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Implementing Time Lines in Microsoft Excel Templates

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Implementing Time Lines in Microsoft Excel Templates

Description

Microsoft Excel is extremely useful for many different types of digital scholarship projects. This one looks at the ability of Excel to create time lines for historical projects using an Excel template developed for project time lines. Before starting I will warn the reader that because of the way Excel stores and handles dates, these time lines only work for dates after Jan. 1, 1900. There are some potential fixes for this that I hope to address in the future.

The timeline which was developed for this project can be found at <http://chuckkann.com/timelines/excel/Mandela.xlsx>. You can download this and see the finished product.

Attached is a pdf files with step-by-step instructions on how to implement this project. Additional material may be available at <http://chuckkann.com>.

The Microsoft site <https://templates.office.com/en-us/Timelines> has timeline templates in other formats, but they generally work in a similar fashion to the timeline I am using. So once you have done a time line following these steps, you should be able to handle any Excel formatted time line.

If you do timelines using this document, let me know what you think...

Have fun!

Disciplines

Adult and Continuing Education and Teaching | Curriculum and Instruction | Instructional Media Design | Junior High, Intermediate, Middle School Education and Teaching | Online and Distance Education | Public History

How to Create a Time Line in Excel

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1. Download a project time line. Go to <https://templates.office.com/en-us/Timelines>, and retrieve the circled template. The other templates at this site also create nice time lines, and they all work on the same basic principles. Once you have done a timeline using this format, you might want to try others and see how they work.

The screenshot shows a web browser window with the URL <https://templates.office.com/en-us/Timelines> in the address bar. The page displays a grid of template thumbnails. On the left, there are navigation menus for 'BROWSE BY PRODUCT' (Excel, PowerPoint, Word) and 'BROWSE BY CATEGORY' (Agendas, Blank and General, Brochures, Budgets, Business, Calendars, Cards, Certificates, College Tools, Diagrams). The main content area shows several templates, each with a thumbnail, a title, a description, and a file type. The 'Project timeline with milestones' template is highlighted with a red circle. Below is a table summarizing the visible templates:

Thumbnail Description	Template Title	File Type	Availability
12-month timeline	12-month timeline	Word	FREE
Project planning timeline	Project planning timeline	Word	FREE
Timeline with flags infographic	Timeline with flags infographic (Berlin theme, widescreen)	PowerPoint	FREE
Timeline slide (blue horizontal chevrons)	Timeline slide (blue horizontal chevrons, widescreen)	PowerPoint	FREE
Circle Accent Timeline	Event timeline diagram slide (widescreen)	PowerPoint	FREE
Basic Timeline SmartArt	Timeline SmartArt diagram slide (white on dark gray, widescreen)	PowerPoint	FREE
Project Timeline (circled in red)	Project timeline with milestones	Excel	FREE
4 week project timeline	Project timeline	Excel	FREE

- Your blank timeline should look *something* like the following. These templates change from time to time, but how the templates function changes very little. Realize that small changes in the format will not affect how these instructions.

YOUR PROJECT
TIMELINE

PROJECT START

MILESTONE 1
MILESTONE 2
MILESTONE 3
MILESTONE 4
MILESTONE 5
MILESTONE 6
MILESTONE 7
MILESTONE 8
MILESTONE 9
MILESTONE 10
PROJECT END

23 Jan 23 Feb 23 Mar 23 Apr 23 May 23 Jun 23 Jul 23 Aug 23 Sep 23 Oct 23 Nov 23 Dec

PROJECT DETAILS

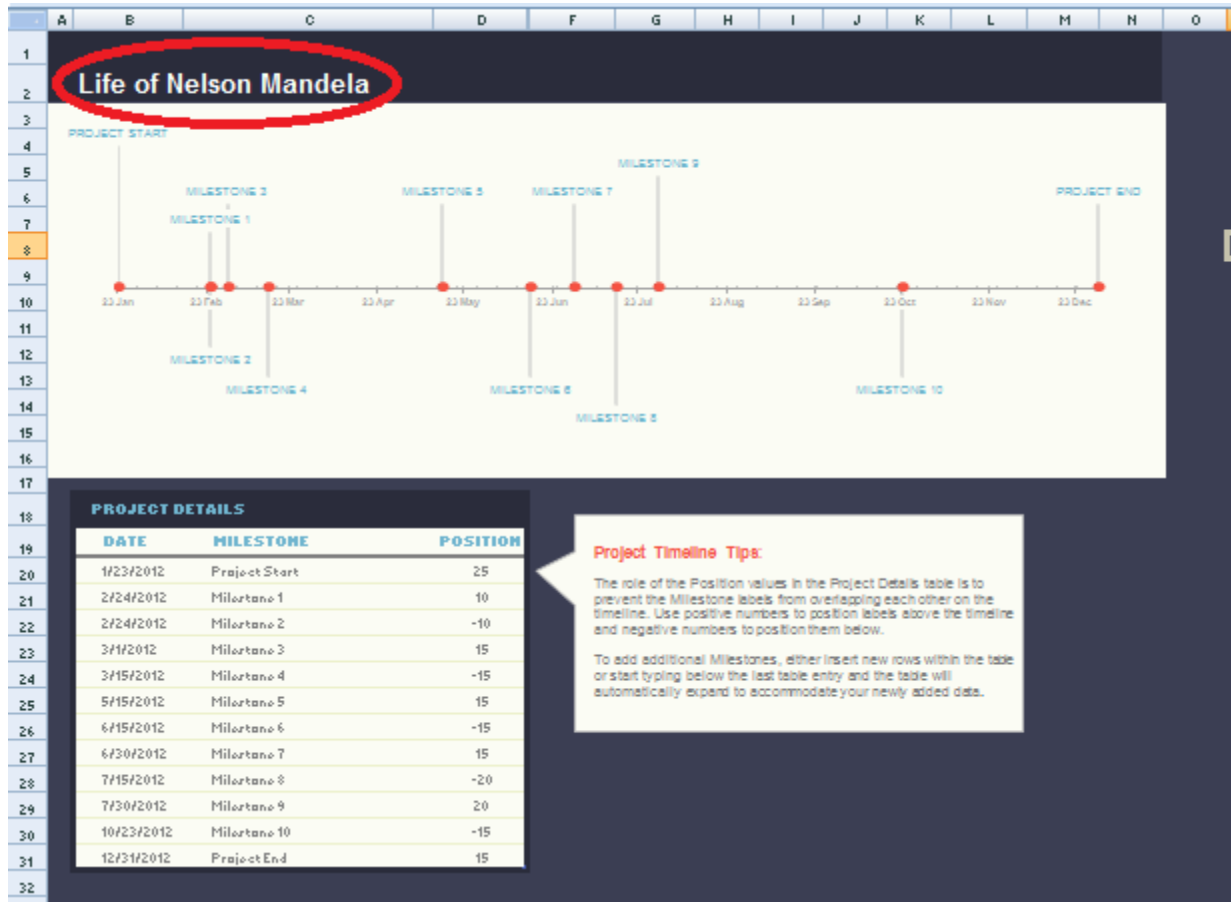
DATE	MILESTONE	POSITION
1/23/2012	Project Start	25
2/24/2012	Milestone 1	10
2/24/2012	Milestone 2	-10
3/1/2012	Milestone 3	15
3/15/2012	Milestone 4	-15
5/15/2012	Milestone 5	15
6/15/2012	Milestone 6	-15
6/30/2012	Milestone 7	15
7/15/2012	Milestone 8	-20
7/30/2012	Milestone 9	20
10/23/2012	Milestone 10	-15
12/31/2012	Project End	15

Project Timeline Tips:

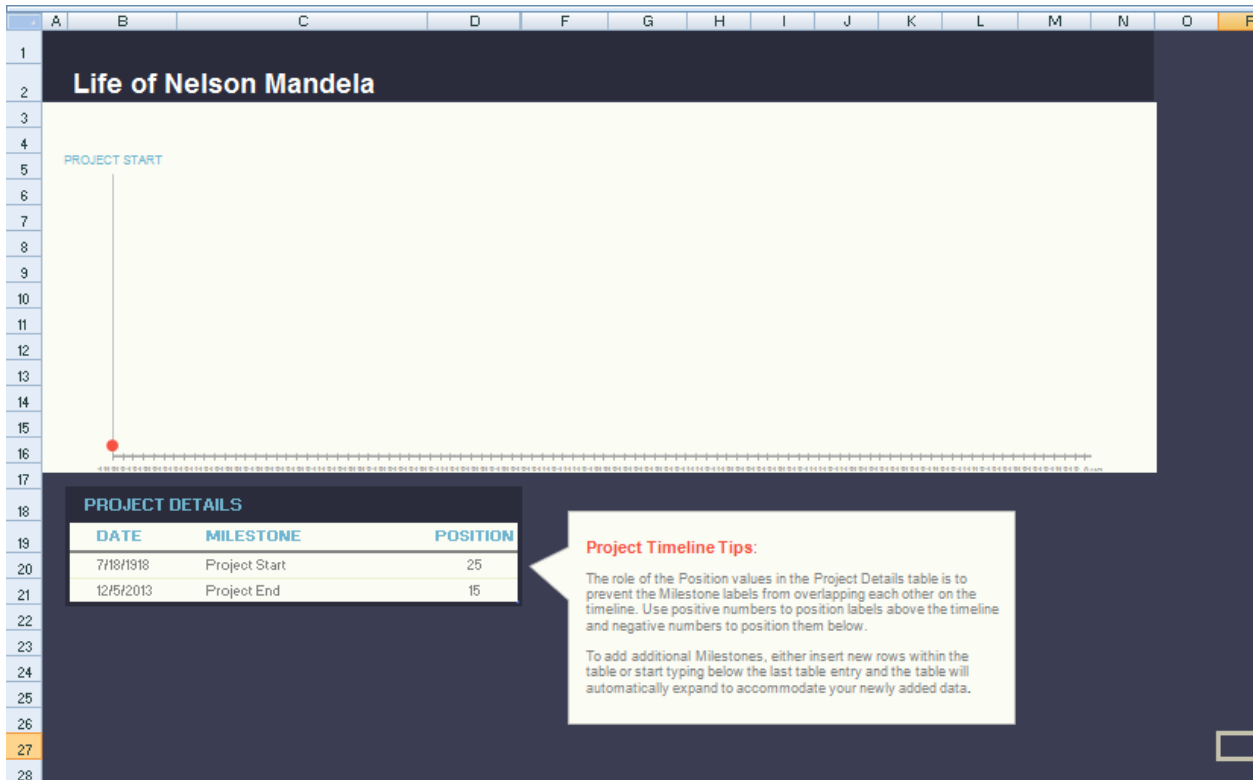
The role of the Position values in the Project Details table is to prevent the Milestone labels from overlapping each other on the timeline. Use positive numbers to position labels above the timeline and negative numbers to position them below.

To add additional Milestones, either insert new rows within the table or start typing below the last table entry and the table will automatically expand to accommodate your newly added data.

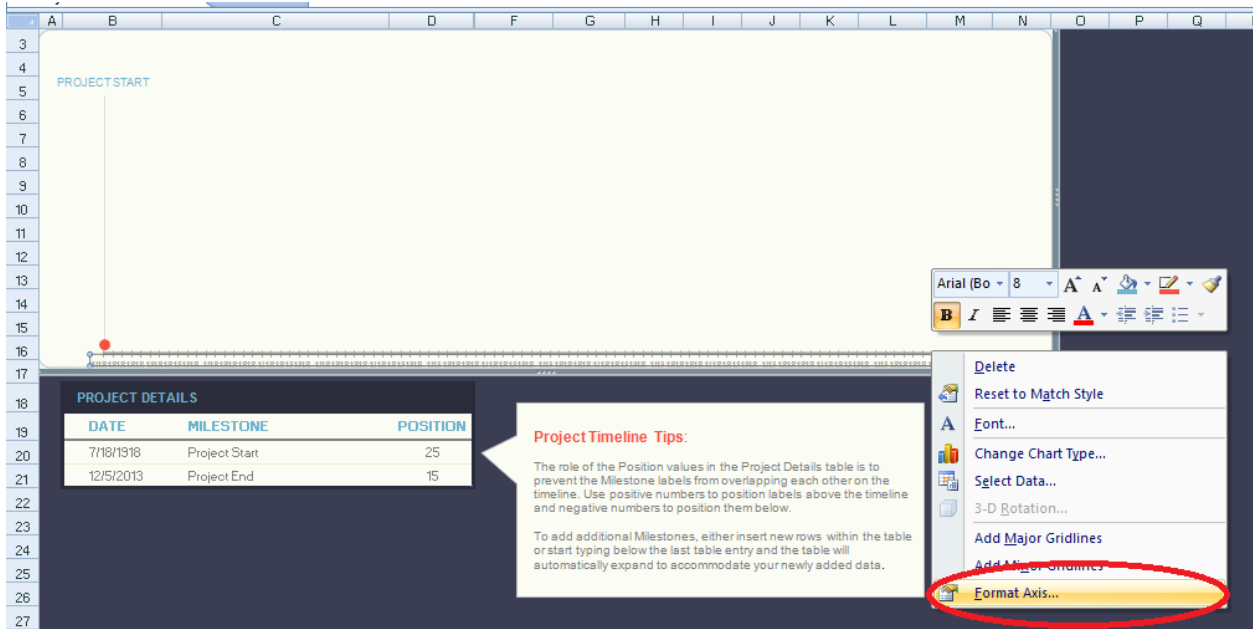
- Change the title to something more appropriate to your project. To do this, simply type over the existing text.



4. Change the first date to be the beginning of your timeline, and the last date to the end of your time line. Delete all the other rows from the table. This will help as you format your time line. Note that dates before 1/1/1900 are not handled in Excel. You can use them, but the timeline will not have the correct spacing between dates.



- Right click on the X axis (be sure you are on the axis, and not in the space above or below the axis or the menu will not be correct. Select the Format Axis option.



6. Format the data in the axis. The Major unit for the chart is the one that gets a value (in our case a date) below it. The Minor unit is the one that gets tick marks. For this chart, we choose 10 years for the Major unit (as Mandela's life was over 90 years), and 1 year as the minor unit. The Base unit is the same as the minor unit.

PROJECT DETAILS

DATE	MILESTONE	POSITION
7/18/1918	Project Start	25
12/5/2013	Project End	15

Format Axis - Axis Options

Minimum: Auto Fixed 1/1/1918

Maximum: Auto Fixed 1/1/2013

Major unit: Auto Fixed 10 Years

Minor unit: Auto Fixed 1 Years

Base Unit: Auto Fixed Years

Dates in reverse order

Axis Type:
 Automatically select based on data
 Text axis
 Date axis

Major tick mark type: Cross

Minor tick mark type: Inside

Axis labels: Next to Axis

Vertical axis crosses:
 Between dates
 At date: 1/1/1918
 At maximum date

Position Axis:
 On tick marks
 Between tick marks

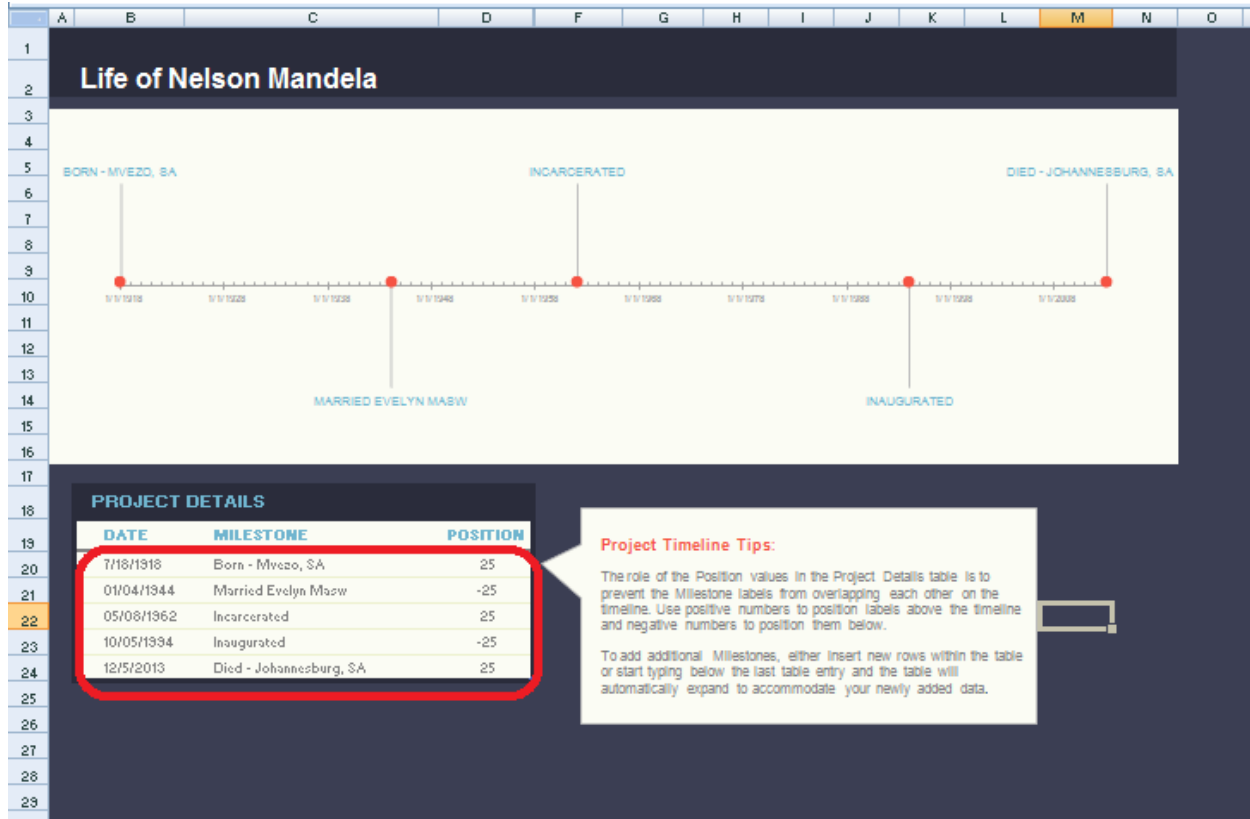
Close

7. Choose the format for the values in the Axis, and select the date type. You should now be showing the timeline with nice dates in the X axis.

The screenshot shows the 'Format Axis' dialog box in Microsoft Project. The 'Axis Options' list on the left has 'Number' selected. In the 'Number' category, the 'Date' option is selected in the 'Type' dropdown. The 'Format Code' is set to 'm/d/yyyy'. The background shows a project timeline for 'Life of Nelson Mandela' with a 'PROJECT START' milestone.

DATE	MILESTONE	POSITION
7/18/1918	Project Start	25
12/5/2013	Project End	15

- Fill in the rest of the dates for your project. When you enter points, make the position of some of the points in positive, and some in negative. This makes the axis easier to see. Positive points are shown above the axis, and negative points are shown below the axis. Note that the magnitude of the number determines how high or low the points will be.



- Find some nice pictures about the events you want to show, and insert them into the spreadsheet. You can drag them around to place them in appropriate positions, and you can resize them by dragging on a corner to make them bigger or smaller.

The screenshot shows a spreadsheet project titled "Life of Nelson Mandela". The main area features a horizontal timeline with several milestones marked by red dots and labeled with text and images. The milestones are: "BORN - MVEZO, SA" (with a photo of a young Mandela), "MARRIED EVELYN MASW" (with a photo of the couple), "INCARCERATED" (with a portrait of Mandela), "INAUGURATED" (with a photo of Mandela at a podium), and "DIED - JOHANNESBURG, SA" (with a photo of a funeral). The timeline axis has dates from 1/1/1918 to 1/1/2013.

Below the timeline is a table titled "PROJECT DETAILS" with the following data:

DATE	MILESTONE	POSITION
7/18/1918	Born - Mvezo, SA	25
01/04/1944	Married Evelyn Masw	-25
05/08/1962	Incarcerated	25
10/05/1994	Inaugurated	-25
12/5/2013	Died - Johannesburg, SA	25

To the right of the table is a callout box titled "Project Timeline Tips:" containing the following text:

The role of the Position values in the Project Details table is to prevent the Milestone labels from overlapping each other on the timeline. Use positive numbers to position labels above the timeline and negative numbers to position them below.

To add additional Milestones, either insert new rows within the table or start typing below the last table entry and the table will automatically expand to accommodate your newly added data.

- This is a nice spreadsheet project for middle school students. To make it better, the events can be hyperlinked to text or other information either in the document or online in the web. I hope to look at doing this in follow on articles.