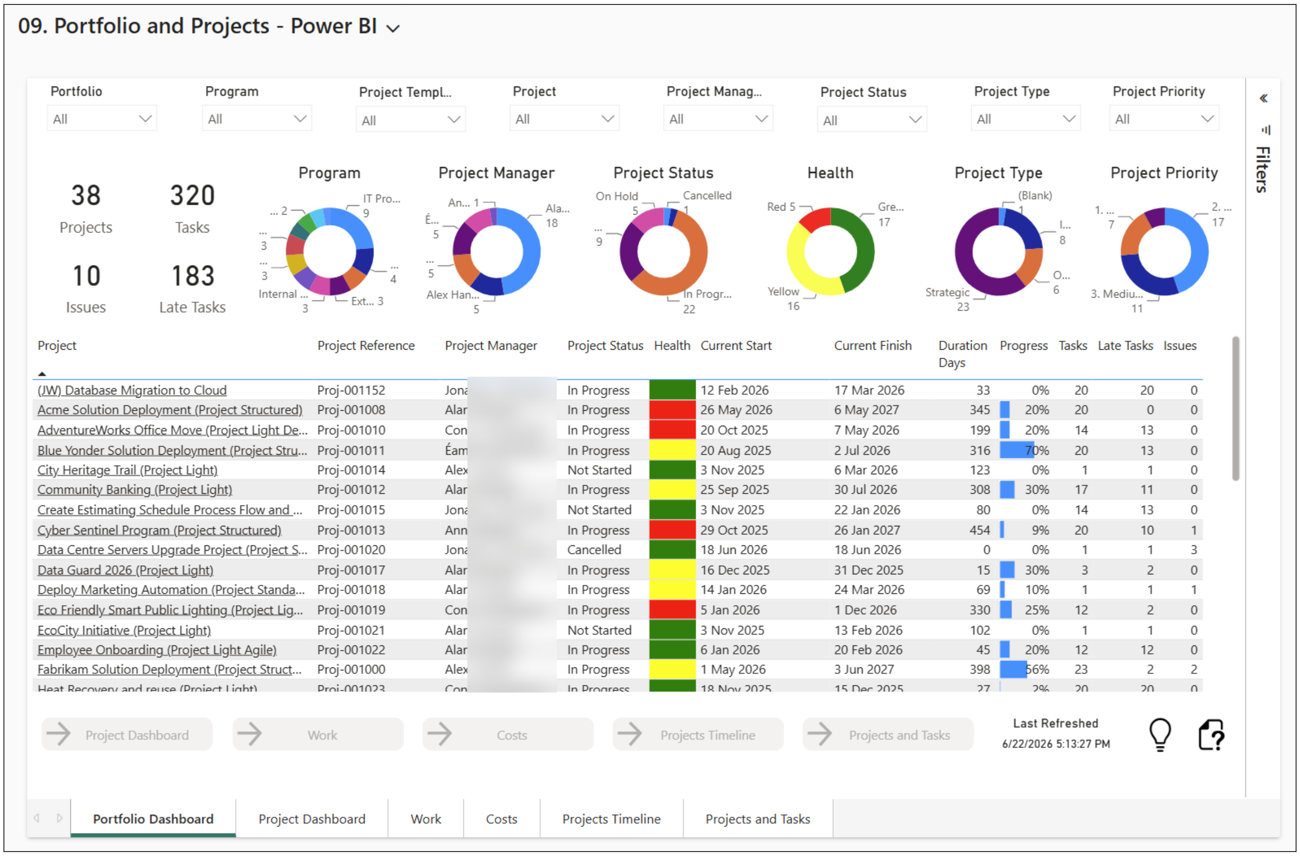
# Portfolio and Projects - Power BI




## Project Management Context

The Portfolio and Projects - Power BI Dashboard consolidates fragmented data from various projects into a single, interactive executive overview. Its primary purpose is to bridge the gap between strategic business objectives and ground-level execution by tracking overall portfolio health, budget utilization, and critical project timelines. By replacing disparate spreadsheets with automated data refreshes, the dashboard eliminates subjective reporting and empowers leadership to proactively mitigate risks before they impact the bottom line.

Structurally, the dashboard balances high-level insights with granular execution details. Executives can monitor macro-level metrics like Cost and Schedule Performance at a glance, while Project Management Offices (PMOs) can slice data by department, milestone, or timeline. Crucially, it includes resource allocation matrices to track team capacity, helping managers prevent burnout and efficiently deploy talent across competing initiatives.

**Tip** See also Power BI Dashboards Overview.

**Portfolio Dashboard**

The Portfolio Dashboard provides a centralized view of projects across the organization, allowing portfolio managers and leadership to quickly assess project health, progress, ownership, and overall performance. Rather than opening individual projects one at a time, the dashboard consolidates key metrics, visual indicators, and detailed project information into a single workspace to support reporting, prioritization, and decision making.

The dashboard provides users with an interactive method to explore high-level portfolio metrics, review visual summaries, and drill into project-specific information by selecting different records and using the available filtering and navigation options.

## Portfolio Summary Metrics

At the top of the dashboard are several high-level metrics that provide an immediate snapshot of the portfolio. These indicators summarize the current state of projects, helping users quickly understand workload, progress, and overall portfolio performance without reviewing individual project records. These summary values are intended to provide an executive-level overview before moving into more detailed analysis.

## Portfolio Health Charts

Across the top of the page are multiple color-coded donut charts that visualize the status of projects in different categories. These charts make it easy to identify trends, recognize areas that may require attention, and understand the overall distribution of project health at a glance. These charts provide a quick visual summary that complements the detailed information displayed below.

## Project List

The main section of the dashboard contains a detailed list of projects included within the selected portfolio. Each row represents an individual project and displays important information that allows users to compare projects without opening each one individually. The project list serves as the primary working area for reviewing portfolio information and identifying projects that may require additional attention.

## Status Indicators

Several columns use color-coded indicators to communicate project health and performance. Green, yellow, and red visual cues help users quickly identify projects that are performing well, those requiring monitoring, and projects that may need immediate action.

These visual indicators allow users to prioritize their attention without having to read every detail in the project record.

## Project Performance Details

Alongside the health indicators, additional columns display project-specific metrics and progress information. These values help users evaluate project performance, compare initiatives, and understand where each project stands within the overall portfolio. Together, these details provide the context needed to support portfolio reviews and management discussions.

## Filtering and Navigation

The dashboard is used interactively by selecting different items and navigating through the available information. Users can change the current focus of the dashboard, allowing them to review different projects while the surrounding information updates accordingly. This interactive behavior makes the dashboard useful for both high-level executive reporting and day-to-day portfolio management.

## Portfolio Monitoring

The overall purpose of the dashboard is to provide a single location for monitoring the health of an entire project portfolio. By combining summary metrics, visual analytics, and detailed project information, users can quickly identify risks, review project performance, and make informed decisions about priorities and resource allocation. The dashboard reduces the need to navigate through multiple project pages, making portfolio oversight faster and more efficient.

#### Project Dashboard

The Project Dashboard provides a comprehensive view of an individual project's overall status, progress, and key performance indicators. It brings together schedule, health, work tracking, and project metrics into a single interface so project teams and stakeholders can quickly understand the current state of the project and identify areas that may require attention.

The dashboard is shown as an interactive workspace where users can review summary information, explore visual reports, and monitor project performance without navigating through multiple pages.

## Project Summary

The top section of the dashboard presents high-level project information and summary metrics that provide an immediate snapshot of the project's current status. These values help users quickly assess overall progress before reviewing more detailed information.

## Project Health Indicators

Visual health indicators provide an easy-to-understand assessment of the project's condition. Color-coded gauges and status indicators highlight areas that are performing well as well as items that may require additional review or corrective action.

## Performance Charts

Several charts display project information in graphical form, allowing users to quickly recognize trends, compare categories, and understand how work is distributed across the project. These visualizations support faster decision making than reviewing raw data alone.

## Task and Work Tracking

The dashboard includes detailed tables that summarize project work and related information. Users can review individual work items, monitor progress, and identify outstanding activities directly from the dashboard.

## Project Metrics

Additional numerical metrics provide deeper insight into the project's performance. These measurements help track important aspects of execution and provide objective data for evaluating overall project progress.

## Interactive Filtering

Users can interact with the dashboard by selecting different elements and changing the displayed information. This allows project managers to focus on specific areas while keeping the rest of the dashboard synchronized.

## Project Monitoring

The Project Dashboard serves as a central location for monitoring day-to-day project performance. By combining summary information, visual analytics, and detailed reporting, it enables project teams to stay informed, identify potential issues early, and make data-driven decisions throughout the project lifecycle.

#### Work

The Work report organizes assignment information into an interactive reporting view. It brings together charts, filters, and a detailed assignment register so users can examine where work is assigned, what type of work is represented, and which items require follow-up. The report is designed for reviewing work volume and responsibility across a broader set of records without naming or relying on any single project or individual.

Clicking different bars, table entries, and filter values changes the report's focus. When an element is selected, the surrounding visuals and the assignment list adjust to show the subset of work connected to that selection. This makes the report useful for moving from an overall work view into a more targeted review of a specific category, assignee group, project grouping, status, or assignment type.

One of the main visuals groups work by assignee so users can see how assignments are distributed across team members. The stacked bars separate work into assignment types, which helps reveal whether the workload is made up mostly of tasks, actions, issues, risks, deliverables, or other work categories. Selecting a bar segment narrows the report to the assignments represented by that portion of the chart.

## Assignment Volume by Project

A second visual organizes assignments by project grouping. This view helps users compare where work is concentrated and which areas contain the largest number of assigned items. When a project bar or segment is clicked, the report changes focus to that selection and the detailed list updates to show the matching assignment records.

## Assignment Type Segmentation

The color-coded segments in the visuals distinguish different kinds of work. This allows users to separate routine task activity from other work items such as actions, issues, risks, deliverables, and similar assignment categories. Clicking a specific segment refines the report so users can investigate that type of work in isolation.

## Detailed Assignment Register

Below the charts, the report displays a structured list of assignment records. The table includes fields such as the related work area, assignment title, assigned owner, assignment type, status, and due date. As users interact with the charts or filters, this register changes to reflect only the records that match the selected focus.

## Filter Panel

The filter panel on the right side provides dropdown controls for narrowing the report by portfolio, program, project, project manager, or assignee. These controls allow users to define the reporting scope before analyzing the visuals and list. Changing a filter limits the report to the selected criteria and helps remove unrelated records from view.

## Cross-Filtering Behavior

The report uses cross-filtering to connect charts, filters, and table data. A click in one area affects the other areas, so the report becomes more specific without requiring users to open a separate page. This behavior supports quick investigation because users can test different selections and immediately see how the displayed records change.

## Workload Review

The report helps users review the balance and distribution of assigned work. By comparing the assignment counts across people, categories, and project groupings, users can identify where work appears concentrated or where a closer review may be needed. The interaction pattern makes it possible to shift between broad workload review and focused assignment analysis.

## Status and Due Date Awareness

The assignment table includes status and due date information so users can connect work ownership with timing and completion details. Once the report is filtered or a chart element is selected, these fields help users understand the current condition of the remaining records. This is especially useful for reviewing open work, completed items, or upcoming due dates within the selected focus.

## Report Navigation

The bottom navigation shows that the Work report is part of a larger reporting set. Users can move between related report pages while staying within the same reporting experience. The Work page specifically concentrates on assignment-level information and provides a focused way to review work activity through interactive selections.

#### Costs

The Costs report provides a financial view of work by bringing together budget-related information, cost summaries, and visual analysis in a single reporting page. It is designed to help users evaluate spending, compare financial information across work items, and better understand where project costs are concentrated. Selecting different charts, rows, and report elements changes the report's focus, allowing the information displayed across the page to update and provide a more detailed view of the selected data.

## Financial Summary

The upper portion of the report presents a concise financial snapshot that allows users to quickly understand overall cost activity. Rather than reviewing individual records, users can begin with an aggregated view before exploring the underlying details.

## Cost Distribution Visualizations

Interactive charts display how costs are distributed across different categories. Clicking a chart segment immediately shifts the report's focus to the selected category, making it easier to investigate the associated financial information without leaving the page.

## Detailed Cost Breakdown

A tabular section organizes financial data into individual records for closer analysis. As different report elements are selected, the table refreshes to display only the information relevant to the current focus, helping users narrow their review.

## Context-Sensitive Reporting

The report responds dynamically to user interaction. Selecting a row, chart element, or summary value filters the surrounding visuals and details so that users can progressively drill into the financial data while maintaining context.

## Comparative Financial Analysis

The report supports side-by-side evaluation of spending patterns by presenting multiple visual perspectives at once. This makes it easier to identify variations, recognize trends, and understand how different portions of the data relate to one another.

## Focused Data Exploration

Instead of requiring separate reports for every question, the report encourages exploration through interaction. Each selection refines the displayed information, allowing users to move from broad financial summaries to increasingly specific cost details.

## Decision Support

The Costs report serves as an analytical workspace for reviewing financial performance. By combining interactive visuals with detailed reporting, it helps users identify areas of interest, investigate spending patterns, and make informed financial decisions based on the currently selected report focus.

**Projects Timeline**

The Projects Timeline report presents project work on a calendar-based timeline, allowing users to see when activities begin, how long they extend, and where items overlap across the reporting period. The report is centered around a horizontal timeline view, where each bar represents scheduled work positioned against date markers. This makes the report useful for understanding sequencing, duration, and timing relationships at a glance.

When a user clicks a timeline bar, category label, or related report element, the page refocuses around that selection. Other visuals and details respond to the click, helping the viewer move from a broad timeline view into a narrower view of the selected work without referencing any specific named project or individual.

The central area of the report is organized as a Gantt-style timeline. Work items are listed vertically, while dates run horizontally across the page. This arrangement helps users understand not only what is scheduled, but also when each item occurs and how its timing relates to surrounding work.

## Date-Based Perspective

The report emphasizes time as the primary lens for review. By placing scheduled items against a shared date scale, users can recognize early, current, and later activities in one view. This supports planning conversations where the timing of work matters as much as the work itself.

## Bar Length and Placement

Each timeline bar communicates duration and placement. Longer bars indicate work spanning a greater period, while the position of the bar shows when that work falls within the overall schedule. This visual format makes it easier to interpret timing than reading date fields alone.

## Click-to-Focus Behavior

Clicking a bar or related element changes the report's focus to the selected portion of the timeline. The surrounding information narrows to match the selection, allowing users to isolate one area of scheduled work while still remaining within the same report page.

## Filtered Timeline Review

The report includes controls and selectable elements that allow the displayed schedule to be refined. As filters or on-screen selections are applied, the timeline adjusts to show a more targeted set of items. This helps users reduce clutter and concentrate on the timing details that matter for the current review.

## Schedule Relationships

Because multiple items appear on the same date scale, the report helps reveal relationships between pieces of work. Users can see which activities run in parallel, which items follow one another, and where schedule density increases during certain periods.

## Detail Exploration

The lower or supporting areas of the report provide additional information tied to the selected timeline content. When the focus changes through a click, these details update to reflect the selected item or grouping, giving users a practical way to move from visual timing to supporting schedule information.

## Planning Use

The Projects Timeline report is best used when teams need to discuss timing, coordination, and upcoming work. It supports schedule review by showing where work sits on the calendar, how items align, and how the report view changes as users interact with the timeline.

#### Projects and Tasks

The Projects and Tasks report provides a unified view of project-level information alongside the tasks that support ongoing work. By combining summary information with detailed task records, the report helps users understand how individual activities contribute to overall progress. Clicking different rows, fields, and report elements changes the report's focus, updating the information displayed so users can examine related tasks and project details without leaving the report.

## Project and Task Relationship

This report presents projects together with their associated tasks, making it easier to understand how work is organized. Selecting a different project updates the task information shown on the screen, allowing users to quickly shift their attention between different sets of work.

## Task Details

A detailed table displays information about individual tasks, including their current status and other key attributes. As users select different records, the table refreshes to show the tasks associated with the current report focus.

## Interactive Record Selection

The report is designed for exploration rather than static viewing. Clicking on different records immediately changes what is displayed, helping users move between related information while maintaining context within a single report.

## Progress Visibility

Visual indicators and data columns provide insight into how work is advancing. Users can compare task activity across different selections and observe how the displayed information changes as the report focus shifts.

## Focused Information Display

Instead of displaying every available record at once, the report dynamically adjusts the visible information based on user interaction. This reduces clutter and allows users to concentrate on the specific projects and tasks they want to review.

## Navigation Through Related Data

The report supports seamless navigation between connected information. Selecting one element updates the surrounding data, creating an intuitive workflow for reviewing projects and their associated tasks without opening additional pages.

## Work Management Insights

By combining interactive filtering with detailed task information, the Projects and Tasks report provides a practical workspace for reviewing ongoing work, monitoring activity, and understanding how individual tasks fit into the broader project landscape.