



*Welcome to
SharePoint
Saturday
Virginia Beach
Jan 11, 2014*

7:30 - 8:30 - Registration(Lobby)
Breakfast (Sponsor Hall)

8:30 - 8:45 - Welcome

9:00 - 10:15 – 1st Sessions

10:30 - 11:45 – 2nd Sessions

11:45 - 12:30 – Lunch
(Sponsor Hall)

12:30 - 1:45 - 3rd Sessions

2:00 - 3:15 – 4th Sessions

3:30 - 4:45 – 5th Sessions

5:00 - 5:30 - Closing &
Giveaways

Platinum Sponsors



Gold Sponsors



Silver Sponsors





DASHBOARDS FOR EVERYONE!

WHAT YOU CAN DO WITH SHAREPOINT

TRICIA WILCOX ALMAS

SHAREPOINT SATURDAY

JANUARY 11, 2014

AGENDA

- Who
- What
- Where
- When
- Why
- How

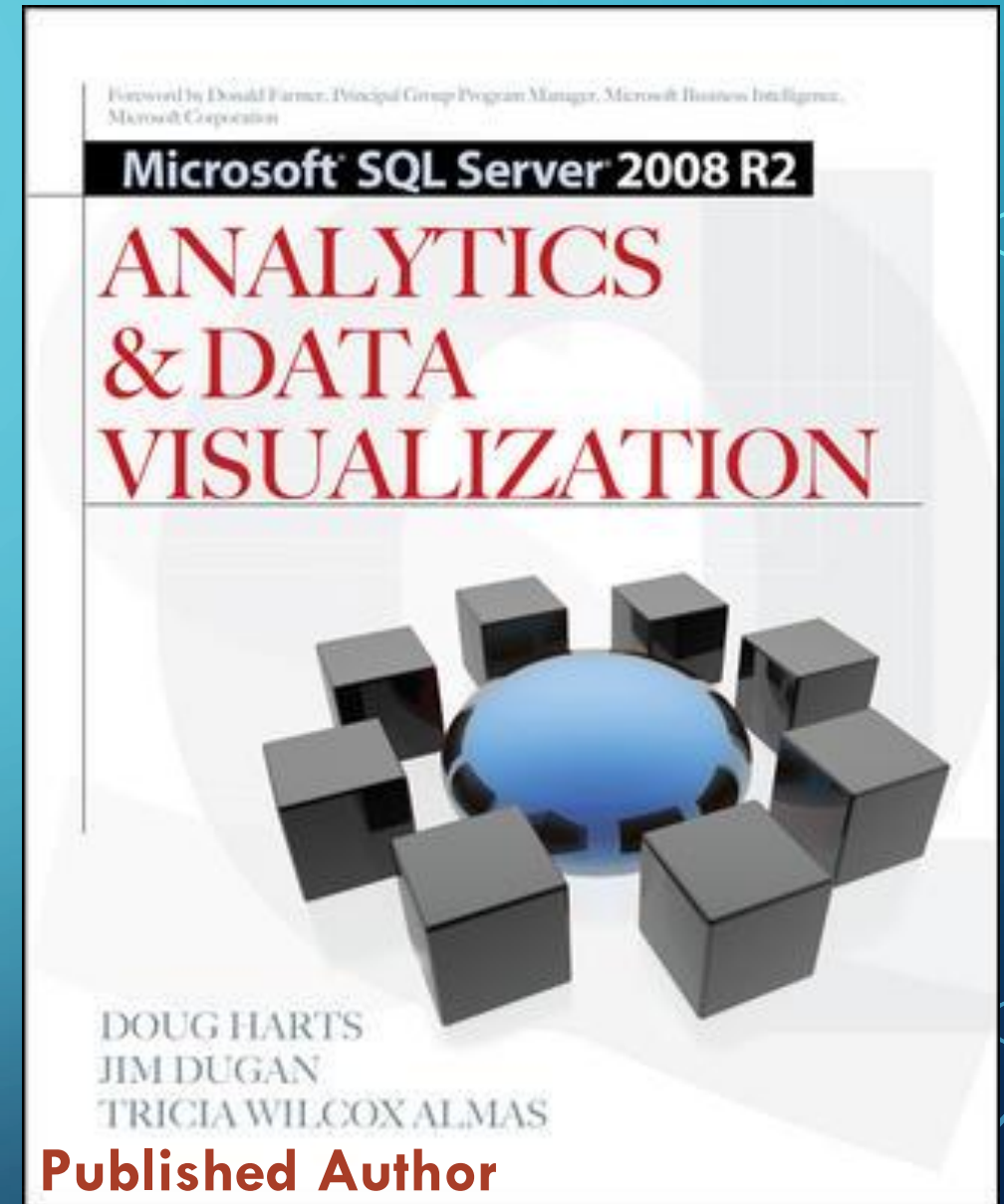
SharePoint is a great platform for information management solutions, and can support the entire information lifecycle if both the requirements and SharePoint's capabilities are understood. We will look at several examples of information collection, storage, display and reporting thru SharePoint. Bring your SharePoint challenges for this lively discussion about how to use SharePoint to make information delivery easier.

WHY SHOULD YOU LISTEN TO ME?

Instructor



Consultant



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>








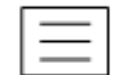
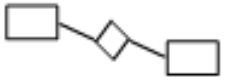
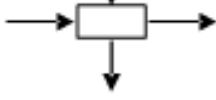
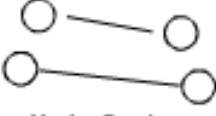
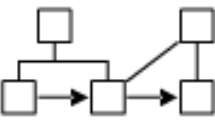


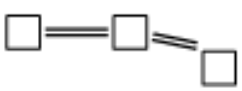
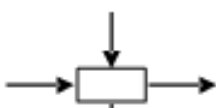
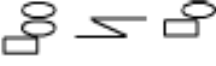
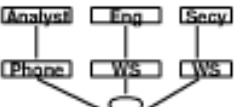
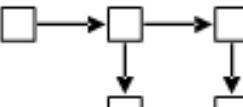
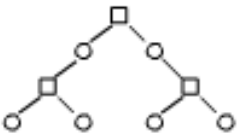
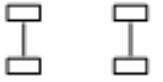
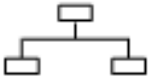
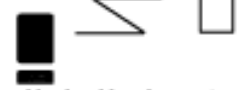

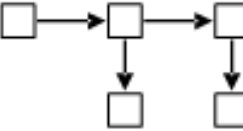







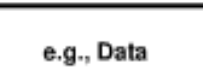
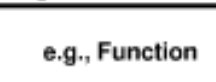
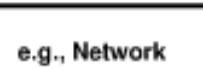
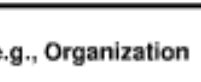
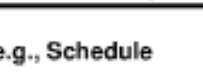
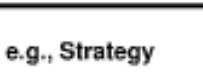
WHAT DOES IT MEAN 4 YOU

- Mobility
- BYOD
- Timeliness
- Better educated users
- Expectations

RULE #1 – BEGIN WITH THE END IN MIND

- Thank you to Steven Covey
- Who is it for? Role-based or Individual?
- What questions must it help answer?
- What is audiences' time tolerance?
- Is this a one-off or part of a larger program?

Zachman's Framework for Information Systems Architecture

	What	How	Where	Who	When	Why
	Data	Function	Network	People	Time	Motivation
REQUIREMENTS ANALYSIS	Scope List of Things Important to Business 	Function List of Processes the Business Performs 	Network List of Locations Important to Business 	People List of Organizations Important to Business 	Time List of Events Significant to Business 	Motivation List of Business Goals/Strategies 
OWNER	Investor Entity=Class of Business Thing 	Function Function=Class of Business Process 	Network Node=Major Business Location Link=Business Linkage 	People Agent=Class of Agent Work=Work Product 	Time Time=Major Business Event Cycle=Business Cycle 	Motivation End=Business Objectives Means=Business Strategy 
DESIGN	Information System Model e.g., Data Model 	Function e.g., Data Flow Diagram 	Network e.g., Distributed System Architecture Node=Info Sys Funct Link=Line Char 	People e.g., Human Interface Structure Agent=Role Work=Job 	Time e.g., Processing Structure Cycle=Component Cycle 	Motivation e.g., Knowledge Architecture End=Criterion Means=Option 
DEVELOPMENT	Technology Model e.g., Data Design Entity=Segment/Row Relationship=Pointer/Key 	Function e.g., Structure Chart Funct=Computer Funct Arg=Screen/Device Formats 	Network e.g., System Architecture Node=Hardware/System Software Link=Line Specification 	People e.g., Human/Technology Interface Agent=User Work=Job 	Time e.g., Control Structure Cycle=Component Cycle 	Motivation e.g., Knowledge Organization End=Condition Means=Action 
	Components e.g., Data Definition Description 	Function e.g., Program 	Network e.g., Network Architecture 	People e.g., Security Architecture 	Time e.g., Timing Definition 	Motivation e.g., Knowledge Definition 
	Subcontractor Ent=Fields Rel=Addresses 	Funct=Language Stmt Arg=Control Blocks 	Node=Addresses Link=Protocols 	Agent=Identity Work=Transaction 	Time=Interrupt Cycle=Machine Cycle 	End=Means 
	Functioning System e.g., Data	e.g., Function	e.g., Network	e.g., Organization	e.g., Schedule	e.g., Strategy

1. Use as a guide for organizing documentation
2. Use as a framework for organizing BI KPIs
3. Use for QA and workflow design
4. <http://www.zachmaninternational.com/index.php/the-zachman-framework>

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



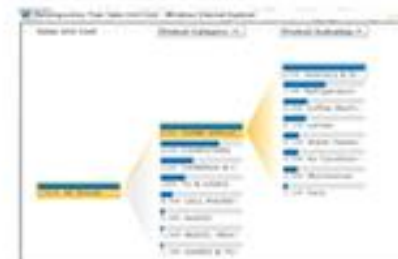
Analytic Charts

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

Scorecards

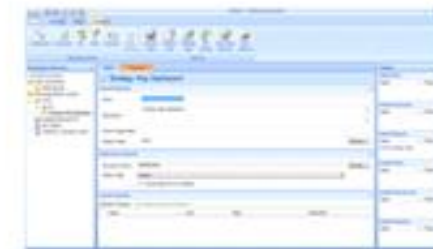


Pivot Tables

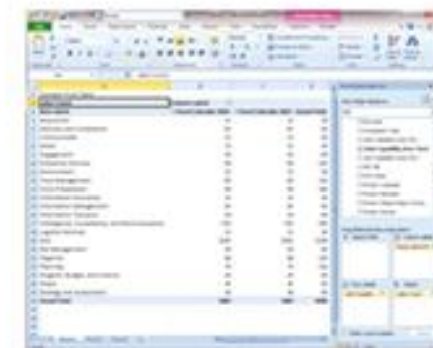


Decomposition Trees

Tools to Create Displays



PerformancePoint Dashboard Designer



Excel Professional 2010



Reporting Services (BIDS)



Visio, SharePoint Designer, ReportBuilder

MY FAVORITE INFORMATION STRUCTURE

- Takes work to design, source and build, but worth it!
- Great query performance because aggregations already calculated
- More intuitive for end users
- Three main elements – Facts (things we measure), KPIs and Dimensions (attributes)



INFORMATION SYSTEM = PROCESS AND DATA

Common Processes

- Usually arranged by Function, supported by an LOB application
- Sometimes a many-to-many relationship



Data

- Create
- Read/Browse/Scan
- Update
- Retire (not current, still relevant)
- Delete/Archive

PROCESSES

Referenced from:

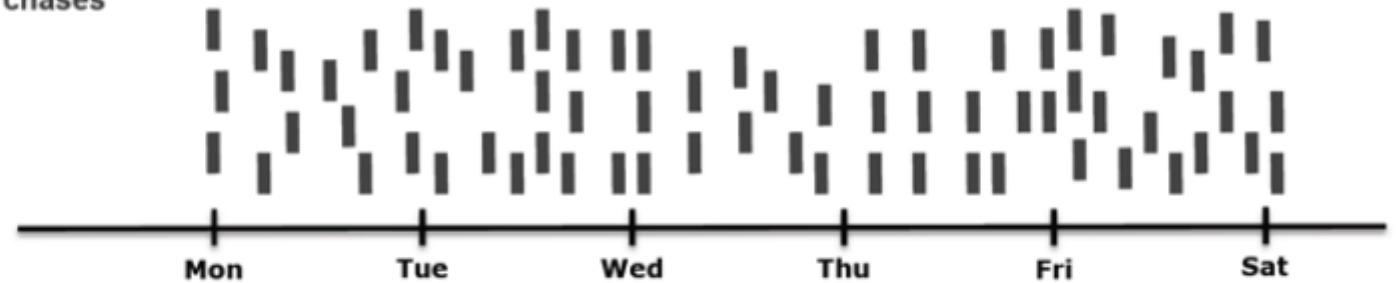
[Agile Data Warehouse Design](#),
Lawrence Corr, DecisionOne
Press, 2011, Page 28.

<http://www.decisionone.co.uk/>

Identify Event Type Early

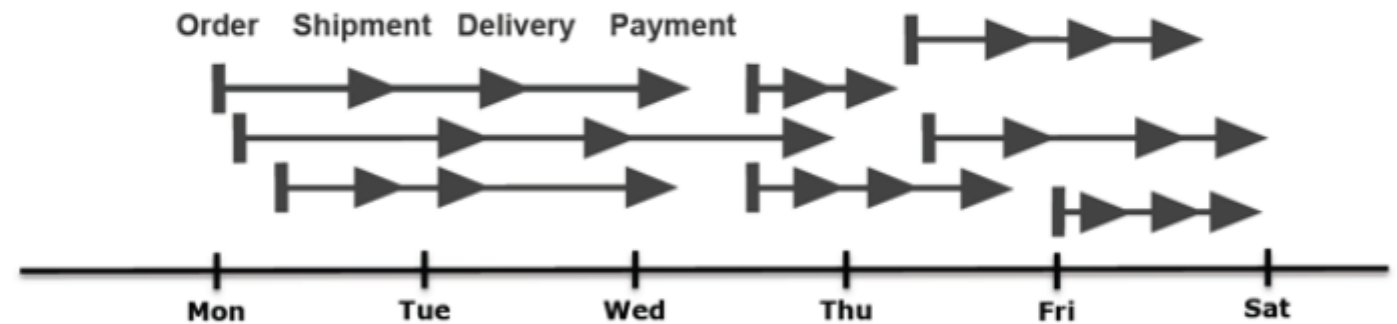
Retail Product Purchases

Discrete
[DE]



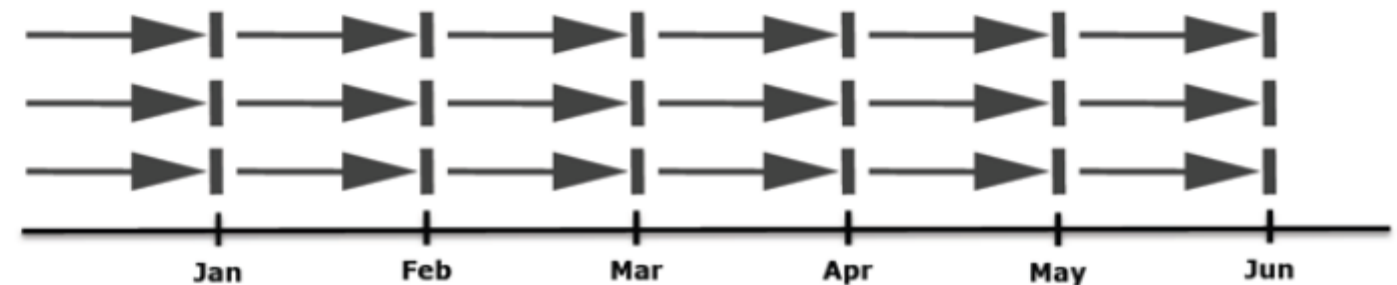
Wholesale Orders

Evolving
[EE]



Interest Charges/Account Balances

(Regularly)
Recurring
[RE]



IDENTIFY PROCESS AND DATA

Proceed Through the Business Process Value Chain

Process Sequence	Who			What			Where		Why and How					
	EMPLOYEE	SUPPLIER	RESELLER	CARRIER	COMPONENT	PRODUCT	PROCESS	TEST	PLANT	WAREHOUSE	STORE	CONTRACT	SHIP MODE	PO
MANUFACTURING PLANS							✓		✓					
BILL OF MATERIALS						✓	✓							
PURCHASE ORDERS		✓	✓			✓			✓				✓	✓
COMPONENT DELIVERIES			✓			✓			✓				✓	✓
SUPPLIER PAYMENTS		✓	✓			✓								✓
COMPONENT INVENTORY CHECKS						✓			✓					
QA TESTS						✓			✓	✓				
MANUFACTURING PROCESSES		✓				✓	✓	✓		✓				
PRODUCT INVENTORY CHECKS							✓					✓		
WAREHOUSE SHIPMENTS				✓	✓		✓				✓	✓		✓

When (Value Chain Sequence)

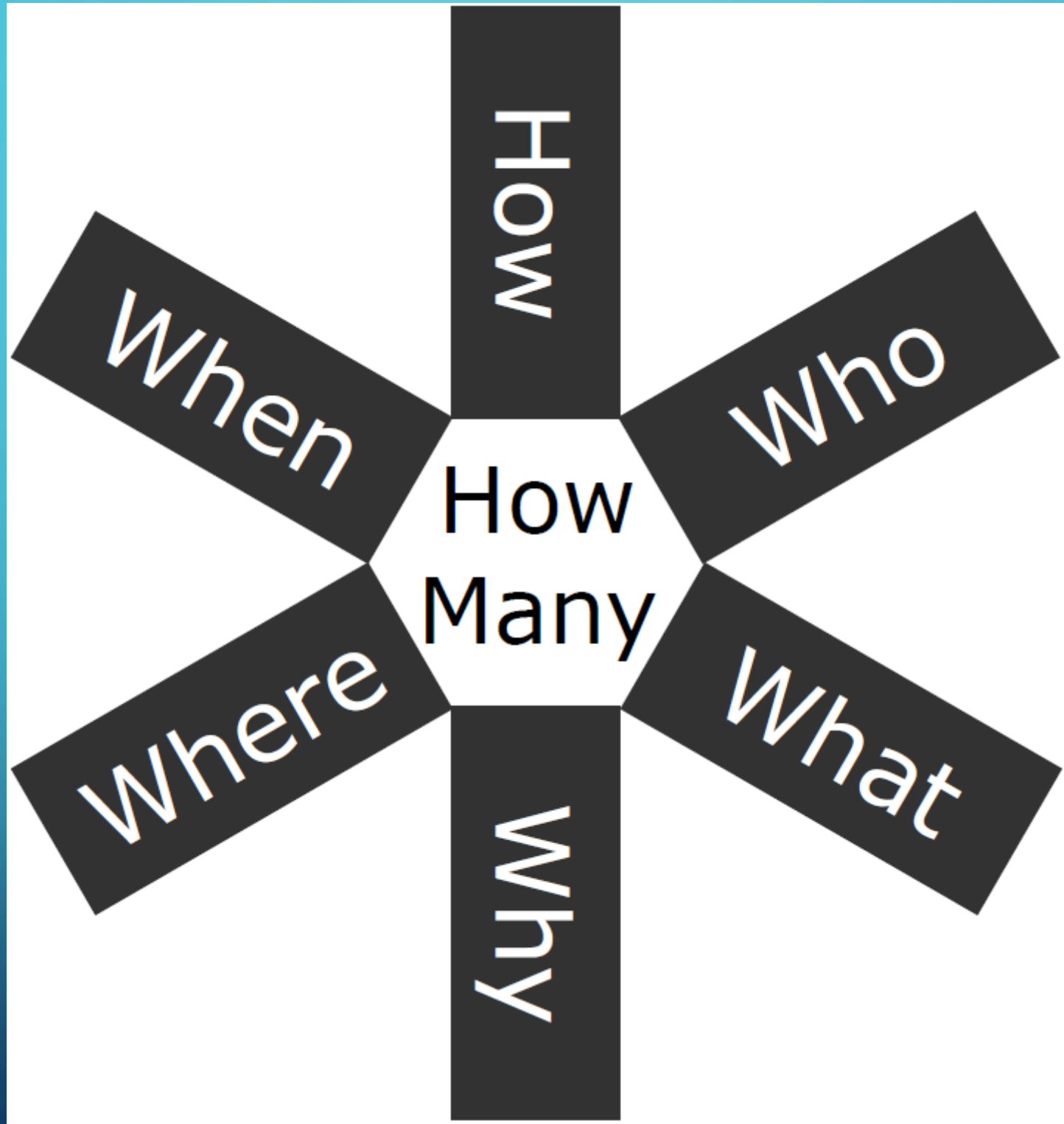
Conformed Dimensions
Used in a multiple events

Unconformed (Local) Dimension
Used in one event only

Referenced from:
[Agile Data Warehouse Design](http://www.decisionone.co.uk/), Lawrence Corr,
 DecisionOne Press, 2011,
 Page 103.

ORGANIZING AND PRESENTING INFORMATION

- Use a common logical framework
- Leverage fundamental understanding
- Do not neglect or delay Taxonomy – agree on vocabulary
- Consistent design yields higher adoption
- Build in better feedback mechanisms (likes, ratings, comments)
- Apply framework at multiple levels of abstraction
- Apply framework to different functions or disciplines
- Apply framework to strategic, operational or tactical layers



7Ws Dimensional Model



When
Time
Day
Month
Fiscal Period

How – Facts:
Much
Many
Often
Measurements

Who
Customer
Employee
Third Party
Organization

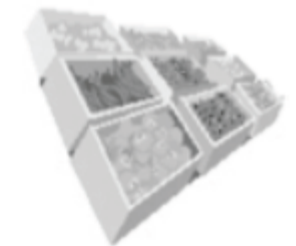


Where
Location
Geographic
Store
Ship To
RFID

??

Why
Causal
Promotion
Reason
Weather
Competition

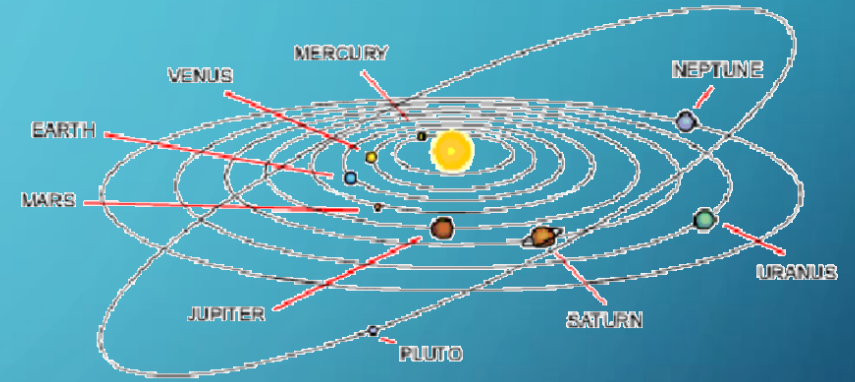
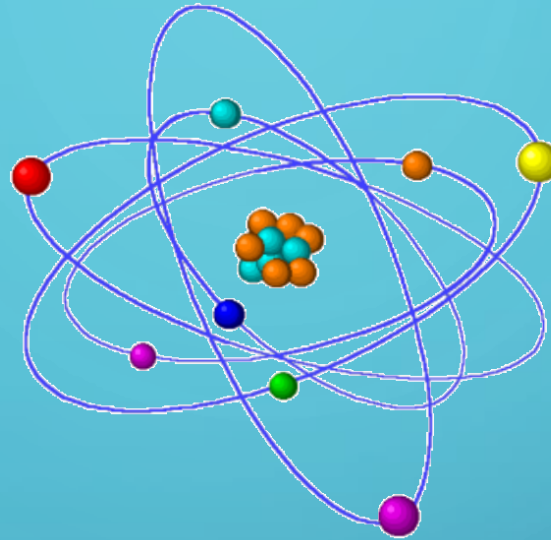
What
Product
Service
Transactions



Referenced from:
Agile Data Warehouse Design, Lawrence Corr,
DecisionOne Press,
2011, Page 155.
<http://www.decisionone.co.uk/>

SCOPE

- Abstraction
- Aggregation
- Drill Up
- Drill Down
- Drill Across

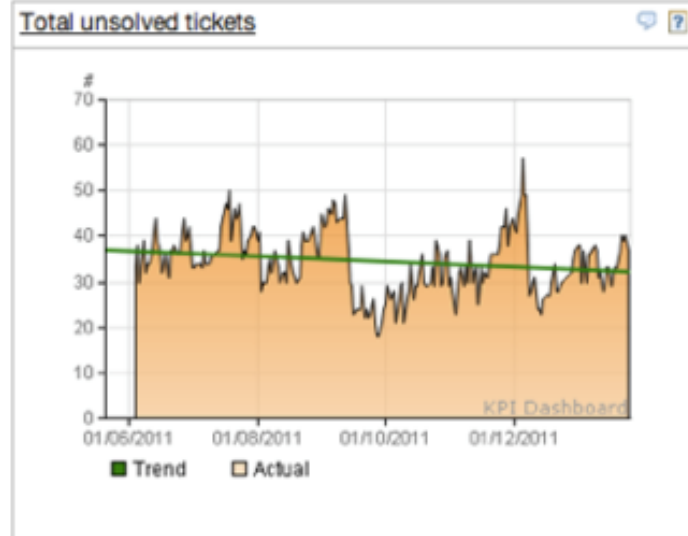
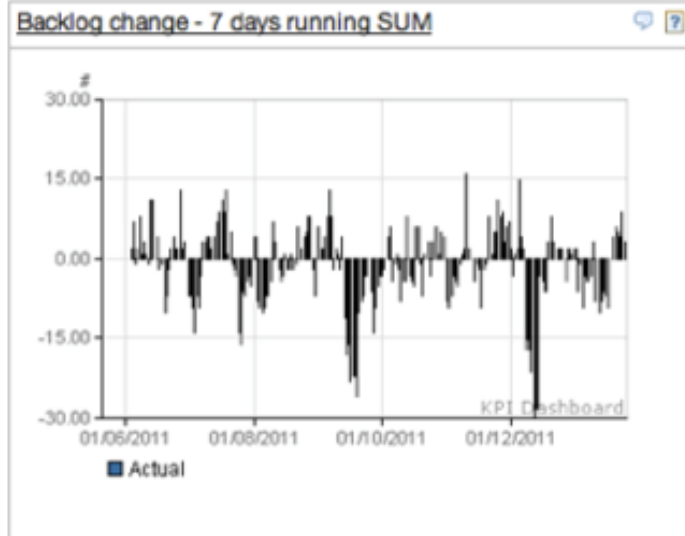
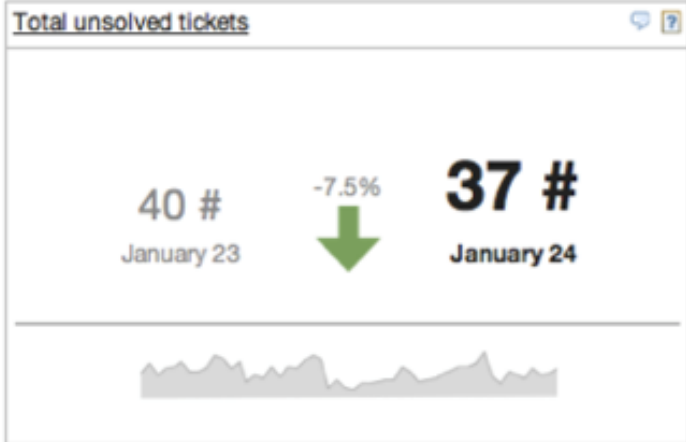


APPLY THE FRAMEWORK TO YOUR ENVIRONMENT

- Level – Strategic, Operational, Tactical, Individual
- Info Organization – Who, What, When, Where, How, How Many, Why
- Process and Event Type Information – Discrete, Evolving, Recurring
- SharePoint Web Parts –incredible variety available, use best fit to information characteristics

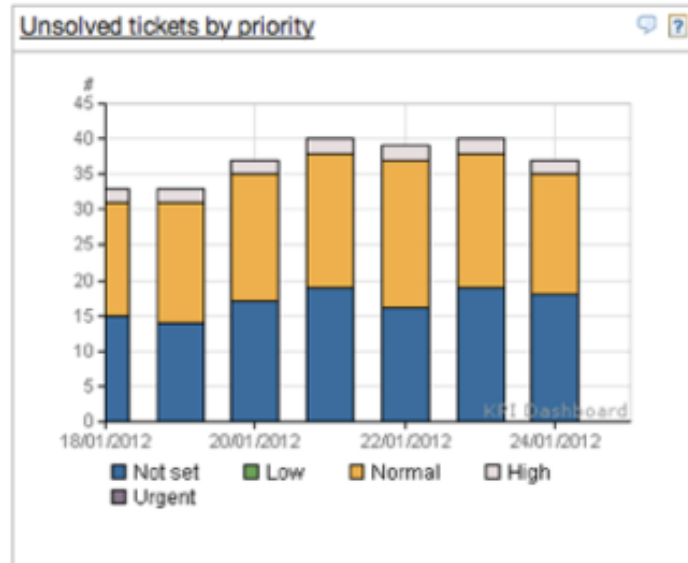
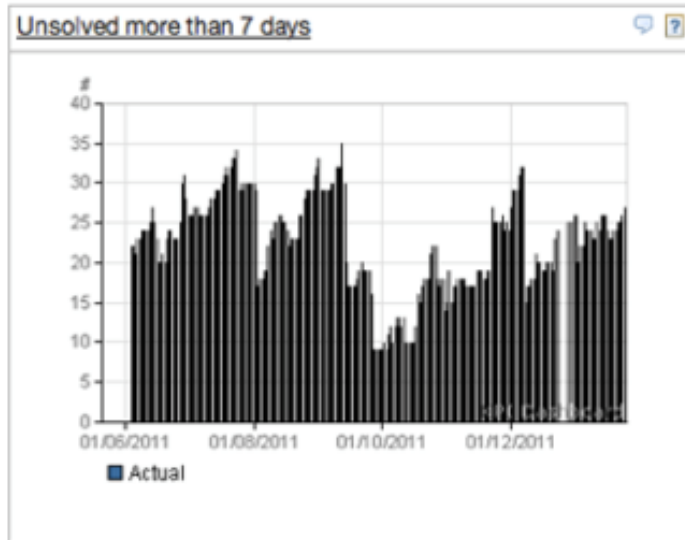
RULE #1 – BEGIN WITH THE END IN MIND

- Dashboards must help the viewer answer questions – identify those early
- Dashboards must be succinct and timely – try to design for no scrolling, all components help describe the current situation
- Implement drill down to provide more detailed information in context
- Each dashboard is different and will tell a story about organizational information



Unsolved tickets by assignee

Name	Trend	Value(#)
Paul van Nistelrooy		9
Erik Hoffmann		7
Karel van der Poel		6
Arjen Pront		5
Guus Mathijssen		5
Erwin Nijman		2
Not assigned		2
Pieter Goris		1
Jochen Pohle		0

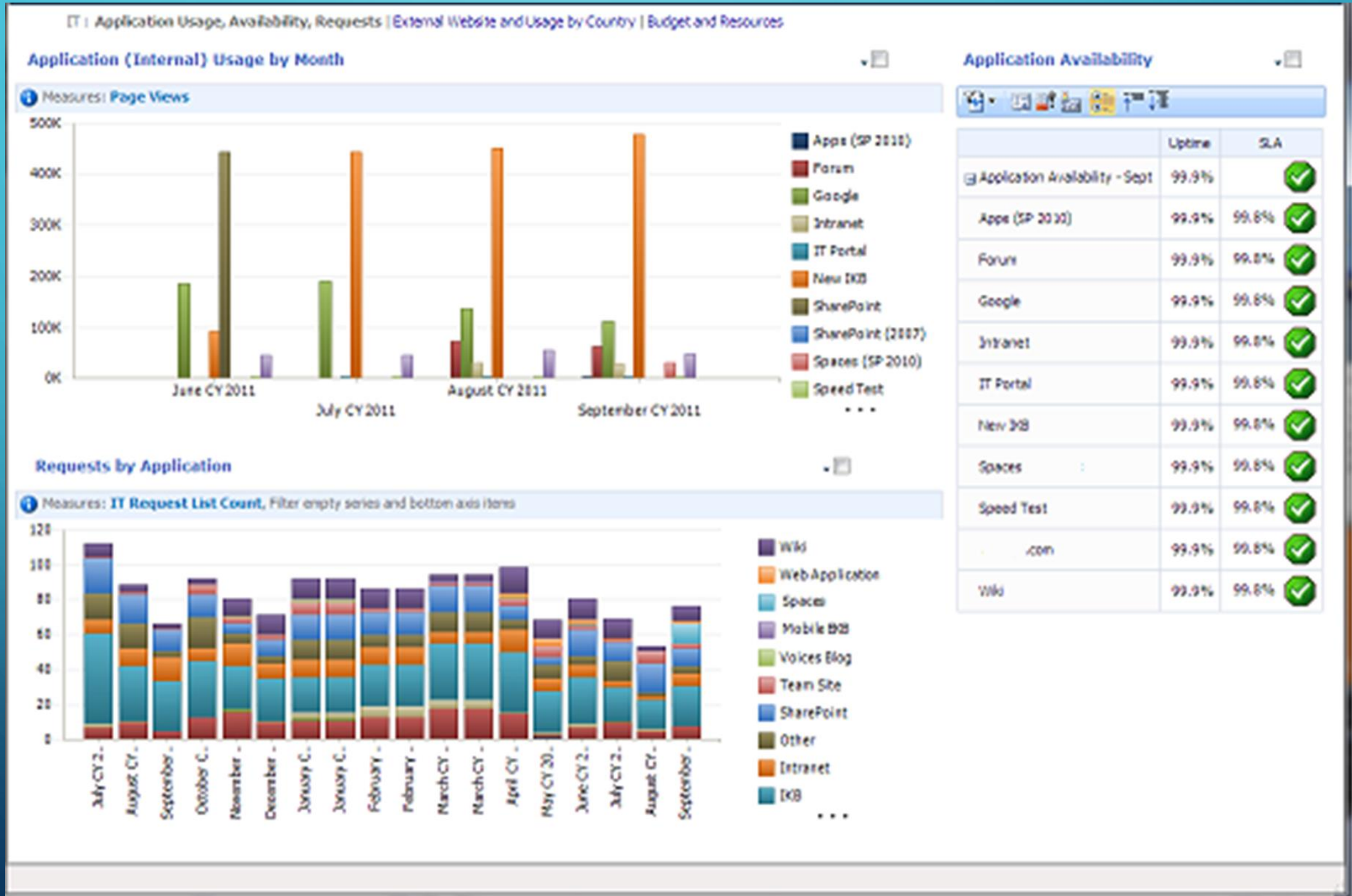


Unsolved tickets by assignment group

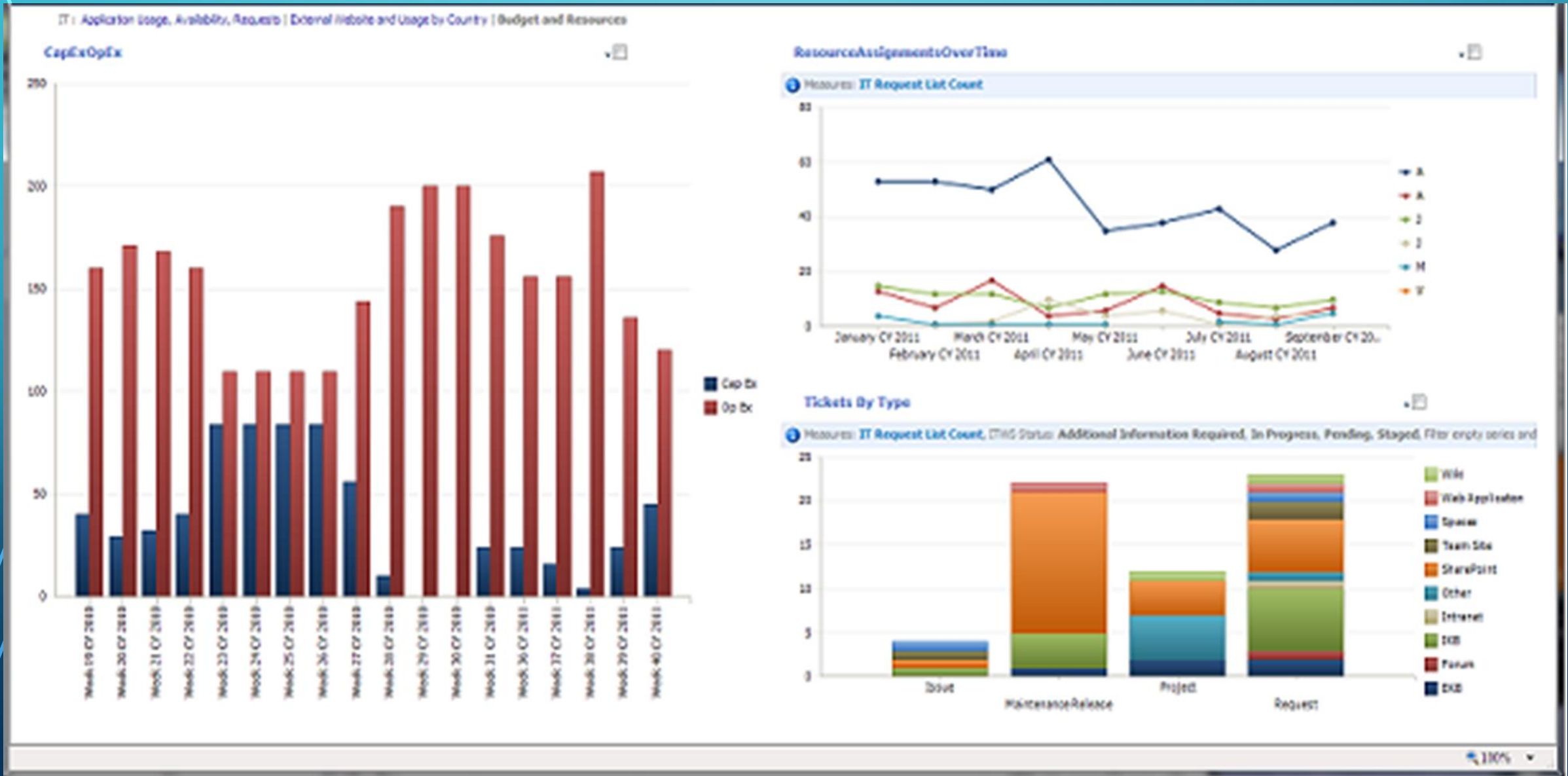
Name	Trend	Value(#)
Email		12
KPI Dashboard		12
Partner with us		5
KPI Consulting		4
Not assigned		2
KPI Benchmark		1
KPI Project		1
KPI Library		0
Mirror42		0

DASHBOARD EXAMPLES – HELP DESK TICKETS

IT OPERATIONS – APP AVAILABILITY AND UPTIME



IT OPERATIONS – APP USAGE AND RESOURCE ASSIGNMENTS

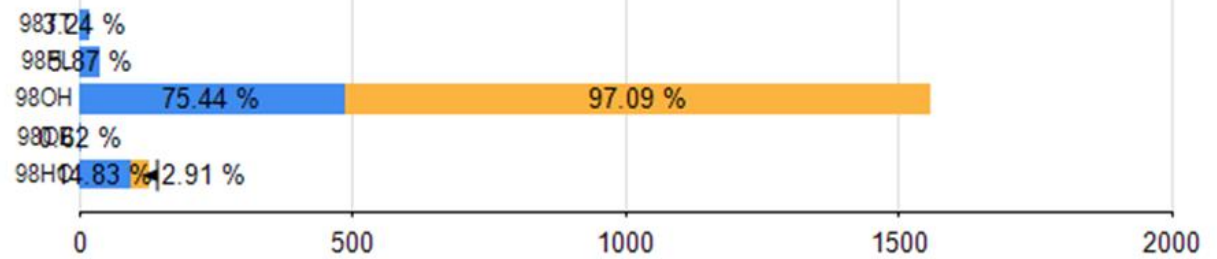


Summary of all East Region OH hours for time period

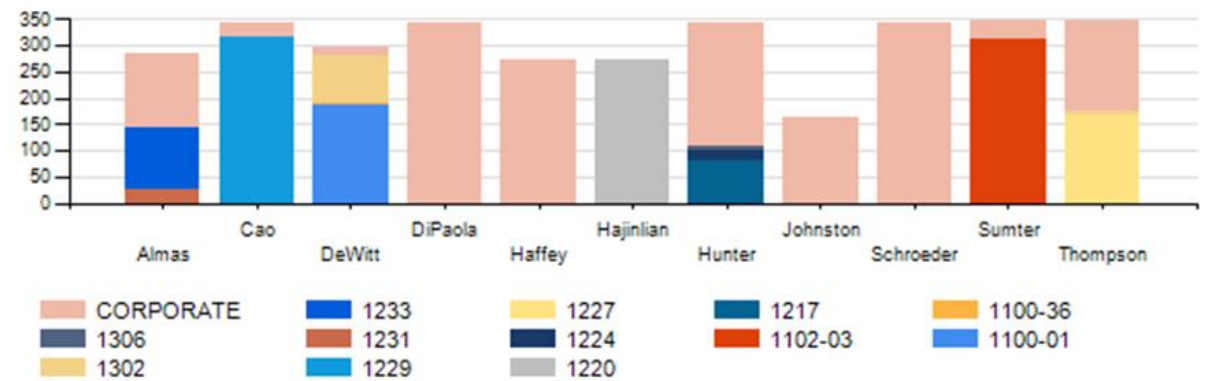
Overhead Code ID	Qty Hours	% of Total
98HO	128.00	7.32 %
98OB	4.00	0.23 %
98OH	1,557.50	89.08 %
98PL	38.00	2.17 %
98TT	21.00	1.20 %
Total	1,748.50	

Proj Nbr	Proj Name	Hrs Qty	% of Total
1100-01	OPEX	190.50	5.67 %
1100-36	Technical Consulting Work	2.00	0.06 %
1102-03	USARC IT Services	314.00	9.34 %
1217	Fit Analysis/Tech Arch Service	81.00	2.41 %
1220	eDC Tool Version 2.0	275.00	8.18 %
1224	CJL Engineering	20.50	0.61 %
1227	Information Technology Service	168.00	5.00 %
1229	JIEDDO	316.00	9.40 %
1231	Canon ITS BI Health Check	25.00	0.74 %
1233	SharePoint Roadmap	120.00	3.57 %
1302	Azure App Assessment	96.00	2.86 %
1306	Amyx	6.00	0.18 %
CORPORATE	Corporate	1,748.50	52.00 %
		3,362.50	

OH Hrs by Category



Employee Hours by Type for the Selected Time Period



GROUP HOURS DASHBOARD

JFCOM MANAGERIAL ACCOUNTING DASHBOARD

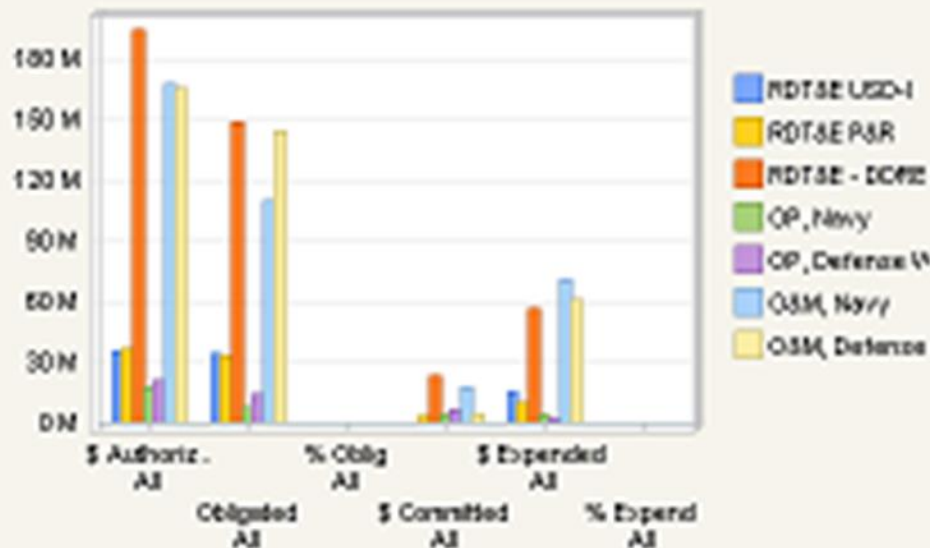
Decision Support Center: **Managerial Accounting** | [Financial Reporting](#) | [Integrated Project or Operation Display](#)

Financial execution (STARS) data as of 5 August 2009 | Labor (SLDC404) data as of 15 Aug 2009

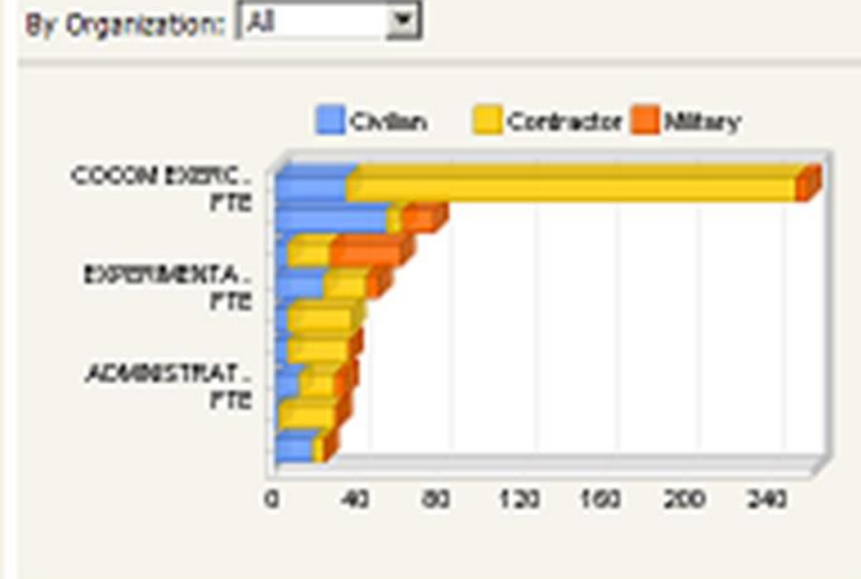
Select an Appropriation: **O&M, Defense Wide, O&M, Navy, OP, Defense Wide, OP, Navy ...**

Appropriation	\$ Authorized	Obligated	% Oblig	\$ Committed	\$ Expended	% Expend
	All	All	All	All	All	All
RDT&E USD-I	35,860,586	34,600,707	96	148,028	15,859,009	44
RDT&E P&R	37,083,591	32,795,588	88	3,199,138	9,966,577	27
RDT&E - DORE	194,192,700	148,713,359	77	23,097,296	56,520,785	29
OP, Navy	17,793,887	8,098,207	45	4,115,342	4,104,259	23
OP, Defense Wide	21,183,059	14,869,306	70	6,146,220	1,943,721	9
O&M, Navy	168,172,600	109,838,018	65	18,015,870	71,132,302	42
O&M, Defense Wide	165,749,200	144,022,746	87	4,331,421	61,573,184	37
Grand Total	640,046,023	492,937,932	77	59,053,316	221,069,839	35

Managerial Accounting Chart



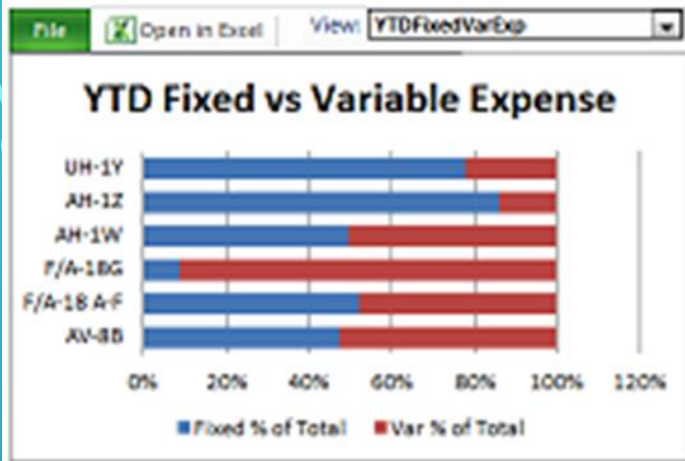
Top 10 Labor Consuming Activities



[Link to Manpower Consumed by Organization](#)

AIRFORCE MAINTENANCE OPERATIONS DASHBOARD

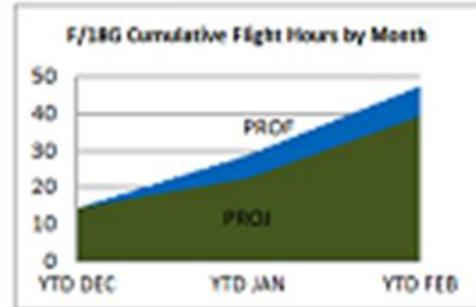
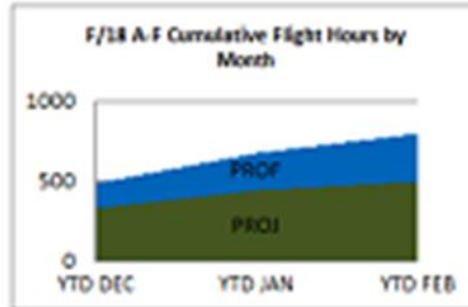
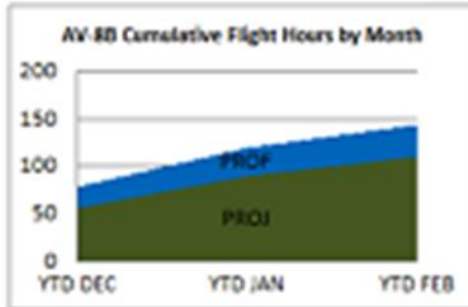
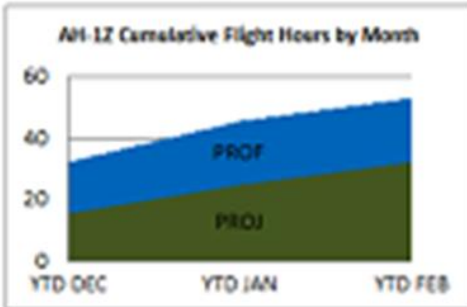
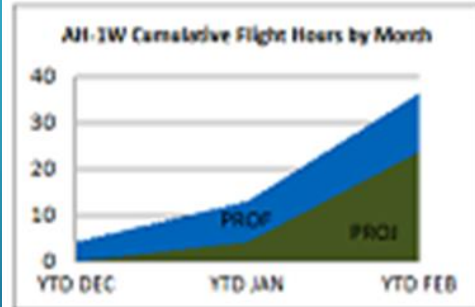
Excel Web Access - AOASummary [1]



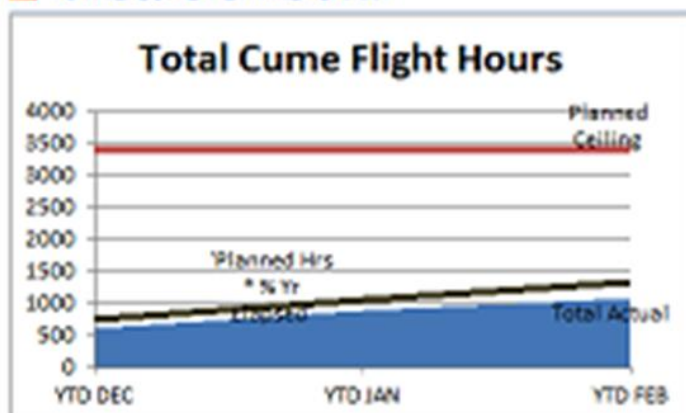
Excel Web Access - AOASummary [2]



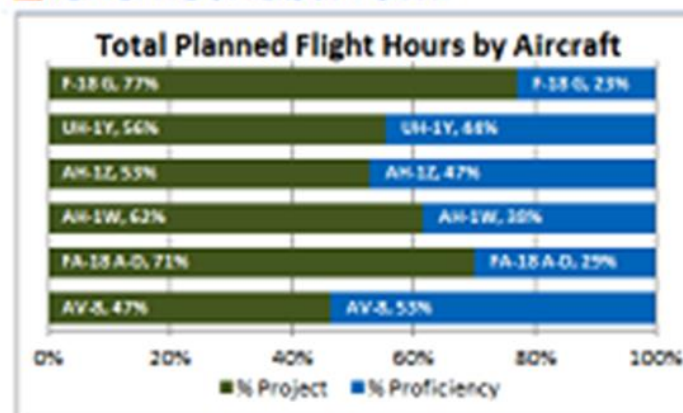
Excel Web Access - AOASummary [3]



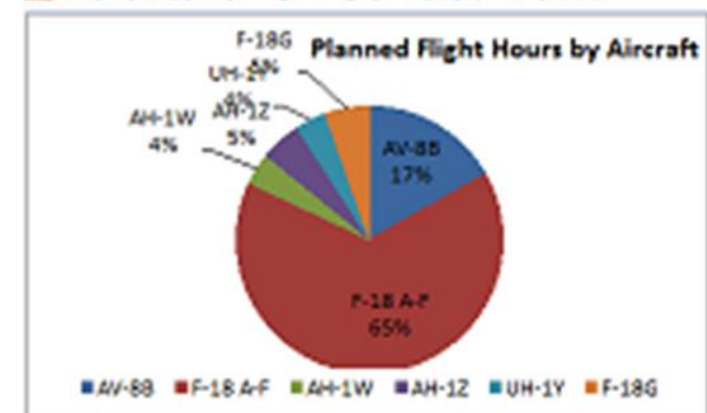
TOTAL CUME FLT HRS CHART



PLN FLT HRS BY AIRCRAFT CHART



PROPORTION OF FLT HRS BY AIRCRAFT CHART



PROJECT MANAGEMENT DASHBOARD

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	●

Project Risks

Risk Item	Impact Classification Category	Impact Rating	% Probability	Exposure
Funding truncated NEW	Financial	4	75 %	3
Change in project staff at critical time NEW	Organization-wide Change	2	50 %	1
Project doesn't pass regulatory QA NEW	Technical	3	25 %	0.75

Links

Hyperlink

- [Project Deliverable Documents](#) NEW
- [Project Code](#) NEW
- [Project Issues List](#) NEW
- [Project Risk List](#) NEW
- [Third Party Products](#) NEW

Project Hours Burndown Chart

Project Hours per Period

Task Details

Title: Deliverables Late NEW

Organization Name: Portal Team

Submitted By: Tricia Almas

Project Name: Project Zulu

Description: The deliverables for the last iteration of the SM project are late due to stakeholder disengagement

Applications, Procedures or Functions Effected: SM Silverlight Chart update

Proposed Solution:

Rationale: Mandatory Meeting with Stakeholders

Further Action?: Yes

Further Action: What: Schedule conference room and projector for meeting

Further Action: Assigned to: Tricia Almas

Status: Resolution Meeting Scheduled

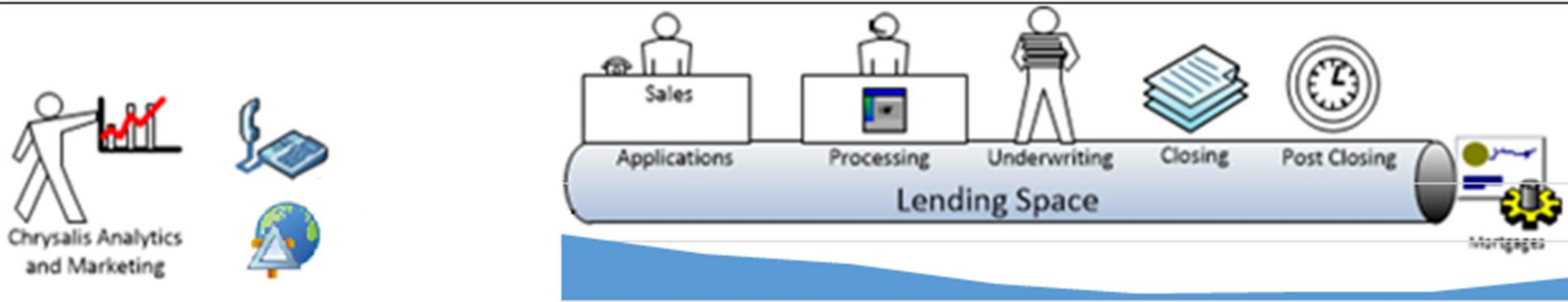
Task Name

- ARCIC-TRADOC
 - Project Kick-off Meeting
 - Introductory (Scope) Meeting
 - Create Project Schedule for this engagement
 - Create Overall Project Plan and architectural road map
 - IPR
 - Create Weekly Status Report
 - Create Monthly Status Report
 - Infrastructure and Environment Assessment and Recommendations
 - Requirements and Analysis
 - Solution Development
 - Deployment
 - Training
 - Quality Assurance Testing
 - Production Environment Deployment
 - User Acceptance Testing
 - Deployment Complete

Gantt Chart

MORTGAGE PROCESS DASHBOARD

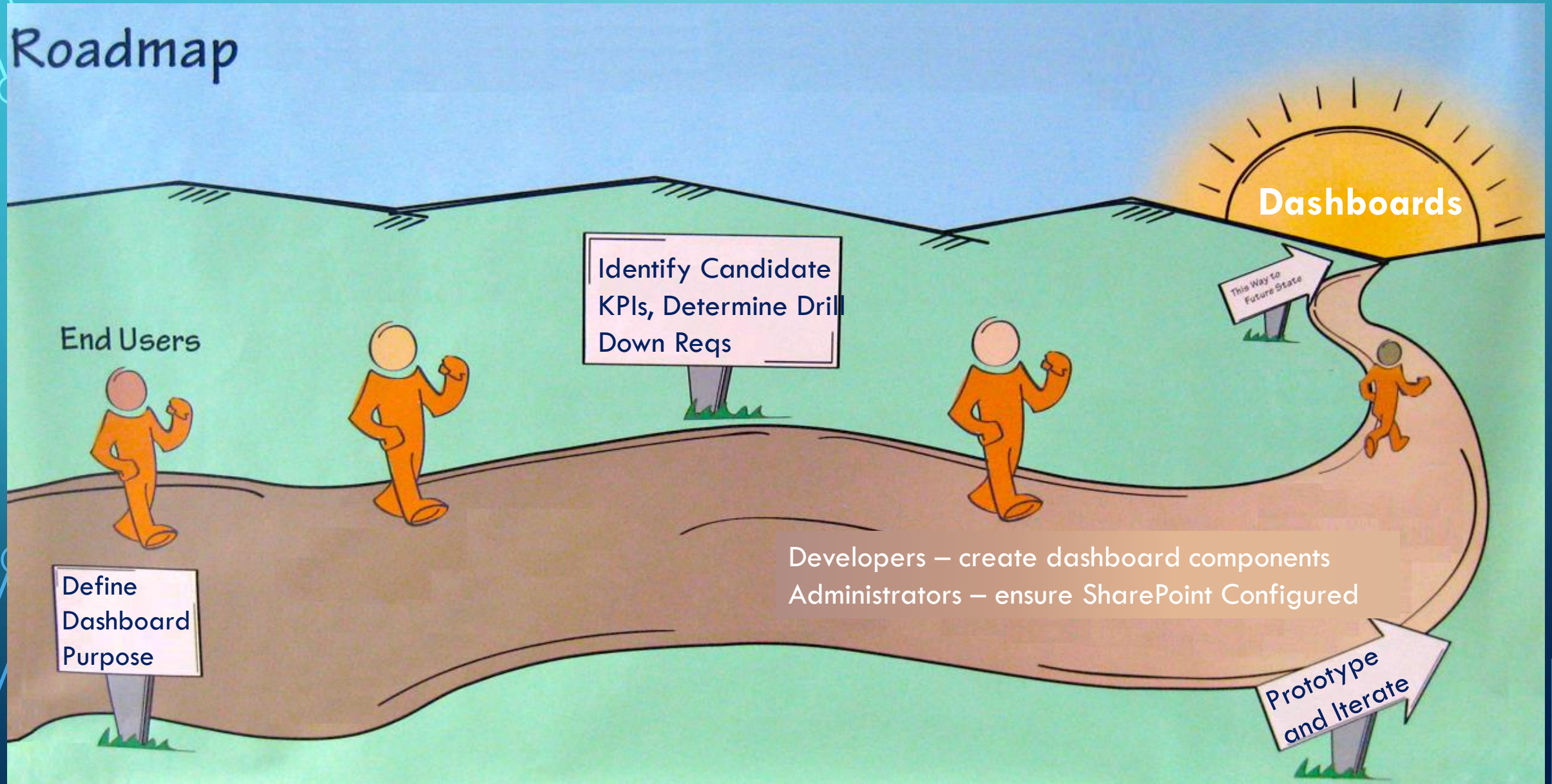
Loan Pipeline



This Week 1/30/2013	Trend	Rating	Step	Calls	Application	Processing	Underwriting	Closing	Post Closing	Sold	Servicing
Mailings: 32,000	→	✓	Loans-Forward	5700	4000	3200	1500	600	750	700	2000
Calls: 5,700	→	!	Trend	↑	↑	↑	↑	↑	→	→	↑
Web: 17,439	↑	✓	Efficiency	88%	75%	79%	88%	96%	91%	99%	76%
			Rating	!	×	×	!	✓	✓	✓	×
Avg Days Processing 34 days	→		Loans-Reverse	855	600	480	225	90	113	105	300
Avg Days @ Title Co 12 days	↓		Trend	↑	↑	→	↑	↑	→	→	↑
Avg Days Closing 4 days	↑		Efficiency	87%	79%	74%	79%	88%	89%	99%	45%
			Rating	✓	!	×	!	✓	✓	✓	×

HOW DO WE GET THERE?

Roadmap



DASHBOARD DESIGN

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.

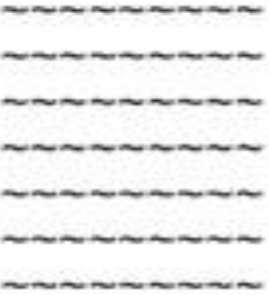
Ancillary Information

- 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

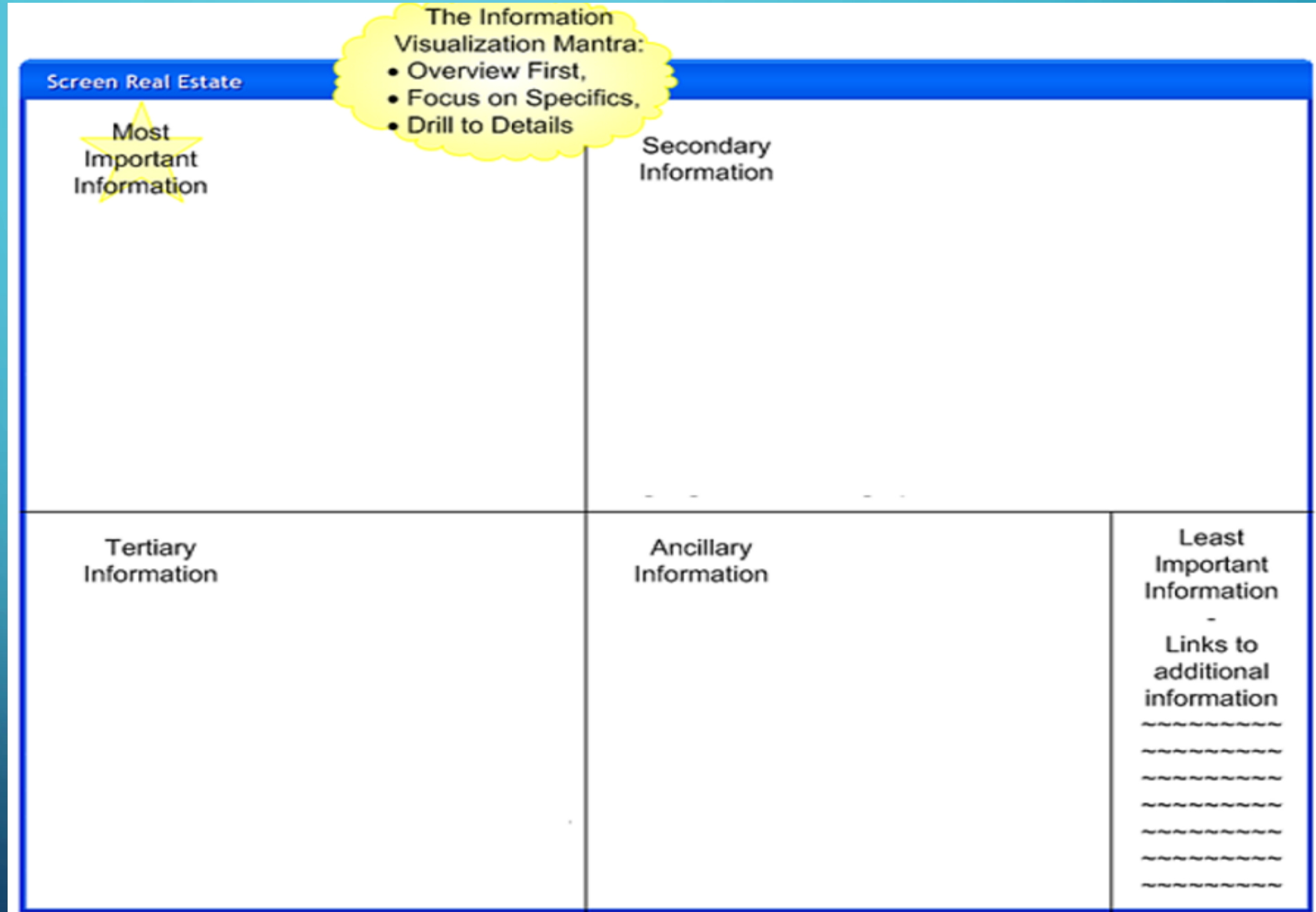
Links to additional information



NEW DASHBOARD MOCKUP

Create the inventory for each Dashboard

- Scorecard
- Strategy Map
- Interactive Charts
- Drill-down Reports
- Pivot Tables or Charts
- Gauges
- Search Results
- Hyperlinks
- Announcements
- What else?



DASHBOARD METADATA

Basic Dashboard Metadata	
Dashboard Name:	
Purpose:	
Subject Area:	(Financial, Marketing, Sales, etc.)
Audience and User Groups (security):	

Quadrant 1	Data source	Component Name	Object Type	Calculations or KPI?	Notes
Webpart 1					
Webpart2					
Webpart 3					
Quadrant 2	Data source	Component Name	Object Type	Calculations or KPI?	Notes
Webpart 1					
Webpart2					
Webpart 3					
Quadrant 3	Data source	Component Name	Object Type	Calculations or KPI?	Notes
Webpart 1					
Webpart2					
Webpart 3					
Quadrant 4	Data source	Component Name	Object Type	Calculations or KPI?	Notes
Webpart 1					
Webpart2					
Webpart 3					

Navigation

Specify links to other pages, links to drill down on KPIs and Reports, etc.

Webpart Location	Webpart Name	Hyperlink
Q1wp1		
Q1wp2		
Qnwpn		

<http://triciawilcoxalmas.wordpress.com>

DECISIONS, DECISIONS

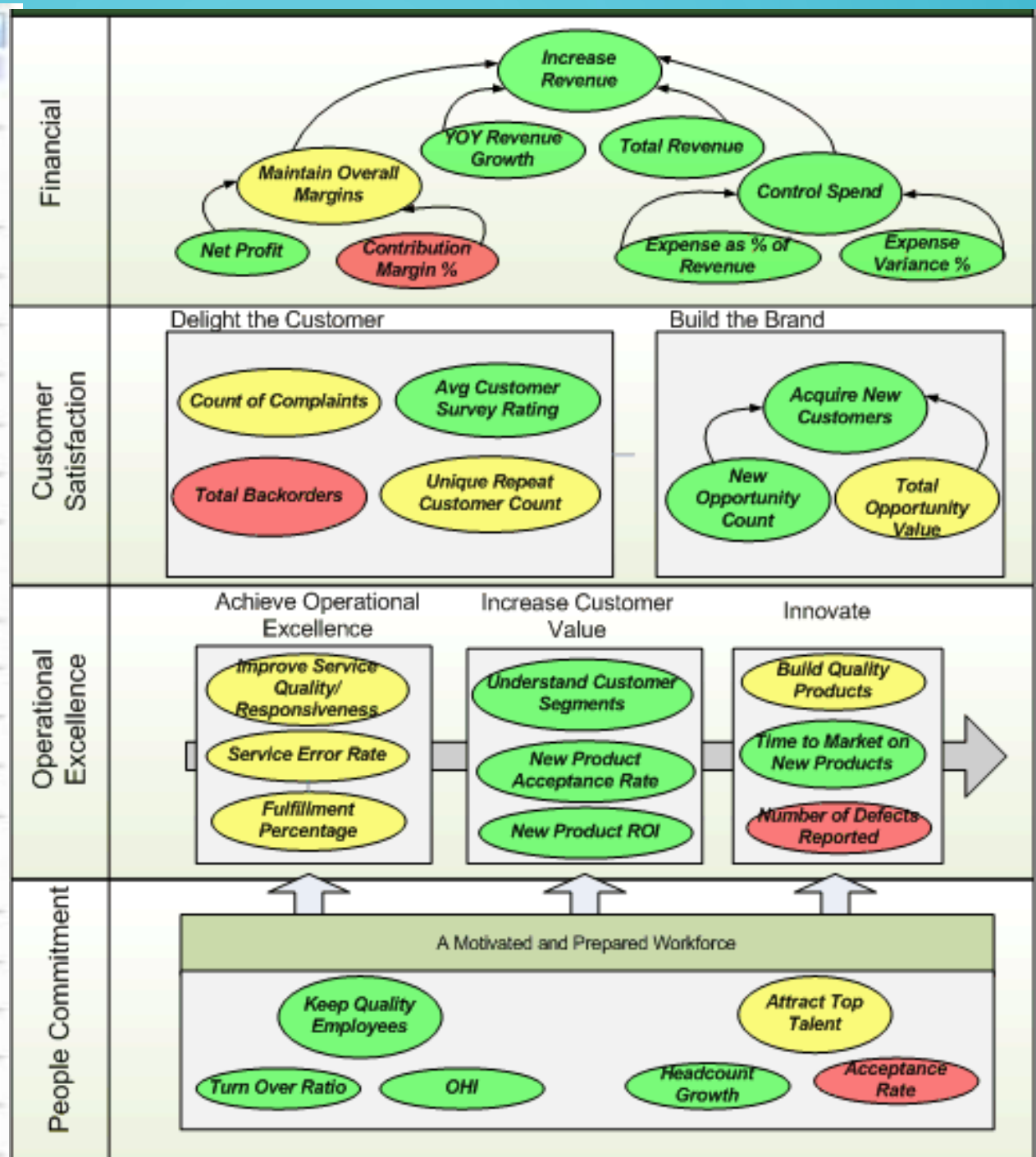
So how do you decide which tool to use for each dashboard component?

- 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

STRATEGIC DASHBOARDS

- Focused on **Enterprise Goals and Objectives**
- Shows progress on strategic initiatives
- Balanced Scorecard and Performance Management
- Shows current state information on organizational functions
- Alerts for items which require *Leadership Intervention or Decision*
- Create a SharePoint solution like “Campaign Plan” or “Sync Matrix” to capture data and track progress toward goals

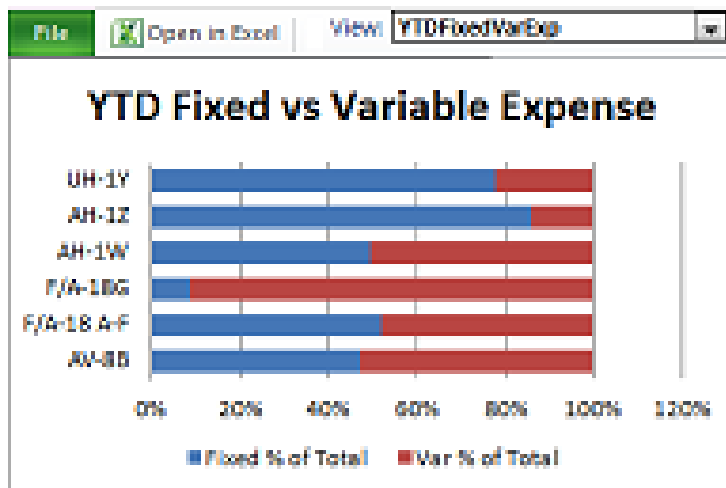
	Link	Lead Org	Current	Target
A - Concept Development and Learning	Link	COLD	1	5
B - Requirements Integration	Link	RID	4	5
B-01 Fight Req & Accelerate Capabilities	Link	RID	4	5
B-02 Maneuver, Aviation, & Soldier Capabilities (Future Modular Force)	Link	RID	3	5
B-03 Fires & Air Defense Artillery Capabilities (Future Modular Force)	Link	Value: COLD Description: Lead ARCIC Organization	5	5
B-04 Protection Capabilities (Future Modular Force)	Link		5	5
B-05 Improve Logistics Capabilities (Modular Force)	Link		5	5
B-06 Human Dimension Capabilities (Future Army)	Link	RID	4	5
C - BCT Modernization	Link	FFID	1	5
D - Assessment, Architecture & Mission Command	Link	A2&BCD	3	5
D-01 Provide Integrated DOTMLPF (RIO) Solutions to the ARSTAFF	Link	A2&BCD	3	5
D-02 Enable the Network	Link	A2&BCD	2	5
D-03 Develop Network Capabilities & Synch DOTMLPF Activities	Link	AIMD	4	5
D-04 Prioritization of Gaps & DOTMLPF(RIO) Solutions	Link	AIMD	2	5
D-05 Support Capability Dev with Studies & Analysis Leadership	Link	AIMD	4	5
E - Transform, Governance & Communication	Link	DCoS	2	5
E-01 Develop TRADOC & ARCIC Policies & Guides	Link	ARCIC DCoS	1	5
E-02 Develop Plans & Help Shape Strategic Documents & Meetings	Link	ARCIC DCoS	4	5
E-03 Resource & Personnel Management	Link	ARCIC DCoS	2	5
E-04 Develop Strategic Engagement Plan	Link	ARCIC DCoS	0	5
E-05 Building Partner Capacity (BPC)	Link	IAPD	0	5
E-06 Lead the Total Army Analysis 2013-2017	Link	FDD	4	5



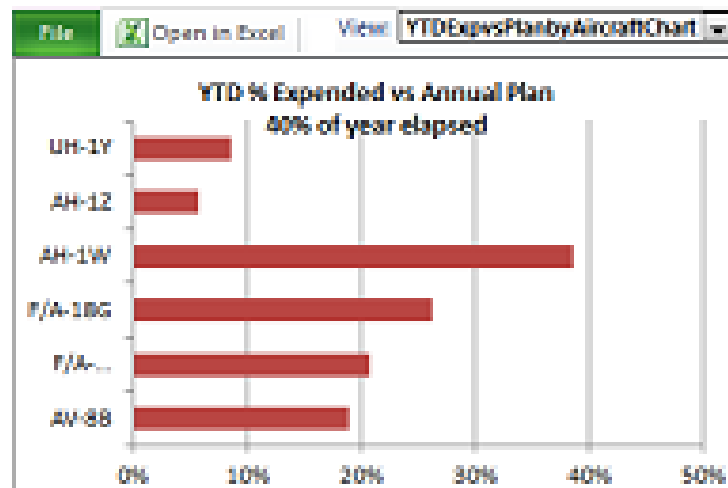
OPERATIONAL DASHBOARDS

- Focused on Operational Goals and Objectives
- Usually supported by LOB applications
- Leverage DWs, Data Marts where possible, PowerPivot is useful tool
- Don't neglect unstructured data – Search Results, ExSumms, hyperlinks to relevant content and websites

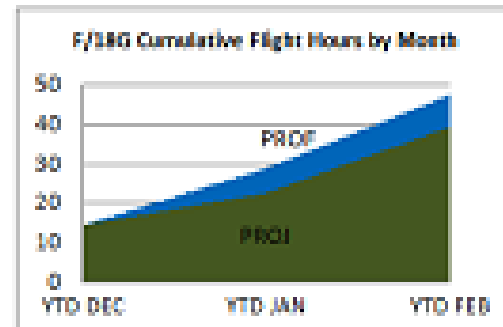
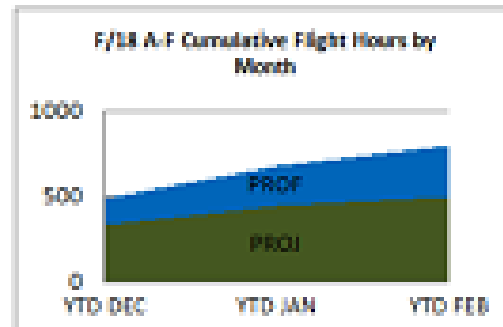
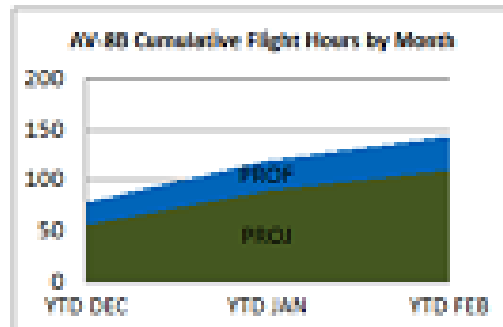
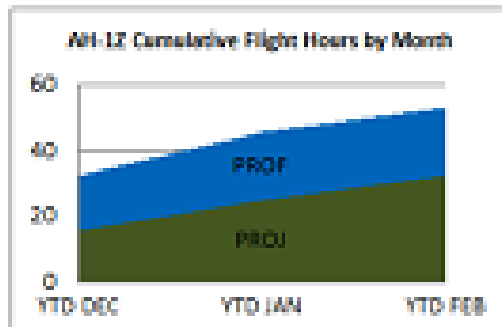
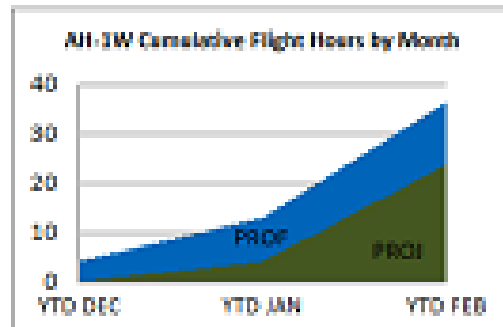
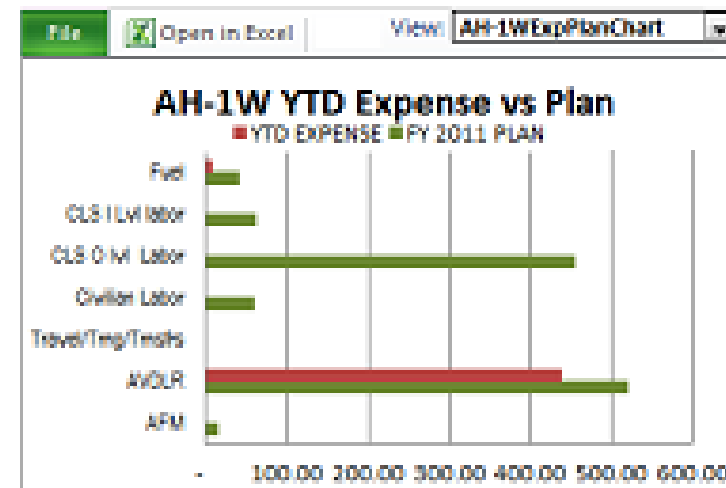
Excel Web Access - AOASummary [1]



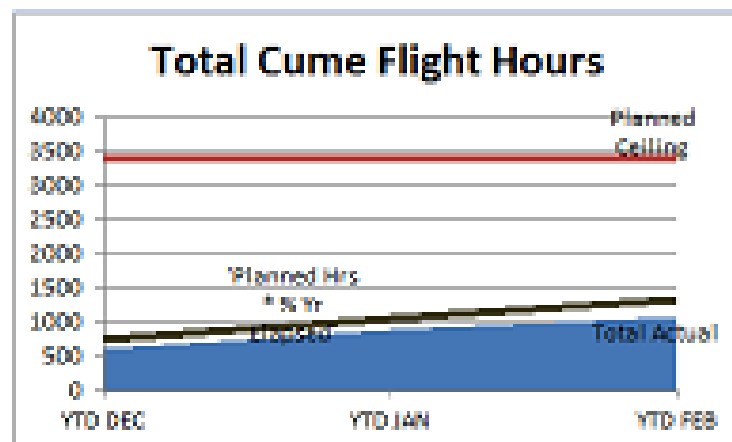
Excel Web Access - AOASummary [2]



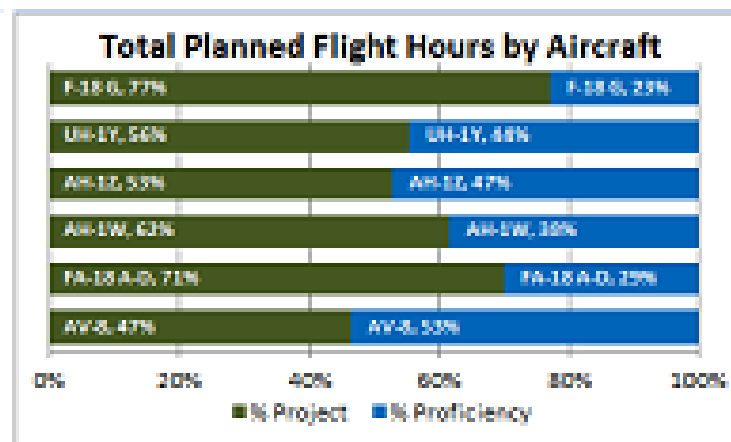
Excel Web Access - AOASummary [3]



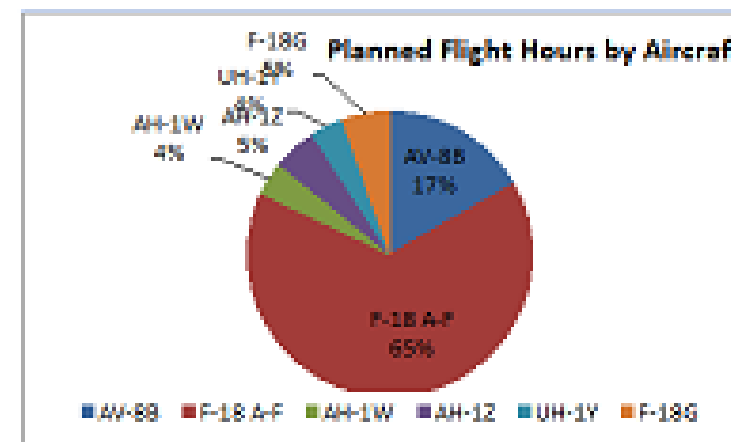
TOTAL CUME FLT HRS CHART



PLN FLT HRS BY AIRCRAFT CHART

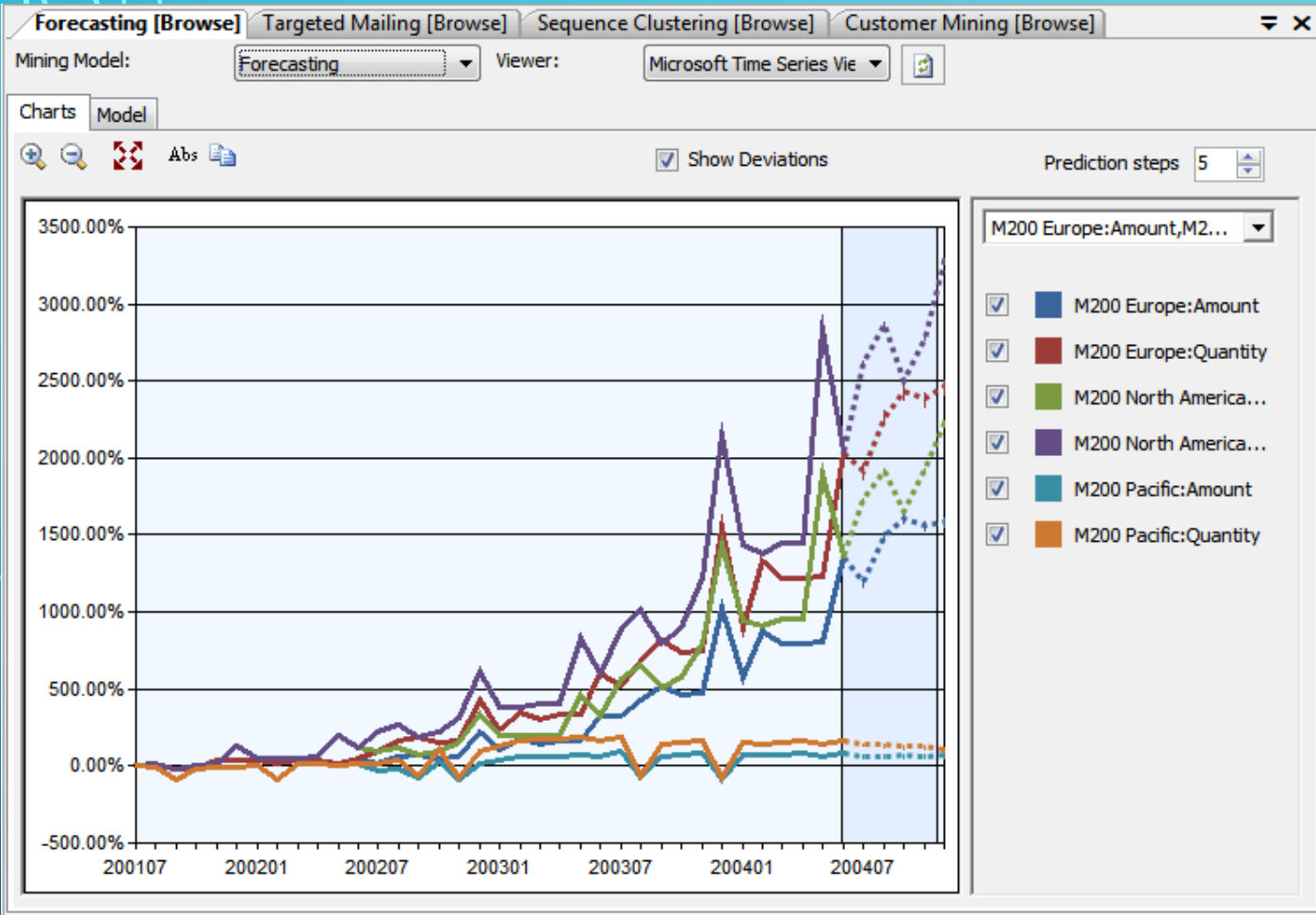


PROPORTION OF FLT HRS BY AIRCRAFT CHART



TACTICAL DASHBOARDS

- Generally Ad-hoc, need may arise quickly
- Focus on one program, initiative or situation
- Leverage PowerPivot, Power View, Excel Services, Report Builder
- Data Mining Add-in for Excel has some interesting visualizations



Customer Mining [Browse] Market Basket [Browse] Customer Mining [Lift Chart] Object Explorer

Mining Model: Customer Clusters Viewer: Microsoft Cluster Viewer

Cluster Diagram Cluster Profiles Cluster Characteristics Cluster Discrimination

Cluster 1: Cluster 1 Cluster 2: Cluster 6

Discrimination scores for Cluster 1 and Cluster 6

Variables	Values	Favors Cluster 1	Favors Cluster 6
Yearly Income	10000 - 30000		
Yearly Income	40000 - 70000	100.000	
Occupation	Manual		
Occupation	Professional		
Number of Cars Owned	2 - 3		
Number of Cars Owned	0 - 1		
Yearly Income	80000 - 90000		
Commute Distance	0-1 Miles		
Occupation	Clerical		
Commute Distance	5-10 Miles		
Occupation	Skilled Manual		
Commute Distance	10+ Miles		
Commute Distance	2-5 Miles		

USING EXCEL COMPONENTS ON THE DASHBOARD

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 image shows the Microsoft Excel interface with the 'Save & Send' ribbon selected. The 'Save to SharePoint' button is highlighted in yellow. A red circle highlights the 'Publish Options' button in the 'Save to SharePoint' group. A red arrow points from this button to the 'Publish Options' dialog box in the foreground.

Save & Send

- Send Using E-mail
- Save to Web
- Save to SharePoint**

File Types

- Change File Type
- Create PDF/XPS Document

Save to SharePoint

Save to a SharePoint site to collaborate with other people on this workbook

Publish Options

Recent Locations

- AnalyticsReports
http://talmas-m4500:30000/AnalyticsRe...
- SharedDocuments
https://portal.microlinkllc.com/Services...

Locations

- Browse for a location

Save As

Publish Options dialog box:

Show Parameters

Only the selected items are shown by Excel in the browser. The entire workbook is always shown in Excel.

Items in the Workbook

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

OK Cancel

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 grid of web part options. 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, there is a dropdown menu labeled 'Add Web Part to:' with 'Top Left Zone' selected.

PUBLISHING EXCEL WORKBOOKS AND EXCEL SERVICES WEB PARTS

System Account ▾

Right Zone

Select an Asset -- Webpage Dialog

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

All Documents ▾

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

Location (URL): /AnalyticsReports

OK Cancel

Excel Web Access - ProjectBurndown [1]

Workbook Display

Workbook: http://talmas-m4500:30000/A...

Named Item: BurndownChart

Toolbar and Title Bar

Title Bar:

- Autogenerate Web Part Title
- Autogenerate Web Part Title URL

Type of Toolbar: Full ▾

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

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

REPORTING SERVICES REPORT AS WEB PART

Site Actions | Browse | Page | System Account

Author Portal | Project Dashboard

Author Portal | CampaignPlan | Knowledge Management Portal | Scrappers | Dashboard Designer | IMVB | Project Management Site | Search this site...

Report Viewer - Project by Investment Type and JCA

Number of Projects by Investment Type and JCA Area

JCA Area	Number of Projects
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	Green Circle
Budget	3	2	Yellow Triangle
Resources	3	1	Red Diamond
Issues	3	2	Yellow Triangle
Risks	3	3	Green Circle

Site Content

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 ON THE DASHBOARD



This example is from the Contoso Sample Data

PERFORMANCEPOINT DASHBOARD DESIGNER

The screenshot displays the PerformancePoint Dashboard Designer interface. The window title is "Untitled - Dashboard Designer". The ribbon includes "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).

The "Workspace Browser" on the left shows a tree structure:

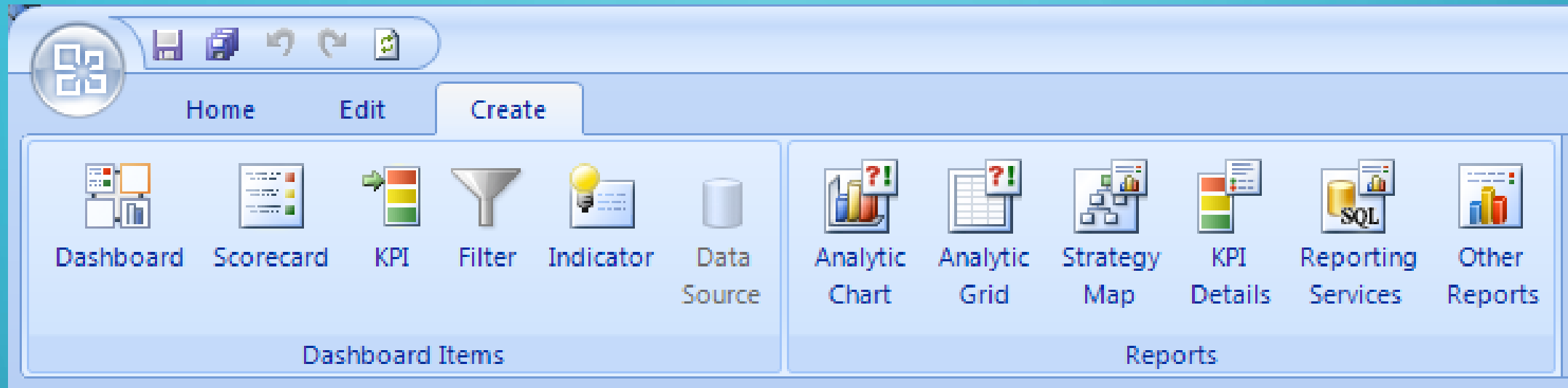
- UntitledWorkspace
 - Data Connections
 - PlanningCube
 - PerformancePoint Content
 - FY Budget by Sponsor
 - New Report
 - TestExcel - Burndown Char

PerformancePoint Content

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

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

PERFORMANCEPOINT 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 ranges 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 "Date" dimension in the Details pane and the "Date Fiscal_Hierarchy" field in the Series table.

Workspace Browser:

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

Design Tab:

Measures: **Required Amount Total**

Details Pane:

- (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 Table:

Series	Bottom Axis	Background
Resource Sponsor Name	Date Fiscal_Hierarchy	

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

PERFORM

The screenshot displays the Microsoft Dynamics CRM Dashboard Designer interface. The main window is titled 'Untitled - Dashboard Designer' and shows a dashboard for 'Comprehensive Transition Plans'. The dashboard includes a table for 'Actual and Targets' and a 'Data Mappings' section. A 'Dimensional Data Source Mapping' dialog box is open in the foreground, showing the configuration for the 'Project Portfolio Count' measure.

Dashboard Designer Interface:

- Menu:** Home, Edit, Create
- Clipboard:** Paste, Copy
- Workspace:** Add Lists, Add Items, Remove, Refresh
- Item:** Properties, Permissions, Rename, Delete
- Changes:** Compare Item, Validate Item, Mark Differences
- Import:** Import Items

Workspace Browser:

- UntitledWorkspace
- Data Connections
- PlanningCube
- PerformancePoint Content
- WWR
- mgt
- Comprehensive Transi...

Comprehensive Transition Plans - Actual and Targets:

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 Dialog:

Select a measure: Project Portfolio Count

Select a dimension:

- New Dimension Filter
- New Time Intelligence Filter
- X

Name	Default
OPR Organization.OPR Organization Name	Default Member (ALL)
Project Portfolio.Primary Mission Major Function Suppor...	Default Member (All)

Aggregate members by: Default

Use MDX tuple formula

Buttons: Change Source..., OK, Cancel

PERFORMANCEPOINT SCORECARD

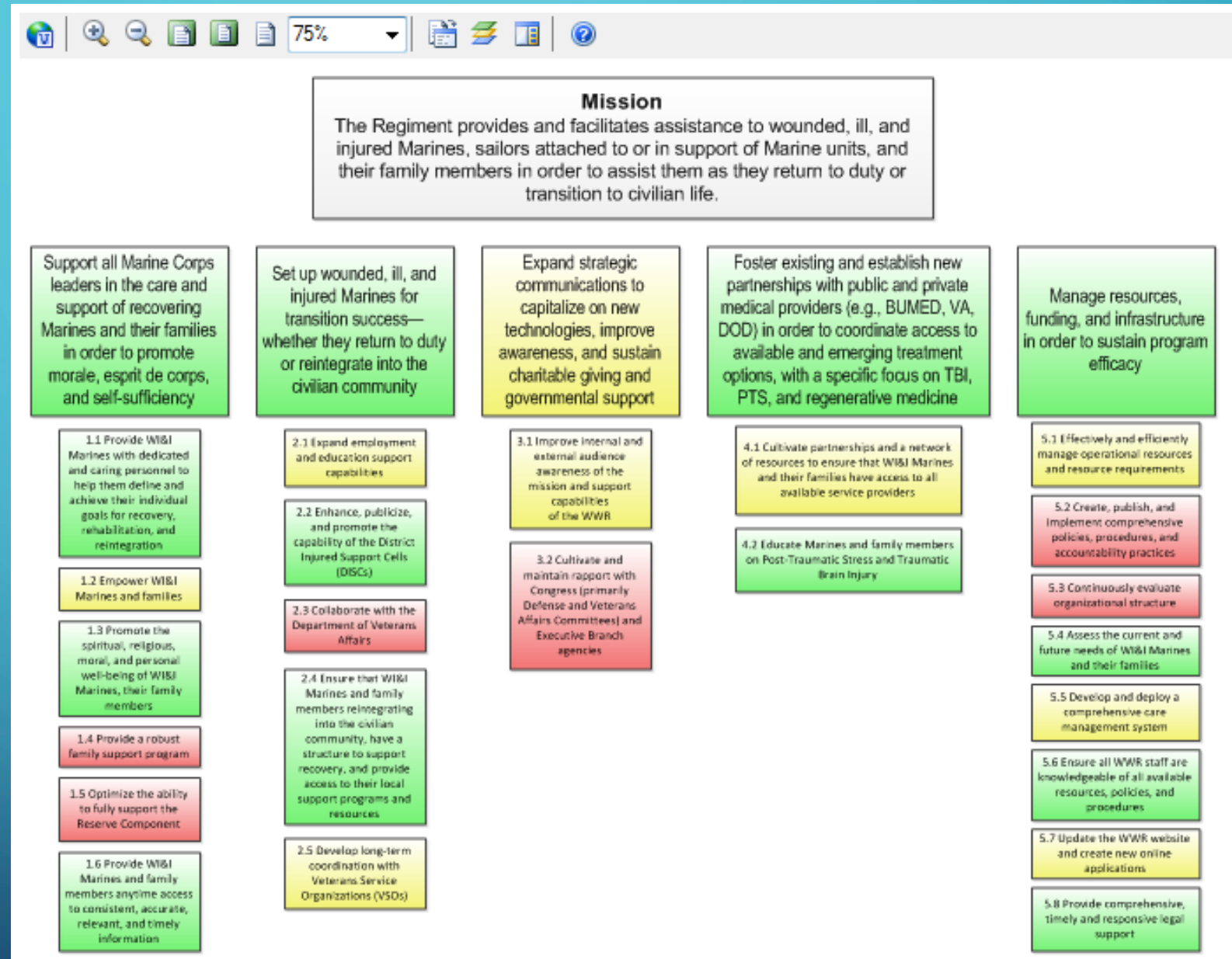
**Drag and drop KPIs
Properties & Dimensions**

	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	▲

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 displays the 'Strategy Map Editor' application. The main window shows a strategy map with a 'Mission' box at the top and several strategic initiatives below it. A red circle highlights the 'Connect Shape' button in the toolbar. A 'Connect Shape' dialog box is open, showing a table of KPIs and their status. The dialog box also includes a 'Connect' button, a checked checkbox for 'Show KPI name in shape text', and a 'Close' button. At the bottom right of the main window, there are 'Apply' and 'Cancel' buttons.

Strategy Map Editor

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

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

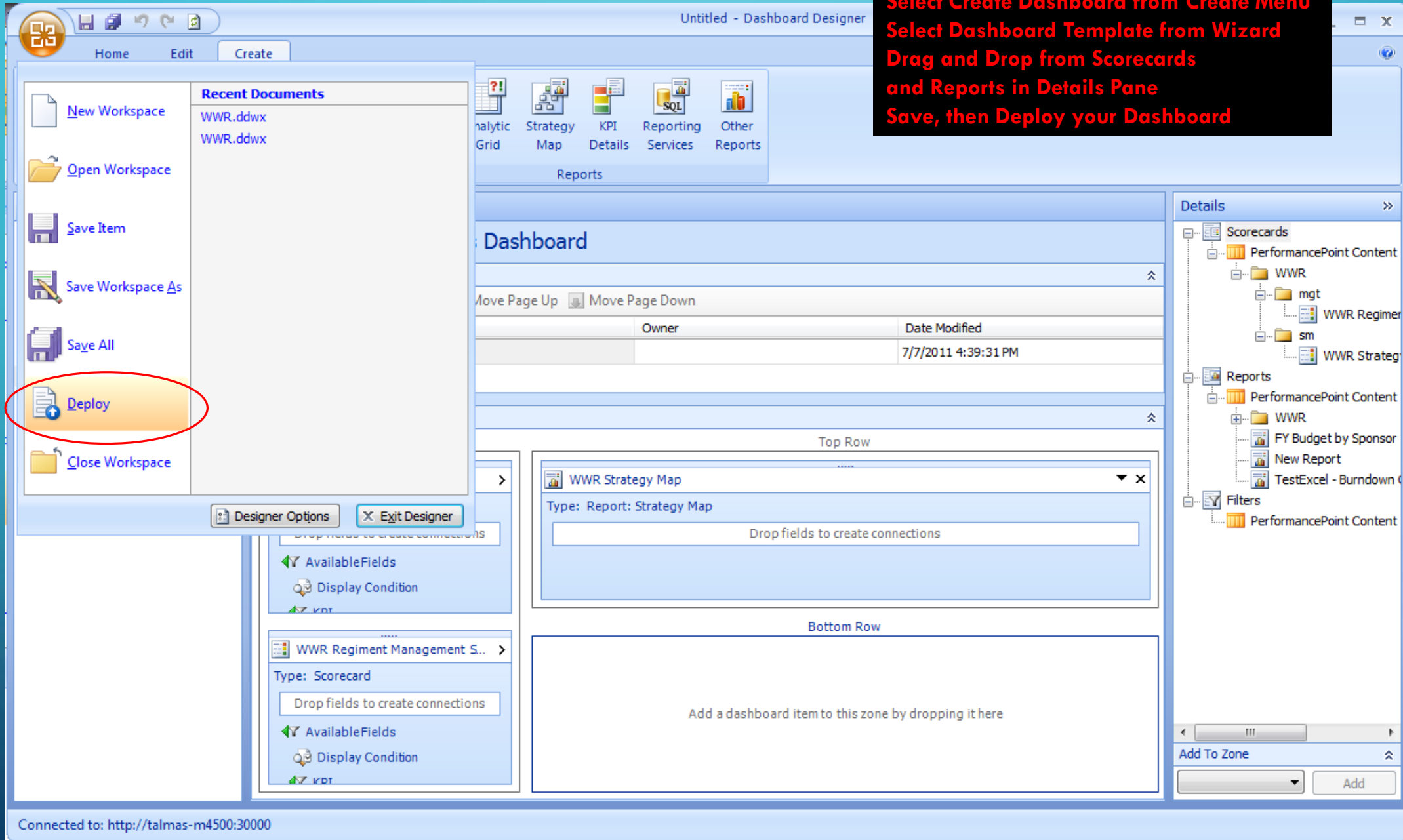
- Create the Strategy Map Report
- Import the Visio File
- Select a shape
- Click Connect Shape button on toolbar
- Select the KPI from the Connect Shape dialog box

1.2 Empower WI&I Marines and families

2.3 Collaborate

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 shows the SharePoint interface for adding and viewing PerformancePoint web parts. At the top, the 'Page Tools' ribbon is visible with tabs for 'Site Actions', 'Browse', 'Page', and 'Insert'. The 'Insert' tab is active, showing various web part categories and a list of PerformancePoint web parts: PerformancePoint Filter, PerformancePoint Report, PerformancePoint Scorecard, and PerformancePoint Stack Selector. A green callout bubble points to the 'PerformancePoint Report' web part, stating: "PerformancePoint Dashboard components can be added to any Dashboard". Below the gallery, the 'PerformancePoint Report' web part is added to the page. The 'Add a Web Part' button is highlighted. The report viewer displays a 'Report Viewer - Project by Investment Type and JCA' with a navigation bar and a chart titled 'Number of Projects by Investment Type and JCA Area'. Below the chart, the text 'Number of Portfolios by JCA' is visible.

PerformancePoint Dashboard components can be added to any Dashboard

PerformancePoint Report

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.

Add Web Part to: Left Column

Add Cancel

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.

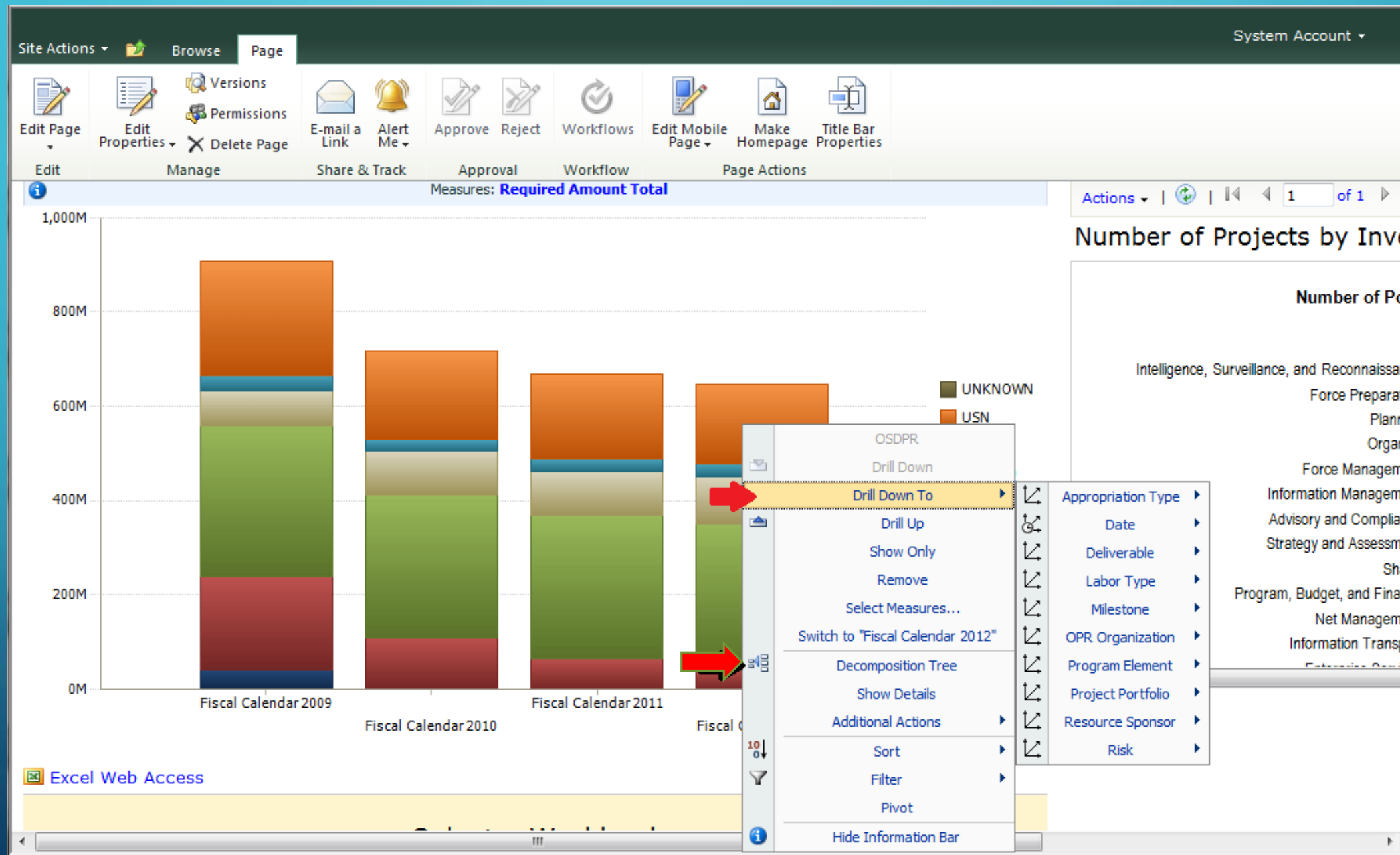
Report Viewer - Project by Investment Type and JCA

Actions | 1 of 1 | FindNext | 100%

Number of Projects by Investment Type and JCA Area

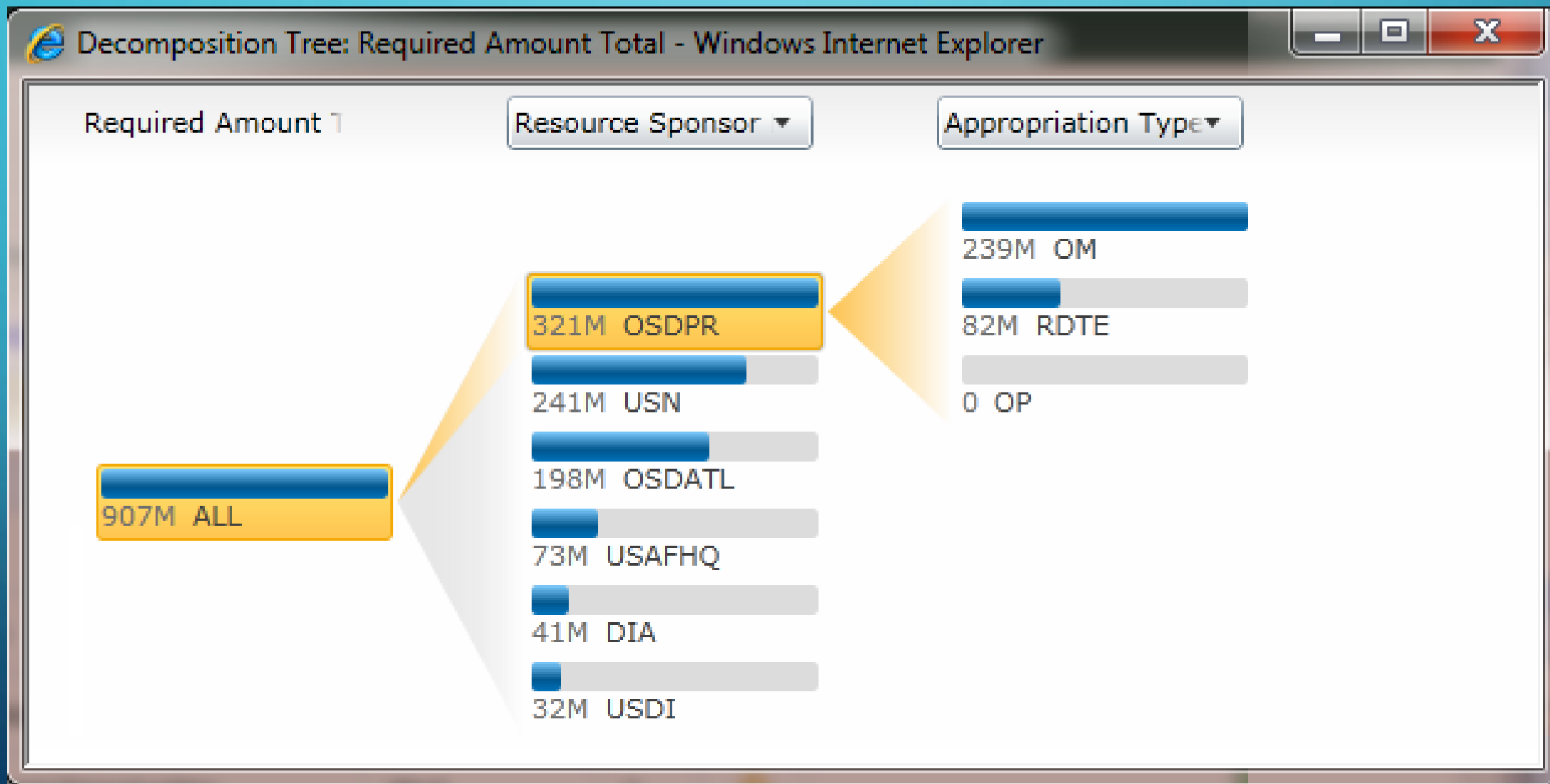
Number of Portfolios by JCA

INTERACTIVE PERFORMANCE POINT REPORTS



INTERACTIVE PERFORMANCEPOINT REPORTS

- Decomposition Tree – shows part to whole



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?

Tricia Wilcox Almas

- Email me to get your dashboard design template or download from my blog



Join Me on



TriciaWilcoxAlmas@yahoo.com

Blog <http://triciawilcoxalmas.wordpress.com>



*Welcome to
SharePoint
Saturday
Virginia Beach
Jan 11, 2014*

7:30 - 8:30 - Registration(Lobby)
Breakfast (Sponsor Hall)

8:30 - 8:45 - Welcome

9:00 - 10:15 – 1st Sessions

10:30 - 11:45 – 2nd Sessions

11:45 - 12:30 – Lunch
(Sponsor Hall)

12:30 - 1:45 - 3rd Sessions

2:00 - 3:15 – 4th Sessions

3:30 - 4:45 – 5th Sessions

5:00 - 5:30 - Closing &
Giveaways

Platinum Sponsors



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Silver Sponsors

