

Displaying information in SharePoint Using Excel Services, Reporting Services and PerformancePoint

SharePoint Saturday Washington DC August 11, 12 & 13, 2011

Agenda

Many SharePoint users and developers are not aware of the various ways that information can be exposed in SharePoint. Whether the data is stored in lists, or is from a Line of Business application (LOB), SharePoint gives you several options for displaying reports, graphs, scorecards, strategy maps and other valuable information insight. We will also cover the basics of good dashboard design.

- Choices for Information Display in SharePoint
- Dashboard Design Template
- Deciding Which Tool To Use To Create Display Components
- Set Up For Excel Services, Reporting Services And PerformancePoint
- Publishing Excel Workbooks And Excel Services Web Parts
- Report Libraries And The Reporting Services Report Viewer Web Part
- Whirlwind Overview Of PerformancePoint Dashboard Designer
- Deploying PerformancePoint Dashboards
- Using PerformancePoint Web Parts

Why should you listen to me?

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Instructor



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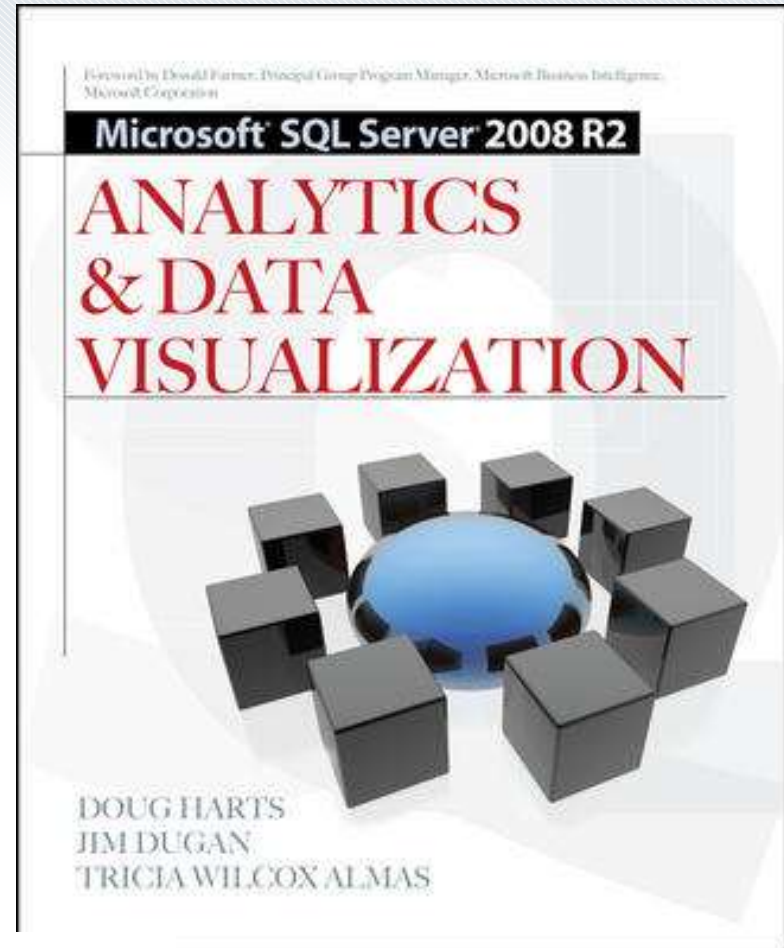
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Microsoft® SQL Server 2008 R2 Analytics & Data Visualization, McGraw-Hill,

Doug Harts, Jim Dugan, Tricia Wilcox Almas

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THE CONFERENCE
7:30-7:45 PM

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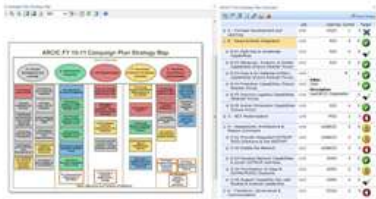
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SharePoint Administrator 2010

Choices for Analytic Information Display in SharePoint

Displaying information in SharePoint Using Excel Services, Reporting Services and PerformancePoint

Type of Dashboard



Strategic



Performance Management



Operational



Process-oriented BI

Type of LOB Information



Financial Information



Human Resources



Schedule Info



Agile Development Info

Type of Data Sources



SQL Databases



SharePoint Lists



Web Services



OLAP Cubes

Type of Information Display Widgets



Gauges



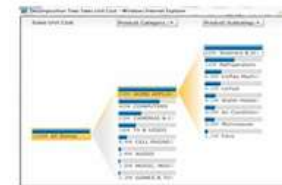
Analytic Charts

Indicator	Goal	Value	Status
Schedule	3	3	Green Circle
Budget	3	2	Red Diamond
Resources	3	1	Yellow Triangle
Issues	3	2	Yellow Triangle
Risks	3	3	Green Circle

Scorecards

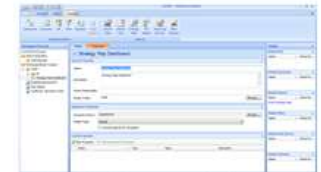


Pivot Tables

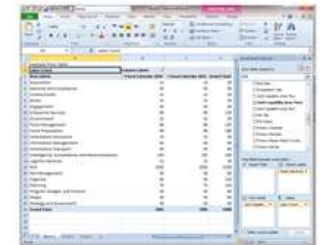


Decomposition Trees

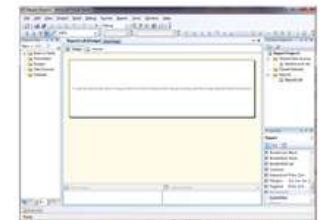
Tools to Create Displays



PerformancePoint Dashboard Designer



Excel Professional 2010



Reporting Services (BIDS)



Visio, SharePoint Designer, ReportBuilder

Decisions, Decisions

So how do you decide which tool to use for each dashboard component?

- Strategic or Performance Dashboards generally need scorecards – create in PerformancePoint or Excel
- Operational and Process-oriented Dashboards will generally show workflow and task completion, and other department-level types of measures – create in Excel or Reporting Services, Process Maps in Visio and PerformancePoint
- Charts, gauges, graphs – Excel or Reporting Services
- Pivots - Excel

Dashboard Design Template


Come to the **MicroLink** booth (Booth # 408) to get your copy of the Dashboard Template and Instructions !!

The Information Visualization Mantra:

- Overview First,
- Focus on Specifics,
- Drill to Details


Screen Real Estate

Most Important Information



This section of the dashboard page should have the most important, most summarized information – like a scorecard of KPIs or small multiples of leading indicators. This section should definitely be graphics oriented.

Secondary Information



This section of the dashboard page should contain clarifying additional information, a good location for geographic-based info or other information visualizations like gauges and small graphs.

Tertiary Information

Row Labels	Acct Nbr	Count	Fin Trx Amt	Fin Trx Ct	Qty Shipped
Midwest	382	\$207,643.18	3,223	1,618	
Northeast	240	\$83,306.53	2,081	993	
South	864	\$2,293,190.79	22,818	2,466	
West	276	\$145,553.05	2,373	998	
Grand Total	1,762	\$2,729,693.55	30,495	6,075	

This section of the dashboard page should display supporting information or more detailed, historical or background information. Graphs with drill-down capabilities, process diagrams, maybe even pivot chart of dimensional data.

Ancillary Information

Executive Summaries

Category A

- ExSumm Topic 1
- ExSumm Topic 2

Category B

- ExSumm Topic 3
- ExSumm Topic 4

Other Dashboards

- Marketing Dashboard
- IT Dashboard
- Distribution Dashboard
- Training Dashboard
- Personnel Dashboard


This section of the dashboard page receives the least attention, so scan-able information is required – Executive Summary listings grouped by topic, Links to specific reports or other dashboards.

Least Important Information

–

Links to additional information

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Excel Services Capabilities

- **More secure sharing of workbooks, reliability and availability.** A single version of the truth.
- **Business intelligence.** Workbooks connected to enterprise data sources can be published to the server and used in business intelligence dashboards and scorecards.
- **Extensibility.** Reusable logic that is contained in workbooks and user-defined functions is available for developers to implement in server-based applications.
- **Use of Unattended Service Accounts.** Excel Services relies on the Secure Store Service to store the encrypted unattended service account.
- **Excel Services is now a Managed Service Application,** and is managed thru SharePoint Central Administration.
- **Slicer feature.** The Slicer feature is a new type of data filter in Microsoft Excel 2010 that is interactive, flexible in design and layout, and always conveys the current filtering state. With these data filters more people benefit from the power of analyzing data using PivotTables and OLAP Functions

Set up for Excel Services and PerformancePoint

The screenshot displays the SharePoint Central Administration interface. The top navigation bar shows 'Service Applications' and 'System Account'. The left-hand navigation pane lists various services, with 'Excel Services Application' and 'PerformancePoint Service Application' highlighted. A red box highlights the breadcrumb 'Central Administration > Manage Excel Services Application' at the top of the main content area. A speech bubble on the right contains the text: 'These tasks are in SharePoint Central Administration, and should be done by your SharePoint Administrator'. The main content area is divided into two sections: 'Manage Excel Services Application' and 'Manage PerformancePoint Services: PerformancePoint Service Application'. The first section includes links for 'Global Settings', 'Trusted File Locations', 'Trusted Data Providers', 'Trusted Data Connection Libraries', and 'User Defined Function Assemblies'. The second section includes links for 'PerformancePoint Service Application Settings', 'Trusted Data Source Locations', 'Trusted Content Locations', and 'Import PerformancePoint Server 2007 Content'. A red arrow points from the 'PerformancePoint Service Application' link in the left pane to the corresponding breadcrumb in the main content area.

Service Applications System Account

Manage Administrators Properties Publish Permissions

Central Administration > Manage Excel Services Application

Use this page to change settings for Excel Services Application

Operations Sharing

Name

Access Services

Access Services

Application Discovery and Load Balancer Service

Application Discovery and Load Balancer Service
8e594e071749

Application Registry Service

Application Registry Service

Business Data Connectivity Service

Business Data Connectivity Service

Excel Services Application

Excel Services Application

Managed Metadata Service

Managed Metadata Service

PerformancePoint Service Application

PerformancePoint Service Application

Search Administration Web Service for Search

Search Service Application

Search Service Application

Secure Store Service

Secure Store Service

Security Token Service Application

State Service

State Service

Global Settings
Define load balancing, memory, and throttling thresholds. Set the unattended...

Trusted File Locations
Define places where spreadsheets can be loaded from.

Trusted Data Providers
Add or remove data providers that can be used when refreshing data connections.

Trusted Data Connection Libraries
Define a SharePoint Document Library where data connections can be loaded from.

User Defined Function Assemblies
Register managed code assemblies that can be used by spreadsheets.

Central Administration > Manage PerformancePoint Services: PerformancePoint Service Application

PerformancePoint Service Application Settings
Configure settings such as cache durations, filter behavior, and query time-out.

Trusted Data Source Locations
Define SharePoint locations to store data sources.

Trusted Content Locations
Define SharePoint locations to store content such as dashboards and scorecards.

Import PerformancePoint Server 2007 Content
Load content such as dashboards and scorecards from an existing database.

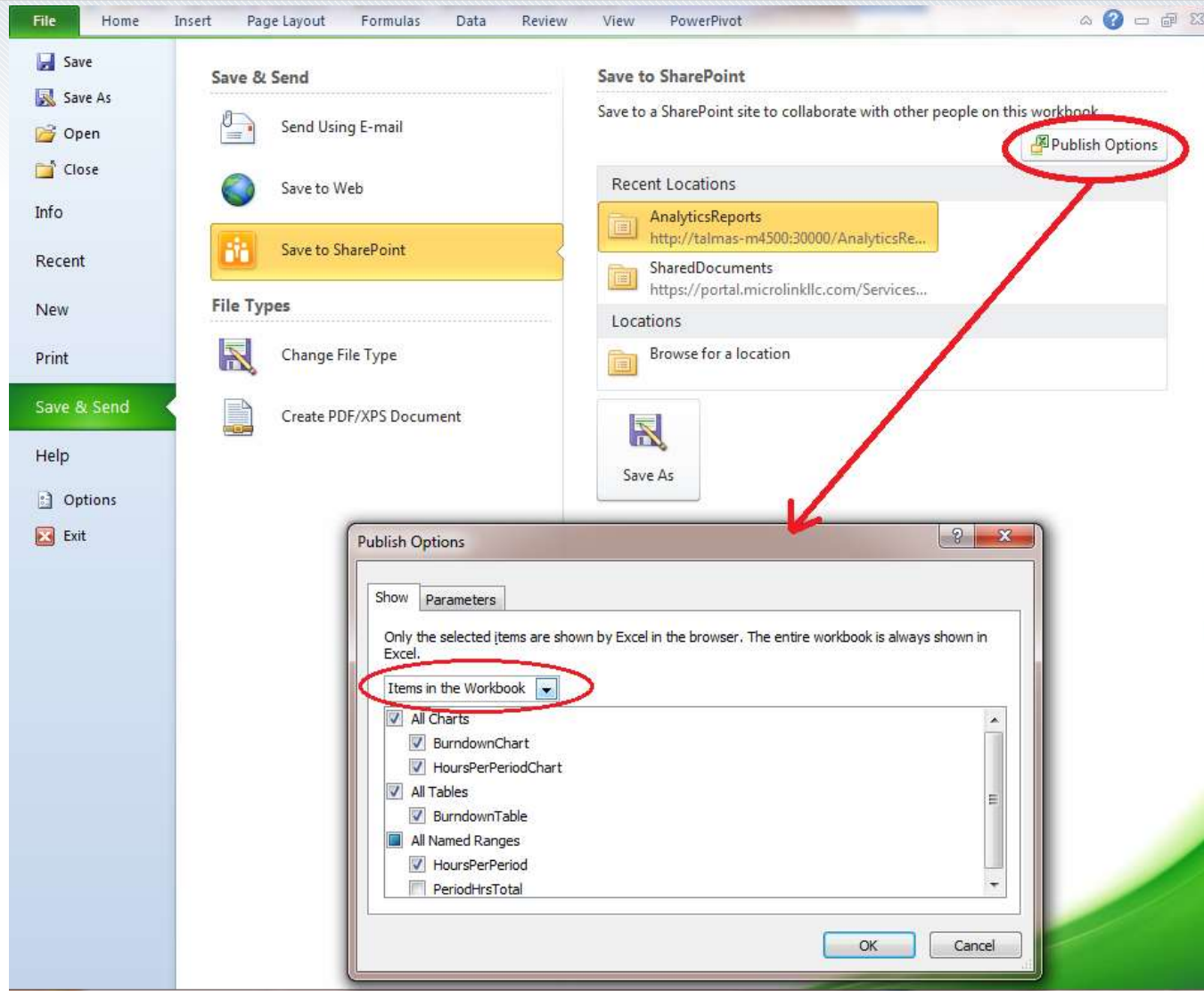
These tasks are in SharePoint Central Administration, and should be done by your SharePoint Administrator

Using Excel Components on the Dashboard

Once the Service Applications are configured in Central Administration, in order to use Excel components on your dashboards, take a couple of steps:

- Publish your Excel Workbooks to a SharePoint Library (Document or Reports Library preferred)
 - Name your items (charts and tables)
 - Choose the Publish Options
 - Select Items in the Workbook Option
- Use Excel Web Access Web Parts to expose that content on your dashboard

Publishing Excel Workbooks and Excel Services Web Parts



Publishing Excel Workbooks and Excel Services Web Parts

The screenshot displays the SharePoint Web Part gallery interface, divided into three main sections:

- Categories:** A list of folders on the left. The 'Business Data' folder is circled in red.
- Web Parts:** A central list of web parts. 'Excel Web Access' is highlighted with a red arrow pointing to it.
- About the Web Part:** A panel on the right titled 'Excel Web Access' with the description: 'Use the Excel Web Access Web Part to interact with an Excel workbook as a Web page.' Below this, a blue speech bubble contains the text 'Select where to put it'. At the bottom, the 'Add Web Part to:' dropdown menu is set to 'Top Left Zone'.

Publishing Excel Workbooks and Excel Services Web Parts

The screenshot shows a SharePoint environment with a 'Right Zone' header and a 'System Account' dropdown. A 'Select an Asset -- Webpage Dialog' is open, displaying a tree view of assets under 'Customized Reports at http://talmas-m4500:30000/AnalyticsReports'. The tree includes folders like 'BI Collection Administration', 'Content and Structure Reports', 'Customized Reports', 'Dashboards', 'Data Connections', 'Documents', 'Drop Off Library', 'Form Templates', 'Images', and 'Links'. A table lists reports:

Type	Content Type	Name
Report		AccountManagers
Report		PlanningCubePivot
Report		ProjectBurndown
Report Builder Report		ProjsByInvTypeandJCA

The 'Excel Web Access - ProjectBurndown [1]' web part configuration is shown on the right. The 'Workbook' field contains the URL 'http://talmas-m4500:30000/A...' with an ellipsis button. A callout bubble points to this ellipsis with the text: 'Must know the Named Item, this ellipses is not a lookup'. Other configuration options include 'Named Item' (BurndownChart), 'Title Bar' (Autogenerate Web Part Title and URL), 'Type of Toolbar' (Full), and 'Toolbar Menu Commands' (Open in Excel, Download a Copy, Download a Snapshot, Refresh Selected Connection, Refresh All Connections, Calculate Workbook, Named Item Drop-Down List). 'Navigation and Interactivity' options include 'Hyperlinks' and 'All Workbook Interactivity'.

Reporting Services Capabilities

- R2 has a new version of Report Builder, an end-user report creation tool.
- Lots of new charts, gauges, sparklines, visualizations including geospatial (mapping) capabilities.
- PowerPivot delivered as a result of project gemini.
- More precise control over chart size.
- Can use a variety of data sources in one report.
- Supports report subscriptions, including delivery to Outlook.
- Can be consumed in SharePoint or PerformancePoint.

Configuring Reporting Services Integration

The screenshot shows the SharePoint 2010 Central Administration interface. The breadcrumb path is "Central Administration > General Application Settings", which is highlighted with a red box. The left navigation pane includes links for External Service Connections, InfoPath Forms Services, Site Directory, SharePoint Designer, Search, Reporting Services (with a red arrow pointing to "Reporting Services Integration"), and Content Deployment. The main content area is titled "Reporting Services Integration" and contains a warning message, instructions, and configuration fields for the Report Server Web Service URL, Authentication Mode, Credentials, and the Reporting Services Feature activation options. The "Report Server Web Service URL" field is populated with "http://talmas-m4500/ReportServer". The "Authentication Mode" dropdown is set to "Windows Authentication". The "Credentials" section has empty input fields for "User Name:" and "Password:". The "Activate the Reporting Services Feature" section has two radio buttons, with the first one selected: "Activate feature in all existing site collections".

Microsoft SharePoint 2010 Central Administration > General Application Settings

Microsoft SharePoint 2010 Central Administration > Reporting Services Integration

Warning: this page is not encrypted for secure communication. User names, passwords, and any other information will be sent in clear text. For more information, contact your administrator.

Use this page to configure integration settings for SQL Server Reporting Services.

Report Server Web Service URL
Specify the URL of the report server instance that you want to integrate with this SharePoint environment.

The Report Server service will be restarted once the service account has been granted access successfully.

Authentication Mode
Specify the authentication mode that is used by the SharePoint site or farm.

Credentials
Specify the credentials of a user who is a member of the Administrator group on the computer that hosts the report server. If the computer hosting the report server is on a separate machine then you need to specify a domain account.

To re-provision the existing integration between this SharePoint environment and SQL Server Reporting Services, specify the credentials of a user who is a member of the Administrators group on the computer that hosts the report server.

Activate the Reporting Services Feature
Specifies the site collection or collections in which the Reporting Services feature is activated.

OK Cancel

http://talmas-m4500/ReportServer

Windows Authentication

User Name:
Password:

Activate feature in all existing site collections
Activate feature in specified site collections

OK Cancel

Report Libraries

The screenshot displays a web application interface with a top navigation bar and a main content area. The top bar includes 'Site Actions', 'Browse', 'Library Tools' (with sub-tabs 'Documents' and 'Library'), and 'System Account'. The 'Library Tools' menu is open, showing options like 'New Document', 'Upload Document', 'New Folder', 'Edit Document', 'View Properties', 'Edit Properties', 'E-mail a Link', 'Download a Copy', 'Workflows', 'Publish', 'I Like It', and 'Tags & Notes'. Below the menu is a table of report items with columns for 'Type', 'Content Type', 'Name', 'Modified', and 'Modified By'. A red callout box points to the text 'Reporting Services Reports, Report Builder Reports, Excel Reports'.

Type	Content Type	Name	Modified	Modified By
	Report	PlanningCubePivot	7/25/2011 4:13 PM	System Account
	Report	ProjectBurdown	7/25/2011 4:12 PM	System Account
	Report Builder Report	ProjsByInvTypeandJCA	7/25/2011 4:27 PM	System Account

Reporting Services Reports, Report Builder Reports, Excel Reports

Display as Stand-alone Report

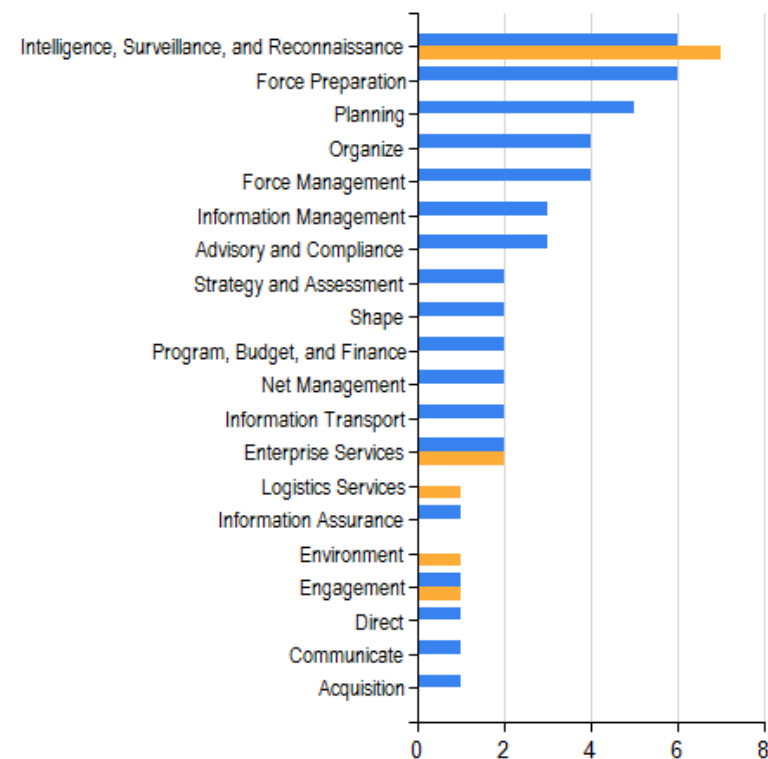
Author Portal > Customized Reports

Actions | | | | 1 of 1 | | Find Next | 100% |

Number of Projects by Investment Type and JCA Area

Joint Capability Area	OEP-2	P-3	Total
Acquisition	1		1
Advisory and Compliance	3		3
Communicate	1		1
Direct	1		1
Engagement	1	1	2
Enterprise Services	2	2	4
Environment		1	1
Force Management	4		4
Force Preparation	6		6
Information Assurance	1		1
Information Management	3		3
Information Transport	2		2
Intelligence, Surveillance, and Reconnaissance	6	7	13
Logistics Services		1	1
Net Management	2		2
Organize	4		4
Planning	5		5
Program, Budget, and Finance	2		2
Shape	2		2
Strategy and Assessment	2		2
Total	48	12	60

Number of Portfolios by JCA



Reporting Services Report as Web Part

Site Actions ▼ 📄 Browse Page System Account ▼

👤 Author Portal ▶ Project Dashboard I Like It Tags & Notes

Author Portal CampaignPlan Knowledge Management Portal Scrappers Dashboard Designer IMVB Project Management Site 🔍 ?

Lists
MilesTaskList
ProjectIssues
RiskList
Links
BI Collection Administration
Phone Call Memo

Dashboards
Project Dashboard

Data Connections
Libraries
Customized Reports
Drop Off Library

PerformancePoint Content
CampaignPlan
Knowledge Management Portal
Scrappers
IMVB
Project Management Site

Site Content

Report Viewer - Project by Investment Type and JCA

Actions ▼ | 🔄 | ⏪ | ⏩ | 1 of 1 | ⏪ | ⏩ | | 100% ▼ | 📄

Number of Projects by Investment Type and JCA Area

JCA Area	Number of Portfolios
Intelligence, Surveillance, and Reconnaissance	7
Force Preparation	6
Planning	5
Organize	4
Force Management	4
Information Management	3
Advisory and Compliance	3
Strategy and Assessment	2
Shape	2
Program, Budget, and Finance	2
Net Management	2
Information Transport	2
Enterprise Services	2
Logistics Services	1
Information Assurance	1
Environment	1
Engagement	1
Direct	1
Communicate	1
Acquisition	1

Related Information

Status List

📄 New ▼ | Actions ▼ | 🔍 Show Only Problems

Indicator	Goal	Value	Status
Schedule	3	3	🟢
Budget	3	2	🟡
Resources	3	1	🔴
Issues	3	2	🟡
Risks	3	3	🟢

PowerPivot Benefits

- A PowerPivot report can be published as an interactive web app with a single click.
- The report itself takes less than 5 minutes to produce if you just want answers.
- Data preparation is essential, and may take less than 30 minutes to bring together multiple data sources.
- Reports based on your company's LOB data, up to hundreds of millions of rows, but still very fast (because of in-memory OLAP).
- Report will automatically refresh with new data as it becomes available.
- Access your workbook applications directly in the browser without having to download the workbooks with all their data to every workstation.

PowerPivot Configuration

The image shows two overlapping screenshots of the SharePoint 2010 Central Administration interface. The top screenshot shows the navigation menu with 'Central Administration > General Application Settings' highlighted in a red box. The bottom screenshot shows the 'PowerPivot Settings' page with 'Configure service application settings' under the PowerPivot section highlighted in a red box. The settings page includes sections for 'Data Load Timeout' and 'Connection Pools'.

Site Actions ▾ Page System Account ▾

Microsoft SharePoint 2010 **Central Administration > General Application Settings**

Central Administration
Application Management
System Settings
Monitoring
Backup and Restore
Security
Upgrade and Migration
General Application Settings
Configuration Wizards

Site Content
Administrative Re...
PowerPivot Mana...
Shared Document...
Style Library
Administrator Tas...
Announcements
Calendar
Content Deploym...
Content Deploym...
Distribution Grou...

External Service Connections
Configure send to connections | Configure document conver...

InfoPath Forms Services
Manage form templates | Configure InfoPath Forms Services
Manage data connection files | Configure InfoPath Forms Se...

Site Directory
Configure the Site Directory | Scan Site Directory Links

SharePoint Designer
Configure SharePoint Designer settings

Search
Farm Search Administration | Crawler Impact Rules

Content Deployment
Configure content deployment paths and jobs | Configure co...
Check deployment of specific content

Reporting Services
Reporting Services Integration | Add a Report Server to the

PowerPivot
Management Dashboard **Configure service application sett...**

Site Actions ▾ System Account ▾

Microsoft SharePoint 2010 Central Administration > PowerPivot Settings

Central Administration
Application Management
System Settings
Monitoring
Backup and Restore
Security
Upgrade and Migration
General Application Settings
Configuration Wizards

Site Content
Administrative Re...
PowerPivot Mana...
Shared Document...
Style Library
Administrator Tas...
Announcements
Calendar
Content Deploym...
Content Deploym...
Distribution Grou...
Health Analyza...
Job Reports

OK Cancel

Data Load Timeout
Setting controlling the loading of files.

Data Load Timeout
The number of seconds before a data load attempt will return an error.
1800
Valid values: >=1, <=3600 (seconds).

Connection Pools
Settings for connection pool.

Connection Pool Timeout
The number of seconds before an idle connection will be removed from the connection pool.
1800
Valid values: >=1, <=3600 (seconds).

Maximum User Connection Pool Size
The maximum number of connections in the user connection pool.
1000
Valid values: >=0, <=10000, or -1 means unlimited.

Maximum Administrative Connection Pool Size
The maximum number of connections in the administrative connection pool.
200

PowerPivot Site Collection Feature

Site Actions System Account ▾

	Assigns IDs to documents in the Site Collection, which can be used to retrieve items independent of their current location.	Activate	
	Document Sets Provides the content types required for creating and using document sets. Create a document set when you want to manage multiple documents as a single work product.	Deactivate	Active
	In Place Records Management Enable the definition and declaration of records in place.	Activate	
	Library and Folder Based Retention Allows list administrators to override content type retention schedules and set schedules on libraries and folders.	Activate	
	Open Documents in Client Applications by Default Configures links to documents so they open in client applications instead of Web applications, by default.	Activate	
	PerformancePoint Services Site Collection Features Features enabling the PerformancePoint Services site including content types and site definitions for this site collection.	Deactivate	Active
	PowerPivot Feature Integration for Site Collections Extends the capabilities of site collections using PowerPivot for SharePoint	Deactivate	Active
	Publishing Approval Workflow Routes a page for approval. Approvers can approve or reject the page, reassign the approval task, or request changes to the page. This workflow can be edited in SharePoint Designer.	Deactivate	Active
	Report Server Integration Feature Enables rich reporting using Microsoft SQL Server Reporting Services.	Deactivate	Active
	Reporting Creates reports about information in Microsoft SharePoint Foundation.	Deactivate	Active
	Search Server Web Parts This feature uploads all web parts required for Search Center.	Activate	
	SharePoint 2007 Workflows Approved set of out-of-box workflow features provided by SharePoint 2007	Deactivate	Active

PowerPivot on the Dashboard



This example is from the Contoso Sample Data

PerformancePoint Benefits

- Great tool for organization-wide performance management initiatives
- Interactive Reports – able to drill down on reports created from OLAP (Cube) data sources
- KPIs can have multiple targets, and appear on multiple scorecards
- Supports Strategy Maps (Visio)
- New Decomposition Tree display was ProClarity feature
- Improved Sort, Filter, View capabilities

PerformancePoint Dashboard Designer

The screenshot displays the PerformancePoint Dashboard Designer application window. The title bar reads "Untitled - Dashboard Designer". The interface includes a ribbon with tabs for "Home", "Edit", and "Create". The "Create" tab is active, showing two groups of icons: "Dashboard Items" (Dashboard, Scorecard, KPI, Filter, Indicator, Data Source) and "Reports" (Analytic Chart, Analytic Grid, Strategy Map, KPI Details, Reporting Services, Other Reports). On the left, a "Workspace Browser" pane shows a tree view with "UntitledWorkspace", "Data Connections", "PlanningCube", and "PerformancePoint Content". Under "PerformancePoint Content", items include "FY Budget by Sponsor", "New Report", and "TestExcel - Burndown Char". The main workspace area is titled "PerformancePoint Content" and contains a table with the following data:

Name	Type	Description	Person Responsible	Modified	Modified By
WWR	Folder				
mgt	Folder				
sm	Folder				
Strategy Map Dashboard	Dashboard	Strategy Map Dashboard		7/7/2011 9:33:44 PM	System Account
WWR Commanders Dashboard	Dashboard	This dashboard contains both the management ...		7/7/2011 4:40:10 PM	System Account
FY Budget by Sponsor	Analytic Chart			7/30/2011 3:52:44 PM	System Account
New Report	Excel Services			7/24/2011 9:18:19 PM	System Account
TestExcel - Burndown Chart	Excel Services			7/30/2011 3:27:05 PM	System Account

At the bottom of the window, a status bar indicates "Connected to: http://talmas-m4500:30000".

PerformacePoint Create Ribbon Menu



Create all your PP objects from here, starting with Data Source. Then build KPIs and Scorecards, and many types of Reports. Strategy Map Reports are special – Visio drawings that have been imported and connected to a scorecard, coloring The diagrams shapes with the color of the KPI indicator.

Analytic Chart and Grid Reports built using an OLAP (SSAS) data source have special, interactive features like drill-down and decomposition tree.

PerformancePoint Dashboard Designer

The screenshot displays the PerformancePoint Dashboard Designer interface. The main workspace shows a dashboard titled "FY Budget by Sponsor" with a stacked bar chart. The chart displays the "Required Amount Total" for four fiscal years: 2009, 2010, 2011, and 2012. The Y-axis represents the amount in millions, ranging from 0M to 1,000M. The legend includes categories: UNKNOWN, USN, USDI, USAFHQ, OSDPR, OSDATL, and DIA. The chart is annotated with red arrows and the text "Drag and Drop" pointing to the chart area.

The details pane on the right shows the following structure:

- (All Measure Groups)
 - Measures
 - Authorized FTE
 - Funded Baseline Total
 - Funding Count
 - Labor Count
 - Project Portfolio Count
 - Required Amount Total
 - Required FTE
 - Shortfall FTE
 - Shortfall Total
 - Dimensions
 - Appropriation Type
 - Date
 - Deliverable
 - Labor Type
 - Milestone
 - OPR Organization
 - Program Element
 - Project Portfolio
 - Resource Sponsor
 - Risk
 - Named Sets

The workspace browser on the left shows the following structure:

- Untitled Workspace
 - Data Connections
 - PlanningCube
 - PerformancePoint Content
 - FY Budget by Sponsor
 - New Report
 - TestExcel - Burndown Char

The bottom axis of the chart is configured as follows:

Series	Bottom Axis	Background
Resource Sponsor Name	Date Fiscal_Hierarchy	

At the bottom of the window, it is connected to: <http://talmas-m4500:30000>

PerformancePoint KPIs

Untitled - Dashboard Designer

Home Edit Create

Cut Copy Paste Add Lists Remove Refresh Add Items Properties Permissions Rename Delete Compare Item Validate Item Mark Differences Import Items

Workspace Browser

UntitledWorkspace

Data Connections

PlanningCube

PerformancePoint Content

WWR

mgt

Comprehensive Transit

Editor Properties

Comprehensive Transition Plans

Actual and Targets

New Actual New Target Delete Selected Metrics Compare

Name	Compare To	Number	Indicators	Data Mappings	Calculation
Actual		1,234,568		3 (Fixed values)	Data value
Target	Actual	(Default)		3 (Fixed values)	Data value

Dimensional Data Source Mapping

Select a measure:

Project Portfolio Count

Select a dimension:

New Dimension Filter New Time Intelligence Filter

Name	Default
OPR Organization:OPR Organization Name	Default Member (All)
Project Portfolio Primary Mission Major Function Support	Default Member (All)

Aggregate members by:

Default

Use MDX tuple formula

Change Source... OK Cancel

3

2.1

1.1

0

>2.10

2.10 to >1.10

1.10 or less

Set the boundaries to reflect changes in Rating – whether the KPI value is Favorable, Cautious or Warning

PerformancePoint Scorecard

Untitled - Dashboard Designer

Home Edit Create

Paste Copy Add Lists Remove Add Items Refresh Properties Permissions Rename Delete Compare Item Validate Item Mark Differences Import Items

Clipboard Workspace Item Changes Import

**Drag and drop KPIs
Properties & Dimensions**

Workspace Browser

- dWorkspace
- a Connections
- PlanningCube
- formancePoint Content
- WWR
 - mgt
 - Comprehensive Transition Plans
 - Coordination of Charitable Gifts
 - Emerging and Alternative Ther
 - Foster Career Opportunities
 - Leadership
 - Leverage Communication Techn
 - Service Provision to Reservists
 - Support WI&I Employment Opp
 - Warrior Athlete Reconditioning I
 - Warrior Games Participation
 - WI&I Advocacy
 - WWR Business Intelligence
 - WWR Regiment Management S
 - WWR Systems and Program Sup

Editor Properties

WWR Regiment Management Scorecard

	Line of Operation	Actual	Target
Leadership	Management	2	▲
Comprehensive Transition Plans	Mind	3	●
Coordination of Charitable Gifts	Mind	2	▲
Warrior Athlete Reconditioning Program Participation	Body	3	●
Warrior Games Participation	Body	3	●
Service Provision to Reservists	Mind	1	◆
Support WI&I Employment Opportunities	Mind	2	▲
Foster Career Opportunities	Mind	1	◆
Leverage Communication Technology	Management	1	◆
Emerging and Alternative Therapy Advocacy	Medical	3	●
WI&I Advocacy	Medical	2	▲
WWR Business Intelligence	Management	1	◆
WWR Systems and Program Support	Management	2	▲

Details

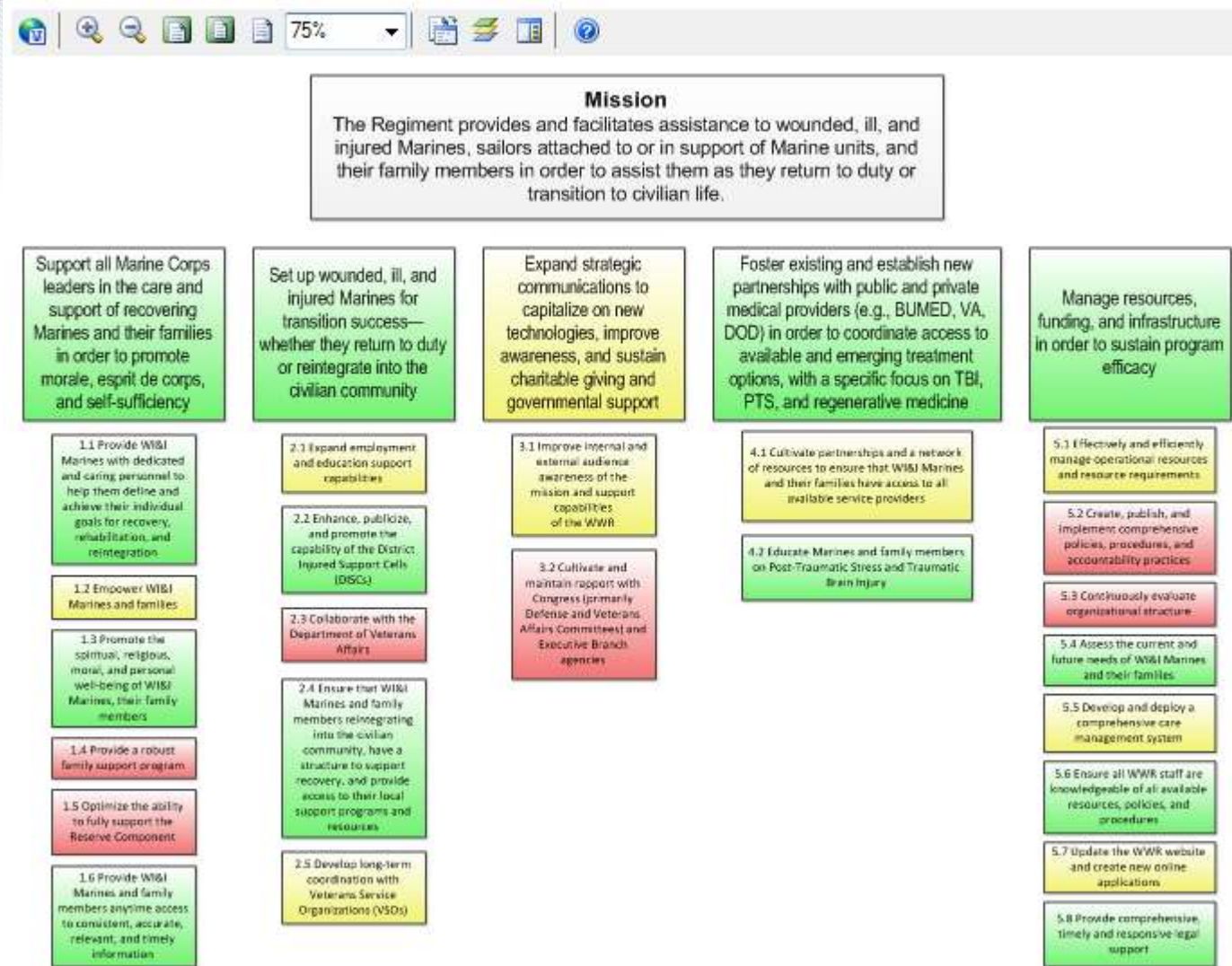
- KPIs
 - PerformancePoint C
- Metrics
 - Actual
 - Target
- Aggregations
 - Average
 - Maximum
 - Minimum
 - Sum
 - Trend
- Dimensions
 - Line of Operation
- Properties
 - Description
 - Name
 - Person Responsible
- Named Sets
- Set Formulas
 - Custom
 - Time

Data Source
No Source

Connected to: <http://talmas-m4500:30000>

PerformancePoint and Visio – Strategy Maps

Strategy Maps are a report type in PerformancePoint, a special combination of a Visio Diagram that has been linked to a Scorecard. The diagram can contain any shapes desired, and will take on the coloration of the KPI indicator it is linked to on the scorecard.

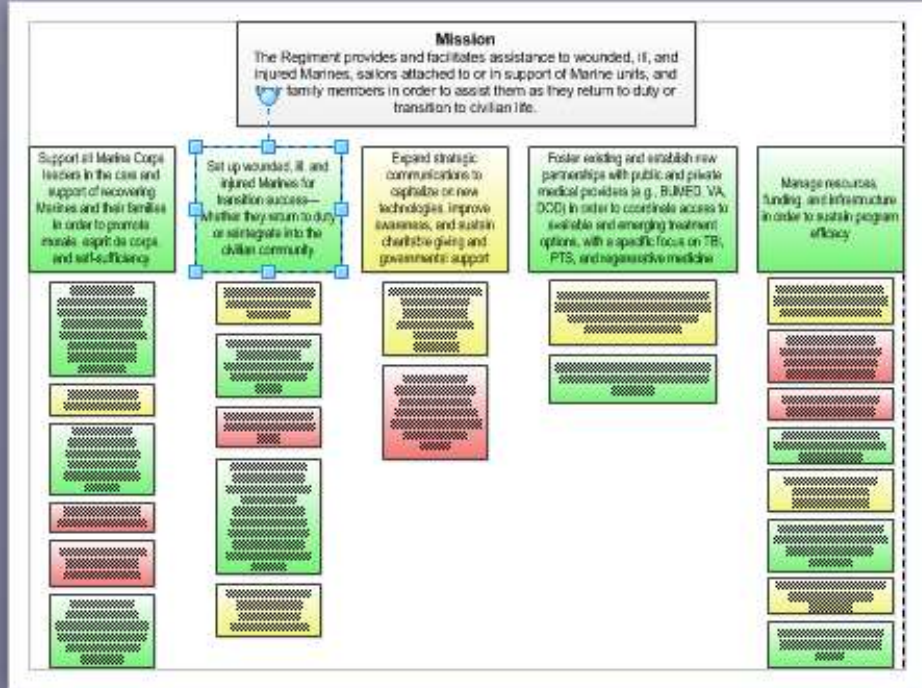


Strategy Map

Strategy Map Editor

Import Visio File Export Visio File Stencil **Connect Shape** Disconnect Shape Resize to Fit

- Create the Strategy Map Report
- Import the Visio File
- Select a shape
- Click Connect Shape button on toolbar
- Select the KPI from the Connect Shape dialog box



Connect Shape

	Line of Operation	Actual	Target
⊕ A Support Leaders	Family	2	✓
⊕ B Transition Success	Mind	2	✓
⊕ C Strategic Communications	Management	2	!
⊕ D Foster Partnerships	Medical	3	✓
⊕ E Manage Resources	Management	2	✓

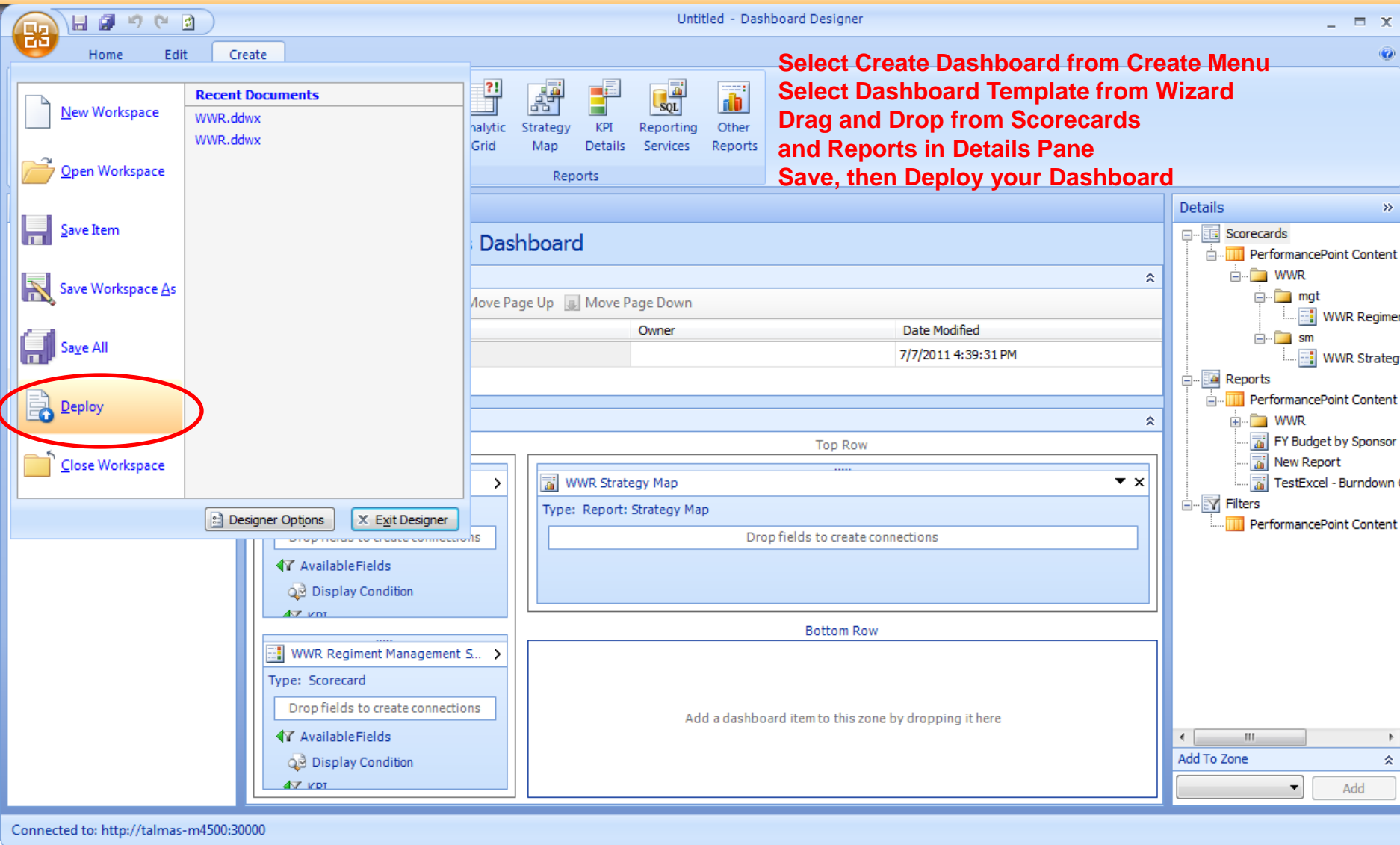
Connect Show KPI name in shape text

Close

Apply Cancel

Deploying PerformancePoint Dashboards

Select Create Dashboard from Create Menu
Select Dashboard Template from Wizard
Drag and Drop from Scorecards
and Reports in Details Pane
Save, then Deploy your Dashboard



Using PerformancePoint Web Parts

The screenshot displays the SharePoint ribbon with the 'Page Tools' tab selected. The ribbon includes sections for 'Edit', 'Manage', 'Share & Track', 'Approval', 'Workflow', and 'Page Actions'. Below the ribbon is the 'Web Parts' gallery, which is divided into 'Categories' (Business Data, Content Rollup, Custom, Document Sets, Filters, Forms, Media and Content, Outlook Web App, PerformancePoint) and 'Web Parts' (PerformancePoint Filter, PerformancePoint Report, PerformancePoint Scorecard, PerformancePoint Stack Selector). The 'PerformancePoint Report' web part is highlighted. To the right, the 'About the Web Part' section provides a description: 'This web part displays PerformancePoint reports. Reports may be linked to other web parts to create an interactive dashboard experience. Report types include: Analytic charts & grids, Strategy Maps, Excel Services, Reporting Services, Predictive Trend charts, and web pages.' Below this, there is a dropdown menu for 'Add Web Part to:' set to 'Left Column', and 'Add' and 'Cancel' buttons.

PerformancePoint Dashboard components can be added to any Dashboard

Add a Web Part

PerformancePoint Report

Select a PerformancePoint Report

To display a PerformancePoint report in the Web Part, you must first select a PerformancePoint Report from a SharePoint list.

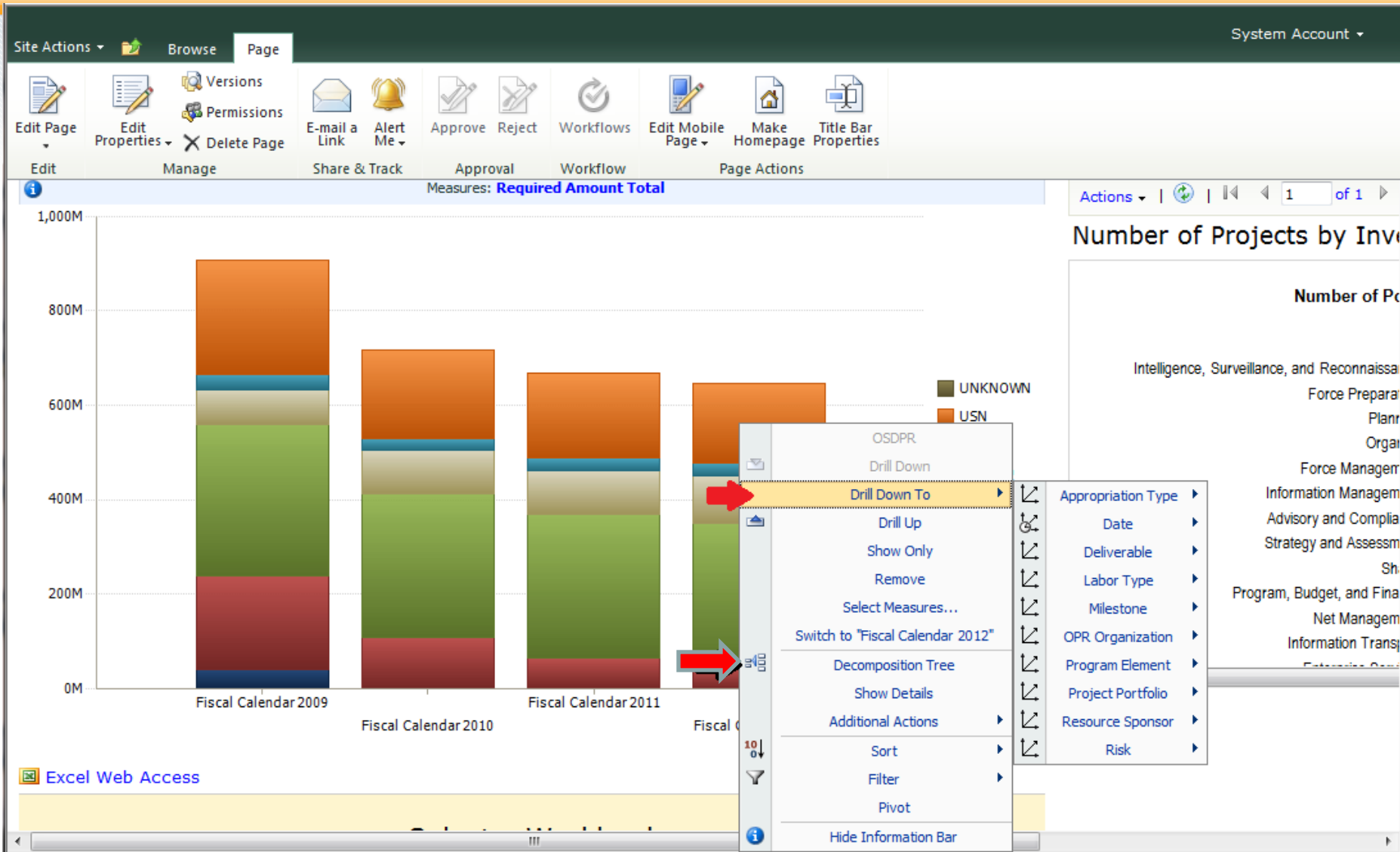
Report Viewer - Project by Investment Type and JCA

Actions | 1 of 1 | FindNext | 100%

Number of Projects by Investment Type and JCA Area

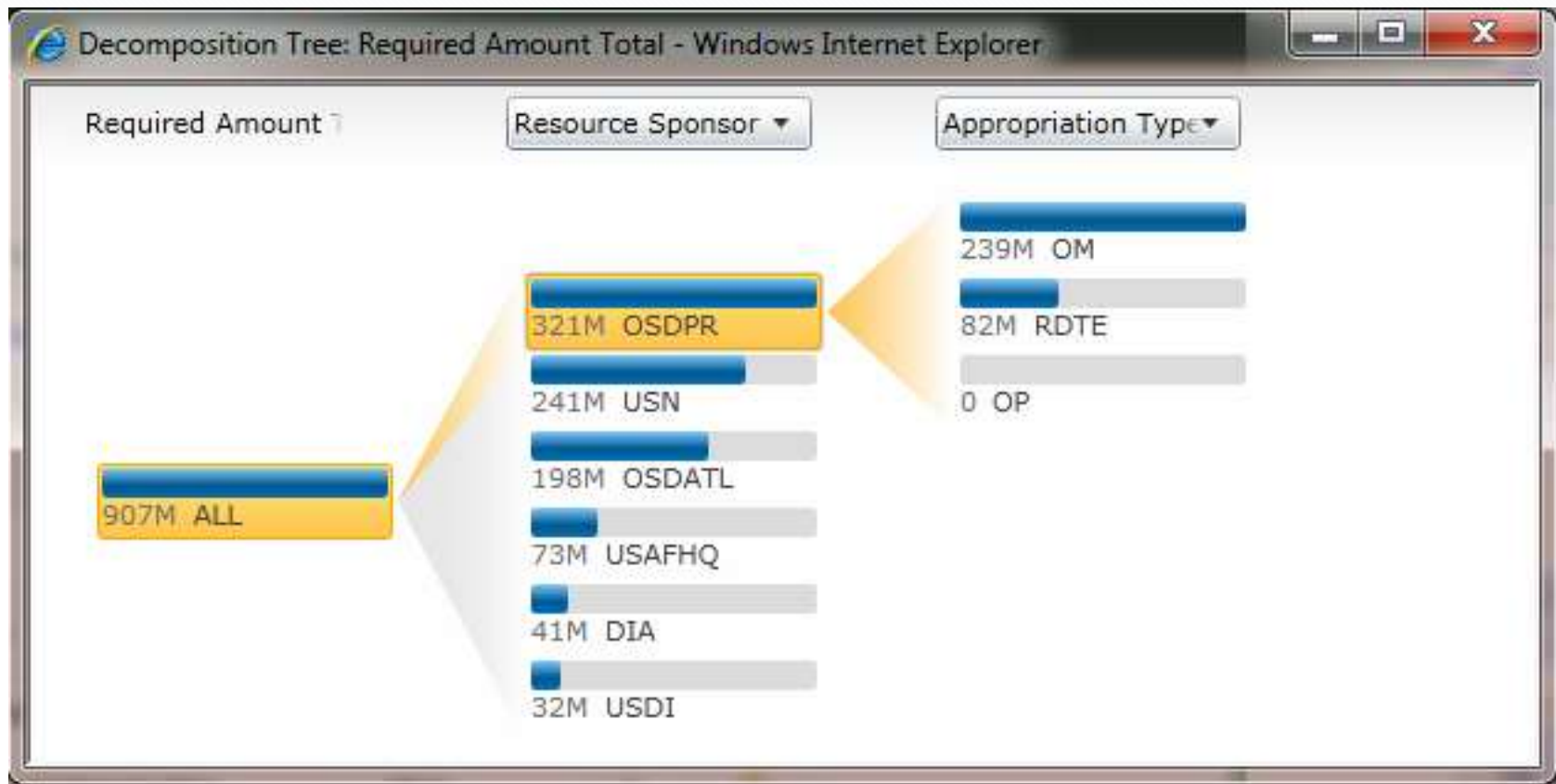
Number of Portfolios by JCA

Interactive PerformancePoint Reports



Interactive PerformancePoint Reports

- Decomposition Tree – shows part to whole



Putting It All Together to Get The Point Across

Use the best tool for the visualization you want to create:

- Sparklines, gauges, charts in Excel or Report Builder
- Interactive charts with drill-down and decomposition in PerformancePoint
- KPIs/Scorecards in either PerformancePoint (Program) or Excel (One-Off)
- PowerPivot requires Excel Add-in and Analysis Services 2008R2 Add-in, but delivers on-demand self-service business intelligence and analytics

Putting It All Together to Get The Point Across

To Wrap It All Up, Here Are Some Best Practices:

- Begin with the end in mind (thanks to Steven Covey). A little planning will help ensure you are happy with the results.
- State the purpose of the dashboard. What questions must it answer?
- Decide on the display components you want on your dashboard.
- Define your data sources.
- Determine the best visualization for each component and which tool to use.
- Build a dashboard page during prototype to get feedback and refine iteratively.
- Keep stakeholders engaged thru-out the process.
- Set up a project dashboard with various display components – use it to demonstrate possibilities to the stakeholders.

Questions?

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- talmas@microlinkllc.com
- MicroLink, LLC Booth # 408 – stop by to get your dashboard design template



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