

KEVIN O'NEILL

Creating Basic Dashboard with PerformancePoint

In order to create simple dashboards using Sharepoint 2010 PerformancePoint the following steps can be followed. Essentially these steps go over creating a data source, creating a KPI, creating a scorecard – then adding the scorecard(s) to a dashboard.

Once PerformancePoint is set-up access the created site and click **Start using PerformancePoint services:**

PerformancePoint

I Like It

PerformancePoint

Dashboards
Data Connections
Libraries
PerformancePoint Content

Recycle Bin
All Site Content

Business Intelligence Center

The Business Intelligence Center enables you to collaborate, discover and manage the information you need to drive the business forward. Business Intelligence, users are empowered with the right business insights enabling them to make informed decisions, and move the business forward, one activity at a time.

Add Insight to Information With Dashboards

A dashboard is a collection of information that helps you and your team make informed decisions. SharePoint Web Part Pages are a great way to quickly assemble content and create the right views for your team. For rich, interactive dashboards, use PerformancePoint Dashboard Designer to create dashboards that contain a mixture of different content types, including Excel Services reports, PerformancePoint Services reports, PerformancePoint Services scorecards and visualizations, Visio Graphics Services diagrams, and more.

- **Start using PerformancePoint Services**
- [View Excel Services samples](#)
- [View SharePoint samples](#)
- [Learn more online](#)

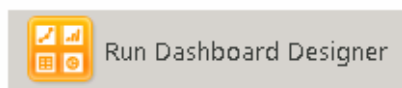
Monitor Key Performance

Use scorecards and status lists to track your progress towards goals more effectively. At a glance, your organization can see how it is performing and identify areas that require attention.

Build and Share Reports

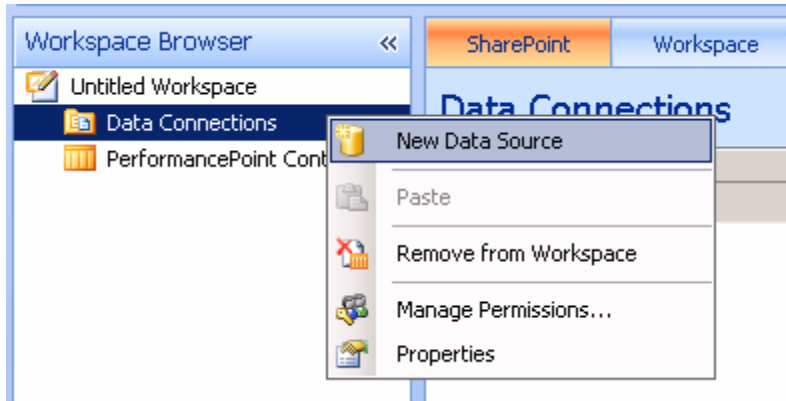
Publish your Excel workbooks to SharePoint using Excel Services and let your team access and interact with their data in full fidelity. Use PerformancePoint Services analytic views to gain quick insights from your dashboards.

Click the Run Dashboard Designer button:

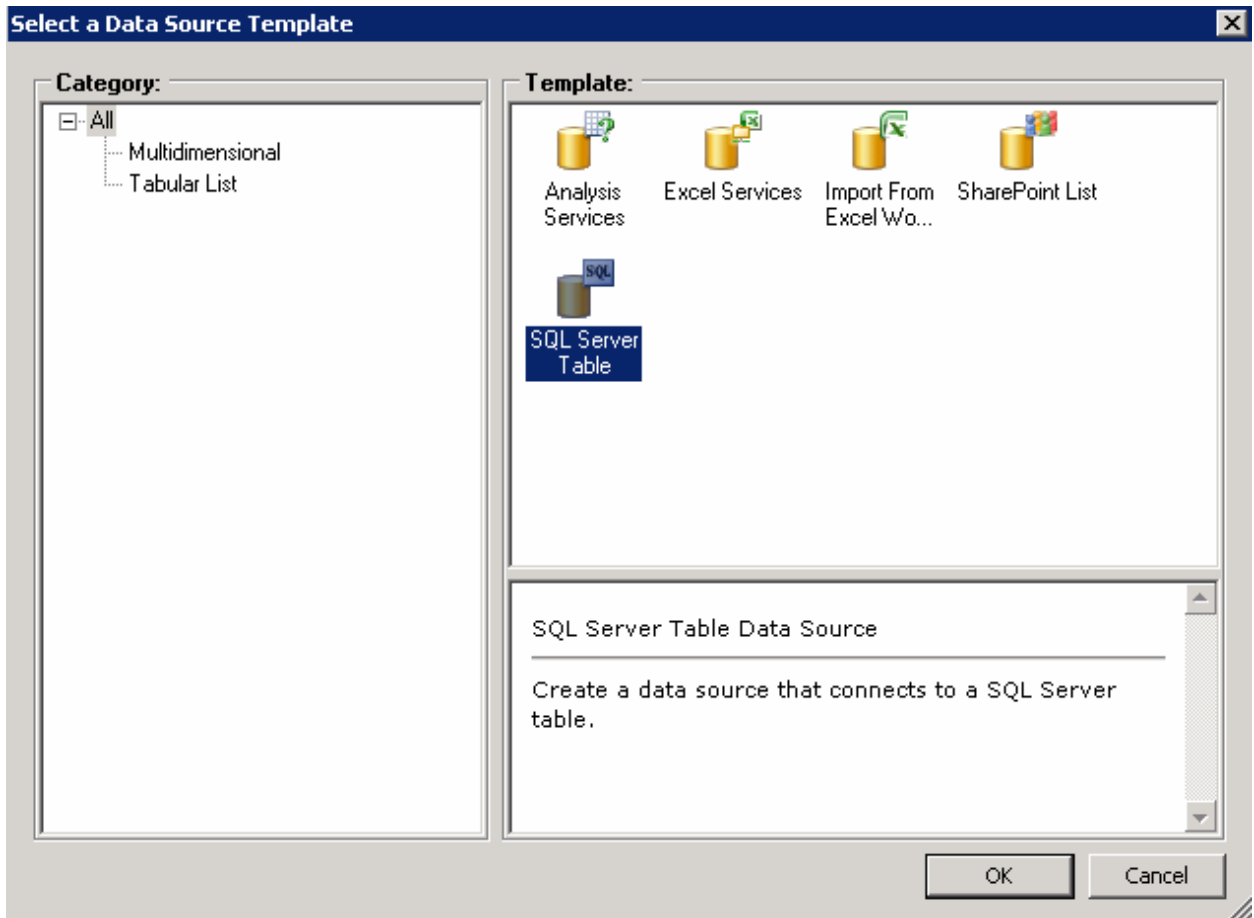


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On the left hand side right mouse click the Data Connections and select New Data Source:



Select SQL Server Table and select OK:



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Enter in the Server: Database: and Table:

Connection Settings ⌵

Use Standard Connection

Server:

Database:

Use the following connection

Connection String:

Table:

Click the Properties tab and Name the connection:

Editor **Properties** Time View

← **New Data Source**

General Properties ⌵

Name:

Description:

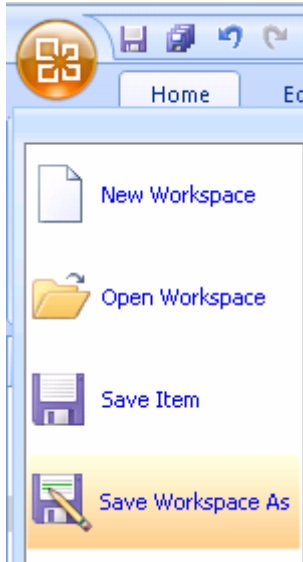
Person Responsible:

Display Folder:

Custom Properties ⌵

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Once completed click the Report Designer icon in the upper left and select Save Workspace As:



Name the workspace with a *.ddwx extension as desired:

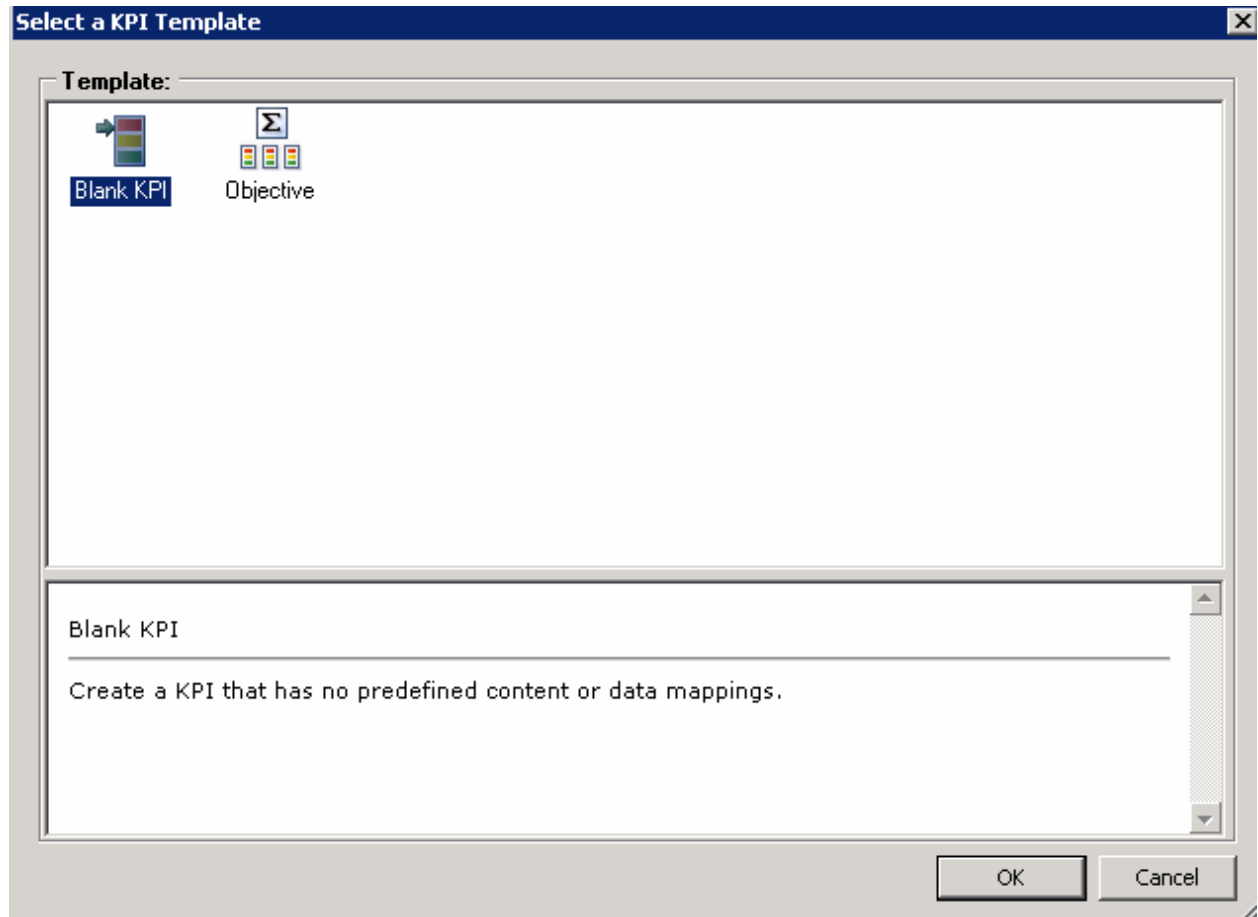


Go to the left and right mouse click the PerformancePoint Content and select New -> KPI

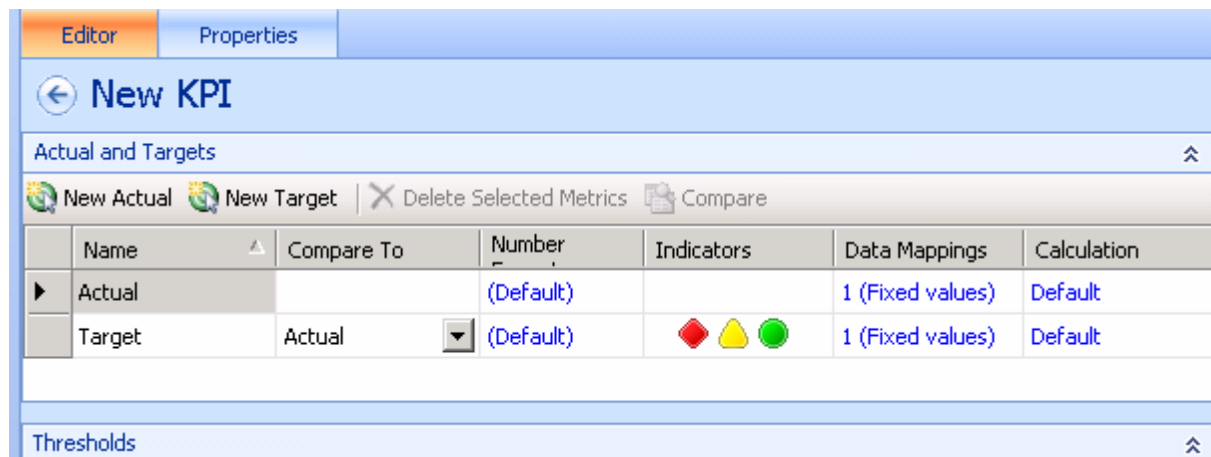


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Select Blank KPI – then click OK:









The screen below is then shown:



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Select the Target row and then the desired Thresholds based on the data set. This can be set by entering the numbers manually or for more granularities the slide rules for each item can be expanded or un-expanded as desired:

▶ Target	Actual	(Default)	  	1 (Fixed values)	Default
Thresholds					
Set Scoring Pattern and Indicator ...					
Best	120%				
Threshold 2	100%		>100.00%		
Threshold 1	50%			100.00% to >50.00%	
Worst	0%				50.00% or less

To change the scoring pattern or icons being used select the Set Scoring Pattern and Indicator at the below screen click Next:

Edit Banding Settings



Select the Scoring Pattern

Select the scoring pattern and banding method.

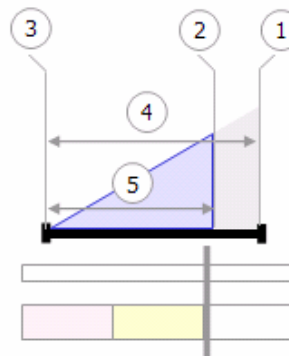
Select the scoring pattern

Select an indicator

Specify the worst value

Scoring pattern:

Banding method:



Band by Normalized Values (Increasing is Better)

The values are determined by dividing the distance of Actual from Worst by the distance of Target from Worst.

1. Target value
2. Actual value
3. Worst value
4. Distance of Target from Worst
5. Distance of Actual from Worst

Band by = Distance of Actual from Worst / Distance of Target from Worst

Band by value shown as percentage.

< Previous

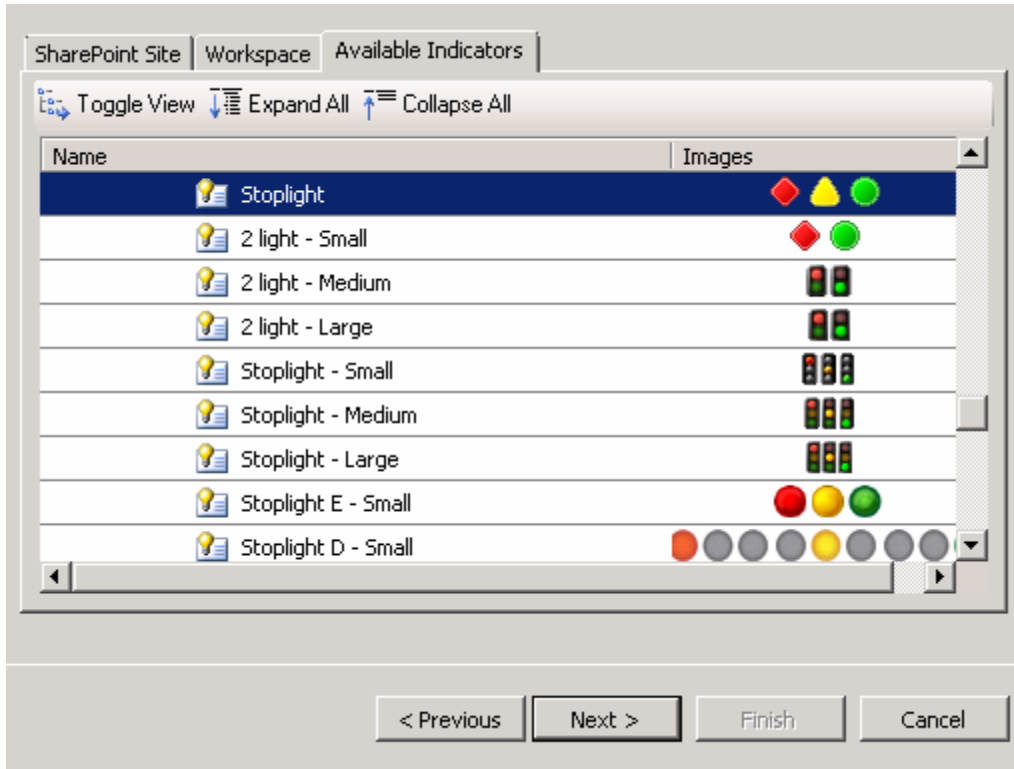
Next >

Finish

Cancel

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At the Available Selectors tab select the icons used to display the Thresholds and then click Next:



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Enter the desired worst value for the set and click Finish:

Edit Banding Settings ✕

 **Specify the worst value**
Define the worst case for the actual.

Select the scoring pattern
Select an indicator
Specify the worst value

Enter worst value:

< Previous Next > Finish Cancel

Select under Data Mappings the Fixed Values link for the first field:

Data Mappings
1 (Fixed values)
1 (Fixed values)

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Click Change Source:

Fixed Values Data Source Mapping [X]

Value:

Change Source... OK Cancel

Select the Connection that houses the desired data:

SharePoint Site | Workspace | Calculated Metric

Toggle View Expand All Collapse All

Name	Type	Description	Person Responsible	Modified
Fixed Values				
Data Connections	Library			
Metastorm	SQL Server T...	Metastorm		1/24/2011

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Under Select a measure – select the field value that contains the desired information in this case the Actual value then click OK:

Dimensional Data Source Mapping

Select a measure:

Select a dimension:

New Dimension Filter New Time Intelligence Filter | X

Name	Default
------	---------

Aggregate members by:

Use MDX tuple formula

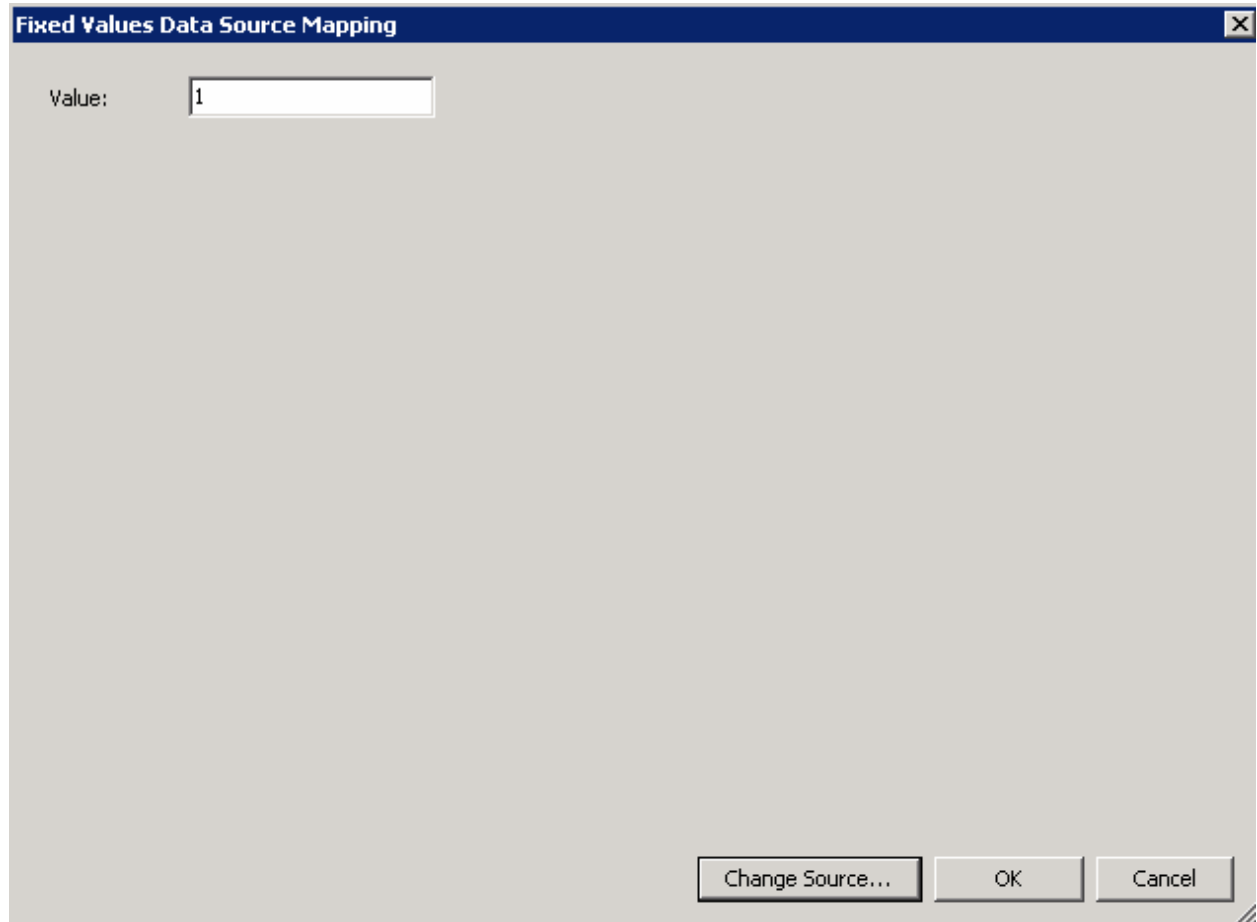
Change Source... OK Cancel

Repeat the same process for the Target value – by selecting the 1 (Fixed values) under Data Mappings:

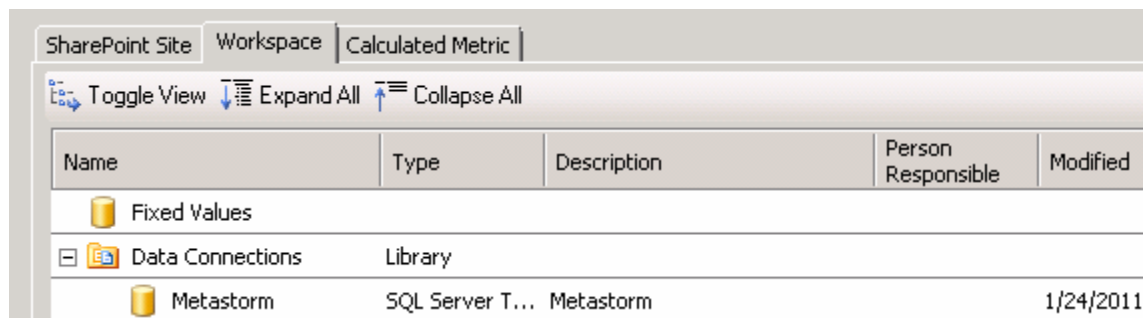
	Name ▲	Compare To	Number	Indicators	Data Mappings
▶	Actual		(Default)		sequence_no (...)
	Target	Actual ▼	(Default)	♦ ▲ ●	1 (Fixed values)

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Click Change Source:



Select the Connection that houses the desired data:

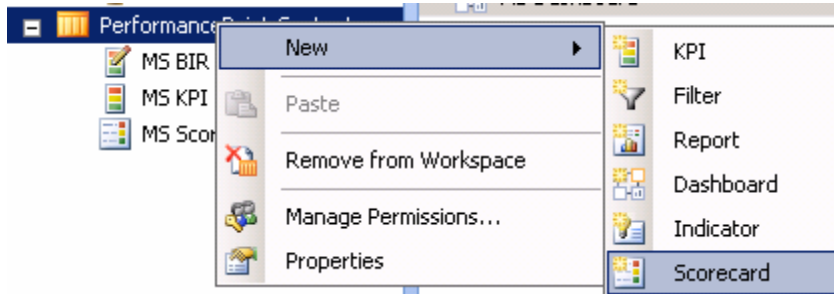


Once completed, on the left hand side click into the created KPI and name it as desired:

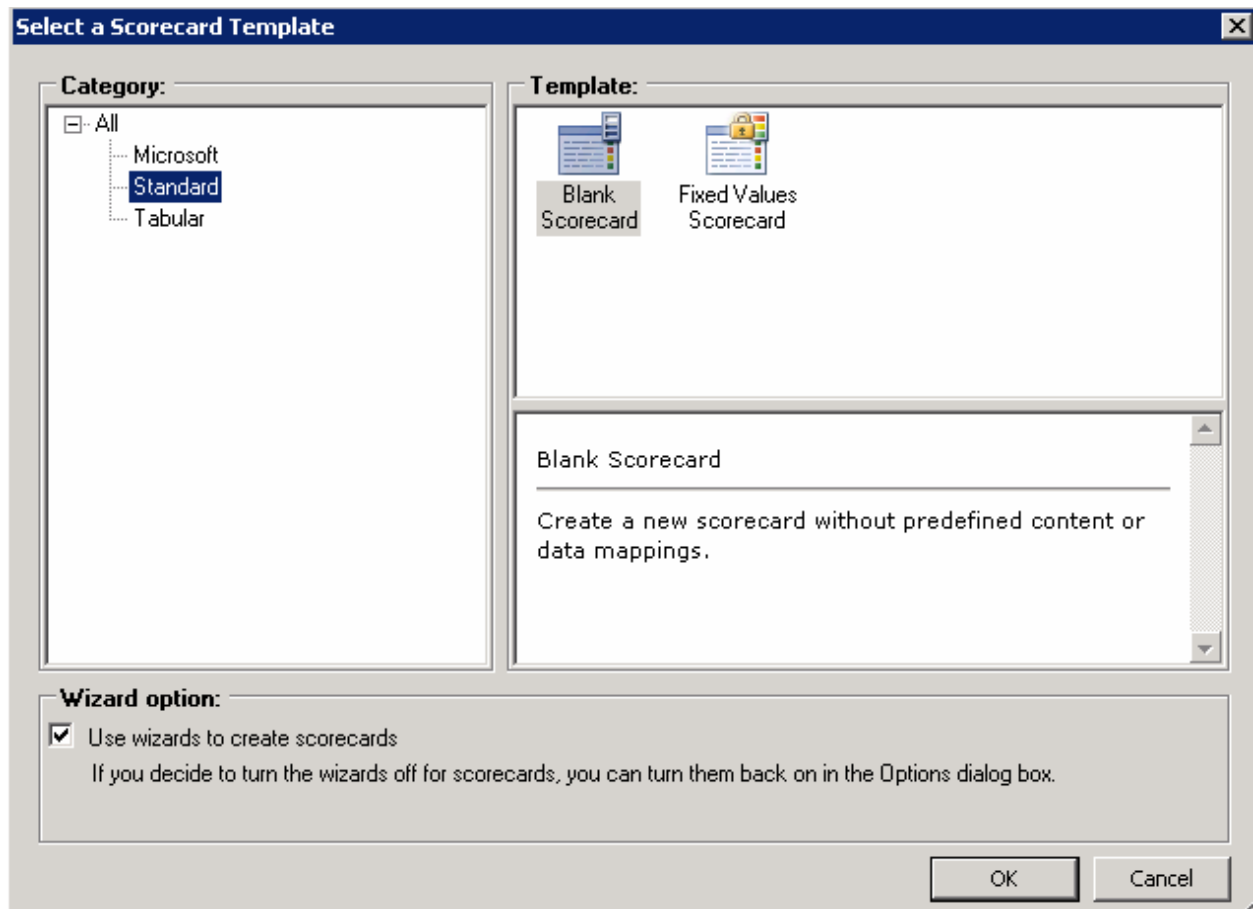


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Right mouse click the PerformancePoint Content and select New -> Scorecard:

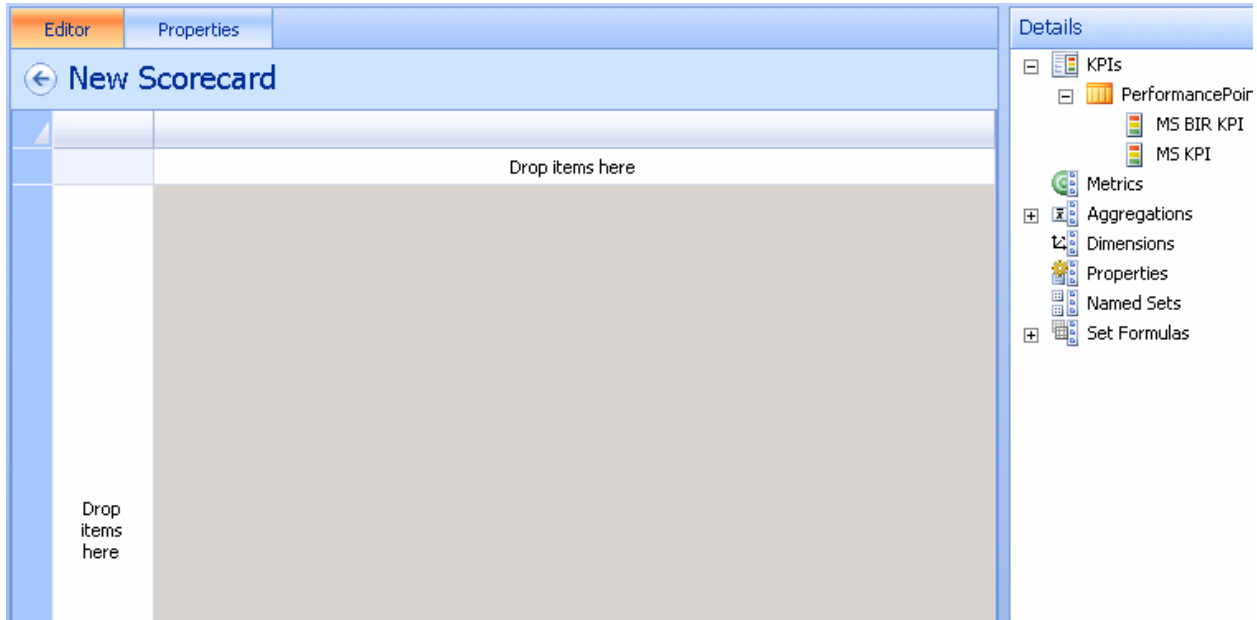


Select Standard – then blank Scorecard and click OK:

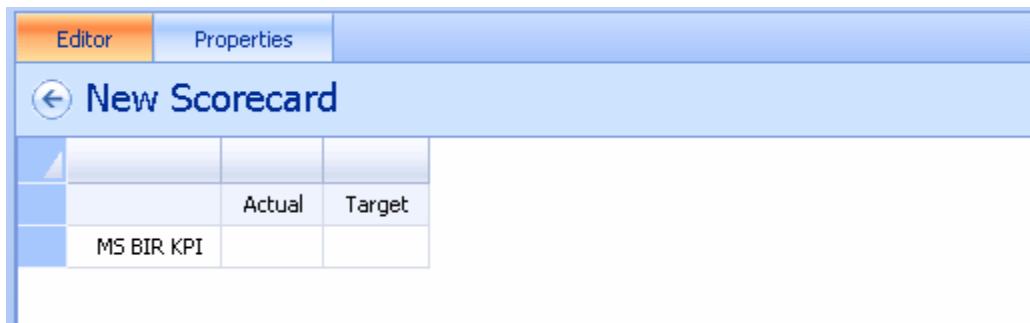


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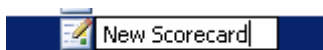
On the right hand side drag and drop the desired created KPI into the Scorecard:



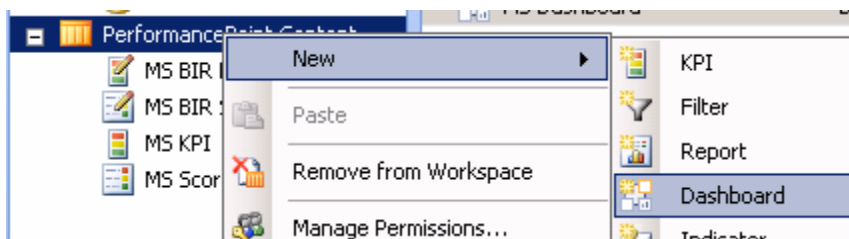
In my case the scorecard looks as such:



On the left hand side select the Scorecard and name it as desired:



Right mouse click the PerformancePoint Content and select New -> Dashboard:

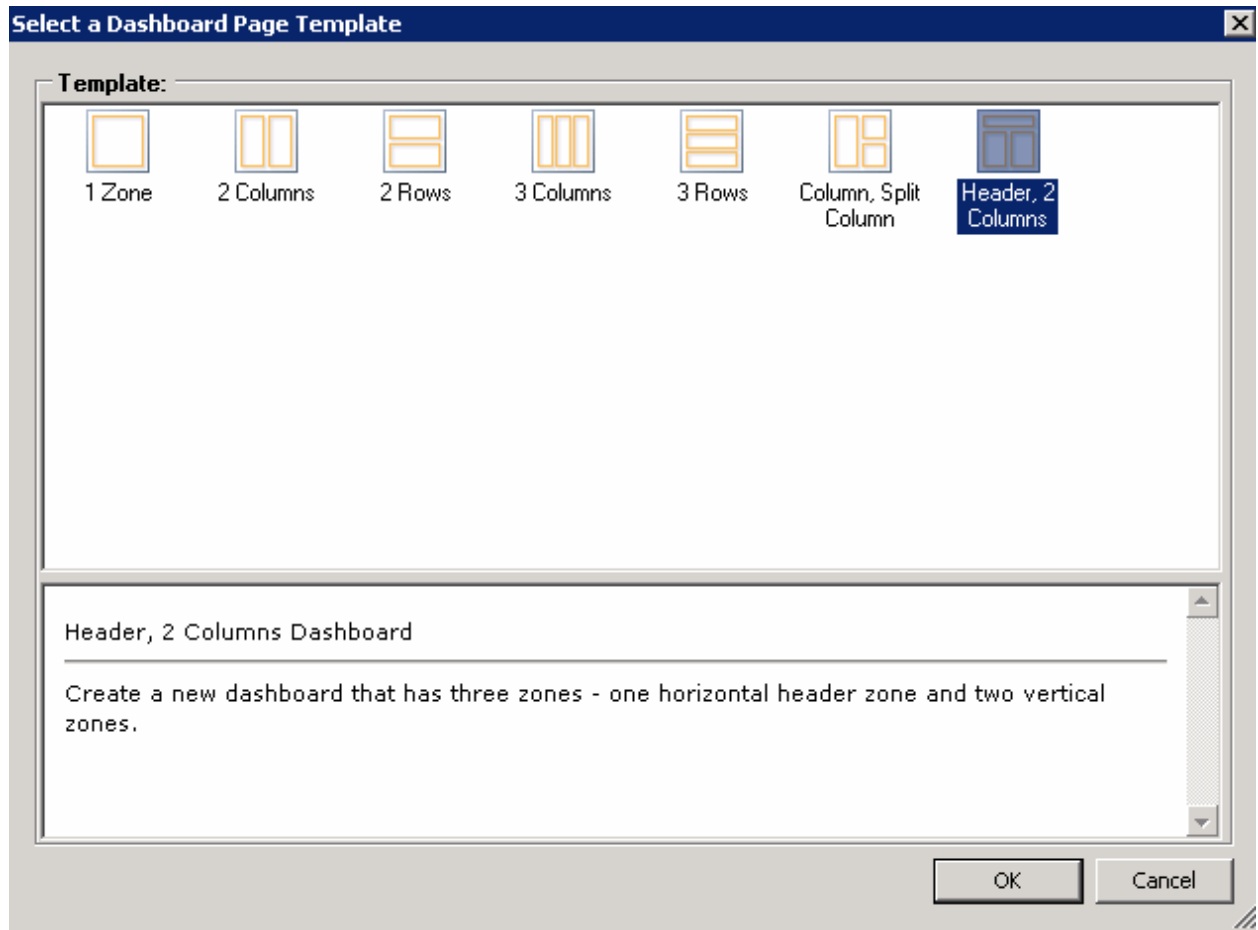


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WEBSITE: [HTTP://WWW.KMO.NAME](http://www.kmo.name)
E-MAIL: ONEILLWEBSITE@VERIZON.NET
USE ALL COMMANDS AT OWN RISK

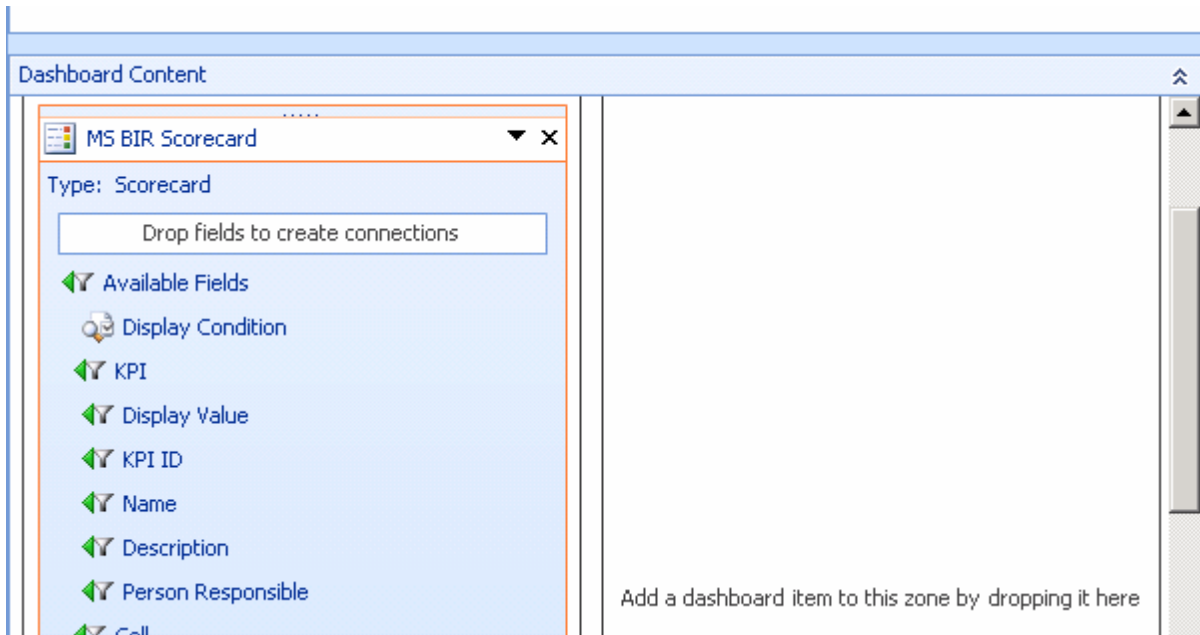
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Select the desired layout then click OK”:

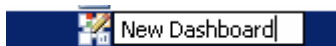


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On the right hand side select the desired Scorecard and drag it into the middle sections desired section:

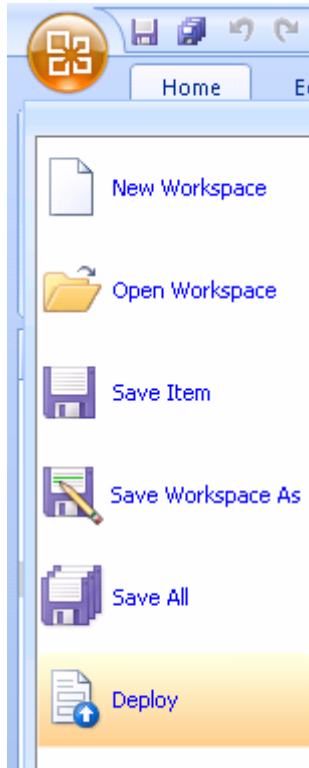


On the left hand side select into the dashboard created and name it as desired:



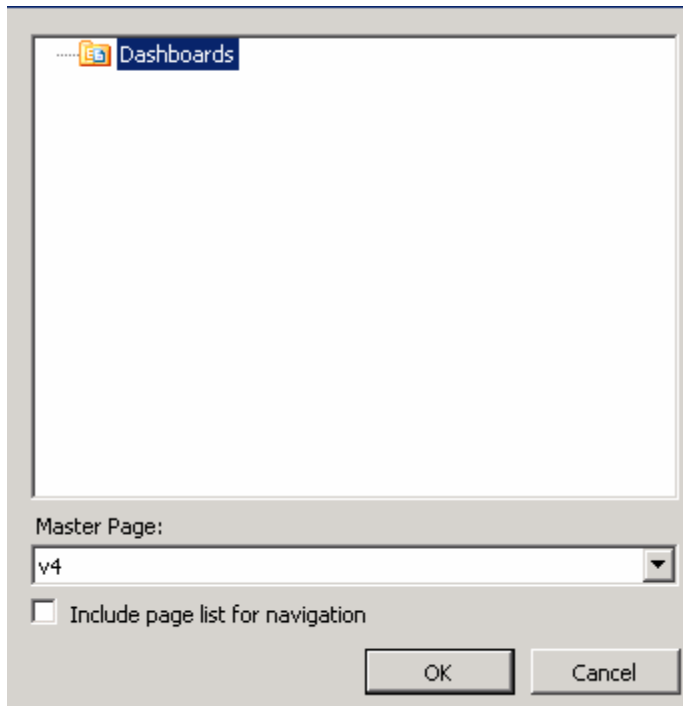
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Select the designer icon and select Deploy:



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Verify the information shown and click OK:



The dashboard then displays on the Sharepoint site:

MS BIR Scorecard

	Actual	Target	
MS BIR KPI	2154988.52	9879878175	-100%

Thus, this process is only a start but essentially can be utilized to create more advanced dashboards by adding more data elements to the scorecard as deemed fit then deploying as desired.