

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

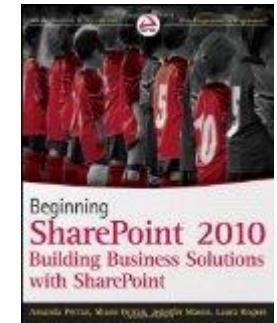




About me...



@jennifermason



www.jenniferannmason.com

RACKSPACE® HOSTING | WWW.RACKSPACE.COM

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 %

 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)							

 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 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

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 ►

The last Modified Document

TestDoc1

Version	1.0
File Size	19 KB
Name	TestDoc1
Modified By	Administrator
Check In	
Comment	
Checked Out To	
Created	7/31/2012 5:20 PM
Created By	Administrator

Documents Grouped by Type

Shared Documents [4]

Name	File Size	Version
Type : (6)		

Web Part Connections

Site Actions  Browse Page

Project Dashboard > Summary Dashboard

Home Task Dashboard Document Dashboard **Summary Dashboard**

 **Filter by Phase**

100% 

Requirements
Design
Build
Deliver

 **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 Title Assigned To

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**

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

 **Phase Details**

Select Title

 Phase 1: Requirements  Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet com

 Phase 2: Design

 Phase 3: Build  **Project Documents**

 Phase 4: Deliver  **Project Tasks**

Type	Name	Version	Title	Assigned To
	Test Document 3	1.0	Specify Design	
	Test PDF 5	1.0	Proof of Concept	Administrator

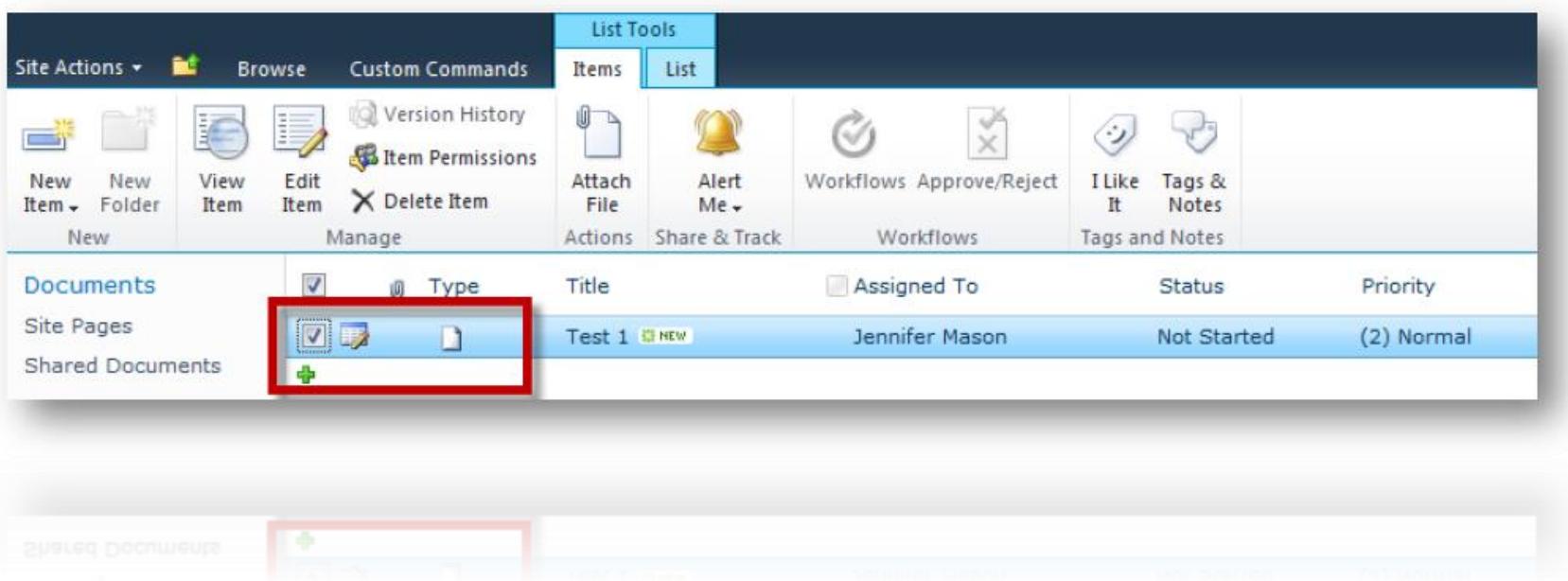
Building the Dashboard

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



The screenshot shows a SharePoint list titled 'Documents'. The list has columns for Type, Title, Assigned To, Status, and Priority. A new item titled 'Test 1' is being added. The 'Type' column for this item has a red box around it, indicating it is being edited. The 'Actions' and 'Share & Track' buttons are visible above the list. The 'List Tools' ribbon tab is selected.

Type	Title	Assigned To	Status	Priority
Test 1 <small>NEW</small>	Jennifer Mason	Not Started	(2) Normal	



List View Pages

- Customizing the OOTB List Forms using Web Parts & Views

FAQs - How do I do X?

View

 **Edit Item**  **Version History**  **Alert Me**

 **Manage Permissions**  **Delete Item**

Actions

Manage

Frequently Asked Question:

How do I do X?

Here is how you do X:

1. Step 1
2. Step 2
3. Step 3
4. Step 4

Rate this FAQ

Rating (0-5)



Associated Procedures

Associated Procedures

Test Document 11111; Procedures



www.jenniferannmason.com

RACKSPACE® HOSTING | WWW.RACKSPACE.COM



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, consectetuer adip pulvinar ultricies, purus lectus malesuada libero, sit
Project 2	Nunc viverra imperdiet enim. Fusce est. Vivamus a Pellentesque habitant morbi tristique senectus et ne Mauris et orci.
Project 3	Nunc viverra imperdiet enim. Fusce est. Vivamus a Pellentesque habitant morbi tristique senectus et ne Mauris et orci.

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

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



Demonstration

Demos



www.jenniferannmason.com

RACKSPACE® HOSTING | WWW.RACKSPACE.COM



Thanks for Coming!



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



March 3-6, 2014 • sharepointconference.com



www.jenniferannmason.com

RACKSPACE® HOSTING | WWW.RACKSPACE.COM