

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

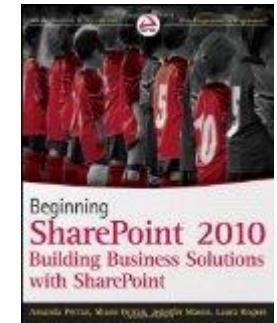




About me...



@jennifermason



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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 ►

The last Modified Document

TestDoc1

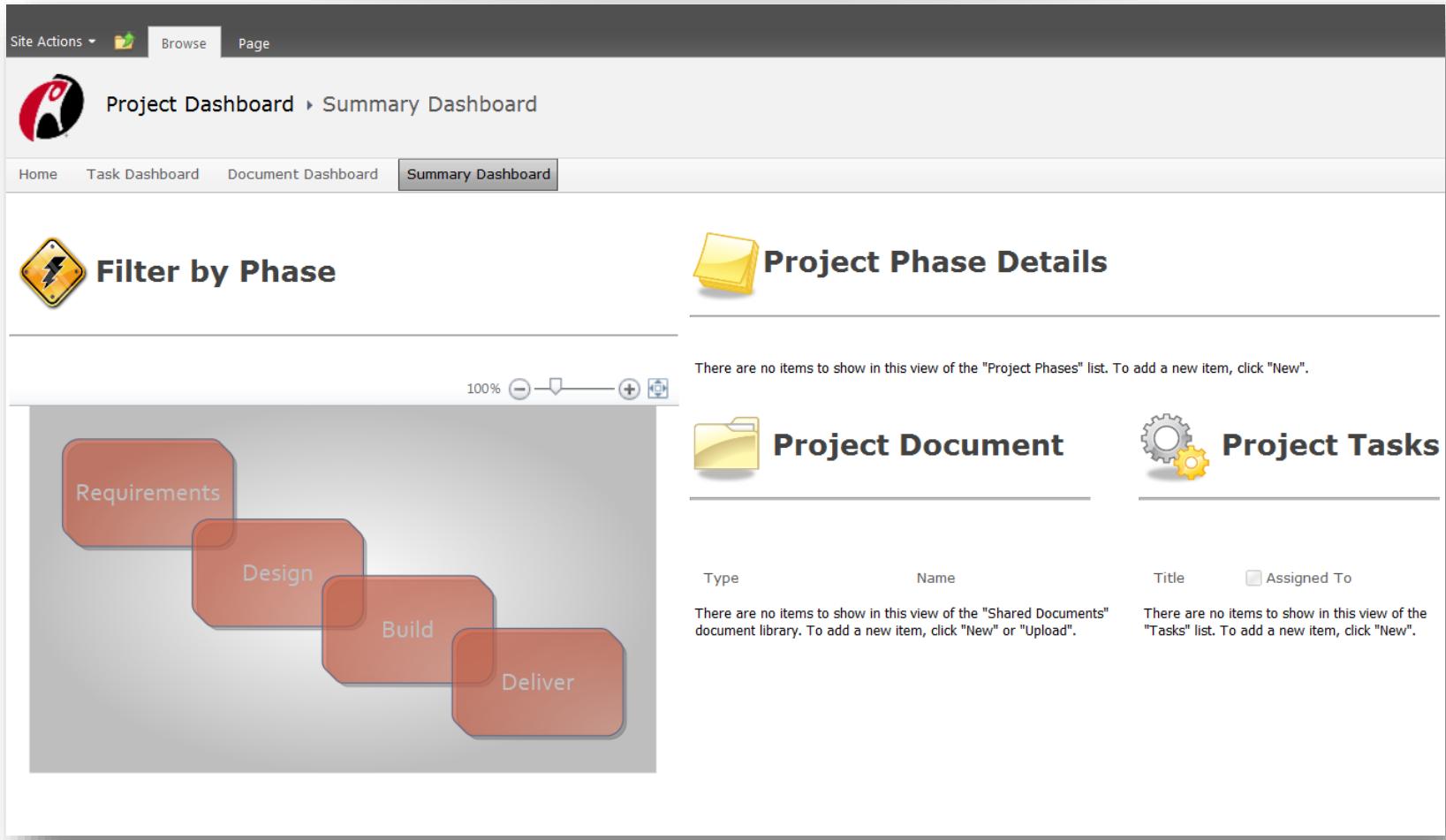
Version	1.0
File Size	19 KB
Name	TestDoc1
Modified By	Administrator
Check In	
Comment	
Checked Out To	
Created	7/31/2012 5:20 PM
Created By	Administrator

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	<input type="checkbox"/> 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".			

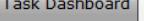
Project Tasks 

Type	Name	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 ▾           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 

 Phase 4: Deliver 

 **Project Documents**

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

 **Project Tasks**



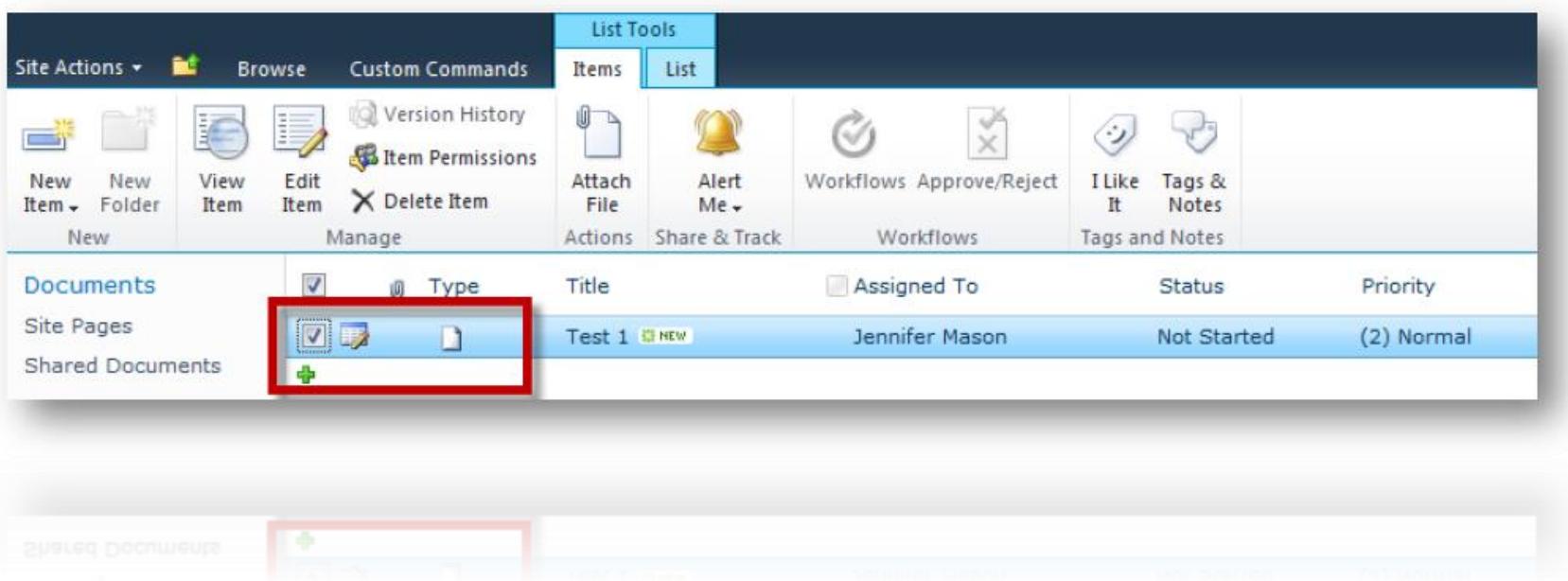
Building the Dashboard

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 three icons: a checkmark, a pencil, and a file, with a red box highlighting the pencil icon. The 'Title' column shows 'Test 1' with a 'NEW' tag. The 'Assigned To' column shows 'Jennifer Mason'. The 'Status' column shows 'Not Started'. The 'Priority' column shows '(2) Normal'. The 'Actions' and 'Share & Track' buttons are visible above the list. The 'List Tools' ribbon tab is selected. The 'List' tab is active. The 'Items' tab is also visible. The 'List Tools' ribbon tab has several buttons: New Item (dropdown), New Folder, View Item, Edit Item, Delete Item, Attach File, Alert Me (dropdown), Workflows, Approve/Reject, I Like It, Tags & Notes, and Tags and Notes. The 'Site Actions' dropdown menu is open, showing options: New Item (dropdown), New Folder, View Item, Edit Item, Delete Item, Manage, and New. The 'Custom Commands' dropdown menu is also open, showing options: Version History, Item Permissions, and Delete Item.



List View Pages

- Customizing the OOTB List Forms using Web Parts & Views

FAQs - How do I do X?

View

Version History Alert Me

Edit Item Manage Permissions Delete Item Manage Actions

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



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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



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



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