

The Frugal Admin: How to make your own Dashboards

CA Callahan
SharePoint Services MVP
CallahanTech
<http://servergrrl.blogspot.com>

Prerequisites

- Experience using Windows SharePoint Services 3.0 (or equivalent)
- General knowledge of and experience using Web Parts, Libraries, and Web Part Pages
- Experience in using Lists and List Views
- Interested in using Web Parts, Web Part Pages, creating Dashboards, and generally getting the most out of Windows SharePoint Services

This session will cover

- i What is a dashboard?
 - It's a page with relevant, dynamic, and useful Web Parts on it.
- i How to create a useful dashboard with OOB capabilities.
 - It's just a matter of designing some Views and connecting some 'Parts...
 - List View or Web Part Page? That is the question.
- i Tips and tricks on dashboard design
 - Give them an easy way to get back home.
 - Let them reset lists (and get around an annoying limitation).
 - Manage the user experience.
- i Tips and Tricks on the home page
 - Let the Quick Launch work for you...
 - How the word "Only" might help when a dashboard is secure



Bio: CA Callahan

- i MVP- SharePoint Services
- i Author- "Mastering Windows SharePoint Services 3.0"
- i Speaker, Principal Trainer, and Technical Writer for CallahanTech.
- i With over ten years of experience working on, writing about, and teaching others to use Microsoft products, Callahan travels around the US speaking at conferences and user groups about Windows SharePoint Services. When she's not either traveling, speaking, (prepping for said speaking engagements), or writing about WSS, she is working with clients to get the most out of their SharePoint implementations.

What is a Dashboard?

- i It is usually a page filled with useful Web Parts.
- i Generally the Web Parts contain information from the lists and libraries on the site, connected together to be more useful.
- i Organized by usefulness onto one page.
- i That page is then made freely accessible from the home page of the site or some other appropriately central location.

How to create a useful dashboard with OOB capabilities.

- Decide what Dashboard pages are needed.
- Select the lists that need to be on the pages
 - Consider how to connect them
 - Design views so the Web Parts can be connected
 - Consider user filtered views
- Create the pages themselves
 - Create Web Part Page repository
 - Separate pages allow you to secure different dashboards
- Place and connect the Web Parts
 - Many to one– Get/Sort Filter From
 - One to many– Provide Row to

Considering lists

- i Consider who needs a dashboard
 - **Project Managers**
 - **Contractors**
- i What kind of list view web parts (and particular views) would be useful for their dashboards?
 - **Project Manager**
 - **Projects (filters Materials, Contractors)**
 - **Project Materials (filters Vendors)**
 - **Vendors**
 - **Contractor Fees**
 - **Building Plans**
 - **Visual Build Records**
 - **Contract Work (Gantt View)**
 - **Contractors**
 - **Calendar**
 - **Contract Work (view filtered by [Me])**
 - **Projects (view filtered by [Me])**
 - **Project Materials (filters Vendors)**
 - **Vendors**

Web Part Pages

- i No need for code
 - Create a Document Library, but use a Web Part Page template.
 - Create New pages
 - Select the web part zone format
 - New pages start in Edit Mode
 - Add web parts, modify and connect them
 - Edit title properties if necessary
- i Consider security

Tips and Tricks

- i Tips and Tricks on the home page
 - Add links for the pages to the Quick Launch
- i Tips and tricks on dashboard design
 - Consider the type of web part page to use
 - Create a link for navigating back to the home page
 - Create a link for clearing filtered lists
 - Manage the user's experience by managing what they can do in Personal Views
 - Create Views of the web parts that filter by [Me] to be relevant to user
 - Secure the pages so only the correct users can access them

Summary

- i What is a dashboard?
 - **It all started with some lists...**
 - Those lists have Web Parts
 - Those Web Parts could be connected
 - Filtering each other, pulling up data that can be useful in one place
 - Those Web Parts would be useful all on one page
 - They'd be useful linked together several ways, depending on the type of viewer...
- i How to create a simple dashboard with oob capabilities
 - **Select the lists that need to be on the pages**
 - Consider how to connect them
 - Design views so the Web Parts can be connected
 - **Place the Web Parts**
 - Web Part Pages versus List Views
 - Create Web Part Page repository (and secure it too)
 - **Connect the Web Parts**
- i Tips and Tricks on the home page
 - **Add links for the pages to the Quick Launch**
- i Tips and tricks on dashboard design
 - **Create a link for navigating back to the home page**
 - **Create a link for clearing filtered lists**
 - **Manage the user's experience by managing what they can do in Personal View**

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