

# Creating Interactive Reports & Dashboards with SharePoint 2007

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# Webinar Chairs

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# Presentation Outline

## Introduction

Introduction to Dashboards  
Reporting Paradigm Shift  
The Problem with SharePoint  
Why Reporting Projects Fail

*Ivan Giugni*

5 Minutes

*Devereaux  
Milburn*

20 Minutes

Introducing DataParts for SharePoint 2007

*Ivan Giugni*

10 Minutes



## LIVE DEMO

DataParts Demo

*Tomas Tezak*

20 Minutes

Closing and Q&A

*Ivan Giugni*

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# Devereaux Milburn

- President & CEO of Portalogiks Inc.  
([www.portalogiks.com](http://www.portalogiks.com))
- 8 Years SharePoint Life-Cycle Development
- Implemented SharePoint solutions for DHS, Treasury, Commerce, USDA, Energy and the Fortune 500
- SharePoint training solutions employed by Intel, Cisco, Nike, Blockbuster, Army and Air Force
- Invited to frame the state of SharePoint reporting for large enterprises

# What to Expect

- Understand core competencies of a successful dashboard
- Effectively gauge SharePoint's reporting capabilities
- Discover dashboard issues affecting medium to large organizations
- Understand why reporting projects fail
- Bridge the gap between SharePoint & reporting
- Provide enterprise reporting and visualization as a service

# Executive Dashboard White Paper



## Executive Dashboards

**ABOUT THE AUTHOR**  
 Devenez Mibum is the author of VTC for SharePoint 2007. As the lead SharePoint architect and developer, he serves as an advocate of solutions, tools, and techniques that promote the advancement of information systems, collaboration, and internal communications through proper adoption of SharePoint technologies.  
 His training solutions have been employed at Nike, Intel, Cisco, Medtronic and Doug Allan Hamilton to successfully onboard millions of users and accelerate adoption rates. In addition to training other SharePoint consultants and IT shops on how to implement SharePoint, the SharePoint Developers Academy is taught in multiple countries to quickly train web teams with the skills, discipline and theory to govern and deploy enterprise-class SharePoint portals.

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Executive Dashboards are a customized web-interface that is accessible only by the executive that is authorized to view particular organizational data and information. Whether it is just a single page or a gateway to reports that support the executive's needs, these also provide a dynamic way to see the state of program or department. They allow their owners immediate access to information and reports and to issue RTI or visit multiple sources to obtain information.

Executive Dashboards often function like the eyes and ears of an enterprise. They serve as a secure website of the single gateway which unifies access to all enterprise information and applications for that site. The complexity and variety of information and services available to a user into a single interface user's needs and access rights. Focused on delivering timely and relevant information based on Executive Dashboards are custom manifestation of an enterprise portal that has the ability to draw data from both internal and external sources.



Project Review Dashboard



Business Intelligence & Decision Support

**CHARACTERISTICS & PROPERTIES OF EFFECTIVE DASHBOARDS**

When using dashboards, there must first be a structure of supporting reporting applications, tools, and data feeds used on a recurring basis. Without the critical component, an executive dashboard becomes an expensive waste of time.

Effective dashboards consist of a summary-level in an organization and often leverage enterprise-class (in an SharePoint Portal Server). Deployments created by impulse often are short lived due to the loss of the integrity of their data sources. Dashboards are usually implemented in the end and of an enterprise level of Integrated Managed Services has been established across the enterprise. Once there is a framework of sites and applications, and a system that treat users as first-class objects, information is packaged up to a dashboard for reporting.

It is not enough to produce a good executive dashboard. Many COO's products offer them as a service to increase their web-services visibility. However, they are not usually positioned to provide

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In their view, each web-part has a defined query that it makes against a database, library, or application, and the resultant data depends on the business rules, objects, and reporting preference of the executive. If graphs are always helpful for presentation, but advanced in application technologies provide more reporting capabilities. Each web-part may query a different source, however several web-parts will be information that can be correlated against other web-parts. In this scenario, drilling down into one web-part allows the others to provide the supporting information.



"For an example of web-part connections please view the dashboard sample titled 'Project Review Dashboard'."

**CHARACTERISTICS & PROPERTIES OF EFFECTIVE DASHBOARDS**

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**Intelligence & Decision Support**

Intelligence and decision support dashboards are designed to consolidate access to content, application reports through a single interface. In the below example, a user can review and drill down through Key Performance Indicators (KPIs) in a single interface. The top web-part shows the status of 10 key indicators and each indicator is in a positive status. By clicking each indicator in the top web-part, the bottom web-part will top-level for that market. Additionally, each field can be sub-ported to forward charts directly from the top-level detailed review of how the risk will affect business.



**Project List**

When clicking a department from the Department List the department's catalog of projects is displayed in the Project List web-part.

The Department Project List displays all projects for that department grouped by the status of the project. Additionally, key metrics about the funding are displayed across the columns for each project.

Clicking on a particular project's detail link, the right two web-parts call the corresponding Project Manager's name and a list of their projects as well as displaying the conditionally formatted status.

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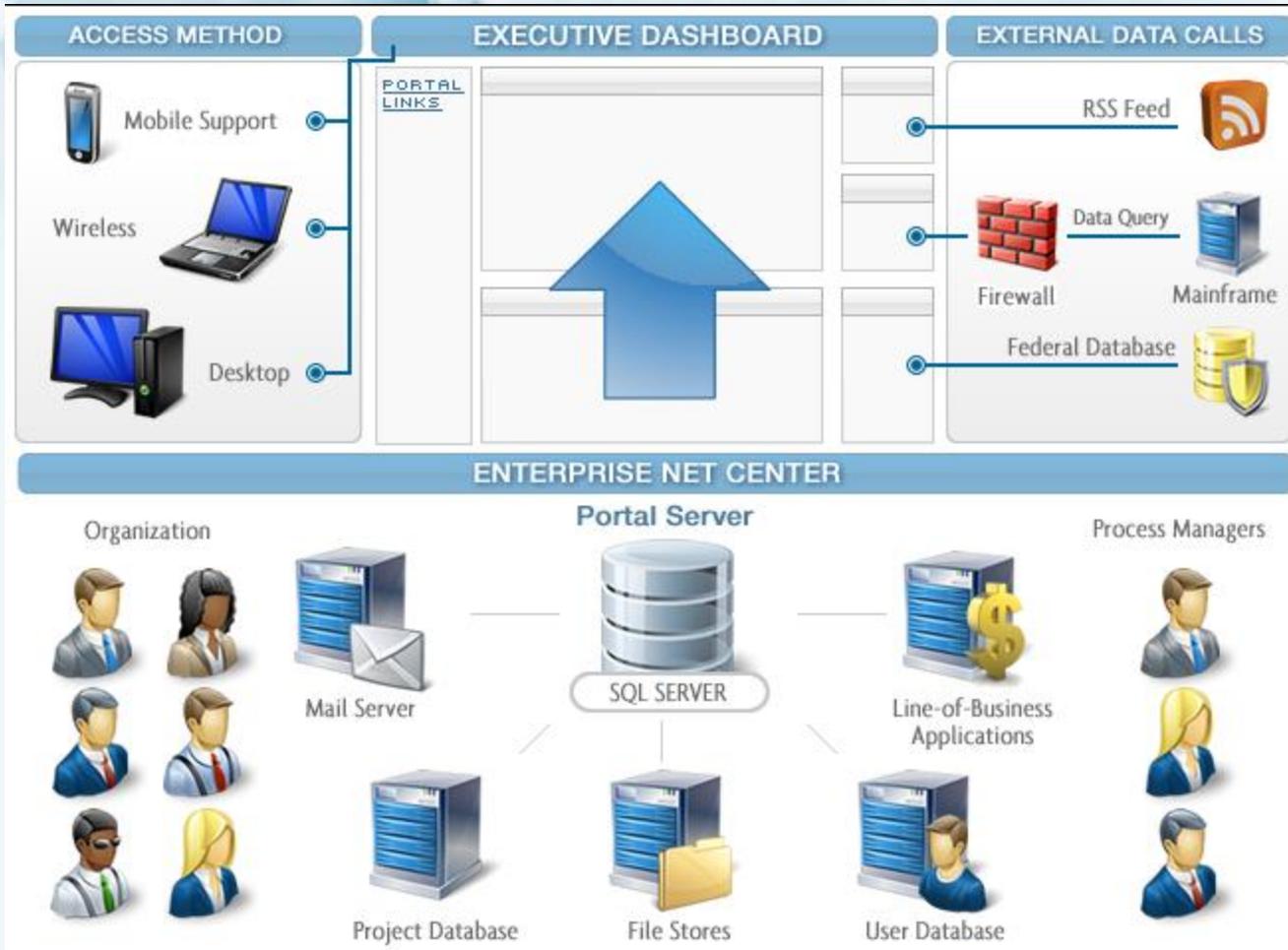
# What are Dashboards?

- Interactive
- Interconnected
- Real-time
- Multi-variable analysis (charts, maps, lists)
- Single Variable Analysis (gauges, digital panels)
- Components can be grouped and arranged

# Principles of Dashboards

1. Consolidation
2. Elevation
3. Reporting
4. Metering
5. Formatting
6. Interchange

# Dashboard Model



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# Paradigm Shift

## *“The Reporting New World Order”*

# Enterprise Reporting Issue Tracker

2001

- Not enough content
- Not enough adoption
- Lack of web-based tracking tools

2003

- No enterprise deployment
- Lack of business applications
- No citizenry of users or culture of use

2007

- Too much data
- Absence of reporting tools for web services
- No turn-key visualization solutions

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# SharePoint Gap Analysis

Enterprise  
Extranet

Document  
Management

Workflows

Tracking  
Solutions

Web Forms

Reporting

1. Charts
2. Maps
3. Gauges
4. Digital Panels
5. Advanced Lists

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# Organizational Challenges

- Lack of data visualization
- Lack of interactive reporting
- Lack of repeatable solutions
- Implementation costs are prohibitive
- Lack of a solution all classes of SharePoint users can employ

# SQL Server Reporting Services

- Implementation Cost
- SQL Resource Consumption
- Specialty Designer Tool  
(Business Intelligence Development Studio)
- Training
- Technical Development of Writing Reports
- Is not a Dashboard tool

# Stand Alone Reporting Tools (Crystal Reports, Tableau, etc.)

- Not a Natural Fit for SharePoint
- Requires additional servers/infrastructure
- Requires development and training
- Subject to uncertain road maps for SharePoint

# Flash & Silverlight

- Cost to develop
- Lack of browser support
- Lack of adoption
- Not repeatable
- No mobile access

# Home Grown Solutions

- Origination cost
- Loss of staff productivity
- Not tailored for SharePoint
- Not repeatable
- Subject to errors and maintenance
- Creates false dependencies (staff & tool kits)
- Attrition – Knowledge Loss

# One-Off Web Parts

- Not always designed for SharePoint
- Maintenance cost
- Only a partial solution
- Not interoperable with each other
- Reporting or Charting, not both

# Performance Point

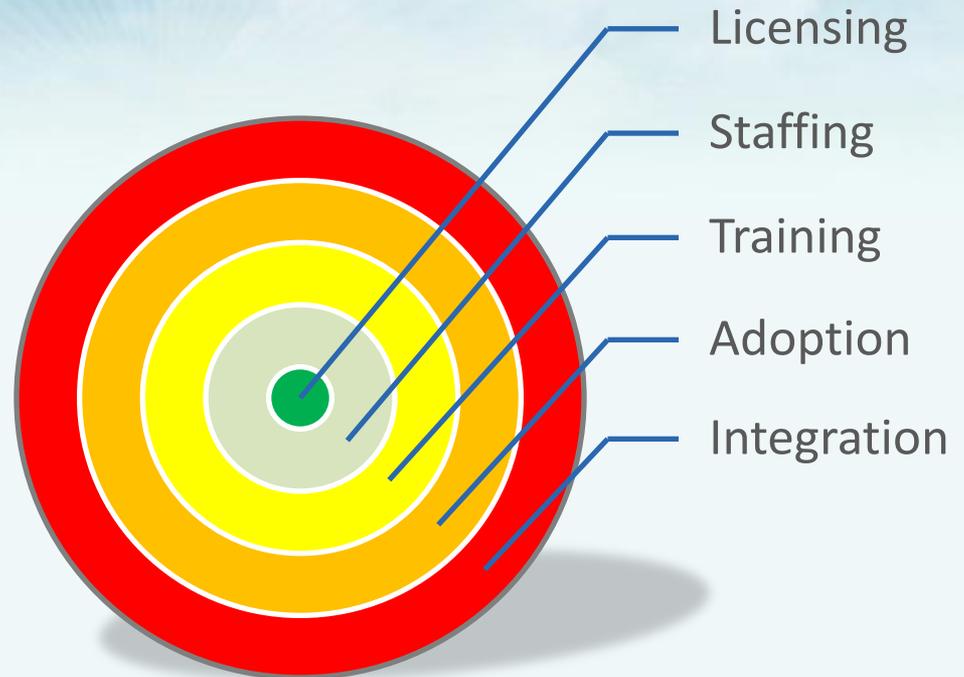
- Licensing (\$20K+)
- Hardware/Appliance Cost
- Staffing & Development Cost
- Myriad of System Requirements

# Performance Point Requirements

Microsoft Office PerformancePoint Server 2007	Hardware requirements	Supported operating systems	Additional requirements						
<b>Clients</b>		<b>Servers</b>							
<b>Dashboard Designer</b>	<ul style="list-style-type: none"> <li>Minimum</li> <li>1 - Pentium 3 CPU</li> <li>1 GB RAM</li> <li>512 MB Available Disk Space</li> <li>100 Mb Network Interface</li> <li>Recommended</li> <li>1 - Dual Core 32-bit CPU (x86)</li> <li>2.5 GHz</li> <li>2 GB RAM</li> <li>2 GB Available Disk Space</li> <li>100 Mb Network Interface</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Server and R2)</li> <li>Microsoft Server and 64-bit</li> <li>Window (exclud</li> <li>Microsoft (Busine N, Ente and 64-bit</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Windows Server 2003 (SP2 and R2), 32-bit and 64-bit</li> <li>Microsoft Windows Server 2008, 32-bit and 64-bit</li> <li>Minimum</li> <li>1 - Pentium 4 CPU</li> <li>2.5 GHz</li> <li>2 GB RAM</li> <li>1 GB Available Disk Space</li> <li>100 Mb Network Interface</li> <li>Recommended</li> <li>2 Dual-Core 64-bit CPUs (x64)</li> <li>4 GB RAM</li> <li>5 GB Available Disk Space</li> <li>7200 RPM IDE Drive</li> <li>1000 Mb Network Interface</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft .NET Framework 2.0</li> <li>Microsoft ASPNet 2.0</li> <li>SQL Native Client 9.0</li> </ul>	<b>Scorecard Viewer for Reporting Services</b>	<ul style="list-style-type: none"> <li>Minimum</li> <li>1 - Pentium 4 CPU</li> <li>2.5 GHz</li> <li>2 GB RAM</li> <li>512 MB Available Disk Space</li> <li>100 Mb Network Interface</li> <li>Recommended</li> <li>2 Dual-Core 64-bit CPUs</li> <li>4 GB RAM</li> <li>5 GB Available Disk Space</li> <li>7200 RPM IDE Drive</li> <li>1000 Mb Network Interface</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Windows Server 2003 (SP2 and R2), 32-bit and 64-bit</li> <li>Microsoft Windows Server 2008, 32-bit and 64-bit</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Office PerformancePoint Monitoring Server 2007</li> <li>Microsoft SQL Server 2005 SP2</li> </ul>	
<b>Add-in for Report Designer</b>	<ul style="list-style-type: none"> <li>Minimum</li> <li>1 - Pentium 3 CPU</li> <li>1 GHz</li> <li>1.5 GB RAM</li> <li>512 MB Available Disk Space</li> <li>100 Mb Network Interface</li> <li>Recommended</li> <li>1 - Dual Core 32-bit CPU (x86)</li> <li>2.5 GHz</li> <li>2 GB RAM</li> <li>2 GB Available Disk Space</li> <li>100 Mb Network Interface</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Server and R2)</li> <li>64-bit</li> <li>Window (exclud</li> <li>Microsoft Server and 64-bit</li> <li>Microsoft (Busine N, Ente and 64-bit</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Windows Server 2003 (SP2 and R2), 32-bit and 64-bit</li> <li>Windows XP (excluding XPe), SP2</li> <li>Microsoft Vista™ (Business, Business N, Enterprise) 32-bit and 64-bit</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Windows Server 2003 (SP2 and R2), 32-bit and 64-bit</li> <li>Microsoft Windows Server 2008, 32-bit and 64-bit</li> <li>Windows XP (excluding XPe), SP2</li> <li>Microsoft Vista™ (Business, Business N, Enterprise) 32-bit and 64-bit</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Internet Info Services (IIS) 5.1 (XP, 7.0 with IIS Metabase configuration compatib Isolation Mode</li> <li>Microsoft .NET Framew</li> <li>Microsoft ASPNet 2.0</li> <li>Microsoft ASPNet AJAX</li> <li>SQL Server 2005 Anal Management Objects 5</li> <li>SQL Server 2005 Nativ SP2</li> <li>SQL ADOMD.NET 9.0</li> <li>msxml6.msi + updates</li> <li>SQL Server 2005 SP2 Server OLEDB 9.0 Pro</li> <li>SQL Server 2000 Anal Service Pack 4 - Build Client Systems (to use 2000 Analysis Services source)</li> </ul>	<b>Monitoring System database</b>	<ul style="list-style-type: none"> <li>Minimum</li> <li>1 - Pentium 4 CPU</li> <li>2.5 GHz</li> <li>2 GB RAM</li> <li>1 GB Available Disk Space</li> <li>100 Mb Network Interface</li> <li>Recommended</li> <li>2 Dual-Core 64-bit CPUs (x64)</li> <li>4 GB RAM</li> <li>5 GB Available Disk Space</li> <li>RAID5</li> <li>1000 Mb Network Interface</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Windows Server 2003 (SP2 and R2), 32-bit and 64-bit</li> <li>Microsoft Windows Server 2008, 32-bit and 64-bit</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft SQL Server 2005 SP2 Standard Edition</li> </ul>
<b>Dashboard Client (IE)</b>		<ul style="list-style-type: none"> <li>Microsoft Server 2l R2), 32-b</li> <li>Microsoft Server 2l and 64-bit</li> <li>Window (excludin</li> <li>Microsoft (Business Enterpris 64-bit</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Windows Server 2003 (SP2 and R2), 32-bit and 64-bit</li> <li>Microsoft Windows Server 2008, 32-bit and 64-bit</li> <li>Minimum</li> <li>1 - Pentium 4 CPU</li> <li>2.5 GHz</li> <li>2 GB RAM</li> <li>1 GB Available Disk Space</li> <li>100 Mb Network Interface</li> <li>Recommended</li> <li>2 Dual-Core 64-bit CPUs (x64)</li> <li>4 GB RAM</li> <li>5 GB Available Disk Space</li> <li>7200 RPM IDE Drive</li> <li>1000 Mb Network Interface</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Internet Info Services (IIS) 6.0, or IIS Metabase and IIS compatibility, IIS 6.0 I</li> <li>Microsoft Office Sharel 2007 or WSS 3.0 (SP1 Server 2008)</li> <li>Microsoft .NET Framew</li> <li>Microsoft ASPNet 2.0</li> <li>Microsoft ASPNet AJAX</li> <li>SQL Server 2005 Anal Management Objects 5</li> <li>SQL Server 2005 Nativ SP2</li> <li>SQL ADOMD.NET 9.0</li> <li>msxml6.msi + updates</li> <li>SQL Server 2005 SP2 Server OLEDB 9.0 Pro</li> <li>SQL Server 2000 Anal Service Pack 4 - Build Client Systems (to use 2000 Analysis Services source)</li> </ul>	<b>Management Reporter</b>	<ul style="list-style-type: none"> <li>Minimum</li> <li>Pentium III compatible or higher</li> <li>500 MB hard disk available*</li> <li>512 MB RAM</li> <li>Recommended</li> <li>Dual Core 1024 MB RAM</li> </ul>	<ul style="list-style-type: none"> <li>Minimum</li> <li>Windows XP Professional SP2</li> <li>Windows Server® 2003 Standard Edition</li> <li>Recommended</li> <li>Microsoft Vista™</li> </ul>	<ul style="list-style-type: none"> <li>Minimum</li> <li>Microsoft® SQL Server™ 2005 Express Edition</li> <li>Microsoft® SQL Server™ 2000 Service Pack 4</li> <li>Microsoft® Outlook 2003</li> <li>Microsoft® Outlook XP</li> <li>Windows® Mail</li> <li>Microsoft® Outlook Express Recommended</li> <li>Microsoft® SQL Server™ 2005 Required</li> <li>Microsoft® Outlook 2007 Required</li> <li>.NET 2.0, .NET 3.0</li> </ul>	

# Why Reporting Projects Fail

- Performance Point
- SQL Server Reporting Services
- Crystal Reports
- Business Data Catalog
- On-off web parts
- Home Grown Solutions
- Flash & Silverlight



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# Make the Most of Your SharePoint Investment

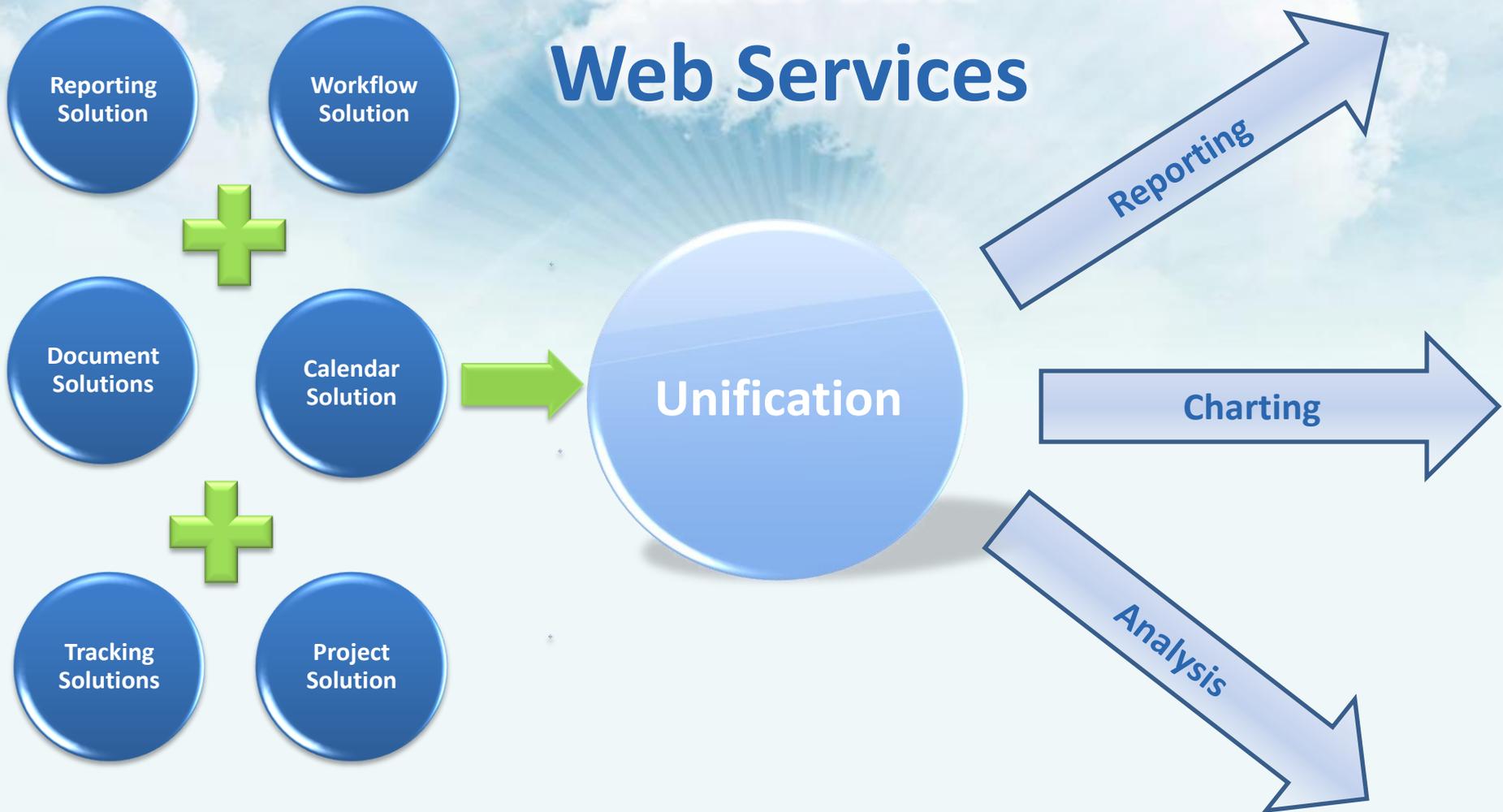
- Last step of integrated web services is reporting
- Not getting the full value from SharePoint



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# SharePoint Web Services



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# Strategic Advantages of Reporting

- Data accessibility
- Increased visibility
- Diversified presentation tool kit
- SharePoint as a tracking tool now provides outcomes, not just lists

# Comprehensive is Key



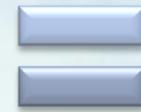
CHARTS



GAUGES



REPORTING



COMPREHENSIVE  
SUITE

- Suite of turn-key, inter-operable web parts
- Allows all classes of users to provision visualization and charting solutions

# Introduction to Software FX

- More than 16 years of experience in data visualization
- Multiple platforms (Developers, DBAs, IT)



COM  
Visual Basic, C++



Visual Studio .NET



SQL Server  
Reporting Services



WPF & Silverlight



Java



PowerShell



SharePoint

# What is DataParts?

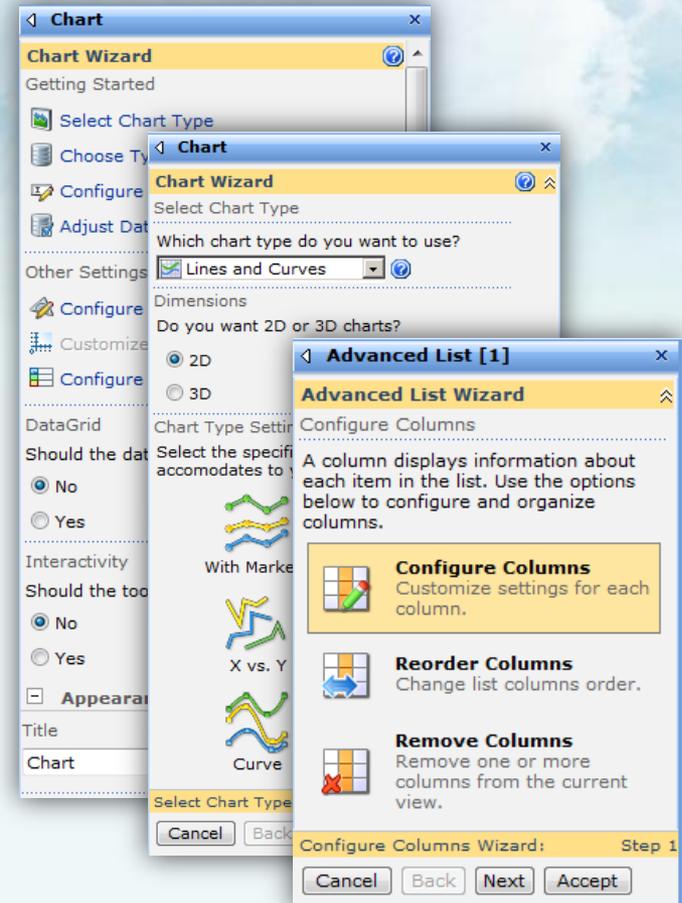
- Complete suite of visualization web parts
- Provides turn-key reports and dashboard solutions for all portal users
- Based on proven award-winning technology  
**(Chart FX and Grid FX)**

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# DataParts is Designed for SharePoint

- Native Web Parts
- Integrated look and feel
- Easy to use and customize
- No external designers are required
- SharePoint is the designer
- Tool Pane Wizards



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# DataParts Charts

- Over 120 chart types
- 2D and 3D charts
- Fully customizable
  - Legends
  - Labels
  - Axes
  - Titles

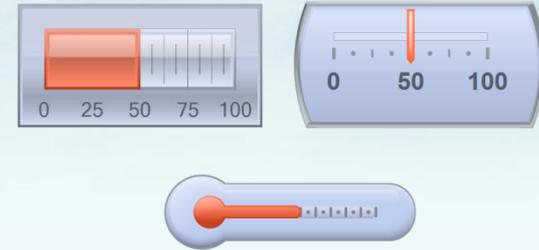


# DataParts Gauges

## Radial



## Horizontal



## Digital Panel



## Vertical



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# DataParts Advanced Lists

The screenshot displays the 'Agents' DataParts Advanced List interface. The interface includes a title bar with 'Agents' and 'Properties & Details', a toolbar with icons for print and export, and a table of agent data. A context menu is open over the 'City' column, showing filtering options. Callouts point to various features: 'Print Controls' (print icons), 'Context Filtering' (filtering menu), 'Titles, Headers & Icons' (title bar), 'Hierarchical Lists' (table structure), 'Export Controls' (export icons), 'Pagination Controls' (Page 1 of 3), 'Inline Gauges' (checkboxes), 'Column Formatting' (dropdown arrow), and 'Sidebars' (agent details sidebar).

**Print Controls**

**Context Filtering**

**Titles, Headers & Icons**

**Hierarchical Lists**

**Export Controls**

**Pagination Controls**

**Inline Gauges**

**Column Formatting**

**Sidebars**

Firstname	Address	City	Zip	Rooms	Price	Primary	Rating
Andrew	14451 Sw 150th Street	Miami	33126	3	1,000,000	✓	
	4251 Sw 13 Te	Coral Springs			3,000,000		

**Details**

Andrew  
(555) 101-4263

A native of Florida, Andrew has been involved in the Real Estate industry since 1996. He was also a commercial and new home builder from 1990 to 1993 in Florida and North Carolina. Andrew assists clients in residential and business relocation to the greater Miami area. Along with representing buyers and sellers in real estate transactions, as an experienced builder and developer Andrew understands the industry from the inside out. With his building background, he knows the reputable builders in the greater Miami area and their specialties to meet your custom home needs.

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# DataParts Card View

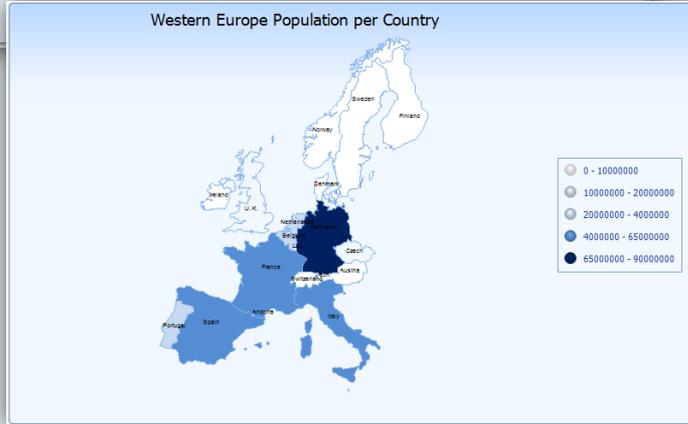
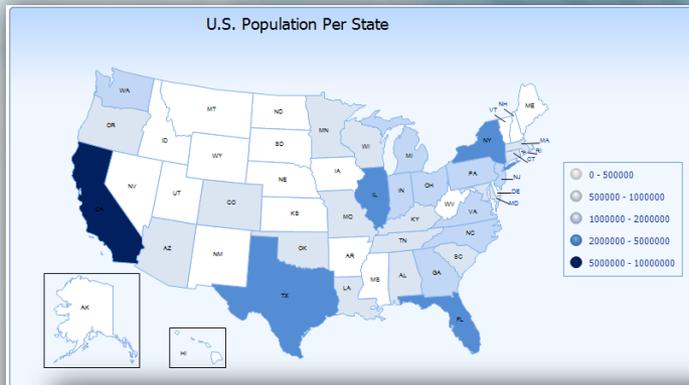


- Business Card style
- Ideal for images
- Useful to show details

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# DataParts Maps

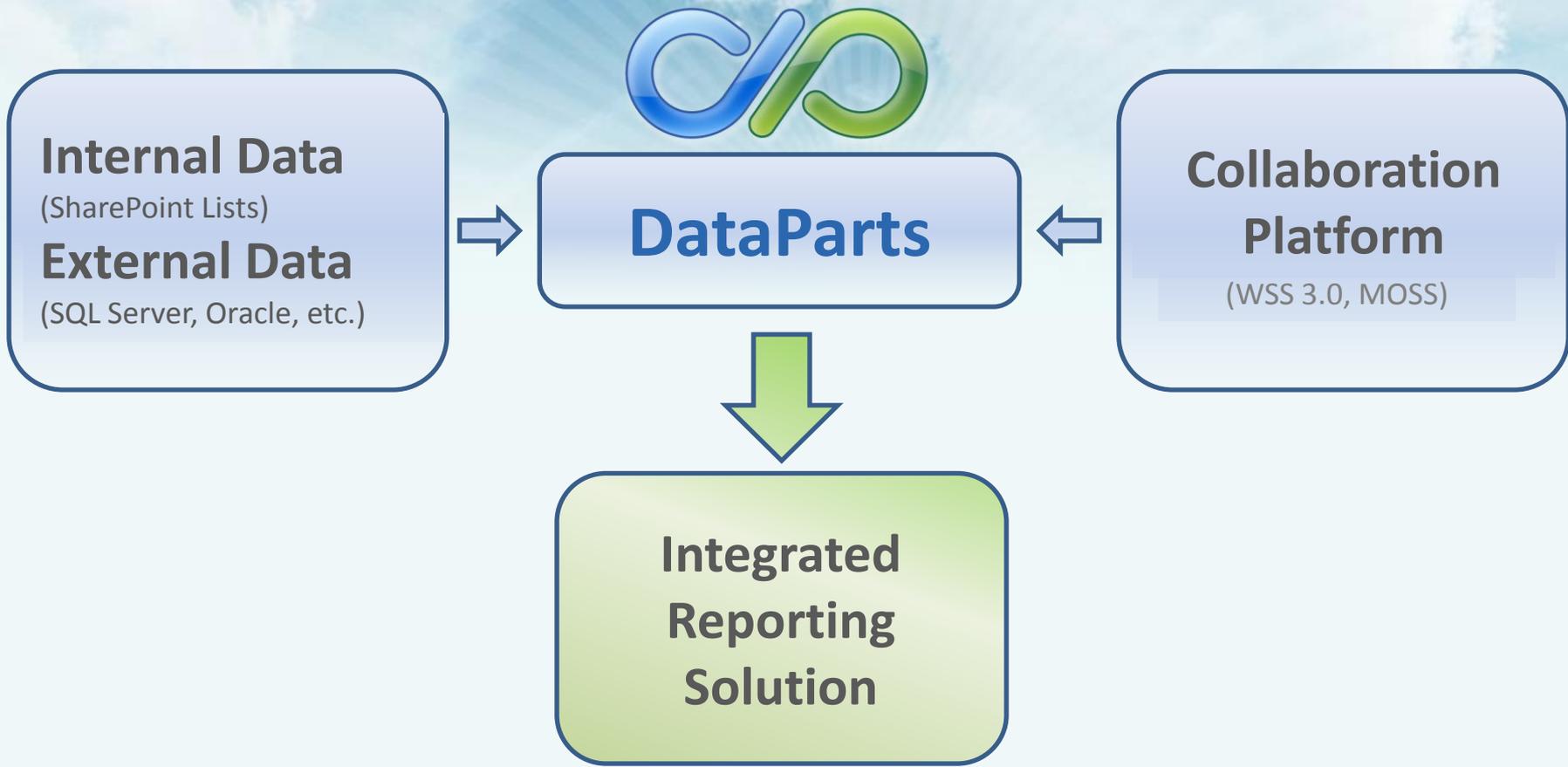


- Value ranges & Column selection
- 200+ Maps library
- Custom maps

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# DataParts Connects to Any Data Source



# DataParts are Interactive

- Fully interactive web parts
- No third party add-ons required  
(e.g. Flash or Silverlight)
- Use AJAX technology to enhance user experience

# DataParts are Interconnected

- Interaction with other DataParts

Enables drilldown capabilities

- Interaction with other SharePoint web parts

Support advanced filtering scenarios

# DataParts are Visually Adaptable

- Maintains Corporate Branding and Identity
- Fully theme-aware
- Accommodates custom 40+ color schemes

The collage displays four instances of the SFX Intranet application, each with a different color scheme. The top-left instance is blue, the top-right is yellow, the bottom-left is green, and the bottom-right is purple. Each instance shows a user profile for 'Andrew Achill' with fields for agent\_id, first\_name, last\_name, phone\_number, email, brokerage\_id, fax, primary\_contact, and rating. The purple theme instance also features a pie chart and a gauge chart. The pie chart data is as follows:

Location	Percentage
Boca Raton	6%
Coral Springs	11%
Fort Lauderdale	20%
Homestead	15%
Lake Worth	17%
Miami	20%
West Palm Beach	11%

The gauge chart shows a value of approximately 35 on a scale from 0 to 70.

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# DataParts is Easy to Deploy

- No additional servers

Installs directly on the SharePoint Server

- Works with any version of SharePoint 2007

1. Windows SharePoint Services 3.0
2. MOSS 2007 Standard
3. MOSS 2007 Enterprise
4. Deploys using any version of SQL, even Express Edition

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# DataParts Live Demos

1. Adding and Configuring DataParts Web Parts
2. Connecting to data
3. A Look at Advanced Lists
4. Using Filter Web Parts
5. Interconnected Web parts
6. Theme Awareness and Flexibility

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# DataParts Licensing

- Small Business (Up to 100 Users)
  - Medium Business (Up to 1000 Users)
  - Enterprise (1000+ Users)
- 
- Trial Version  
[www.SoftwareFX.com/DataParts](http://www.SoftwareFX.com/DataParts)

# Contact Information

## Software FX

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**DataParts Website**

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