

Use dashboards to drive decisions

A dashboard is a Web page that displays information from disparate data sources and helps drive action. In Microsoft Office SharePoint Server 2007 you can use a dashboard to display reports, charts, or key performance indicators (KPIs). Displaying the information together in one place helps you communicate status, observe trends, anticipate problems and opportunities, and make better decisions.

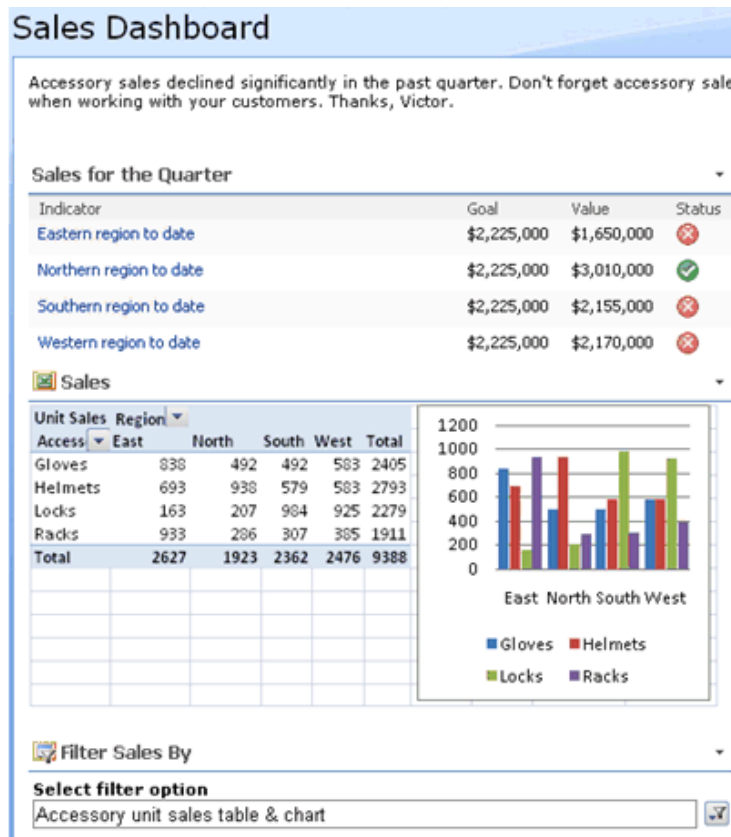
For example, the following Adventure Works **Sales Dashboard** includes:

A message from the company president urging the sales team to increase accessory sales.

Sales for the Quarter, a list of KPIs that obtain and display data from the Adventure Works accounting software.

Sales, tables and charts from an Excel workbook that obtains data from the Adventure Works sales software.

Filter Sales By, enables an employee to change the view of the **Sales** information, making the information more relevant to the employee.



Creating a Dashboard

You can create a dashboard on an existing or new Office SharePoint Server 2007 page by adding Web Parts, such as Key Performance Indicators and Excel Web Access used for **Sales for the Quarter** and **Sales** respectively in the preceding **Sales Dashboard**.

IMPORTANT You must have the Contributor permission level to create a dashboard.

If you are in a SharePoint Report Center you can create a dashboard on a new page with the dashboard template. Starting with the template may be faster than creating the dashboard from a blank Web page. The template is a starting point, you can add or delete items and change the appearance of the page after you create it. The following Web Parts are included with the dashboard page template.

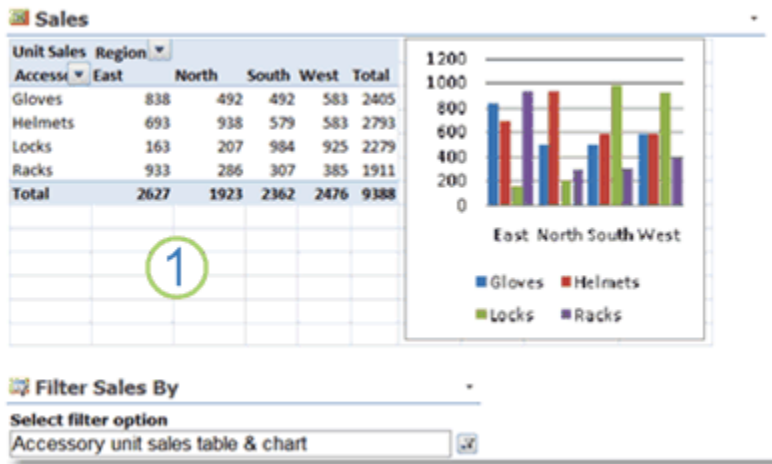
Web Part	Provides the Ability to
Summary	Describe information about status and plans.
KPI list	Display key performance indicators (KPIs). KPIs are visual cues that communicates the amount of progress made toward goals. (Optional)
Excel Web Access	Add an Excel workbook, worksheet, or worksheet range
Contact Details	List the name of the person to contact about the page.
Related Information	Provide links to related information.

Make a Dashboard more Relevant to Users with Filter Web parts

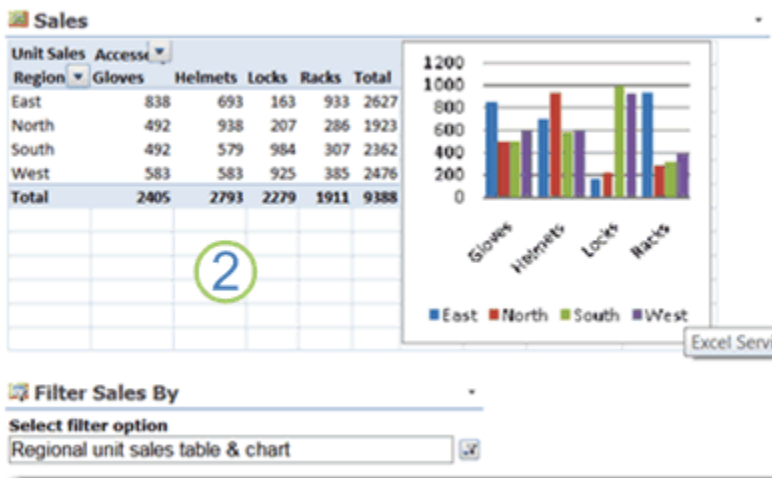
You can add a Filter Web Part to your dashboard so that another person who views the dashboard can filter the information that appears. Filter Web Parts pass values to Web Parts that contain sets of information, enabling the view of the information to change based on the value. The changing view helps make the information more relevant to users.

The default view for **Sales** in the preceding **Sales Dashboard** is, by default, "Accessory unit sales table & chart". The view is filtered by bicycle accessories, such as "Gloves". An employee can change the view by clicking **Browse in Filter Sales By** and selecting a different view, such as "Regional unit sales table & chart". Now the view is filtered by sales regions, such as "East".

1 Sales filtered by Accessory unit sales table & chart



2 Sales filtered by Regional unit sales table & chart



The Filter Web Part can be visible on the page to ask for user input, such as the **Filter Sales By** Filter Web Part in the preceding **Sales Dashboard**, or they can be invisible, as is the case with the Current User Filter Web Part that filters data based on the user who is logged on to the computer.

Information sources for a Dashboard

The Web Parts of a Office SharePoint Server 2007 dashboard can obtain and display information from:

- Manually entered data
- SharePoint lists
- Office Excel 2007
- Microsoft SQL Server 2005 Analysis Services
- Microsoft SQL Server 2005 Reporting Services reports
- Business data connectivity Web Parts that can visualize information residing in line-of-business applications.

NOTE Not all Web Parts can use all of the preceding information sources.