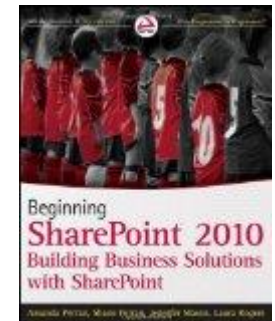


Creating Simple Dashboards Using Out-of- the-Box Web Parts



About me...



My Job Description

- I work with users at Rackspace to answer the question.....

"Wouldn't it be great if we could do {enter thing here}, yeah it would be great! Can you please go do {enter thing here}"



Defining a Dashboard

- What does a simple dashboard mean?
 - Using Content from SharePoint to Tell a Story
 - No Code Solutions (no syntax or semi-colons required)
 - Using the “Simple” in SharePoint to tell a great story!



The Technical Definition



"An easy to read, often single page, real-time user interface, showing a graphical presentation of the current status (snapshot) and historical trends of an organization's key performance indicators (KPIs) to enable instantaneous and informed decisions to be made at a glance."

Source: http://en.wikipedia.org/wiki/Dashboard_%28business%29

The Real World



- Give users the right data with the right context and guide them to the right action.



The Real World

- The story you deliver is unique to your organization.
 - What is right for you “depends”.
- MANY Options!
 - Crawl – Walk - Run



Don't Re-Invent the Wheel

- Know what you can do Out of the Box
 - Don't miss what you can do simply because you are focused only on the end goal.



Session Agenda

- Dashboards
- Examples
- Creating Dashboard



SharePoint Dashboards

- Combine Different Items to create dashboards
- SharePoint has
 - Pages
 - List & Library Web Parts
 - Functional Web Parts
 - Excel Services Web Parts
 - Visio Services Web Parts




Task Dashboard Example

Site Actions

Browse

Page

Administrator



Project Dashboard ▸ Tasks Dashboard

I Like It

Tags & Notes


Home

Task Dashboard

Document Dashboard


Summary Dashboard

Search this site...




My Active Tasks

Title	Status	Priority	Due Date	% Complete
Proof of Concept	In Progress	(2) Normal	8/31/2012	50 %




Overdue Tasks!

Type	Title	Assigned To	Priority	Due Date	% Complete
	Specify Design		(2) Normal	9/11/2012	
	Proof of Concept	Administrator	(2) Normal	8/31/2012	50 %
	Deliverable One		(2) Normal	8/15/2012	
	Deliverable Two		(2) Normal	8/24/2012	
	Deliverable Three		(2) Normal	8/31/2012	
	Final Deliverables Review		(2) Normal	9/1/2012	



Tasks Group By Phase

Title	Assigned To	Status	Priority	Due Date	% Complete	Predecessors	Associated Phase
Associated Phase : Phase 1: Requirements (1)							
Associated Phase : Phase 2: Design (2)							
Associated Phase : Phase 3: Build (3)							
Associated Phase : Phase 4: Deliver (1)							



Tasks Due this Week


Title	Assigned To	Status	% Complete
-------	-------------	--------	------------

Document Dashboard Example

Site Actions ▾

Browse

Page


Project Dashboard ▸ Documents Dashboard


Home

Task Dashboard


Document Dashboard

Summary Dashboard

Search this site...








My Documents



The last Modified Document


Documents Recently Modified by Me:

Type	Name	Modified
	5-year financial plan - manufacturing1	7/27/2012 7:39 PM
	Book1	7/27/2012 7:44 PM
	Book2	7/27/2012 7:44 PM
	Book3	7/27/2012 7:44 PM
	Primary market research schedule	7/27/2012 7:42 PM

1 - 5 ▸

Documents Recently Created (uploaded) by Me:

Name	Created	Modified
------	---------	----------


TestDoc1

Version

File Size

Name

Modified By

Check In

Comment

Checked Out To

Created

Created By

1.0


19 KB

TestDoc1

Administrator

7/31/2012 5:20 PM


Administrator





Documents Grouped by Type

Shared Documents [4]

Name	File Size	Version
------	-----------	---------


Type : (6)







www.jenniferannmason.com


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Web Part Connections

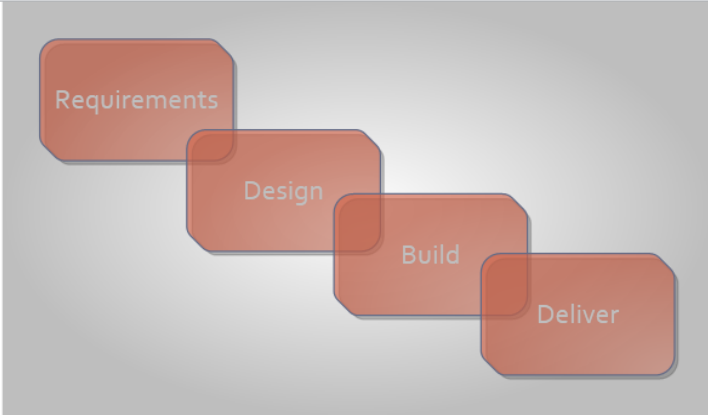
Site Actions  Browse Page


 Project Dashboard ▶ Summary Dashboard

Home Task Dashboard Document Dashboard **Summary Dashboard**


**Filter by Phase**

100%   




**Project Phase Details**

There are no items to show in this view of the "Project Phases" list. To add a new item, click "New".

**Project Document**


Type	Name
There are no items to show in this view of the "Shared Documents" document library. To add a new item, click "New" or "Upload".	


**Project Tasks**

Title	<input type="checkbox"/> Assigned To
There are no items to show in this view of the "Tasks" list. To add a new item, click "New".	

Web Part Connections




Site Actions ▾  Browse Page


 Project Dashboard ▸ Summary Dashboard Two


Home Task Dashboard Document Dashboard Summary Dashboard Summary Dashboard #2


Select a Phase


Select Title

 Phase 1: Requirements


 Phase 2: Design



 Phase 3: Build


 Phase 4: Deliver


 Phase Details

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet con

 Project Documents

Type	Name	Version
	Test Document 3	1.0
	Test PDF 5	1.0

 Project Tasks

Title	<input type="checkbox"/> Assigned To
Specify Design	
Proof of Concept	Administrator
	

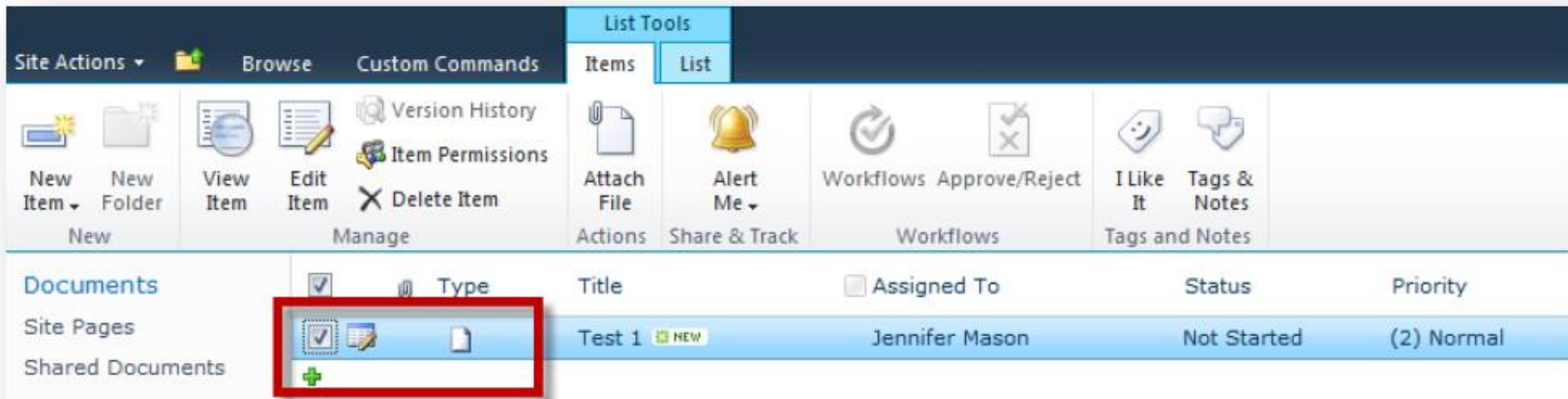
Building the Dashboard

1. Create Lists
2. Create List Associations (Lookup Columns)
3. Create Custom Views
4. Create Page
5. Add & Configure Web Parts on Page
6. Configure Web Part Connections

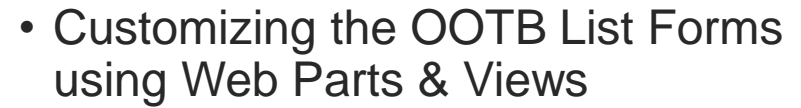


Views

- New Features
 - Inline Editing
 - Newsletter Style
 - Boxed Style
 - Preview Style



Title	Assigned To	Status	Priority
Test 1	Jennifer Mason	Not Started	(2) Normal




Customized Forms

Tasks - New Item

Edit

Save Close Paste Copy Cut Give Feedback

Commit Clipboard Quick Surveys



Budget Planning Tasks

Title	<input type="text"/>
Attachments	Click here to attach a file
Predecessors	<input type="checkbox"/> Test 1

Lookup Columns

Title	Description
Project 1	Proj Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
Project 2	Nunc viverra imperdiet enim. Fusce est. Vivamus a Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas.
Project 3	Nunc viverra imperdiet enim. Fusce est. Vivamus a Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas.

Values entered in one list, provide the drop down choices for a column in another list.

Modified	Modified By
6/7/2011 11:38 AM	CONTOSO\Administrator
6/6/2011 2:39 PM	CONTOSO\Administrator
6/6/2011 2:39 PM	CONTOSO\Administrator
6/6/2011 2:39 PM	CONTOSO\Administrator
6/6/2011 2:39 PM	CONTOSO\Administrator
6/6/2011 2:39 PM	CONTOSO\Administrator
6/6/2011 2:39 PM	CONTOSO\Administrator
6/6/2011 2:39 PM	CONTOSO\Administrator
6/6/2011 2:39 PM	CONTOSO\Administrator
6/6/2011 2:39 PM	CONTOSO\Administrator

Project
Project 1
Project 2
Project 3
Project 1
Project 2
Project 3

Demonstration



Demos



Thanks for Coming!

- Don't Forget to Visit My Blog
– <http://www.jennifermason.com>
- Come see my sessions at #SPC14!



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