

# Creating Simple Dashboards Using Out of the Box Web Parts

# Housekeeping

- Please remember to complete and turn in your evaluation form. The forms help us improve future events and make you eligible for prize drawings.
- Prize drawings will take place in the large conference room after the last session of the day.
- Follow SharePoint Saturday Columbus on Twitter @spscolumbus and hashtag #spscolumbus



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# Creating Simple Dashboards Using Out of the Box Web Parts

Jennifer Mason

Senior SharePoint Consultant

SharePoint911

[jennifer.mason@sharepoint911.com](mailto:jennifer.mason@sharepoint911.com)



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# About me...

- SharePoint Consulting

- <http://www.sharepoint911.com>

- Blog

- <http://www.sharepoint911.com/blogs/jennifer>

- SharePoint Training

- <http://www.sharepoint911.com/services/Pages/Training.aspx>

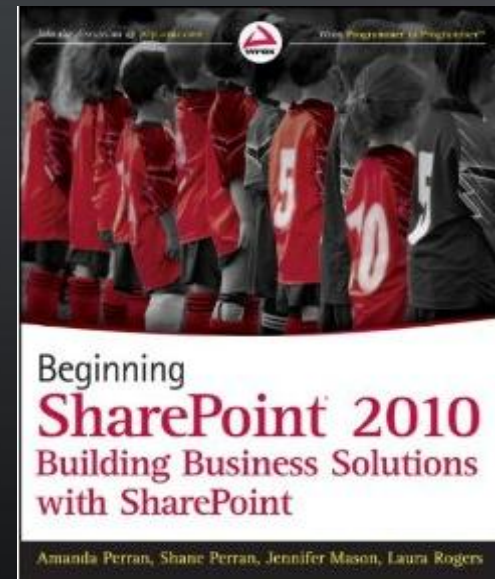
- Twitter

- [@jennifer\\_mason](https://twitter.com/jennifer_mason)



# Latest Books

- Beginning SharePoint 2010: Building Business Solutions with SharePoint



# Session Agenda

- Dashboards
- Examples
- Creating Dashboard



# Dashboards

- Dashboard is a term now being used generally to refer to a web technology based page on which real time information is collated from various sources in the business. The metaphor of a dashboard is adopted here to emphasize the nature of the data being displayed on the page, it is a real-time analysis as to how a business is operating, just like on an automobile dashboard real time information is displayed about the performance of that vehicle.



# SharePoint Dashboards

- Combine Different Items to create dashboards
- SharePoint has
  - Pages
  - List & Library Web Parts
  - Functional Web Parts
  - Excel Services Web Parts
  - Visio Services Web Parts



# Project Dashboard Example

## Project Dashboard

### Select a Project

Select	Title
	<a href="#">Project 1</a> <small>NEW</small>
	<a href="#">Project 2</a> <small>NEW</small>
	<a href="#">Project 3</a> <small>NEW</small>

### Project Details

Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci.

Project Manager:



CONTOSO\jennifer.mason  
CONTOSO\jennifer.mason  
SharePoint Consultant

### Tasks

Type	Title	Assigned To	Status	Due Date
	<a href="#">Task 2</a> <small>NEW</small>	CONTOSO\Administrator	In Progress	6/4/2011
	<a href="#">Task 6</a> <small>NEW</small>	CONTOSO\jennifer.mason	In Progress	6/11/2011

### Shared Documents

Type	Name
	<a href="#">Test Document 10</a> <small>NEW</small>
	<a href="#">Test Document 3</a> <small>NEW</small>
	<a href="#">Test Document 6</a> <small>NEW</small>
	<a href="#">Test Document 9</a> <small>NEW</small>

### Team Discussion

Subject  Created By  Replies

There are no items to show in this view of the "Team Discussion" board. To add a new item, click "New".



[+ Add new discussion](#)




# Task Dashboard Example

## Example 1: Task Dashboard






### Tasks Due this Week

Title	Due Date
Task 8 	6/13/2011
Task 7 	6/12/2011
Task 6 	6/11/2011
Task 5 	6/10/2011
Task 4 	6/9/2011

### Overdue Tasks

Title	<input type="checkbox"/> Assigned To	Due Date
Task 2 	CONTOSO\Administrator	6/4/2011

### Tasks Assigned to Me

Title	Priority	Due Date
Task 2 	(2) Normal	6/4/2011
Task 10 	(2) Normal	6/15/2011
Task 13 	(2) Normal	6/18/2011
Task 14 	(2) Normal	6/19/2011
Task 16 	(2) Normal	6/21/2011

### Tasks Calendar

Tasks Calendar

SEARCH  
LINK TO

LOG IN  
(5)

# Building the Dashboard

1. Create Lists
2. Create List Associations (Lookup Columns)
3. Create Custom Views
4. Create Page
5. Add & Configure Web Parts on Page
6. Configure Web Part Connections





# Web Part Connections


**Select a Project**

Select	Title
<input type="checkbox"/>	Project 1
<input checked="" type="checkbox"/>	Project 2
<input type="checkbox"/>	Project 3

**Project Details**

Proj Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna.

Project Manager:

 CONTOSO\nicola  
CONTOSO\nicola  
Head Honcho

**Tasks**

Type	Title	Assigned To	Status	Start Date	End Date
Task 1	Task 1	CONTOSO\nicola	Started		
Task 3	Task 3	CONTOSO\jennifer.mason	Started		
Task 5	Task 5	CONTOSO\laura	In Progress	6/10/2011	
Task 7	Task 7	CONTOSO\nicola	Completed	6/12/2011	
Task 9	Task 9	CONTOSO\jennifer.mason	Completed	6/1/2011	

**Shared Documents**

Type	Name
Word Document	Test Document 1
Word Document	Test Document 2
Word Document	Test Document 5
Word Document	Test Document 8

**Team Discussion**

Subject	Created By	Replies	Last Updated
Item 1	CONTOSO\Administrator 1		6/6/2011

**Connections**

- Minimize
- Delete
- Edit Web Part
- Connections**

**Get Filter Values From**

- Project Details
- Team Discussion
- Shared Documents
- Select a Project**

# Demonstration

# Dashboard



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# Thanks for Coming!

- Don't forget to visit my blog:  
<http://blogs.sharepoint911.com/blogs/Jennifer>
- Book:
  - Beginning SharePoint 2010: Building Business Solutions with SharePoint
- Attend Training in Ohio!
  - October 24<sup>th</sup> , email [helpnow@sharepoint911.com](mailto:helpnow@sharepoint911.com) for details!



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