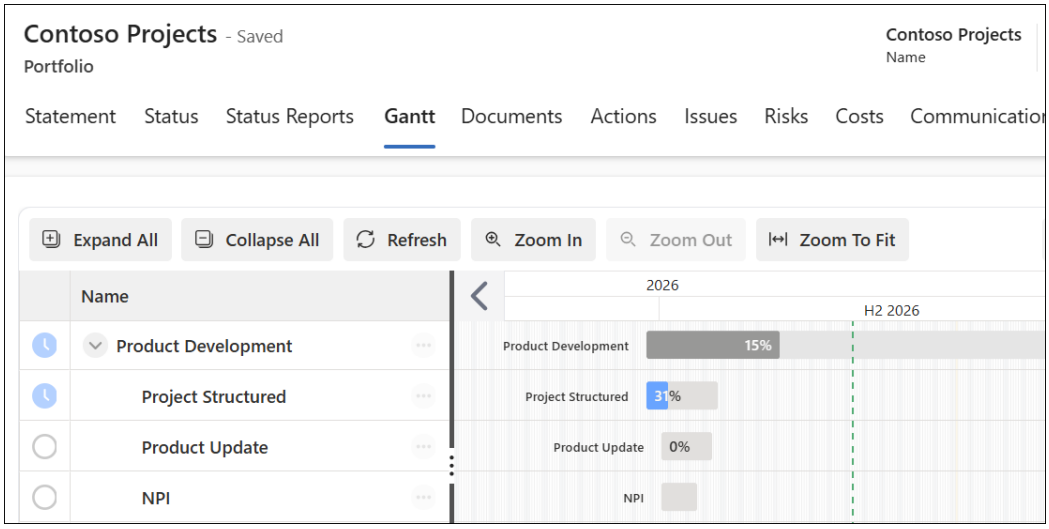
Portfolio Gantt

Project Management Context

The Portfolio Gantt is a high-level, read-only timeline for portfolios that displays programs and projects in a single executive view, enabling leadership teams to understand portfolio progress, timing, and delivery status in one place. It is primarily designed for executives, PMOs and Portfolio Managers who need a high-level view of delivery across multiple programs and projects.

During leadership meetings, executives can get a quick understanding of what programs and projects are active, when they are expected to complete, and where delays may be emerging.



Access the Portfolio Gantt

1. Navigate to the Gantt tab within a portfolio.
2. The Gantt tab displays program and project level ‘tasks’ indicating current status.

Columns

- Name
- Current Start
- Current Finish
- Status
- % Complete

Gantt Toolbar



Toolbar Actions

- The Expand All action expands all Program and Project hierarchy levels.
- The Collapse All action collapses all expandable hierarchy levels.
- The Refresh action reloads the Portfolio Gantt data.
- The Zoom In action increases timeline granularity.
- The Zoom Out action decreases timeline granularity.
- The Expand View action opens the expanded Gantt view.

Zoom To Fit

Zoom To Fit allows you to see more of your entire portfolio at once.

- The initial timeline zoom level automatically fits the entire portfolio date range within the visible timeline.
- The earliest Program/Project start date is visible on initial load.
- The latest Program/Project finish date is visible on initial load.

Expand View



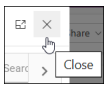
Standard View Mode

Set within a tab that is displayed among the rest of the solution elements.

Expanded View Mode

A larger pop-out view.

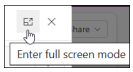
- To enter Expanded view mode, click the Expand View icon 

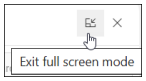
- To exit Expanded view mode, click the Close icon 

Full Screen View Mode

An even larger view that covers the boundaries of the solution.

- To enter Full Screen view mode, from the Expanded View noted above, click the full screen mode

icon 

- To enter back into Expanded view mode, click the Exit full screen mode icon 

- To enter back into Standard view mode, click the Close icon 

> **Tip** You can also use your browser's Full Screen function (typically F11 on the keyboard) to further enlarge any of the screen view modes.

Filter By



The Filter By action opens filtering options and updates displayed records accordingly.

Splitter

- The splitter can be dragged to resize the grid and timeline sections.

Column Filtering

- Column filtering can be applied to displayed grid columns.
- Filtered results update immediately after a filter is applied.
- Clearing a filter restores the full result set.
