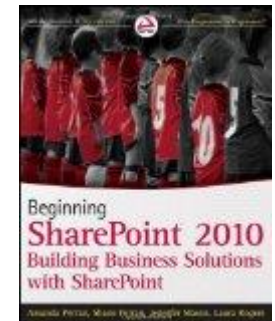


# Creating Simple Dashboards Using Out-of- the-Box Web Parts



# 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



Dashboard is a term now being used generally to refer to a web technology based page on which real time information is collated from various sources in the business. The metaphor of a dashboard is adopted here to emphasize the nature of the data being displayed on the page, it is a real-time analysis as to how a business is operating, just like on an automobile dashboard real time information is displayed about the performance of that vehicle.

# 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



# Project 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
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# Task 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 ▸


**Documents Recently Created (uploaded) by Me:**

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

 **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


HomeTask DashboardDocument DashboardSummary Dashboard

Filter by Phase

Project Phase Details

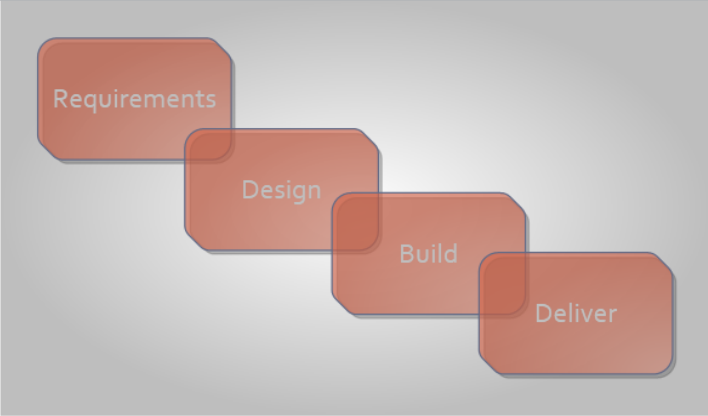
There are no items to show in this view of the "Project Phases" list. To add a new item, click "New".

Project Document

Project Tasks


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


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
	

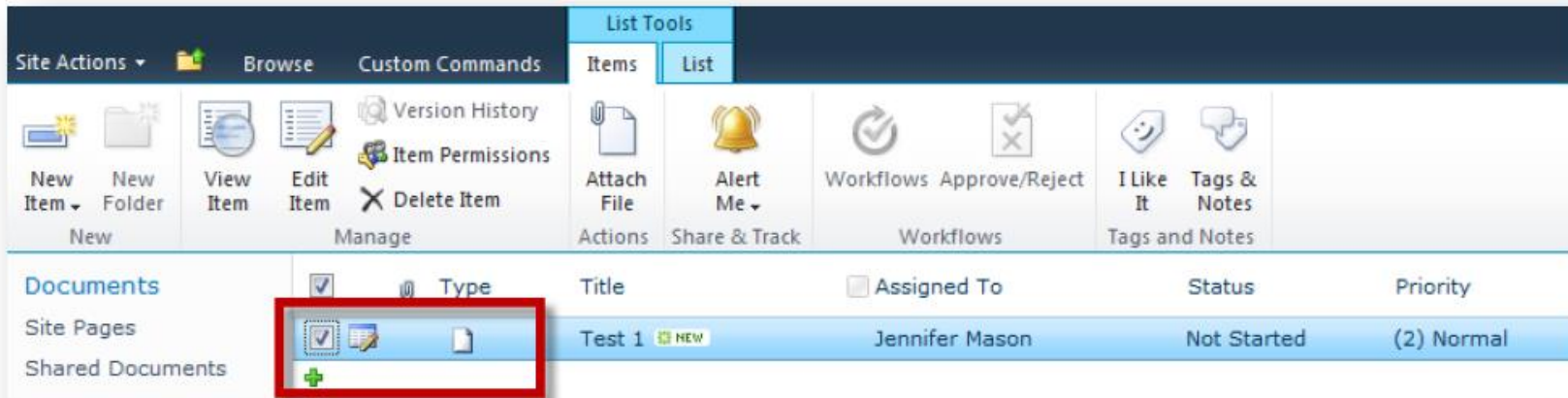
# Building the Dashboard

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



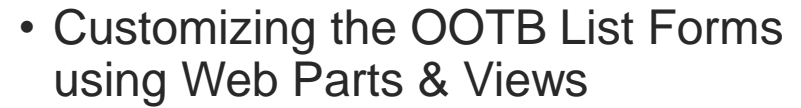
# Views

- 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	<a href="#">Click here to attach a file</a>
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 tellus.
Project 3	Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.

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

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

# Demonstration

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# Demos



# Thanks for Coming!

- Don't Forget to Visit My Blog
  - <http://www.jenniferannmason.com>



- Sign Up for Office Hours at SPTechCon!
  - See me after the session for remaining available times!

