

These instructions walk through the process of creating a Vistogram from an existing set of data. Other documents published by Omnivisto describe the process of preparing that data and the features and intended use of the Vistogram itself.

This document covers the desktop version of PowerBI, specifically Version: 2.150.1704.0 64-bit (January 2026). The steps for the web instance of PowerBI are almost identical. No separate document exists to cover the web version at time of writing.

Omnivisto have noted small discrepancies in the operation of the Vistogram between the web and desktop versions. Generally, these are not material.

For brevity – this document is not exhaustive and (among other things) specifically does not detail every formatting option available.

Make use of the info@omnivisto.com mailbox. The team is experienced, responsive and eager to help wherever possible. Omnivisto will help with data queries relating to required enrichment or transforms. Helping you helps us and Omnivisto will make every effort to keep up-to-date documentation for specific platforms like SmartSheet for instance.

This document assumes that all input data is provided via a static CSV file. This is in fact unlikely to be the case but most of the content remains valid in the event you configure your own data source.

You may use any data set that is available. However, a sample has been provided and that same data set Hotel Project 1.csv was used during the creation of these instructions and within the screenshots.

1. Import the CSV as you would normally.

ID	Active	Task Mode	Name	Duration	Start	Finish	Predecessors	Outline Level	Notes
1	Yes	Auto Scheduled	Project Launch	14 days	03/06/2022 08:30:00	24/06/2022 15:30:00		1	
2	Yes	Auto Scheduled	Initial Review	2 days	03/06/2022 08:30:00	07/06/2022 10:30:00		2	
3	Yes	Auto Scheduled	Review Business Case / Statement of Work	2 days	03/06/2022 08:30:00	07/06/2022 10:30:00		3	
4	Yes	Auto Scheduled	Establish Business Objectives	2 days	03/06/2022 08:30:00	07/06/2022 10:30:00		3	
5	Yes	Auto Scheduled	Determine Technical Complexity	2 days	03/06/2022 08:30:00	07/06/2022 10:30:00		3	
6	Yes	Auto Scheduled	Identify Target Audience	2 days	03/06/2022 08:30:00	07/06/2022 10:30:00		3	
7	Yes	Auto Scheduled	Establish Success Criteria & Measurables	2 days	03/06/2022 08:30:00	07/06/2022 10:30:00		3	
9	Yes	Auto Scheduled	Identify skill set needed	5 days	07/06/2022 10:30:00	14/06/2022 16:30:00		3	
10	Yes	Auto Scheduled	Identify (Initial) HW / SW environment	5 days	07/06/2022 10:30:00	14/06/2022 16:30:00		3	
11	Yes	Auto Scheduled	Develop time & effort estimates	5 days	07/06/2022 10:30:00	14/06/2022 16:30:00		3	
12	Yes	Auto Scheduled	Develop Man Power Budget	5 days	07/06/2022 10:30:00	14/06/2022 16:30:00		3	
13	Yes	Auto Scheduled	Develop Hardware and Software Budget	5 days	07/06/2022 10:30:00	14/06/2022 16:30:00		3	
14	Yes	Auto Scheduled	Develop / Review / Update Initial Budget	5 days	07/06/2022 10:30:00	14/06/2022 16:30:00		3	
16	Yes	Auto Scheduled	Organization	5 days	07/06/2022 10:30:00	14/06/2022 16:30:00		3	
17	Yes	Auto Scheduled	Communication Plan	5 days	07/06/2022 10:30:00	14/06/2022 16:30:00		3	

Figure 1 - Hotel Project.csv imported to PowerBI

While it is not necessary in this instance, you may need to promote in the top row of your input data to headers. Additionally, check for any blank rows at the foot of your input data. These should be deleted if they exist.

2. Within the data model, highlight the fields shown below if using the Hotel Project.csv sample schedule. Otherwise, select the fields that correspond to activity **ID**, activity **name**, activity **start date**, activity **end date** and activity **outline number**.

Convert these 5 fields to the data type [text] as shown in the Figure 2.

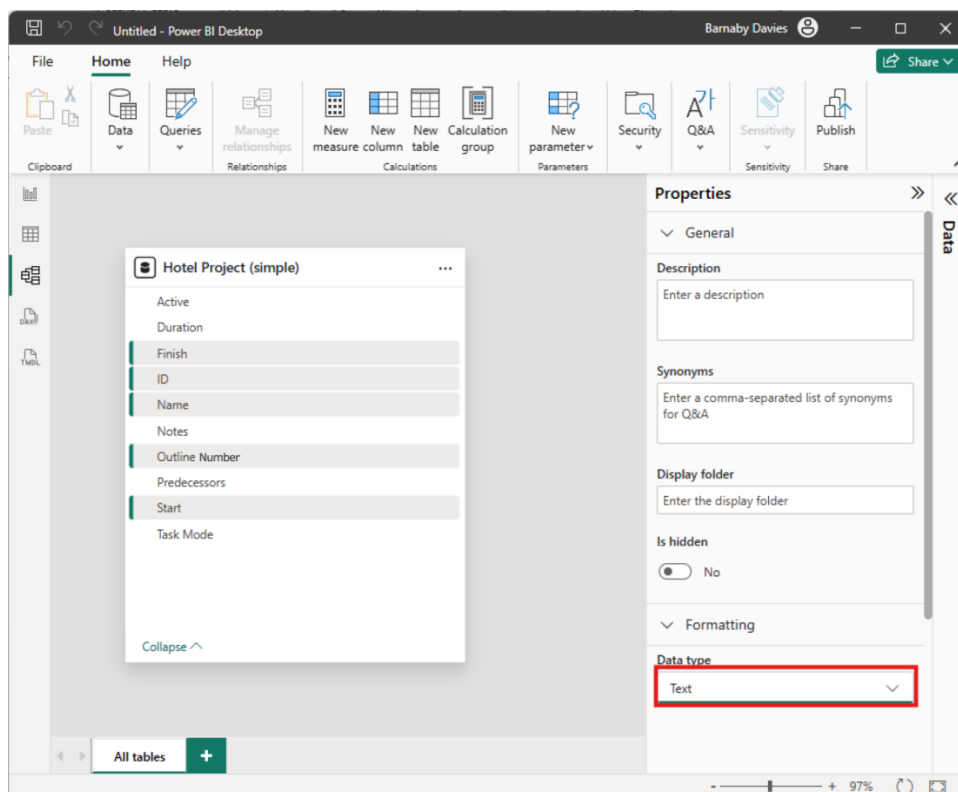


Figure 2 - converting fields to Text

3. Return to the PowerBI workspace and add the Vistogram custom visual.

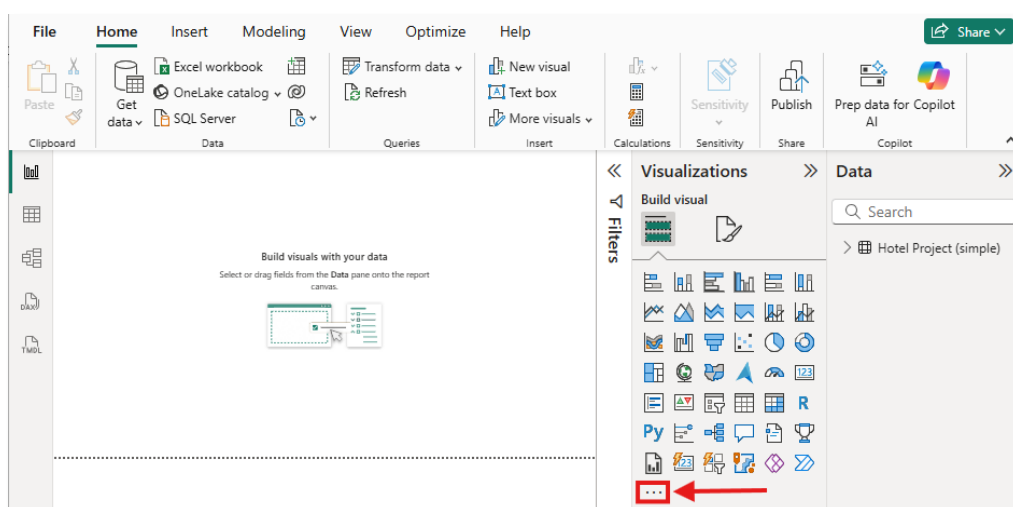


Figure 3 - adding the Vistogram custom visual

- Once the Vistogram custom visual has been added, you will see it available in the PowerBI Visualisations toolbox as shown in the image below.

Working from the top down – maps the five fields as shown below. If you are using your own data set, the field names might be different.

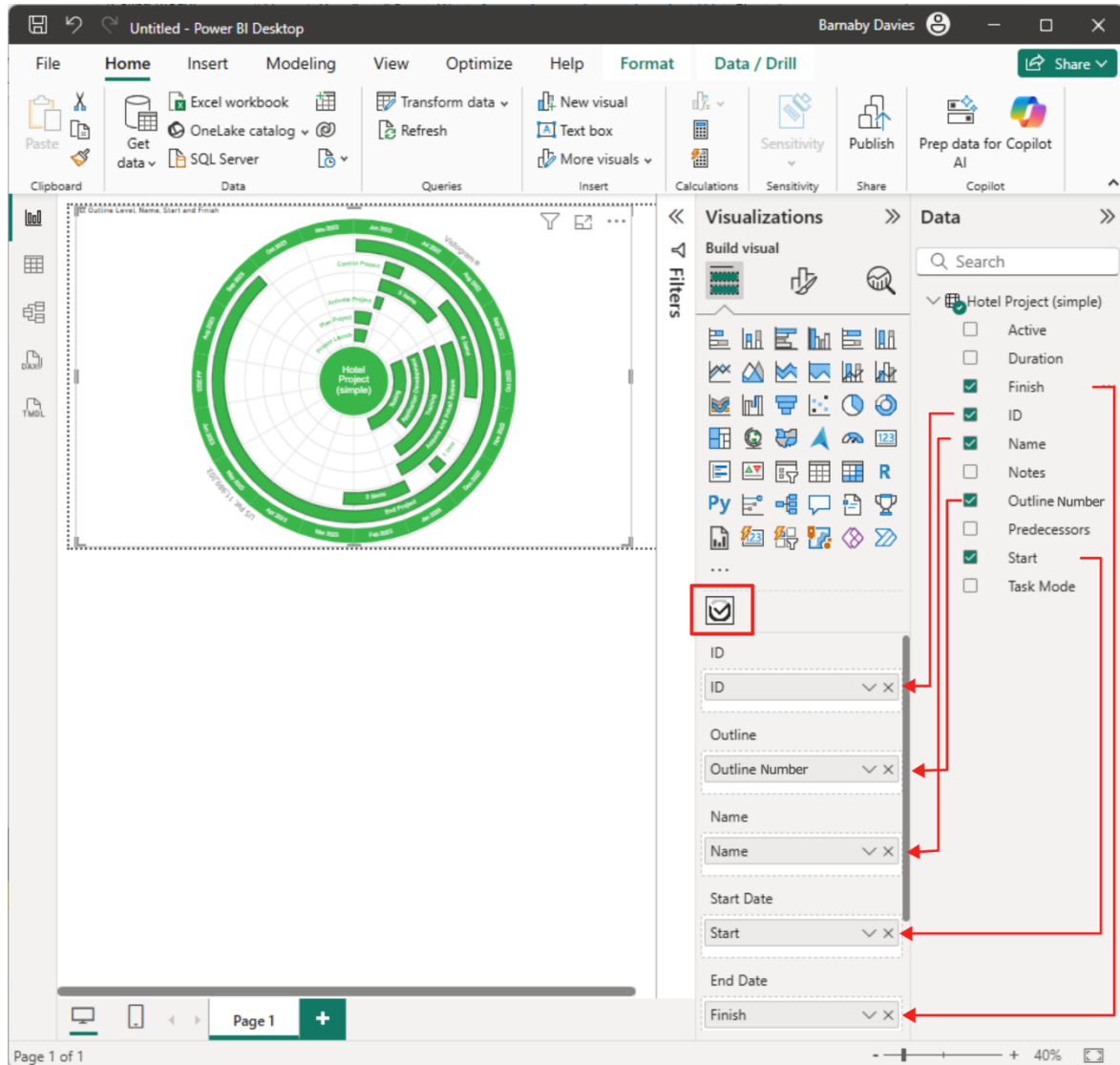


Figure 4 - adding fields in the Vistogram custom visual

Future versions of the Vistogram are expected to include additional optional fields. For instance, RAG status and percent complete. These will be optional.

Your input data sets can contain substantial further information within additional columns. This will not impact the Vistogram. This additional data can be useful if implementing additional visuals in the workspace. One

example is a cross-filtered table in which more detailed information can be surfaced when users interact with the Vistogram.

5. Most elements of the Vistogram are style-able and you should be able to achieve consistency with most existing branding and standards used elsewhere in PowerBI.

The number of tiers in the Vistogram can be adjusted and so too can its size to fit a wide range of input data sets and publication scenarios. In most instances, selecting the Vistogram > Font Auto-scale to 'On' is recommended.

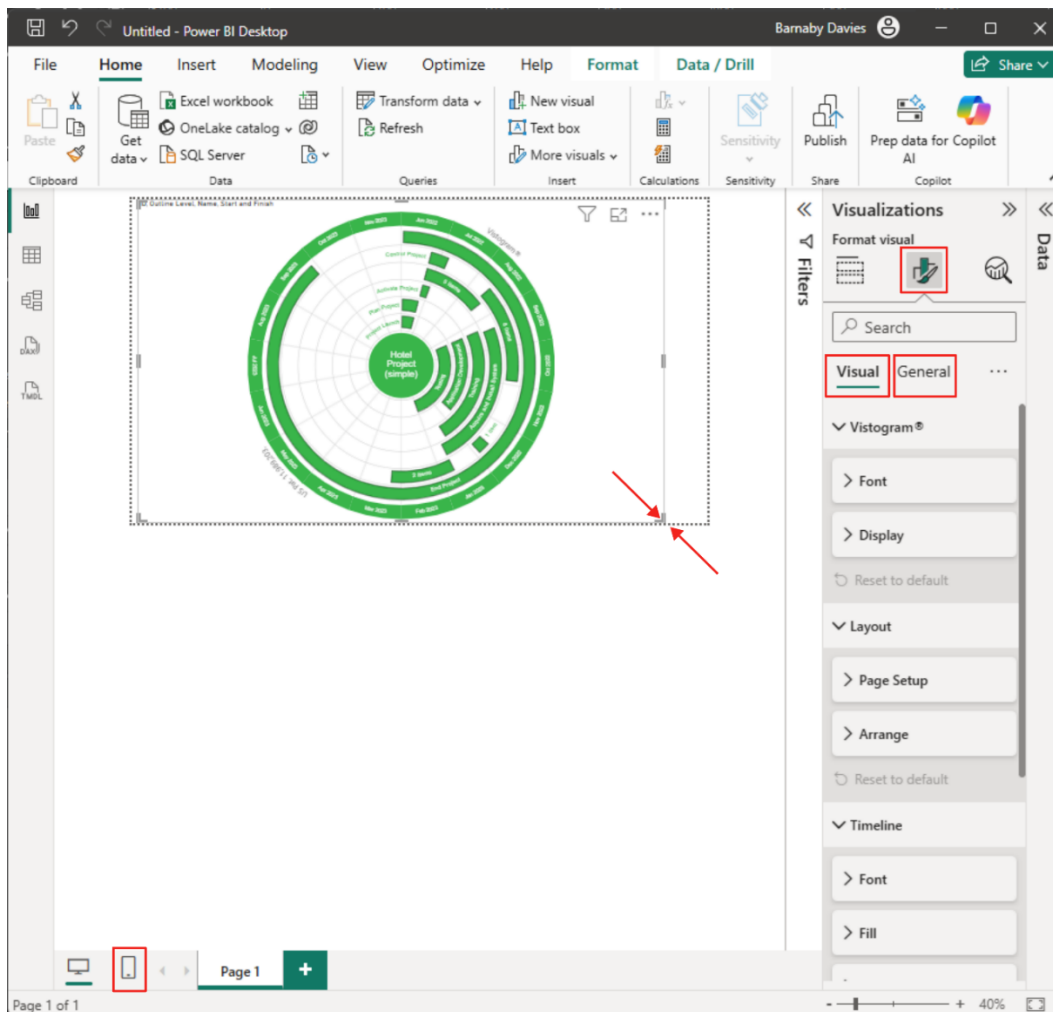


Figure 5 - styling the Vistogram

It is entirely practical to include multiple Vistogram visuals in a single dashboard.

Omnivisto have rectilinear (square) and mobile specific Vistogram configurations in the pipeline. In the interim, if you do publish the Vistogram using the PowerBI mobile service, the current Vistogram works very well on tablet form factors using the mobile PowerBI client.