Creating a Project Timeline using the Chart Web Part (SharePoint 2010)

The purpose of this document is to provide step by step instructions on how to create a high level project timeline. This method utilizes a SharePoint Project Timeline list and Chart Web Part. The Chart Web part must be connected to the list to display the data properly. There are four steps:

1. Create Project Timeline List
2. Create Chart Web Part
3. Connect Chart to Data
4. Customize Chart

1: Create Project Timeline List

1. At the site level:
   - Click Site Actions -> More Options

2. Go to:
   - Filter By -> All Types -> List
   - Select -> Project Timeline
   - Click: More Options
3. Name the list

- List name: Project Timeline
- Description: This list contains dates that are used to generate a high level project timeline.
- Display this list on the Quick Launch? -> No
- Click: Create

4. Add items to the list

The phases are entered in reverse order to ensure they display properly on the timeline. It's counterintuitive, but it works.

The Chart Web Chart (see next section) uses the item ID to sort items on the chart, which creates limitations when sorting by date.

Earliest phase has the highest ID number and the latest phase has the lowest ID number (see ID # column project timeline list).

- Project Phase 1 = ID #4
- Project Phase 2 = ID #3
- Project Phase 3 = ID #2
- Project Phase 4 = ID #1

2: Create Chart Web Part

5. In Edit mode of the site page:

- In the Top Left zone
- Click: Add a Web Part
6. Select the following:

- Categories: Business Data
- Web Parts: Chart Web Part
- Click Add

The chart web part has been added to the page, but it needs to be connected to the list. Move on to step 2 to connect the chart to the project timeline list.

3: Connect Chart to Data

Step 1: Choose a Data Source

- Click: Data & Appearance
- Click: Connect Chart to Data
- Check: Connect to a List
- Click: Next
Step 2: Connect to a List

- The Site drop down list should default to the site you’re currently in. If not, select the correct site from the drop down list.
- In the List drop down list, select Project Timeline
- Click: Next

Step 3: Retrieve and Filter Data

- No changes
- Click: Next
Step 4: Bind Chart to Data

- Expand options by clicking the plus (+) sign next to Series Properties
- Select Series Type: RangeColumn
- Select Y Field: Start Date
- Select Y1 Field: End Date
- Select X Field: Title
- Click: Finish

The list is now connected to the chart, but adjustments are needed. In step 3 we will apply minor design changes.
4: Customize Chart

Step 1: Select Chart Type

- Click: Data & Appearance
- Click: Customize Your Chart
- Chart Type Categories, select: Gantt/Range Column
- Chart Templates, select: Gantt Thin Bars
- Click: Next

Step 2: Chart Appearance Properties

- Appearance Themes tab, change chart size:
  - Width: 600px
  - Height: 200px
  - Click: Next
Step 3: Chart element properties

- Click the tab: **Axes and Grid Lines**
- Note: X-Axis does not require formatting. Proceed to Y-Axis format options.

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Step 3: Chart element properties (continued)

**Format Y-Axis**

- Show Axis Labels:
  - Format (uppercase): MMM
- Axis Settings:
  - Start from zero: Uncheck
  - Interlaced: Check

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Step 3: Chart element properties (continued)

**Format Secondary Y-Axis**

- Click the plus (+) sign next to Secondary Y-Axis
- Show Axis, select: True
- Show Axis Labels: Check
  - Format (lowercase): YYY
- Axis Settings:
  - Start from zero: Uncheck
- Show Major Grid Lines: Check
  - Interval:
    - Enter: 1
    - Select: Years
    - Tick Marks: Outside Area
- Click: Finish
Change Chart Web Part Title

- Pull up the Web Part Menu by clicking the arrow located at the upper right corner of the Chart Web Part
- Select Edit Web Part
- Enter the new title: Project Timeline
- Click: OK

How the Project Timeline appears to users with Reader permissions