How to Build a Management Dashboard with SharePoint

Dux Raymond Sy, PMP
Presentation Objectives

- After completing this presentation, you will learn how SharePoint can be leveraged to build a management dashboard by:
  - Displaying relevant reports with custom views
  - Developing visually relevant key performance indicators (KPI) using out of the box tools and/or third party products
  - Automate status reporting with SharePoint alerts
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Agenda

- What is a Management Dashboard?
- Identify Metrics
- Create SharePoint Lists
- Displaying Visual Indicators with Web Parts
- Automated Notification with Alerts
- Questions and Answers
Management Dashboard

- A management reporting tool that is used to
  - Provide interactive summary of a management report
  - Consolidates, aggregates, and arranges measurements in a visual representation
  - Displayed on a single screen so information can be monitored at a glance
Why SharePoint?

- Built-in capabilities to easily create dashboards
Examples: Recovery.gov + VDOT
4 Steps to Create a Dashboard in SharePoint

1. Identify Metrics
2. Create SharePoint Lists
3. Deploy Visual Indicators with Web Parts
4. Automate Notification with Alerts
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#1: Identify what you want to measure

- What critical elements of your organization do you measure?
  - Schedule
  - Budget
  - Risks
  - Performance
  - ________________

The only man who behaved sensibly was my tailor; he took my measurement anew every time he saw me, while all the rest went on with their old measurements and expected them to fit me.

—George Bernard Shaw, Essayist and Nobel laureate
Example: Project Management

- Good estimation culture
  - Duration
  - Effort
  - Resource

- Project Tracking
  - Comparing planned vs actual
  - Metrics (% vs actual time/cost/duration)

- Project Reporting
  - Establish Key Performance Indicators (KPI)
  - Metrics (what constitutes on schedule vs late?)
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#2: Create SharePoint List

- Create and define relevant lists
  - Milestones
  - Budget
  - Project Schedule

- Define custom views if relevant
  - Used to match user or group interest
  - For example, we are interested in viewing project documents that were modified by the sponsor during project initiation
Example: Project Milestone List

<table>
<thead>
<tr>
<th>Milestone</th>
<th>WBS</th>
<th>Baseline Finish</th>
<th>Actual Finish</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Identified</td>
<td>1.4</td>
<td>3/18/2009</td>
<td>3/18/2009</td>
<td>0</td>
</tr>
<tr>
<td>Suppliers Identified</td>
<td>1.8</td>
<td>4/20/2000</td>
<td>4/20/2000</td>
<td>0</td>
</tr>
<tr>
<td>Recruitment Completed</td>
<td>1.7</td>
<td>3/18/2006</td>
<td>3/18/2006</td>
<td>0</td>
</tr>
<tr>
<td>Cafe Opens</td>
<td>1.6</td>
<td>11/4/2000</td>
<td>11/7/2000</td>
<td>1</td>
</tr>
</tbody>
</table>
Demonstration

Creating a Project Milestone List
Agenda

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#3: Create Dashboard with Web Parts

- Web Parts are customizable software component
  - Created in a Microsoft development environment

- Benefits
  - Reduces complexity of integrating new site functionalities for non-programmers
  - Common Web Parts are available from Microsoft and third-party providers

- Web Parts available for visual indicators
  - MOSS KPI Web Parts
  - Third-Party Web Parts
MOSS KPI Web Parts

- Available out of the box with the Record Center site template

- To leverage KPI Web Parts
  - Relevant list should be available
  - Create a KPI List
  - Display the KPI Web Part
Example: Defining the Milestones KPI List
Example: Viewing the Milestones KPI List

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Value</th>
<th>Goal</th>
<th>Warning List</th>
<th>Milestones</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Initiated 1/6</td>
<td>1.2</td>
<td>3/12/2009</td>
<td>3/14/2009</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Location Identified 1/4</td>
<td>1.4</td>
<td>3/10/2009</td>
<td>3/13/2009</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Suppliers Identified 1/5</td>
<td>1.5</td>
<td>4/29/2009</td>
<td>4/30/2009</td>
<td>-4</td>
<td></td>
</tr>
<tr>
<td>Recruitment Completed 1/7</td>
<td>1.7</td>
<td>3/18/2009</td>
<td>3/18/2009</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Cafe Opens 1/9</td>
<td>1.9</td>
<td>11/9/2009</td>
<td>11/17/2009</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
Example: Displaying the Milestones KPI WP
Demonstration

Defining Visual Indicators with MOSS KPI web parts
What if we are using WSS?

- WSS does not have KPI web parts available out of the box

- Options
  - Purchase Third Party web parts
  - Code JavaScript or Jquery with Content Editor Web Part
    - Details can be found at EndUserSharePoint.com
  - Utilize SharePoint Designer
  - Utilize Visual Studio .NET
Example: Bamboo Chart Plus Web Part
Additional Third-Party Dashboard Tools

- Third-party web parts are available to create dashboards
  - Bamboo Solutions
  - Dundas
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Automated Reminders

- SharePoint alerts
  - Receive e-mail notifications when list items change
- How can this feature be valuable?
Example: Setting Alerts
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Questions?

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