

## The SharePoint Collaborus™

001- Executive Dashboards – April 2007

### INTRODUCTION

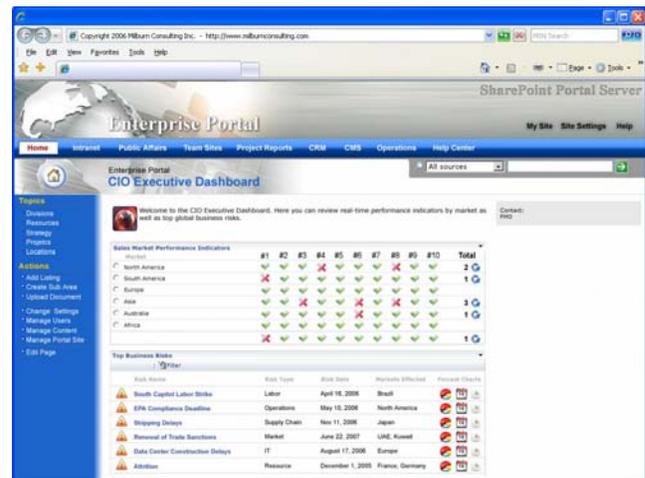
As more organizations are storing their business information via web services, Executive Dashboards are becoming a popular way for C-Level executives to manage information and programs across an enterprise. With its ability to instantly report data from a variety of sources, allow formatting based on business rules, and provide interactive functions Executive Dashboards are quickly becoming the an important tool for executives to obtain information and metrics on their organization.

An Executive Dashboard is a customized web-interface that is accessible only by the executive that is authorized to see or manage particular organizational data and information. Whether it is just a single page or a gateway to an entire site of reports that support the executive’s needs, these sites provide a dynamic way to see the state of an enterprise, program or department. They allow their owners immediate access to information and reports without the need to issue RFIs 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 websites that is the single gateway which unifies access to all enterprise information and applications for that individual. It distills the complexity and variety of information and services available to a user into a single interface targeted to that user's needs and access rights. Focused on delivering timely and relevant information based on business rules, Executive Dashboards are custom manifestation of an enterprise portal that has the ability to aggregate real-time data from both internal and external sources.



Project Review Dashboard



Business Intelligence & Decision Support

## IMPLEMENTATIONS & PROPERTIES OF EFFECTIVE DASHBOARDS

To report actionable data, there must first reside a structure of supporting reporting applications, tools, and sites that the enterprise uses on a recurring basis. Without this critical component, an executive dashboard becomes little more than an expensive news reader.

The most valuable dashboards operate at a summit-level in an organization and often leverage enterprise-class frameworks such as SharePoint Portal Server. Deployments created by impulse often are short lived due to the lack of strategy and the integrity of their data sources. Dashboards are usually implemented in the tail end of an initiative once some level of Integrated Managed Services has been established across the enterprise. Once there is a common framework of sites and applications, and a system that treat users as first-class objects, information and data can be packaged up to a dashboard for reporting.

The technology alone is not enough to produce a good executive dashboard. Many COTS products offer them as part of their product to increase their web services visibility. However, they are not usually positioned to provide leadership, workflow, or intelligence services and rather are listed as a possible scenario for the product. Additionally, it is not advised to be influenced by the format, style, or layout of a potential portal/dashboard product. Any product can be switched to look like another with an Extensible Style Sheet (.xsl) and some clever graphics.

The bottom line is that the determining factor is not what a dashboard does, but how it does it. There are six core dashboards principles, regardless of what the system reports it will be effective if it employs a majority of the following six properties:

<b>Consolidation</b>	Aggregates business data from a variety of internal and external sources
<b>Elevation</b>	Elevates information that is important or critical to the owner
<b>Reporting</b>	Reports quantitative information regarding the status of projects, performers, and initiatives
<b>Metering</b>	Supplies metrics based on organizational standards or business rules
<b>Formatting</b>	Utilizes conditional formatting to direct the user's attention to important items
<b>Interchange</b>	Has the ability to pass information between web parts to display correlating and supporting information

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## ROLES & UTILIZATIONS OF EXECUTIVE DASHBOARDS

Can you remember the last time you were in a meeting and were able to pull up the organization's roll-call on your PDA, provide real-time project status without an RFI, or provide performance metrics? Executive dashboards can often eliminate the fact finding process and empower decision making information on the fly. Once established, they can provide visibility and transparency into business operations and deliver real-time information to decision makers. Additionally, their value is enhanced when historical information is displayed along real-time information, when alerts are issued upon reaching established thresholds, and when reviewing, managing and delegating organizational items. Although not limited to the following, the below scenarios are commonly used when establishing an executive dashboard:

- Project Reporting
- Business Scorecards
- Key Performance Indicators (KPIs)
- Risk Management
- Treat Modeling
- Revenue Management
- Return on Investment Reports (ROIs)
- Roll Call & Staffing

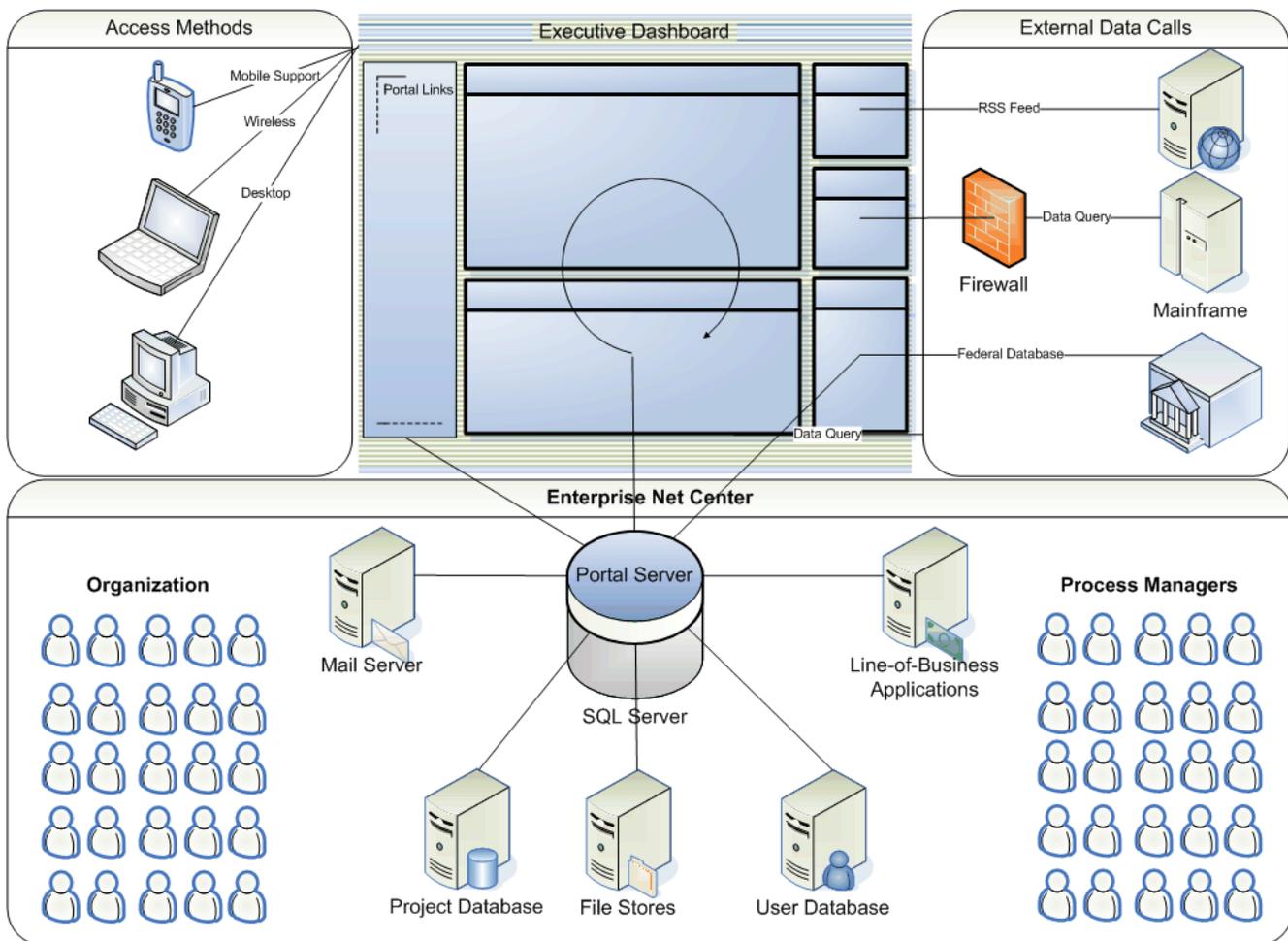
## FUNCTIONAL BREAKDOWN & COMPONENTS

Enterprises are organic in nature; it is common that the aggregated information is contributed by hundreds or possibly thousands of users. Dashboards most commonly reside in an exclusive area of an enterprise portal which not only provides restricted access, but it allows the dashboard to render data and content in native form from within the same environment. Additionally, it ensures that this information will be deliverable to a variety of different platforms and locations such as your desktop and laptop, your home and work computers, and even a PDA device. Many CIOs even set their dashboard as their home page so that upon opening a browser it displays the current state of their organization or program.

The Portal Server functions as a keystone that integrates other data sources and line-of-business applications from across the enterprise and packages them for display on a dashboard. Beyond the organization, a dashboard can query data from a variety of external sources as well. Custom trusts can be established between a portal dashboard and other secure systems thus making it your Single Sign-On (SSO) gateway to collect and report information.

From a technical view, each web part has a defined query that it makes against a database, library, or application. The view of the resultant data depends on the business rules, criteria, and reporting preference of the executive. Charts and graphs are always helpful for presentation, but advances in application technologies provide more interactive reporting experiences. Each web part may query a different source; however several web parts will be reporting information that can be correlated against other web parts. In this scenario, drilling down into one web parts forces the others to provide the supporting information.

\*For an example of web part connections please view the dashboard sample titled "[Project Review Dashboard](#)".



## SAMPLES OF EXECUTIVE DASHBOARDS

### Project Review Dashboard

A project management dashboard provides a user real-time visibility into business operations. This is helpful with tracking multiple projects across departments as the dashboard can correlate key information against departments and staff. This dashboard employs web part connections that instantly pass and pull data from other web parts on the page to display correlating information.

#### Usage Outline:

1. Upon clicking a department from the **Department List** the department's catalog of projects is displayed in the **Departmental Project List** web part.
2. The **Departmental 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.
3. Upon clicking a particular project's detail link, the right two web parts call the corresponding Project Manager's profile and a list of their projects as well as displaying the conditionally formatted status.

**Enterprise Portal**  
SharePoint Portal Server

My Site Site Settings Help

Home Intranet Public Affairs Team Sites Project Reports CRM CMS Operations Help Center

Enterprise Portal  
CIO Executive Dashboard

All sources

**Topics**

- Divisions
- Resources
- Strategy
- Projects
- Locations

**Actions**

- Add Listing
- Create Sub Area
- Upload Document
- Change Settings
- Manage Users
- Manage Content
- Manage Portal Site
- Edit Page

Welcome to the CIO Executive Dashboard. Here you can review the project status and staff by department. Use the Department List Web Part below to select the department you wish to review. The associated Web Parts will automatically pull up the corresponding information and alert you to critical items.

Contact: PMO

**Department List**

Department	First Name	Last Name
Human Resources	Brett	Alan
Project Management Office	Joe	Jackson
Operations	Frank	Jones
Research & Development	Gary	Lanter
Legal Affairs	Gary	Mac
Information Technology	Lisa	Smith

**Departmental Project List**

Project	Project Funding	Spent Funds	Percentage of Funds Spent	Department Head	Deadline
<b>Count = 11 Sum = \$150,939.00 Sum = \$64,830.00</b>					
<b>Status : 0 Behind Schedule (6)</b>					
<b>Status : 1 On Schedule (4)</b>					
<b>Count = 4 Sum = \$67,394.00 Sum = \$45,120.00</b>					
Lease Agreement <b>NEW</b>	\$1,000.00	\$100.00	10.00%	Alan	
Venture Contract <b>NEW</b>	\$16,000.00	\$5,000.00	31.25%	Jones	6/5/2007
Cooperative Agreement <b>NEW</b>	\$50,164.00	\$40,000.00	79.74%	Mac	8/15/2006
Trade Deal <b>NEW</b>	\$230.00	\$20.00	8.70%	Jackson	10/16/2006
<b>Status : 2 Ahead of Schedule (1)</b>					

**Project Status**

**MERGER**

Dept Head	Jones
% of Spent	0.5%
Status	0 Behind Schedule

**NEW HARDWARE**

Dept Head	Jones
% of Spent	1%
Status	0 Behind Schedule

**OFFICE MOVE**

Dept Head	Jones
% of Spent	87.71%

**Name:** Frank Jones  
**Phone:** 555-5555  
**Email:** frank@company.com  
<http://www.company.com>

## Business Intelligence & Decision Support

Business intelligence and decision support dashboards are designed to consolidate access to content, applications and 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 whether each market is in a positive status. By clicking each Market in the top web part, the bottom web part displays the top risks for that market. Additionally, each risk can be extrapolated to forecast charts directly from the web part for more detailed review of how the risk will affect business.

The screenshot shows a SharePoint Portal Server interface for an Enterprise Portal. The main content area is titled 'CIO Executive Dashboard' and contains two primary data sections:

**Sales Market Performance Indicators**

Market	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10	Total
North America	✓	✓	✓	✗	✓	✓	✓	✗	✓	✓	2
South America	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	1
Europe	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	3
Asia	✓	✓	✗	✓	✓	✗	✓	✗	✓	✓	1
Australia	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	1
Africa	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	1

**Top Business Risks**

Risk Name	Risk Type	Risk Date	Markets Effected	Forecast Charts
South Capitol Labor Strike	Labor	April 16, 2006	Brazil	
EPA Compliance Deadline	Operations	May 10, 2006	North America	
Shipping Delays	Supply Chain	Nov 11, 2006	Japan	
Renewal of Trade Sanctions	Market	June 22, 2007	UAE, Kuwait	
Data Center Construction Delays	IT	August 17, 2006	Europe	
Attrition	Resource	December 1, 2005	France, Germany	

## Related Resources

- VIDEO: [Robust Reporting Portal on Microsoft Office SharePoint Server 2007](#)