



# Displaying Information In SharePoint Using Excel Services, Reporting Services And PerformancePoint

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# AGENDA

Many SharePoint users and developers are not aware of the various ways that information can be displayed 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?

## Consultant



SharePoint Administrator 2010

## Instructor



Productivity through Education®

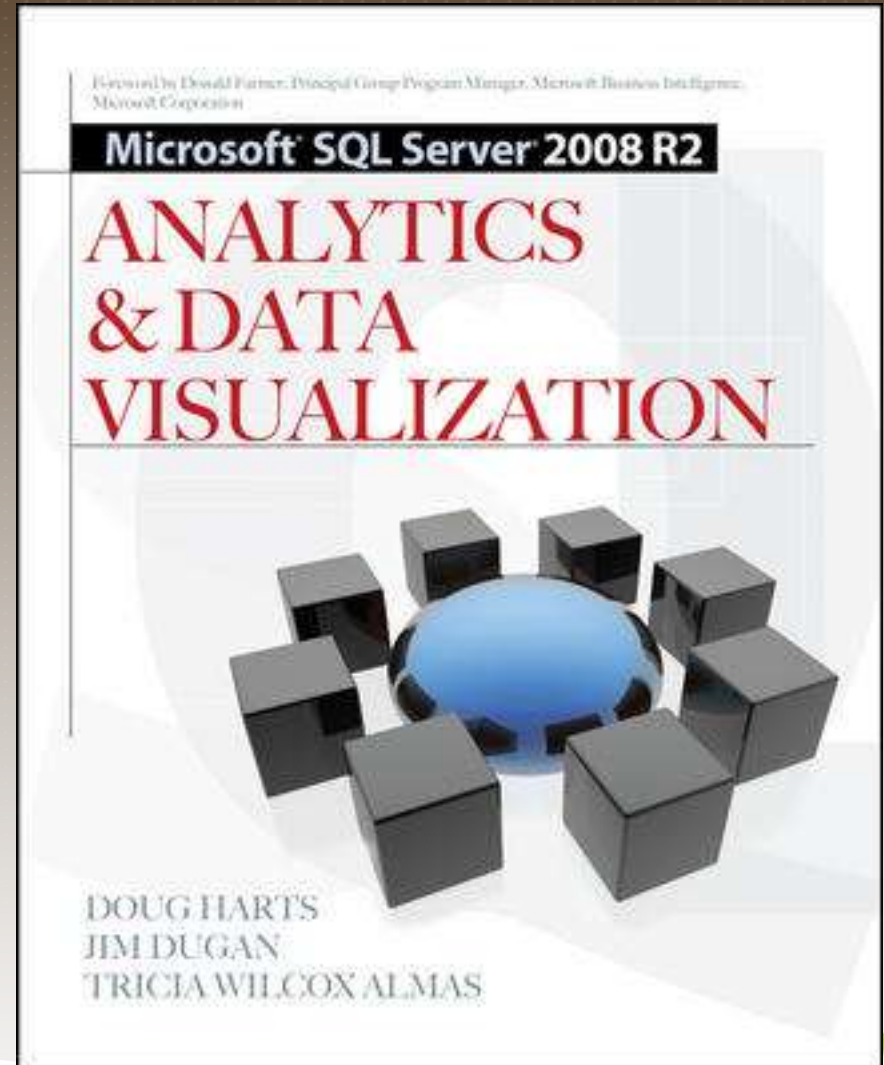
1/17/2012 Rockville MD 1501 SharePoint 2010

## Published Author

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

Doug Harts, Jim Dugan, Tricia Wilcox Almas

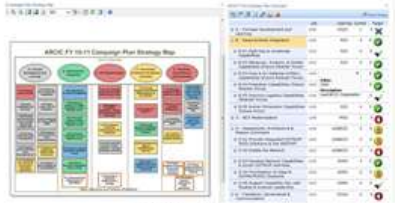
<http://www.mhprofessional.com/contributor.php?id=44423>



# 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



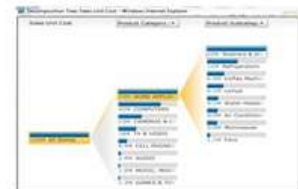
Analytic Charts

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

Scorecards

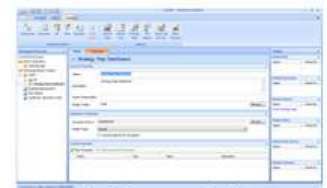


Pivot Tables



Decomposition Trees

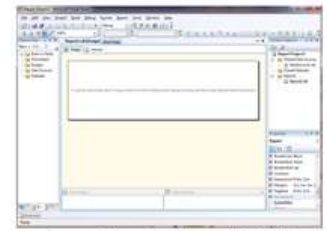
## Tools to Create Displays



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 and PowerPivot



# DASHBOARD DESIGN TEMPLATE

**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.

**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
<b>Grand Total</b>		<b>1,762</b>	<b>\$2,729,693.55</b>	<b>30,495</b>	<b>6,075</b>

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.

**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.

**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

**Least Important Information**

Links to additional information

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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.

The Information Visualization Mantra:

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



# 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 through 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 left-hand navigation pane lists various service applications, 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 green speech bubble contains the text: 'These tasks are in SharePoint Central Administration, and should be done by your SharePoint Administrator'. Below this, the 'Global Settings' page for Excel Services is shown, with a red arrow pointing to the 'Trusted File Locations' link. Another red arrow points from the 'PerformancePoint Service Application' in the left pane to the breadcrumb 'Central Administration > Manage PerformancePoint Services: PerformancePoint Service Application'. Below this, the 'PerformancePoint Service Application Settings' page is shown, with a red circle around the 'Secure Store Service' link in the left pane.

Service Applications System Account

Manage Administrators Properties Publish Permissions

Operations Sharing

**Central Administration > Manage Excel Services Application**

Use this page to change settings for Excel Services Application

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

**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.

Excel Services Application Web Service Application Proxy Started

**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.

State Service Proxy Started

Secure Store Service



# 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

The screenshot displays the Microsoft Excel 2010 interface. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, and PowerPivot. The 'Save & Send' task pane is active, showing options like 'Send Using E-mail', 'Save to Web', and 'Save to SharePoint'. The 'Save to SharePoint' option is highlighted. The 'Recent Locations' list includes 'AnalyticsReports' and 'SharedDocuments'. The 'Publish Options' button is circled in red, and a red arrow points to the 'Publish Options' dialog box.

The 'Publish Options' dialog box is open, showing the 'Parameters' tab. The text reads: 'Only the selected items are shown by Excel in the browser. The entire workbook is always shown in Excel.' The 'Items in the Workbook' dropdown is circled in red. The list of items to be published includes:

- All Charts
  - BurndownChart
  - HoursPerPeriodChart
- All Tables
  - BurndownTable
- All Named Ranges
  - HoursPerPeriod
  - PeriodHrsTotal

Buttons for 'OK' and 'Cancel' are visible at the bottom of the dialog box.

# 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. The 'Excel Web Access' web part 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 green 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


Right Zone

System Account ▾

Excel Web Access - ProjectBurndown [1] X

Workbook Display

Workbook:  

Named Item:  

Toolbar and Title Bar

**Title Bar:**

- Autogenerate Web Part Title
- Autogenerate Web Part Title URL

Type of Toolbar:  ▾

**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**

**Navigation:**

- Hyperlinks

**Interactivity:**


- All Workbook Interactivity

Select an Asset -- Webpage Dialog

Current Location: Customized Reports at http://talmas-m4500:30000/AnalyticsReports

All Documents ▾

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

Location (URL):  

OK Cancel

Must know the Named Item, this ellipses is not a lookup

# 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-hand 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. The "Report Server Web Service URL" field contains "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 "Reporting Services Feature" section has two radio buttons, with "Activate feature in all existing site collections" selected. "OK" and "Cancel" buttons are present at the top and bottom right of the configuration area.

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 the 'Library Tools' section of a reporting application. The 'Library' tab is active, showing a menu with options like 'New Document', 'Upload Document', and 'New Folder'. A dropdown menu is open under 'New Document', listing 'Report', 'Report Builder Report', 'Report Data Source', 'Report Builder Model', and 'Document'. A red circle highlights the text 'Reporting Services Reports, Report Builder Reports, Excel Reports' in the 'Report' dropdown item. Below the menu is a table of report items with columns for Type, Content Type, Name, Modified, and Modified By.

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



# DISPLAY AS STAND-ALONE REPORT

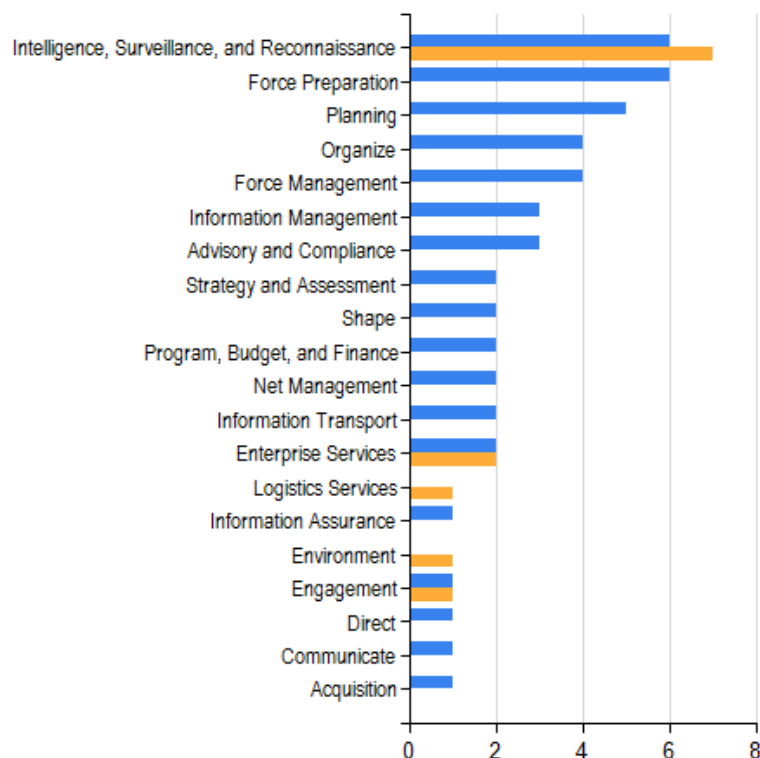
Author Portal > Customized Reports

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
<b>Total</b>	<b>48</b>	<b>12</b>	<b>60</b>

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 USES AND CONSIDERATIONS

- ▶ Can connect to a variety of data sources
  - ▶ SQL Server, Analysis Services, Access, Reporting Services, MS Azure DataMarket, Atom Data Feed, Excel File, Text File, MS Parallel Data Warehouse, Oracle, Teradata, Sybase, Informix, IBM DB2, Other
- ▶ Can quickly “mash-up” data from multiple sources without an ETL process
- ▶ Because all data is stored in memory, analysis and results are quick
- ▶ Extensive use of PowerPivot may increase your app server memory needs, and which app server it runs on
- ▶ PowerPivot can be integrated with Reporting Services and PerformancePoint
- ▶ Results displayed in SharePoint, but must have Excel 2010 PowerPivot Add-in



# POWERPIVOT CONFIGURATION

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-hand navigation pane shows the following categories and items:

- 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...

The main content area lists several services, with the **PowerPivot** section highlighted by a red circle. The link **Configure service application settings** is also circled in red.

The screenshot shows the **PowerPivot Settings** dialog box. The breadcrumb path is **Central Administration > PowerPivot Settings**. The dialog contains the following settings:

- Data Load Timeout**: Setting controlling the loading of files. Value: 1800. Valid values: >=1, <=3600 (seconds).
- Connection Pools**: Settings for connection pools.
  - Connection Pool Timeout**: The number of seconds before an idle connection will be removed from the connection pool. Value: 1800. Valid values: >=1, <=3600 (seconds).
  - Maximum User Connection Pool Size**: The maximum number of connections in the user connection pool. Value: 1000. Valid values: >=0, <=10000, or -1 means unlimited.
  - Maximum Administrative Connection Pool Size**: The maximum number of connections in the administrative connection pool. Value: 200.



# POWERPIVOT SITE COLLECTION FEATURE

The screenshot displays the 'Site Actions' page in SharePoint, showing a list of features and their status. The 'PowerPivot Feature Integration for Site Collections' feature is highlighted with a red oval. The page is titled 'System Account' in the top right corner. The left sidebar shows the 'Site Content' menu with various options like 'BI Collection Ad', 'Content and Str', 'Customized Rep', 'Dashboards', 'Data Connection', 'Documents', 'Drop Off Library', 'Form Templates', 'Images', 'Links', 'MilesTaskList', 'Pages', 'PerformancePoi', 'Phone Call Mem', and 'ProjectDashboa'. The main content area lists features with their descriptions and status buttons.

Feature Name	Description	Activate Button	Status
	Assigns IDs to documents in the Site Collection, which can be used to retrieve items independent of their current location.	Activate	
<b>Document Sets</b>	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
<b>In Place Records Management</b>	Enable the definition and declaration of records in place.	Activate	
<b>Library and Folder Based Retention</b>	Allows list administrators to override content type retention schedules and set schedules on libraries and folders.	Activate	
<b>Open Documents in Client Applications by Default</b>	Configures links to documents so they open in client applications instead of Web applications, by default.	Activate	
<b>PerformancePoint Services Site Collection Features</b>	Features enabling the PerformancePoint Services site including content types and site definitions for this site collection.	Deactivate	Active
<b>PowerPivot Feature Integration for Site Collections</b>	Extends the capabilities of site collections using PowerPivot for SharePoint	Deactivate	Active
<b>Publishing Approval Workflow</b>	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
<b>Report Server Integration Feature</b>	Enables rich reporting using Microsoft SQL Server Reporting Services.	Deactivate	Active
<b>Reporting</b>	Creates reports about information in Microsoft SharePoint Foundation.	Deactivate	Active
<b>Search Server Web Parts</b>	This feature uploads all web parts required for Search Center.	Activate	
<b>SharePoint 2007 Workflows</b>	Aggregated 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
- ▶ Synchronizes with PerformancePoint Content Library in SharePoint
- ▶ 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



# PERFORMACEPOINT DASHBOARD DESIGNER

The screenshot displays the PerformancePoint Dashboard Designer application window. The title bar reads "Untitled - Dashboard Designer". The interface includes a ribbon with "Home", "Edit", and "Create" tabs. 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, the "Workspace Browser" shows a tree view with "PerformancePoint Content" selected. The main area, titled "PerformancePoint Content", displays a table of items:

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 left, the 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

Untitled - Dashboard Designer

Home Edit Create

Dashboard Scorecard KPI Filter Indicator Data Source

Analytic Chart Analytic Grid Strategy Map KPI Details Reporting Services Other Reports

Dashboard Items Reports

Workspace Browser

- UntitledWorkspace
- Data Connections
  - PlanningCube
  - PerformancePoint Content
    - FY Budget by Sponsor**
    - New Report
    - TestExcel - Burndown Char

Design Query Properties

## FY Budget by Sponsor

Measures: **Required Amount Total**

1,000M  
800M  
600M  
400M  
200M  
0M

Fiscal Calendar 2009 Fiscal Calendar 2010 Fiscal Calendar 2011 Fiscal Calendar 2012

UNKNOWN  
USN  
USDI  
USAFHQ  
OSDPR  
OSDATL  
DIA

**Drag and Drop**

Details

(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

Series	Bottom Axis	Background
Resource Sponsor Name	Date Fiscal_Hierarchy	

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

# PERFORMANCEPOINT KPIS

Untitled - Dashboard Designer

Home Edit Create

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

Clipboard Workspace Item Changes Import

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

and Indicator...

3

2.1 >2.10

1.1 2.10 to >1.10

0 1.10 or less

Details

Related Scorecards

Name	Person...
WWR Regiment ...	

Related Data Sources

Name	Person...
------	-----------

Related Indicators

Name	Person...
------	-----------

# PERFORMANCEPOINT SCORECARD

The screenshot displays the PerformancePoint Dashboard Designer interface. The main workspace shows a scorecard titled "WWR Regiment Management Scorecard" with a table of metrics. A red arrow points from the "Line of Operation" column header in the table to the "Line of Operation" property in the Details pane on the right. The Details pane also shows other properties like "Name" and "Person Responsible".

**Drag and drop KPIs  
Properties & Dimensions**

	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 pane properties:

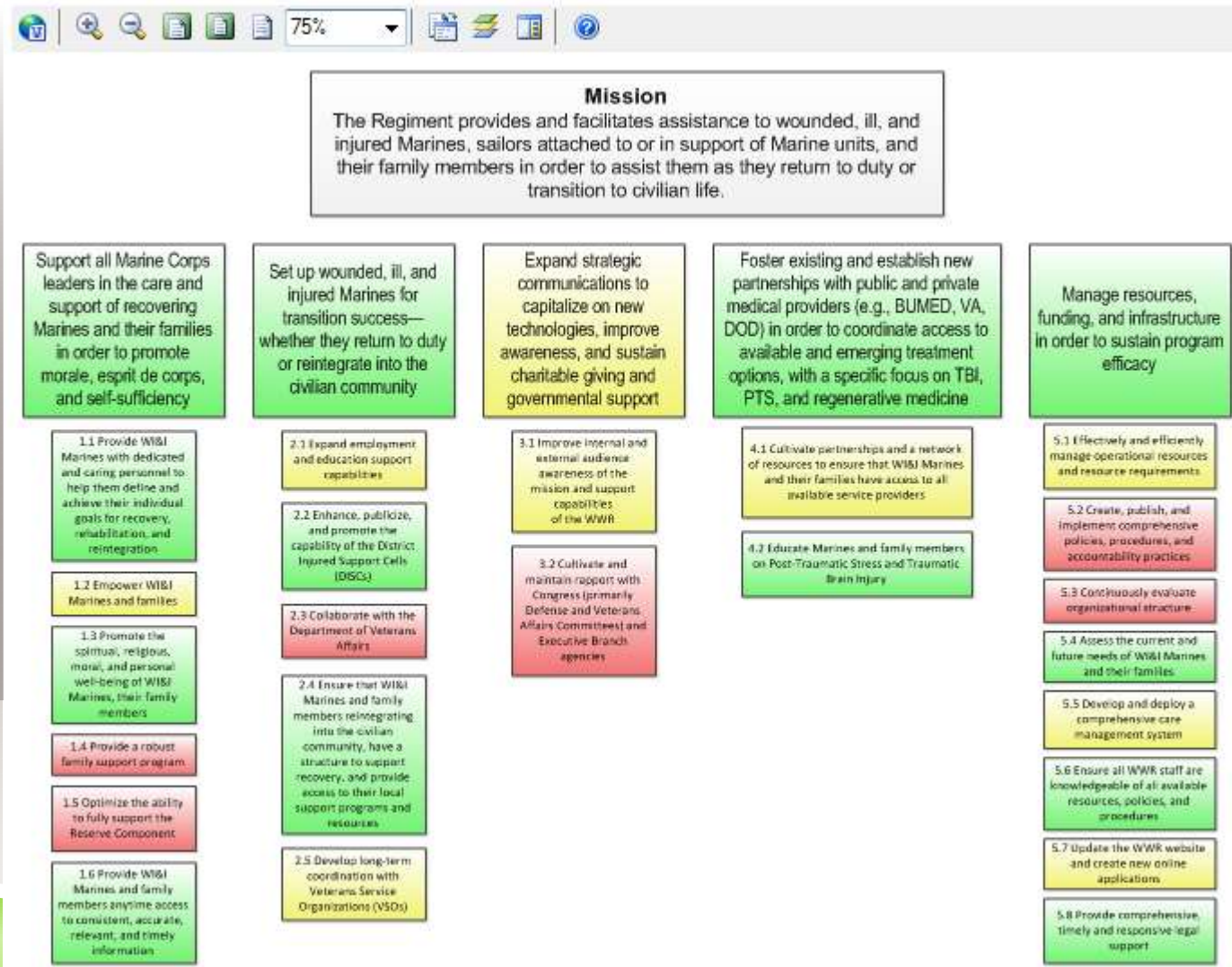
- KPIs
- PerformancePoint C
- Metrics
  - Actual
  - Target
- Aggregations
  - Average
  - Maximum
  - Minimum
  - Sum
  - Trend
- Dimensions
- Properties
  - Description
  - Line of Operation
  - Name
  - Person Responsible
- Named Sets
- Set Formulas
  - Custom
  - Time

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.



# CONNECTING STRATEGY MAP TO SCORECARD

The screenshot shows the 'Strategy Map Editor' window. The main area displays a strategy map with a central 'Mission' box at the top, connected to several strategic initiatives. The 'Connect Shape' dialog box is open in the foreground, showing a table of KPIs and their status. The 'Connect Shape' button is highlighted in the toolbar.

**Connect Shape Dialog Box:**

	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	✓

Show KPI name in shape text

**Strategy Map Content:**

- Mission:** The Regiment provides and facilitates assistance to wounded, ill, and injured Marines, sailors attached to or in support of Marine units, and family members in order to assist them as they return to duty or transition to civilian life.
- Strategic Initiatives:**
  - Support all Marine Corps leaders in the care and support of recovering Marines and their families in order to promote morale, esprit de corps and self-reliance.
  - Set up wounded, ill and injured Marines for transition success—whether they return to duty or reintegrate into the civilian community.
  - Expand strategic communications to optimize or new technologies, improve awareness, and sustain charitable giving and government support.
  - Foster existing and establish new partnerships with public and private medical providers (e.g., BUMED, VA, DOD) in order to coordinate access to available and emerging treatment options, with a specific focus on TB, PTSD, and regenerative medicine.
  - Manage resources, funding, and infrastructure in order to sustain program efficacy.

1.2 Empower W&I Marines and families

2.3 Collaborate

Apply

Cancel

# DEPLOYING PERFORMANCEPOINT DASHBOARDS

The screenshot shows the Microsoft PerformancePoint Designer application window titled "Untitled - Dashboard Designer". The "Create" menu is open, and the "Deploy" option is highlighted with a red circle. The interface includes a "Recent Documents" pane on the left, a "Reports" pane at the top, a central "Dashboard" workspace, and a "Details" pane on the right. The "Details" pane shows a tree view of the dashboard structure, including "Scorecards" and "Reports". The "Dashboard" workspace contains a table with columns "Owner" and "Date Modified", and a "WWR Strategy Map" report. The "Details" pane also shows a "Filters" section.

**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**

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

# USING PERFORMANCEPOINT WEB PARTS

The screenshot shows the SharePoint ribbon with the 'Page Tools' tab selected. The ribbon includes sections for 'Edit', 'Manage', 'Share & Track', 'Approval', 'Workflow', and 'Page Actions'. The 'Web Parts' section is expanded, showing a list of categories on the left and a list of web parts in the center. The 'PerformancePoint' category is selected, and the 'PerformancePoint Report' web part is highlighted. A green callout bubble points to the 'PerformancePoint Report' web part with the text: 'PerformancePoint Dashboard components can be added to any Dashboard'. The 'About the Web Part' section on the right provides a description of the PerformancePoint Report web part and includes an 'Add Web Part to:' dropdown menu set to 'Left Column' and 'Add' and 'Cancel' buttons.

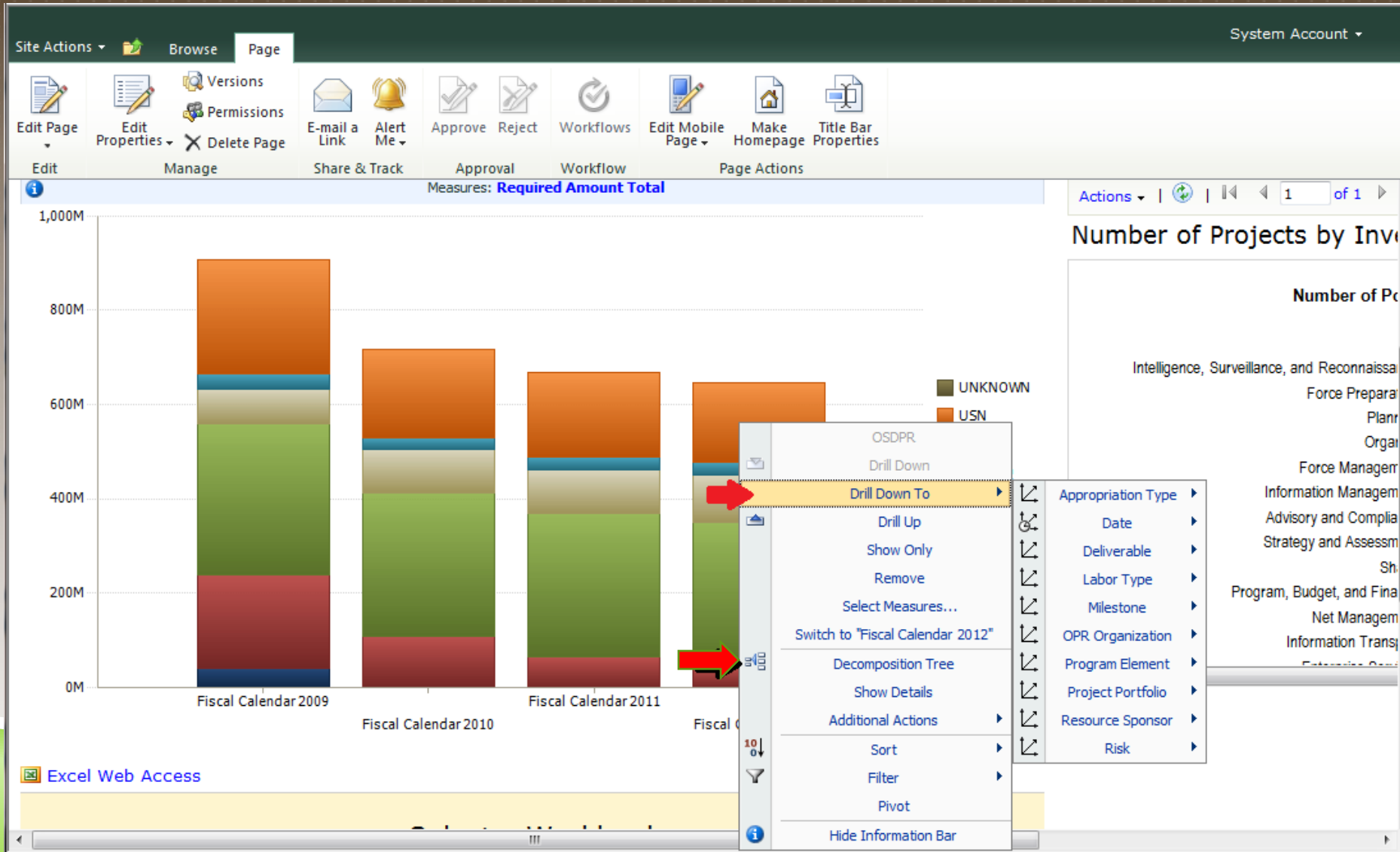
PerformancePoint Dashboard components can be added to any Dashboard

The screenshot shows the 'Add a Web Part' dialog box for the PerformancePoint Report web part. The dialog has a yellow header with the text 'Add a Web Part'. Below the header, the title 'PerformancePoint Report' is displayed. The main content area features a large heading 'Select a PerformancePoint Report' and a sub-heading 'To display a PerformancePoint Report in the Web Part, you must first select a PerformancePoint Report from a SharePoint list.' There is a small icon of a folder with documents at the bottom left of the dialog.

The screenshot shows a PerformancePoint Report viewer. The title is 'Report Viewer - Project by Investment Type and JCA'. Below the title, there is a navigation bar with 'Actions' and various controls. The main content area displays a report titled 'Number of Projects by Investment Type and JCA Area'. Below this report, there is another report titled 'Number of Portfolios by JCA'. The viewer includes a vertical scrollbar on the right side.

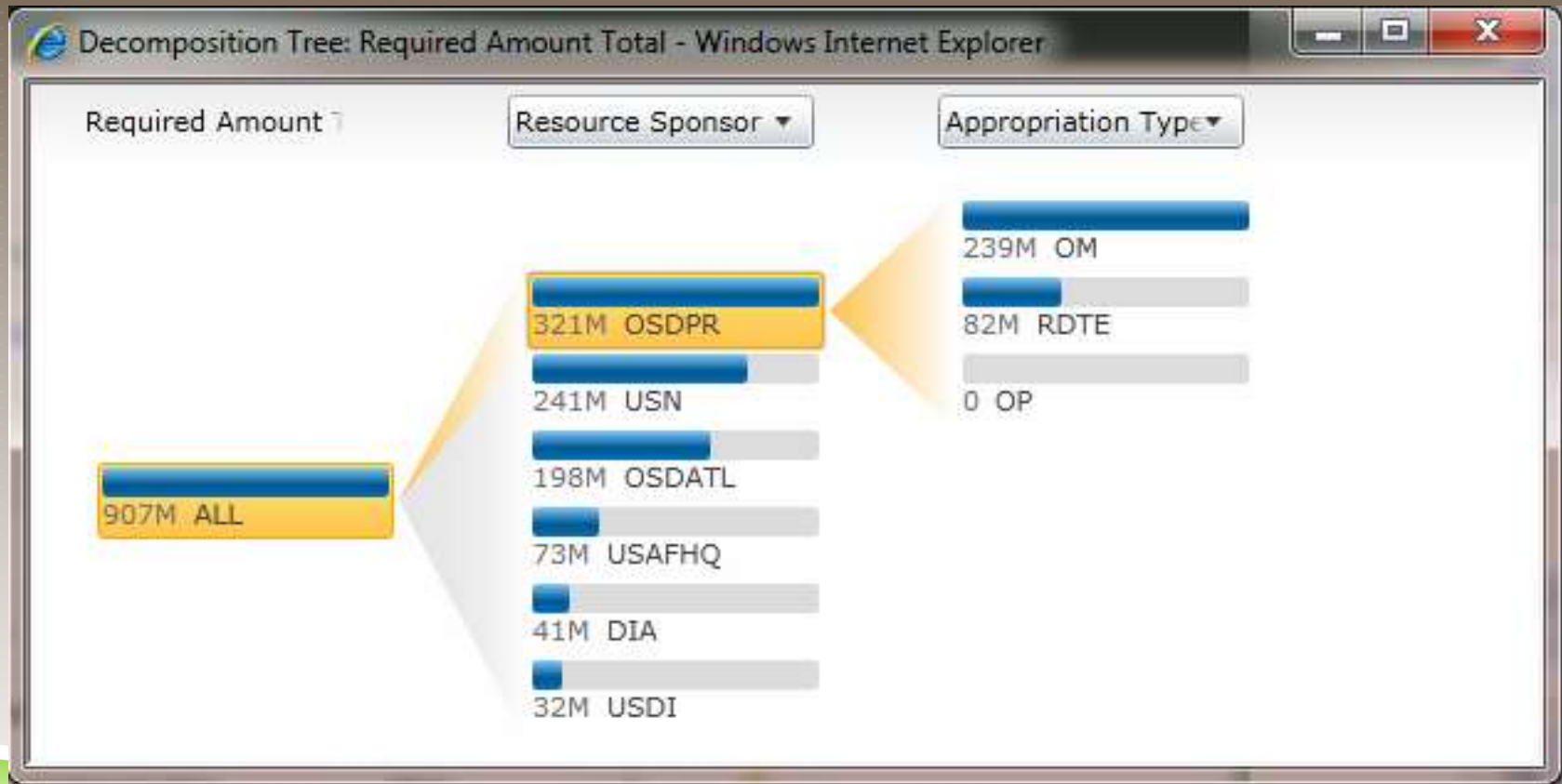


# INTERACTIVE PERFORMANCE POINT REPORTS



# 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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- ▶ Email me to get your dashboard design template



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