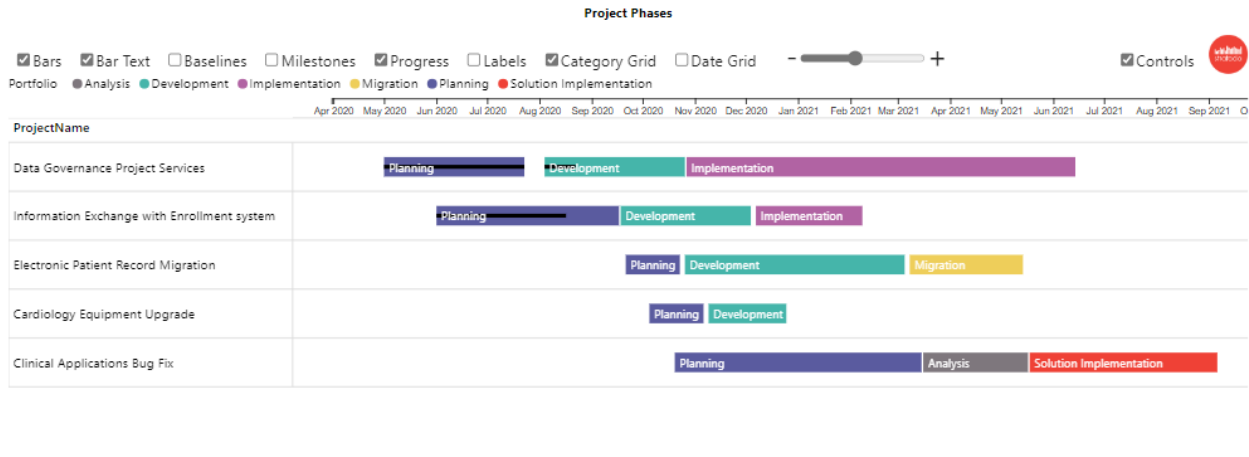


Project Phases

Here, we will show how to configure the “Project Phases” 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 Phases** button.



Here are the fields in the order they appear

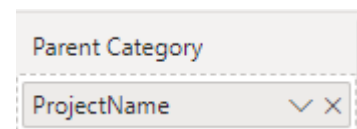
Parent Category (required)

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-Phases** table, we will use Project Name.

ProjectName
Data Governance Project Services
Information Exchange with Enrollment system
Data Governance Project Services
Information Exchange with Enrollment system
Electronic Patient Record Migration
Cardiology Equipment Upgrade
Clinical Applications Bug Fix
Electronic Patient Record Migration
Data Governance Project Services
Cardiology Equipment Upgrade
Information Exchange with Enrollment system
Electronic Patient Record Migration
Clinical Applications Bug Fix
Clinical Applications Bug Fix

Here is the field in the Parent Category field well:



In the visual the result is:

ProjectName
Data Governance Project Services
Information Exchange with Enrollment system
Electronic Patient Record Migration
Cardiology Equipment Upgrade
Clinical Applications Bug Fix

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 Phase field.

ProjectName	ProjectPhase
Data Governance Project Services	Planning
Information Exchange with Enrollment system	Planning
Data Governance Project Services	Development
Information Exchange with Enrollment system	Development
Electronic Patient Record Migration	Planning
Cardiology Equipment Upgrade	Planning
Clinical Applications Bug Fix	Planning
Electronic Patient Record Migration	Development
Data Governance Project Services	Implementation
Cardiology Equipment Upgrade	Development
Information Exchange with Enrollment system	Implementation
Electronic Patient Record Migration	Migration
Clinical Applications Bug Fix	Analysis
Clinical Applications Bug Fix	Solution Implementation

Here is the field in the Timeline Category field well:

Timeline Category

ProjectPhase

Milestone/Task (required)

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

ProjectName	TasksMilestone
Data Governance Project Services	False
Information Exchange with Enrollment system	False
Data Governance Project Services	False
Information Exchange with Enrollment system	False
Electronic Patient Record Migration	False
Cardiology Equipment Upgrade	False
Clinical Applications Bug Fix	False
Electronic Patient Record Migration	False
Data Governance Project Services	False
Cardiology Equipment Upgrade	False
Information Exchange with Enrollment system	False
Electronic Patient Record Migration	False
Clinical Applications Bug Fix	False
Clinical Applications Bug Fix	False

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



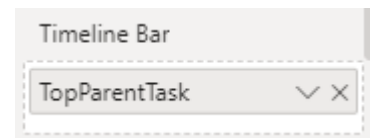
Milestone/Task
TasksMilestone

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 Top Parent Task. Note that the visual will only use the data from the Project Name field when the Milestone/Task field is False:

ProjectName	TopParentTask
Data Governance Project Services	Planning
Information Exchange with Enrollment system	Planning
Data Governance Project Services	Development
Information Exchange with Enrollment system	Development
Electronic Patient Record Migration	Planning
Cardiology Equipment Upgrade	Planning
Clinical Applications Bug Fix	Planning
Electronic Patient Record Migration	Development
Data Governance Project Services	Implementation
Cardiology Equipment Upgrade	Development
Information Exchange with Enrollment system	Implementation
Electronic Patient Record Migration	Migration
Clinical Applications Bug Fix	Analysis
Clinical Applications Bug Fix	Solution Implementation

Here is the field in the Timeline Bar field well:



Timeline Bar
TopParentTask

Timeline Bar Text (optional)

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

ProjectName	TopParentTask
Data Governance Project Services	Planning
Information Exchange with Enrollment system	Planning
Data Governance Project Services	Development
Information Exchange with Enrollment system	Development
Electronic Patient Record Migration	Planning
Cardiology Equipment Upgrade	Planning
Clinical Applications Bug Fix	Planning
Electronic Patient Record Migration	Development
Data Governance Project Services	Implementation
Cardiology Equipment Upgrade	Development
Information Exchange with Enrollment system	Implementation
Electronic Patient Record Migration	Migration
Clinical Applications Bug Fix	Analysis
Clinical Applications Bug Fix	Solution Implementation

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

Timeline Bar Text

TopParentTask

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 Phase Start Date and Earliest Project Phase Finish Date:

ProjectName	ProjectPhaseStart	Earliest ProjectPhase Finish Date
Data Governance Project Services	5/1/2020 12:00:00 AM	7/23/2020 12:00:00 AM
Information Exchange with Enrollment system	6/1/2020 12:00:00 AM	9/17/2020 12:00:00 AM
Data Governance Project Services	8/4/2020 12:00:00 AM	10/26/2020 12:00:00 AM
Information Exchange with Enrollment system	9/18/2020 12:00:00 AM	12/4/2020 12:00:00 AM
Electronic Patient Record Migration	9/21/2020 12:00:00 AM	10/23/2020 12:00:00 AM
Cardiology Equipment Upgrade	10/5/2020 12:00:00 AM	11/6/2020 12:00:00 AM
Clinical Applications Bug Fix	10/20/2020 12:00:00 AM	3/15/2021 12:00:00 AM
Electronic Patient Record Migration	10/26/2020 12:00:00 AM	3/5/2021 12:00:00 AM
Data Governance Project Services	10/27/2020 12:00:00 AM	6/14/2021 12:00:00 AM
Cardiology Equipment Upgrade	11/9/2020 12:00:00 AM	12/25/2020 12:00:00 AM
Information Exchange with Enrollment system	12/7/2020 12:00:00 AM	2/8/2021 12:00:00 AM
Electronic Patient Record Migration	3/8/2021 12:00:00 AM	5/14/2021 12:00:00 AM
Clinical Applications Bug Fix	3/16/2021 12:00:00 AM	5/17/2021 12:00:00 AM
Clinical Applications Bug Fix	5/18/2021 12:00:00 AM	9/6/2021 12:00:00 AM

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

Timeline Bar Start Date

ProjectPhaseStart

Timeline Bar Finish Date

Earliest Earliest Projec...

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 Phase Start and Project Baseline Phase Finish.

ProjectName	ProjectBaselinePhaseStart	ProjectBaselinePhaseFinish
Data Governance Project Services	5/1/2020 8:00:00 AM	7/23/2020 5:00:00 PM
Information Exchange with Enrollment system	6/1/2020 8:00:00 AM	8/11/2020 5:00:00 PM
Data Governance Project Services	7/24/2020 8:00:00 AM	10/26/2020 5:00:00 PM
Information Exchange with Enrollment system	8/12/2020 8:00:00 AM	10/28/2020 5:00:00 PM
Electronic Patient Record Migration	9/21/2020 8:00:00 AM	10/23/2020 5:00:00 PM
Cardiology Equipment Upgrade	10/5/2020 8:00:00 AM	11/6/2020 5:00:00 PM
Clinical Applications Bug Fix		
Electronic Patient Record Migration	10/26/2020 8:00:00 AM	3/5/2021 5:00:00 PM
Data Governance Project Services	10/27/2020 8:00:00 AM	6/14/2021 5:00:00 PM
Cardiology Equipment Upgrade	11/9/2020 8:00:00 AM	12/25/2020 5:00:00 PM
Information Exchange with Enrollment system	10/29/2020 8:00:00 AM	12/31/2020 5:00:00 PM
Electronic Patient Record Migration	3/8/2021 8:00:00 AM	5/14/2021 5:00:00 PM
Clinical Applications Bug Fix		
Clinical Applications Bug Fix		

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

Baseline Bar Start Date

ProjectBaselinePhaseStart

Baseline Bar Finish Date

ProjectBaselinePhaseFinish

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. In the example we will not use a milestone, so we leave that field well blank:

Milestone

Add data fields here

Milestone Date

Milestones only need one date, and this is where it's needed. In the example we will not use a milestone date, so we leave that field well blank:

Milestone Date

Add data fields here

Data Label

Data labels can be displayed on milestones, timeline bars or both. In the example we will not use a data label, so we leave that field well blank:

Data Label

Add data fields here

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 Task Percent Completed field:

ProjectName	TaskPercentCompleted
Data Governance Project Services	100
Information Exchange with Enrollment system	71
Data Governance Project Services	22
Information Exchange with Enrollment system	0
Electronic Patient Record Migration	0
Cardiology Equipment Upgrade	0
Clinical Applications Bug Fix	0
Electronic Patient Record Migration	0
Data Governance Project Services	0
Cardiology Equipment Upgrade	0
Information Exchange with Enrollment system	0
Electronic Patient Record Migration	0
Clinical Applications Bug Fix	0
Clinical Applications Bug Fix	0

Here is the field in the % Completion field well:

% Completion

TaskPercentCompleted

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