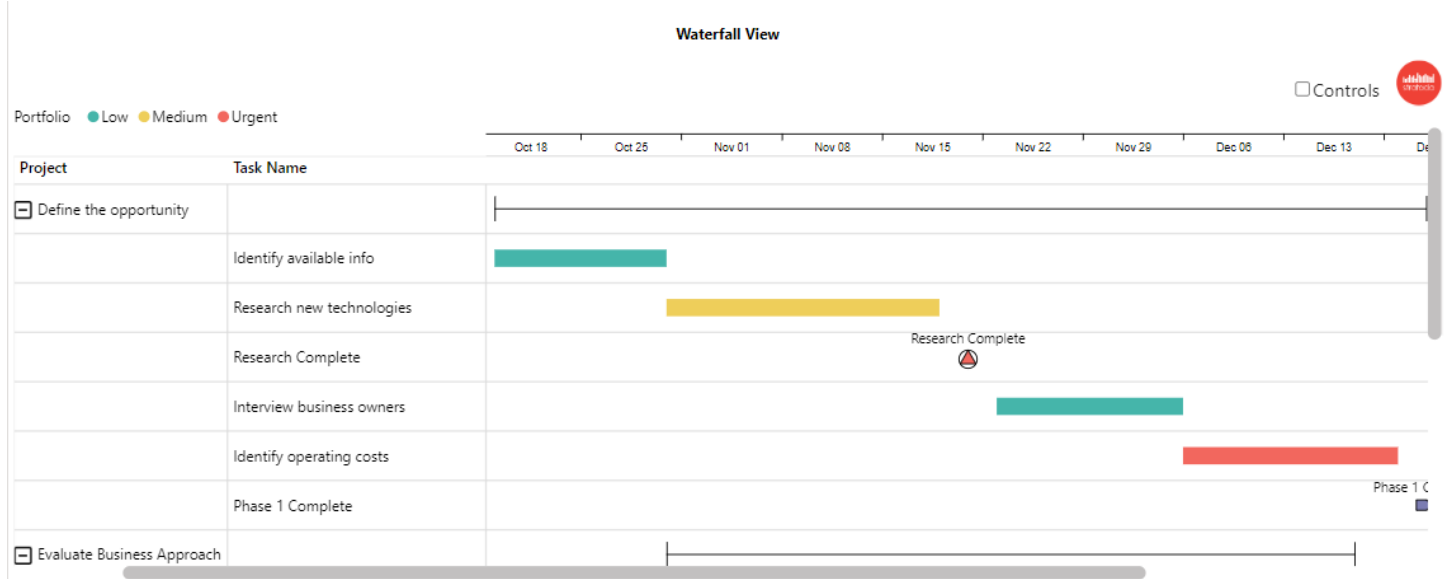


Configuring the Stratada Gantt Timeline visual for Power BI

The following tutorial will use our sample Timeline reports file which can be downloaded [here](#). The data source for those reports can be downloaded [here](#).

For our first example we will show how to configure the “Waterfall view” report included in the sample reports:



Parent Category (required)

Parent Category defines the rows in the Timeline visual. Multiple fields can be used to display a hierarchy. Our example shows a two-level hierarchy: Project and Task.

From the Excel data file on the **Waterfall-View** tab, we will use Project and Task Name:

Project	Task Name
Define the opportunity	Identify available info
Define the opportunity	Research new technologies
Define the opportunity	Research Complete
Define the opportunity	Interview business owners
Define the opportunity	Identify operating costs
Define the opportunity	Phase 1 Complete
Evaluate Business Approach	Define new entity requirements
Evaluate Business Approach	Research acquisition potential
Evaluate Business Approach	Break-even analysis
Evaluate Business Approach	Phase 2 Complete
Evaluate Risks and Rewards	Estimate the competition
Evaluate Risks and Rewards	Assess needed resources availability
Evaluate Risks and Rewards	Review & modify strategic plan
Evaluate Risks and Rewards	Phase 3 Complete

In the Power BI sample report on the **Waterfall-View** tab, click the **Waterfall View** button. Note the fields in the Parent Category field well:

Parent Category

Project ▼ ✕

Task Name ▼ ✕

In the visual, the result is:

Project	Task Name
☰ Define the opportunity	
	Identify available info
	Research new technologies
	Research Complete
	Interview business owners
	Identify operating costs
	Phase 1 Complete

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 Priority field:

Task Name	Priority
Identify available info	Low
Research new technologies	Medium
Research Complete	Important
Interview business owners	Low
Identify operating costs	Urgent
Phase 1 Complete	Medium
Define new entity requirements	Urgent
Research acquisition potential	Low
Break-even analysis	Medium
Phase 2 Complete	Important
Estimate the competition	Urgent
Assess needed resources availability	Medium
Review & modify strategic plan	Urgent
Phase 3 Complete	Medium

Here is the field in the Timeline Category field well:

Timeline Category

Priority ▼ ✕

Milestone/Task (required)

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

Task Name	TaskIsMilestone
Identify available info	FALSE
Research new technologies	FALSE
Research Complete	TRUE
Interview business owners	FALSE
Identify operating costs	FALSE
Phase 1 Complete	TRUE
Define new entity requirements	FALSE
Research acquisition potential	FALSE
Break-even analysis	FALSE
Phase 2 Complete	TRUE
Estimate the competition	FALSE
Assess needed resources availability	FALSE
Review & modify strategic plan	FALSE
Phase 3 Complete	TRUE

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

Task Name	TaskIsMilestone
Identify available info	FALSE
Research new technologies	FALSE
Interview business owners	FALSE
Identify operating costs	FALSE
Define new entity requirements	FALSE
Research acquisition potential	FALSE
Break-even analysis	FALSE
Estimate the competition	FALSE
Assess needed resources availability	FALSE
Review & modify strategic plan	FALSE

Here is the field in the Timeline Bar field well:



The image shows a 'Timeline Bar' field well. Inside the field well, there is a dropdown menu with 'Task Name' selected. The dropdown menu has a downward arrow on the right side and a close button (X) on the far right.

Timeline Bar Text (optional)

The Timeline Bar Text field enables the display of text in the Timeline Bar. For this example we will use Assigned to:

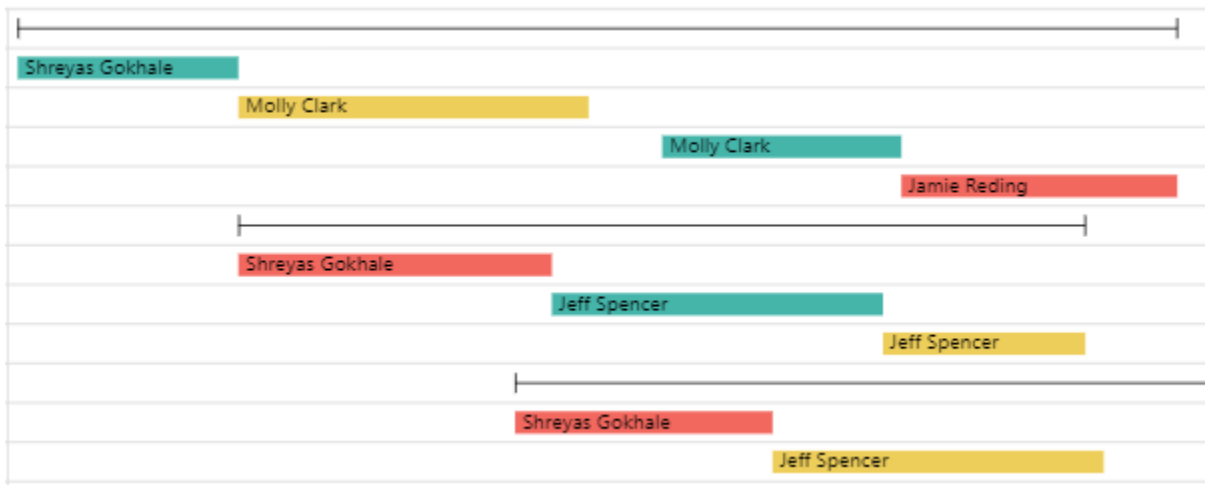
Task Name	Assigned to
Identify available info	Shreyas Gokhale
Research new technologies	Molly Clark
Research Complete	
Interview business owners	Molly Clark
Identify operating costs	Jamie Reding
Phase 1 Complete	
Define new entity requirements	Shreyas Gokhale
Research acquisition potential	Jeff Spencer
Break-even analysis	Jeff Spencer
Phase 2 Complete	
Estimate the competition	Shreyas Gokhale
Assess needed resources availability	Jeff Spencer
Review & modify strategic plan	Jeff Spencer
Phase 3 Complete	

Here is the field in the Timeline Bar field well:

Timeline Bar Text

Assigned to ▼ ✕

The text can now be rendered in the Timeline bars:



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

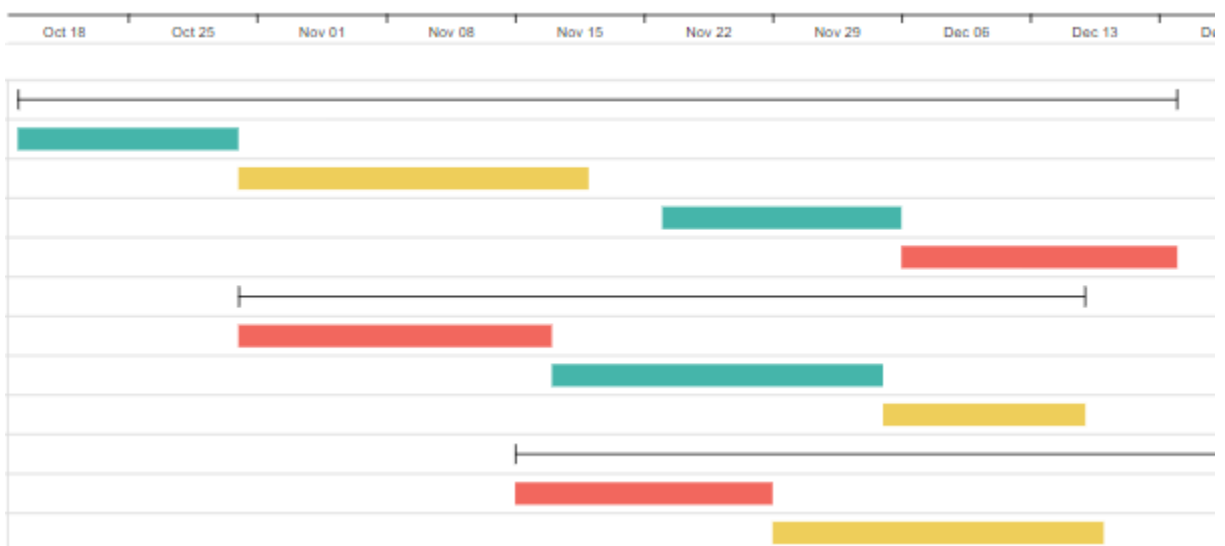
The Timeline Bar Start and Finish dates are used by the Timeline visual to define the Timeline bar display. From the sample data we will use Start Date and Earliest Due Date:

Task Name	Start Date	Earliest Due Date
Identify available info	10/19/2020	10/31/2020
Research new technologies	10/31/2020	11/19/2020
Research Complete	11/21/2020	11/21/2020
Interview business owners	11/23/2020	12/6/2020
Identify operating costs	12/6/2020	12/21/2020
Phase 1 Complete	12/23/2020	12/23/2020
Define new entity requirements	10/31/2020	11/17/2020
Research acquisition potential	11/17/2020	12/5/2020
Break-even analysis	12/5/2020	12/16/2020
Phase 2 Complete	12/18/2020	12/18/2020
Estimate the competition	11/15/2020	11/29/2020
Assess needed resources availability	11/29/2020	12/17/2020
Review & modify strategic plan	12/17/2020	1/4/2021
Phase 3 Complete	1/6/2021	1/6/2021

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

The image shows a configuration panel with two sections. The first section is titled "Timeline Bar Start Date" and contains a dropdown menu with "Start Date" selected and a close button (X). The second section is titled "Timeline Bar Finish Date" and contains a dropdown menu with "Earliest Due Date" selected and a close button (X).

The resulting display:



Baseline Bar Start and Finish Dates (optional)

If you have baseline date data these can be used to show baseline bars. In this example we don't have that data so we will leave these fields empty:



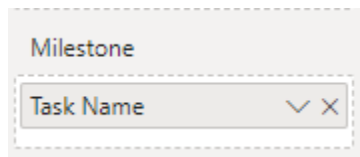
The image shows two identical field configurations. Each configuration consists of a header box with the text 'Baseline Bar Start Date' and 'Baseline Bar Finish Date' respectively. Below each header is a dashed-line box containing the text 'Add data fields here'.

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 Task Name. Note that the visual will only use the data from the Task field when the Milestone/Task field is True:

Task Name	TasksMilestone
Research Complete	TRUE
Phase 1 Complete	TRUE
Phase 2 Complete	TRUE
Phase 3 Complete	TRUE

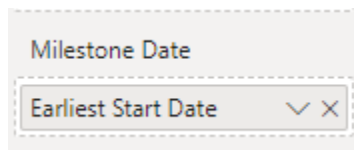
Here is the field in the Timeline Bar field well:



The image shows a field configuration for 'Milestone'. It consists of a header box with the text 'Milestone' and a dashed-line box below it containing a dropdown menu with 'Task Name' selected and a close button (X).

Milestone Date

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



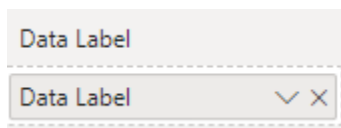
The image shows a field configuration for 'Milestone Date'. It consists of a header box with the text 'Milestone Date' and a dashed-line box below it containing a dropdown menu with 'Earliest Start Date' selected and a close button (X).

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 Data Label which has data for milestones but not for timeline bars (this could also be accomplished through simple DAX):

Task Name	TasksMilestone	Data Label
Identify available info	FALSE	
Research new technologies	FALSE	
Research Complete	TRUE	Research Complete
Interview business owners	FALSE	
Identify operating costs	FALSE	
Phase 1 Complete	TRUE	Phase 1 Complete
Define new entity requirements	FALSE	
Research acquisition potential	FALSE	
Break-even analysis	FALSE	
Phase 2 Complete	TRUE	Phase 2 Complete
Estimate the competition	FALSE	
Assess needed resources availability	FALSE	
Review & modify strategic plan	FALSE	
Phase 3 Complete	TRUE	Phase 3 Complete

Here is the field in the Data Label field well:



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:

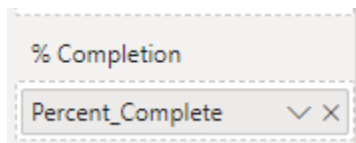


% Completion

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

Task Name	Percent_Complete
Identify available info	100.00%
Research new technologies	50.00%
Research Complete	0.00%
Interview business owners	0.00%
Identify operating costs	0.00%
Phase 1 Complete	0.00%
Define new entity requirements	100.00%
Research acquisition potential	50.00%
Break-even analysis	0.00%
Phase 2 Complete	0.00%
Estimate the competition	100.00%
Assess needed resources availability	50.00%
Review & modify strategic plan	0.00%
Phase 3 Complete	0.00%

Here is the field in the % Completion field well:



The image shows a configuration window for a field well. The title is "% Completion". Below the title, there is a dropdown menu with the text "Percent_Complete" and a small "x" icon to its right, indicating that the field can be removed from the well.

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 field wells for tooltips. The top one is titled "Timeline Bar Tooltips" and contains a dashed box with the text "Add data fields here". The bottom one is titled "Milestone Tooltips" and also contains a dashed box with the text "Add data fields here".