HIPAA Data Compliance Implementation	True
HIPAA Data Compliance Implementation	True
HIPAA Data Compliance Implementation	True
Information Exchange with Encounter Service	False
General Point-of-Care System Implementation	False
General Point-of-Care System Implementation	True
Enhanced Encounter Submission Capability	False
Enhanced Encounter Submission Capability	True
Cardiology Equipment Upgrade	False
Cardiology Equipment Upgrade	True
Cardiology Equipment Upgrade	True
Cardiology Equipment Upgrade	True

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

Milestone/Task
TasksMilestone

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
Cardiology Equipment Upgrade
Enhanced Encounter Submission Capability
General Point-of-Care System Implementation
Information Exchange with Encounter Service
HIPAA Data Compliance Implementation
Standardize Group Enrollment

Here is the field in the Timeline Bar field well:

Timeline Bar
ProjectName

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:

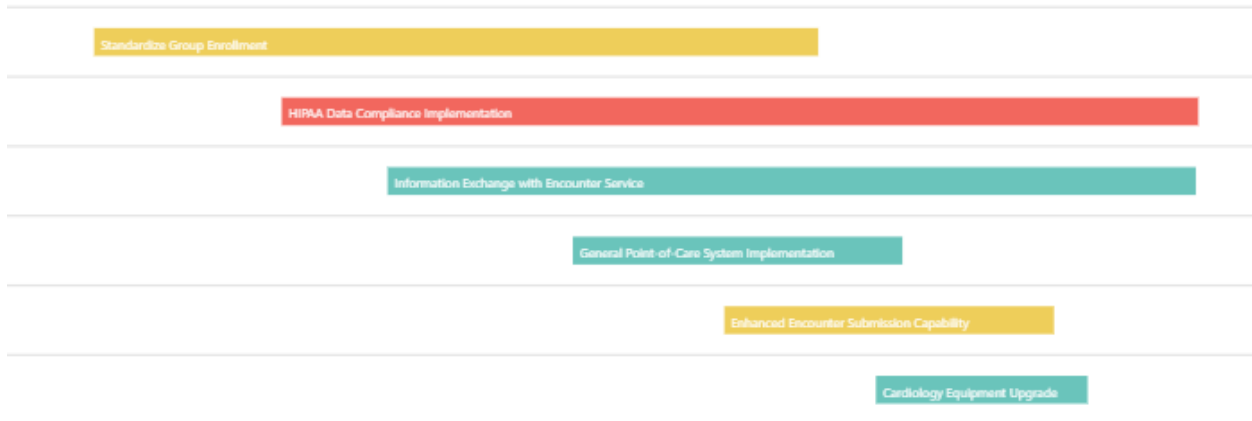
ProjectName
Cardiology Equipment Upgrade
Enhanced Encounter Submission Capability
General Point-of-Care System Implementation
Information Exchange with Encounter Service
HIPAA Data Compliance Implementation
Standardize Group Enrollment

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
Standardize Group Enrollment	11/15/2019 12:00:00 AM	9/11/2020 12:00:00 AM
Standardize Group Enrollment	11/15/2019 12:00:00 AM	9/11/2020 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
Information Exchange with Encounter Service	3/16/2020 12:00:00 AM	2/15/2021 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
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
Cardiology Equipment Upgrade	10/5/2020 12:00:00 AM	1/1/2021 12:00:00 AM
Cardiology Equipment Upgrade	10/5/2020 12:00:00 AM	1/1/2021 12:00:00 AM
Cardiology Equipment Upgrade	10/5/2020 12:00:00 AM	1/1/2021 12:00:00 AM
Cardiology Equipment Upgrade	10/5/2020 12:00:00 AM	1/1/2021 12:00:00 AM

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

The image shows a configuration panel for the Timeline Bar Start and Finish Date field wells. It contains two sections: 'Timeline Bar Start Date' with a dropdown menu set to 'ProjectStartDate', and 'Timeline Bar Finish Date' with a dropdown menu set to 'Earliest Earliest Finish ...'. Each dropdown has a small 'x' icon to the right.

Baseline Bar Start and Finish Dates (optional)

If you have baseline date, these can be used to show baseline bars. In the example, we will not use a baseline dates, so we leave that field well blank:

The image shows a configuration panel for the Baseline Bar Start and Finish Date field wells. It contains two sections: 'Baseline Bar Start Date' and 'Baseline Bar Finish Date'. Each section has a dashed border and contains the text 'Add data fields here'.

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
Cardiology Equipment Upgrade	Planning Complete
Cardiology Equipment Upgrade	Upgrade Comoplete
HIPAA Data Compliance Implementation	Development Complete
HIPAA Data Compliance Implementation	Implementations Complete

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 Earliest Timeline Milestone Date for this field well:

Milestone Date

Earliest Earliest Timeline Milestone Date

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
Cardiology Equipment Upgrade	Planning Complete
Cardiology Equipment Upgrade	Upgrade Comoplete
HIPAA Data Compliance Implementation	Development Complete
HIPAA Data Compliance Implementation	Implementations Complete

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 Project Percent Completed field:

ProjectName	ProjectPercentCompleted
Standardize Group Enrollment	60
Standardize Group Enrollment	60
HIPAA Data Compliance Implementation	40
HIPAA Data Compliance Implementation	40
HIPAA Data Compliance Implementation	40
HIPAA Data Compliance Implementation	40
Information Exchange with Encounter Service	50
General Point-of-Care System Implementation	61
General Point-of-Care System Implementation	61
Enhanced Encounter Submission Capability	10
Enhanced Encounter Submission Capability	10
Cardiology Equipment Upgrade	0
Cardiology Equipment Upgrade	0
Cardiology Equipment Upgrade	0
Cardiology Equipment Upgrade	0

Here is the field in the % Completion field well:

% Completion

ProjectPercentCompleted

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:

Timeline Bar Tooltips

Add data fields here

Milestone Tooltips

Add data fields here