Creating Interactive Reports & Dashboards with SharePoint 2007

For the live webinar recording, please visit:
http://www.softwarefx.com/webinars/0709-SharePoint2007/ViewOnline/

Webinar Chairs

Software FX

Tomas Tezak

Product Manager

tomast@softwarefx.com

561-999-8888 ext:284

Ivan Giugni

VP of Products

ivang@softwarefx.com

561-999-8888 ext:209

Portalogiks Inc.

Devereaux Milburn

President & CEO

devereaux@portalogiks.com

202 . 370 . 6281

Presentation Outline

Introduction	*Ivan Giugni*	5 Minutes
Introduction to Dashboards Reporting Paradigm Shift The Problem with SharePoint Why Reporting Projects Fail	*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*	

Devereaux Milburn

- President & CEO of Portalogiks Inc. (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

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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

Available at: http://www.softwarefx.com/sharepoint/

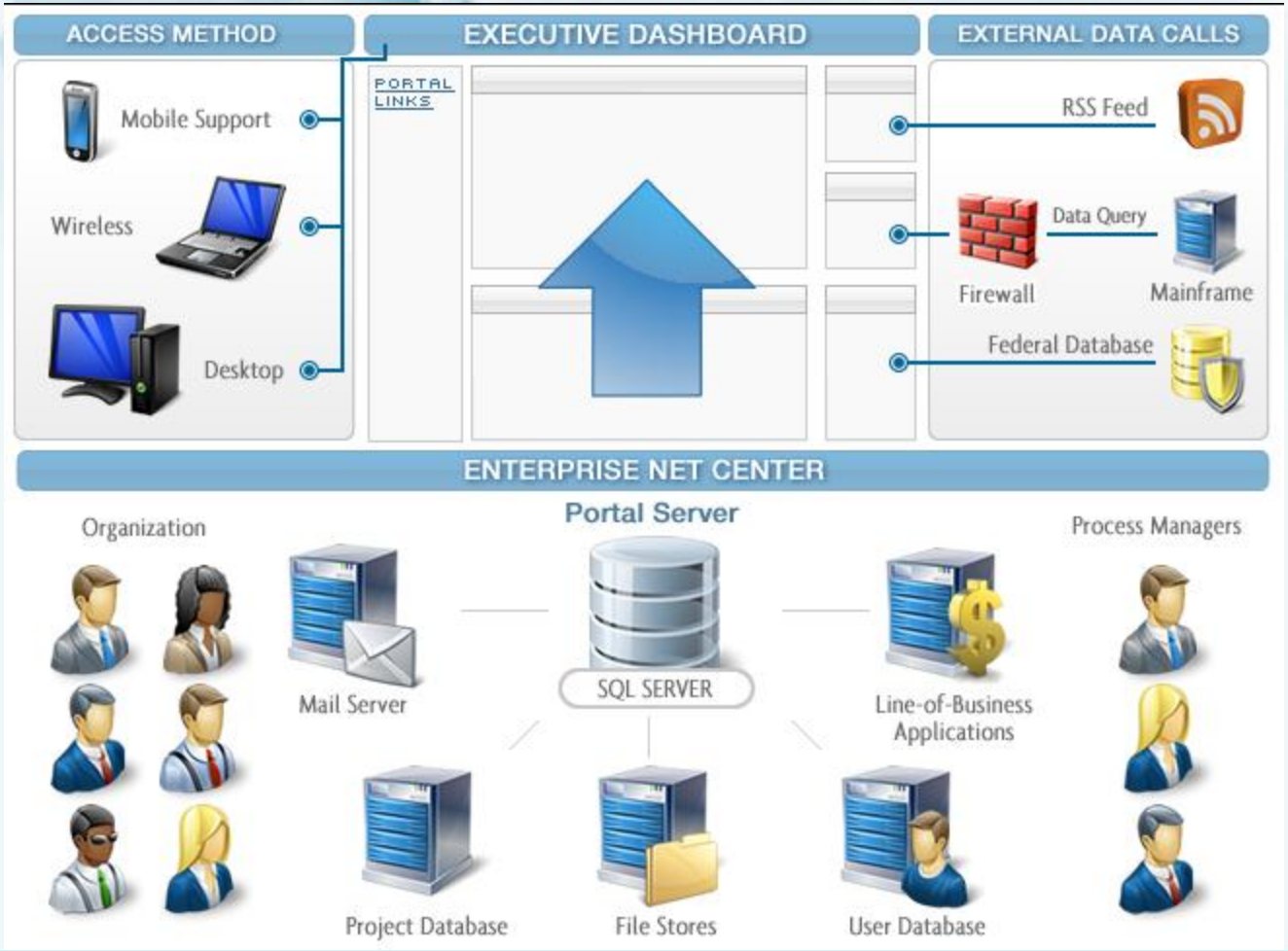
What are Dashboards?

- 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

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SharePoint Gap Analysis

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

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
Clients			
Dashboard Designer	Minimum ▪ 1 - Pentium 3 CP ▪ 1 ▪ 512 MB Available Disk Space ▪ 100 Mb Network Interface Recommended ▪ 1 - Dual Core 32-bit CPU (x86) ▪ 2.5 GHz ▪ 2 GB RAM ▪ 2 GB Available Disk Space ▪ 100 Mb Network Interface	▪ Microso Server and R2 ▪ Micro Server and 64- ▪ Window (exclud ▪ Microso (Busine N, Ente and 64-	
Add-in for Report Designer	Minimum ▪ 1 - Pentium 3 CPU ▪ 1 GHz ▪ 1.5 GB RAM ▪ 512 MB Available Disk Space ▪ 100 Mb Network Interface ▪ Recommended ▪ 1 - Dual Core 32-bit CPU (x86) ▪ 2.5 GHz ▪ 2 GB RAM ▪ 2 GB Available Disk Space ▪ 100 Mb Network Interface	▪ Microso Server and R2 64-bit ▪ Window (exclud ▪ Microso Server and 64- ▪ Microso (Busine N, Ente and 64-	
Dashboard Client (IE)		• Micros Server 2 R2), 32-b • Micros Server 2 and 64-bi • Windo (excludin • Micros (Business Enterpris 64-bit	
Servers			
Monitoring Configuration Wizard	Minimum ▪ 1 - Pentium 4 CPU ▪ 2.5 GHz ▪ 2 GB RAM ▪ 1 GB Available ▪ 100 Mb Recommended ▪ 2 Dual-Core 64-bit CPUs (x64) ▪ 4 GB RAM ▪ 5 GB Available Disk Space ▪ 7200 RPM IDE Drive ▪ 1000 Mb Network Interface	▪ Microsoft Windows Server 2003 (SP2 and R2), 32-bit and 64-bit ▪ Microsoft Windows S 3, 32-bit a	▪ Microsoft .NET Framework 2.0 ▪ Microsoft ASPNet 2.0 ▪ SQL Native Client 9.0
Monitoring Server	Minimum ▪ 1 - Pentium 4 CPU ▪ 2.5 GHz ▪ 2 GB RAM ▪ 1 GB Available Disk Space ▪ 100 Mb Network Interface Recommended ▪ 2 Dual-Core 64-bit CPUs (x64) ▪ 4 GB RAM ▪ 5 GB Available Disk Space ▪ 7200 RPM IDE Drive ▪ 1000 Mb Network Interface	▪ Microsoft Windows Server 2003 (SP2 and R2), 32-bit and 64-bit ▪ Microsoft Windows Server 2008, 32-bit and 64-bit ▪ Windows XP (excluding XPe), SP2 ▪ Microsoft Vista™ (Business, Business N, Enterprise) 32-bit and 64-bit	▪ Microsoft Internet Info Services (IIS) 5.1 (XP 7.0 with IIS Metabase configuration compatib Isolation Mode ▪ Microsoft .NET Framew ▪ Microsoft ASPNet 2.0 ▪ Microsoft ASPNet AJAX ▪ SQL Server 2005 Anal Management Objects S ▪ SQL Server 2005 Nativ SP2 ▪ SQL ADOMD.NET 9.0 ▪ msxml6.msi + updates ▪ SQL Server 2005 SP2 Server OLEDB 9.0 Pro ▪ SQL Server 2000 Anal Service Pack 4 - Build Client Systems (to use 2000 Analysis Services source)
Dashboard Server Web Part for SharePoint	Minimum ▪ 1 - Pentium 4 CPU ▪ 2.5 GHz ▪ 2 GB RAM ▪ 1 GB Available Disk Space ▪ 100 Mb Network Interface Recommended ▪ 2 Dual-Core 64-bit CPUs (x64) ▪ 4 GB RAM ▪ 5 GB Available Disk Space ▪ 7200 RPM IDE Drive ▪ 1000 Mb Network Interface	▪ Microsoft Windows Server 2003 (SP2 and R2), 32-bit and 64-bit ▪ Microsoft Windows Server 2008, 32-bit and 64-bit	▪ Microsoft Internet Info Services (IIS) 6.0, or IIS Metabase and IIS compatibility, IIS 6.0 ▪ Microsoft Office Share 2007 or WSS 3.0 (SP1 Server 2008) ▪ Microsoft .NET Framew ▪ Microsoft ASPNet 2.0 ▪ Microsoft ASPNet AJAX ▪ SQL Server 2005 Anal Management Objects S ▪ SQL Server 2005 Nativ SP2 ▪ SQL ADOMD.NET 9.0 ▪ msxml6.msi + updates ▪ SQL Server 2005 SP2 Server OLEDB 9.0 Pro ▪ SQL Server 2000 Anal Service Pack 4 - Build Client Systems (to use 2000 Analysis Services source)
Scorecard Viewer for Reporting Services	Minimum ▪ 1 - Pentium 4 CPU ▪ 2.5 GHz ▪ R ▪ Disk Space ▪ 100 Mb Network Interface Recommended ▪ 2 Dual-Core 64-bit CPUs ▪ 4 GB RAM ▪ 5 GB Available Disk Space ▪ 7200 RPM IDE Drive ▪ 1000 Mb Network Interface	▪ Microsoft Windows Server 2003 (SP2 and R2), 32-bit and ▪ Windows Server 2003, 32-bit and 64-bit	▪ Microsoft Office PerformancePoint Monitoring Server 2007 ▪ Microsoft SQL Server 2005 SP2
Monitoring System database	Minimum ▪ 1 - Pentium 4 CPU ▪ 2.5 GHz ▪ 2 GB RAM ▪ 1 GB Available Disk Space ▪ 100 Mb Network Interface Recommended ▪ 2 Dual-Core 64-bit CPUs (x64) ▪ 4 GB RAM ▪ 5 GB Available Disk Space ▪ RAID5 ▪ 1000 Mb Network Interface	▪ Microsoft Windows Server 2003 (SP2 and R2), 32-bit and 64-bit ▪ Microsoft Windows Server 2008, 32-bit and 64-bit	Microsoft SQL Server 2005 SP2 Standard Edition
Management Reporter	Minimum ▪ Pentium III compatible or higher ▪ 500 MB hard disk available* ▪ 512 MB RAM Recommended ▪ Dual Core 1024 MB RAM	Minimum ▪ Windows XP Professional SP2 ▪ Windows Server® 2003 Standard Edition Recommended ▪ Microsoft Vista™	Minimum ▪ Microsoft® SQL Server™ 2005 Express Edition ▪ Microsoft® SQL Server™ 2000 Service Pack 4 ▪ Microsoft® Outlook 2003 ▪ Microsoft® Outlook XP ▪ Windows® Mail ▪ Microsoft® Outlook Express Recommended ▪ Microsoft® SQL Server™ 2005 ▪ Microsoft® Outlook 2007 Required ▪ .NET 2.0, .NET 3.0

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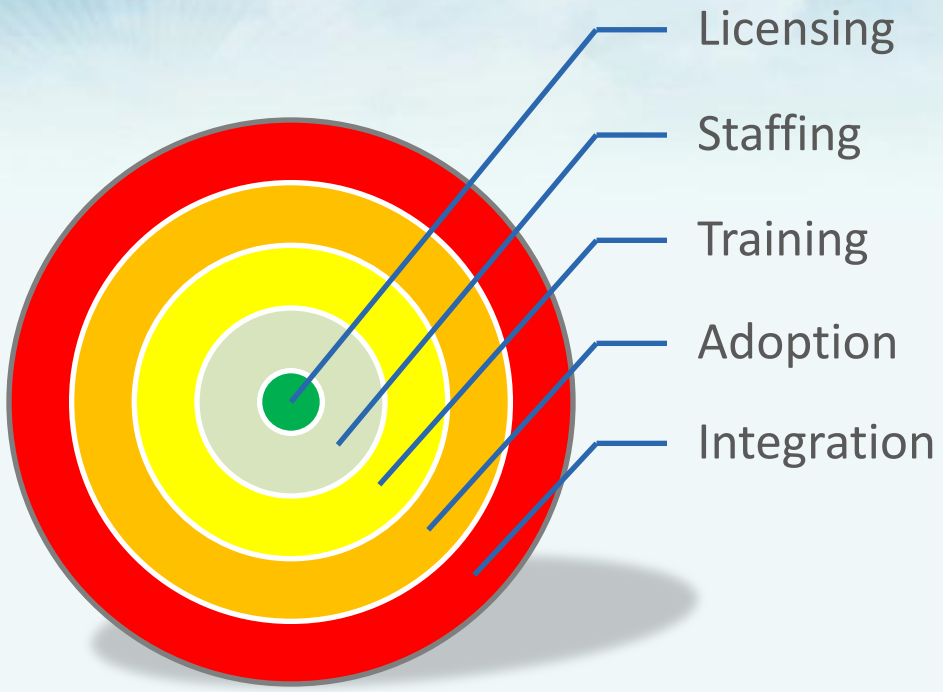
Why Reporting Projects Fail

- 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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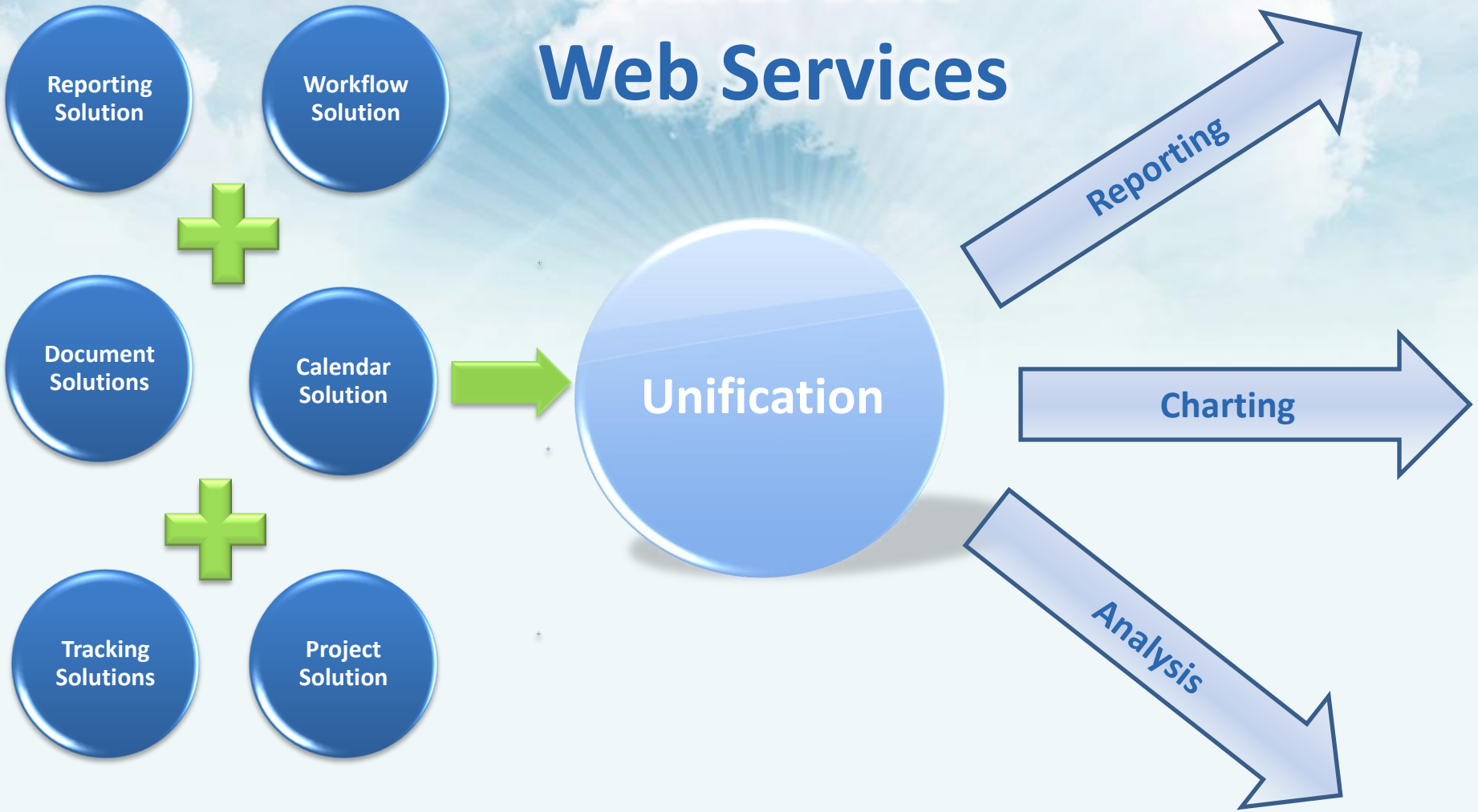
SharePoint Web Services



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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

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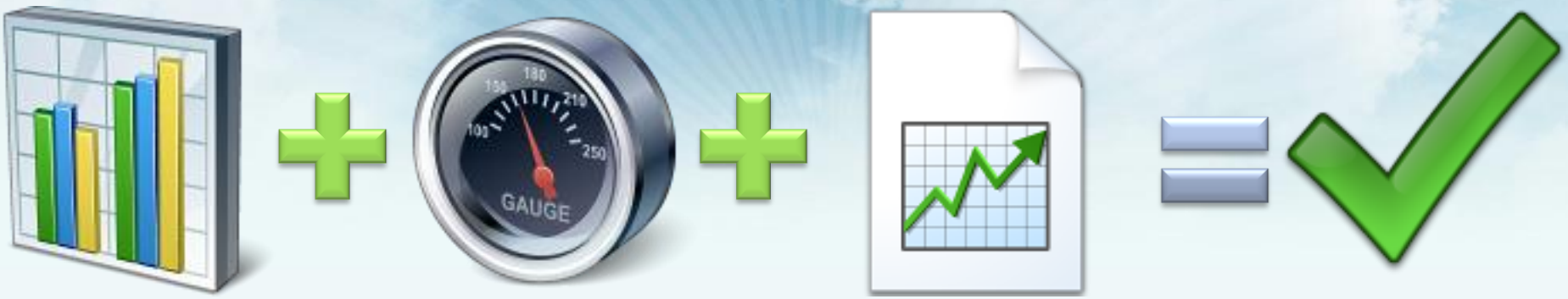
Comprehensive is Key

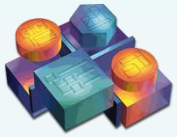


CHARTS GAUGES REPORTING COMPREHENSIVE SUITE

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

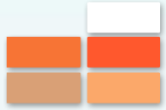
Introduction to Software FX

- 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

SharePoint

WPF & Silverlight

Java

PowerShell

What is DataParts?

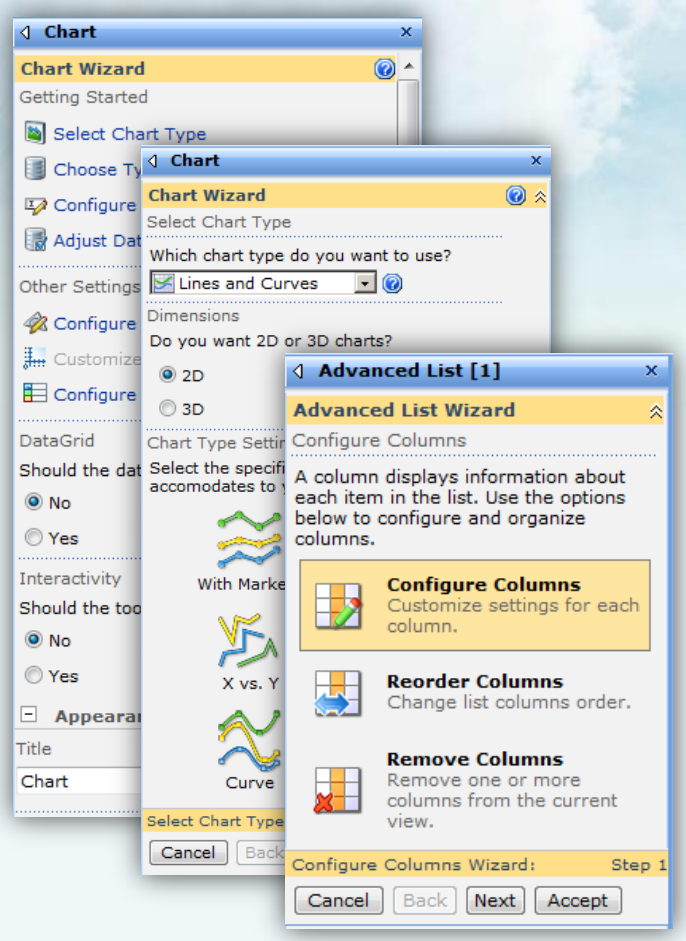
- Complete suite of visualization web parts
- Provides turn-key reports and dashboard solutions for all portal users
- Based on proven award-winning technology **(Chart FX and Grid FX)**

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



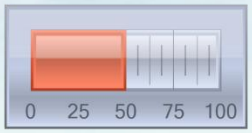
DataParts Charts

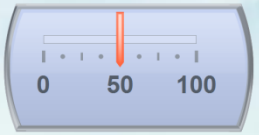
- Over 120 chart types
- 2D and 3D charts
- Fully customizable
  - Legends
  - Labels
  - Axes
  - Titles

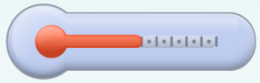
DataParts Gauges

Radial

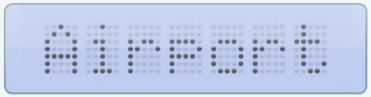
Horizontal



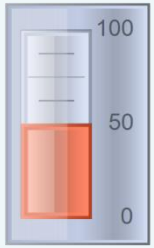


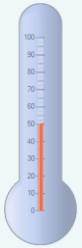


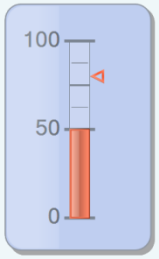
Digital Panel



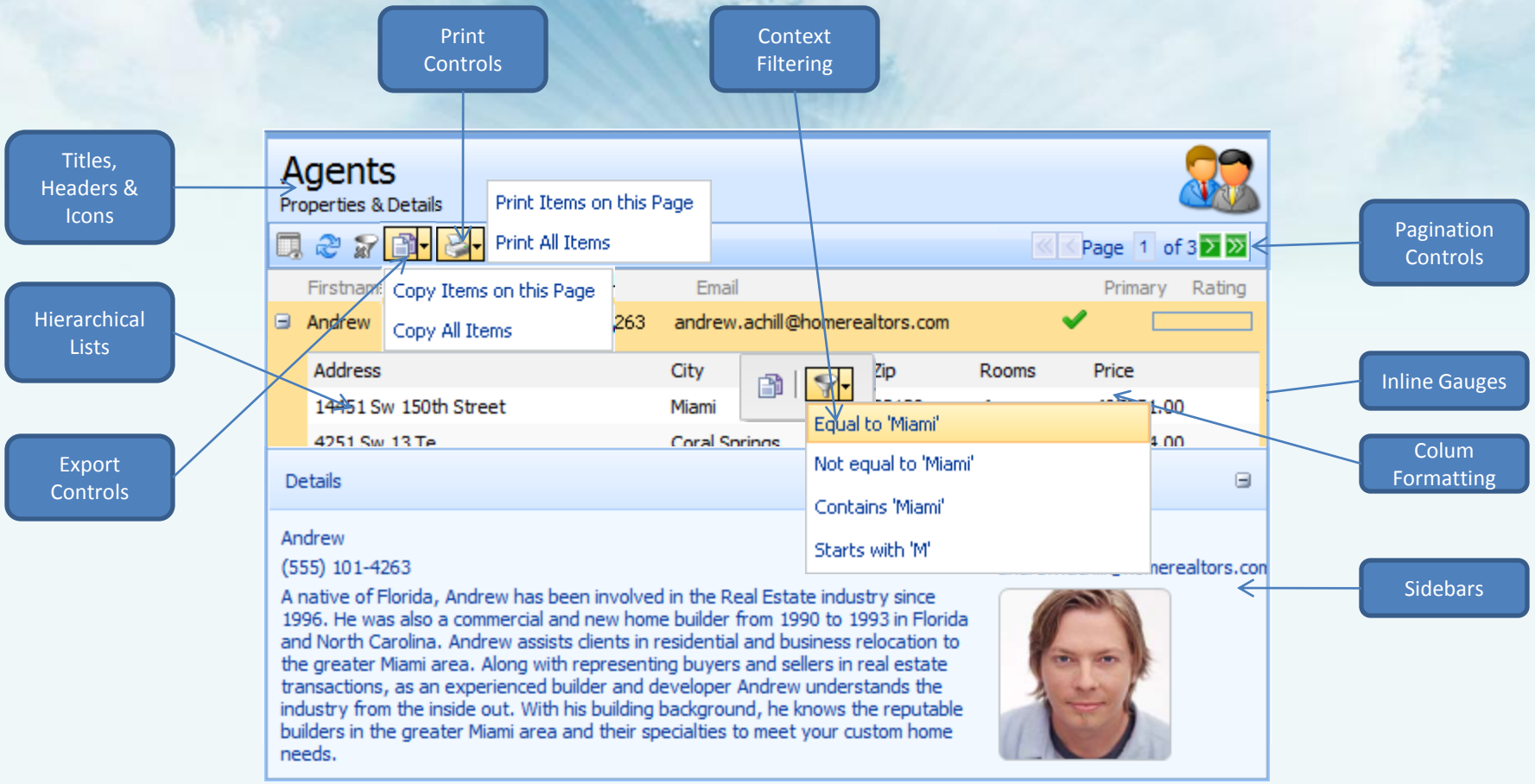
Vertical







DataParts Advanced Lists



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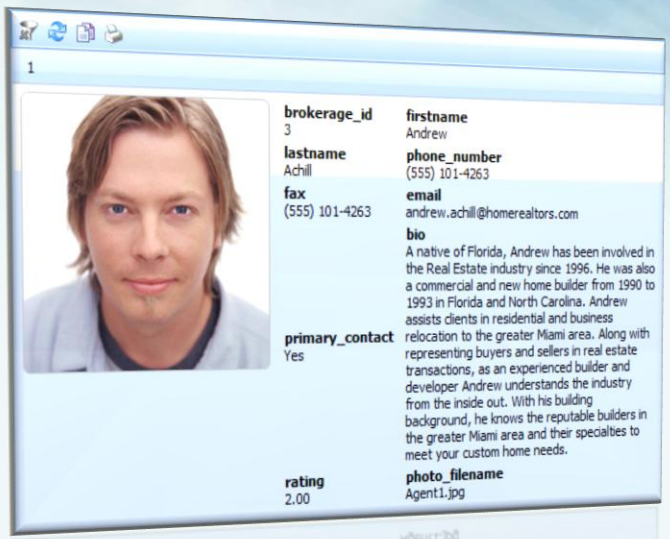
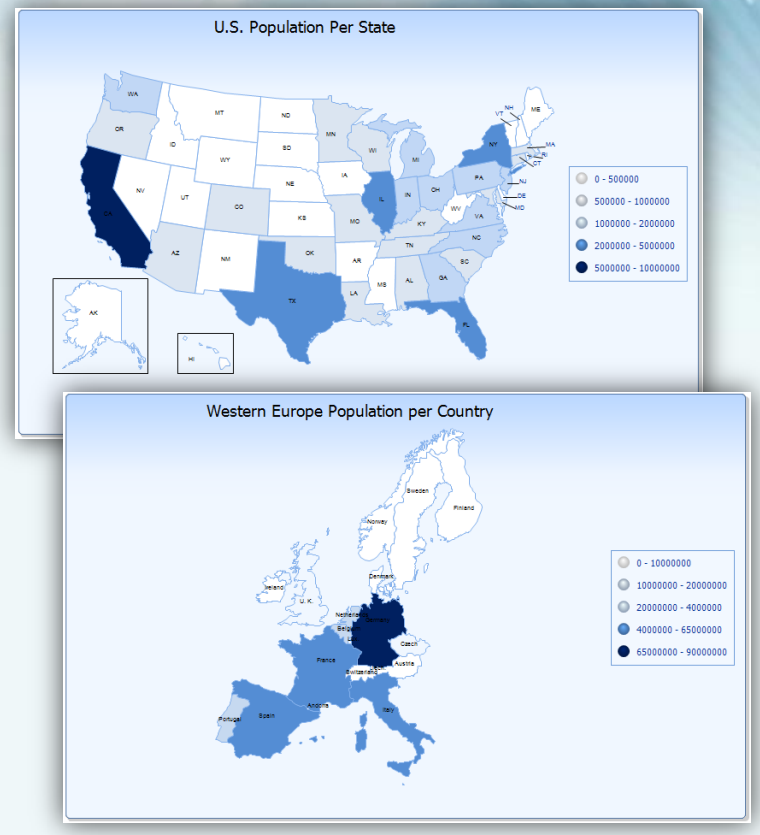
DataParts Card View



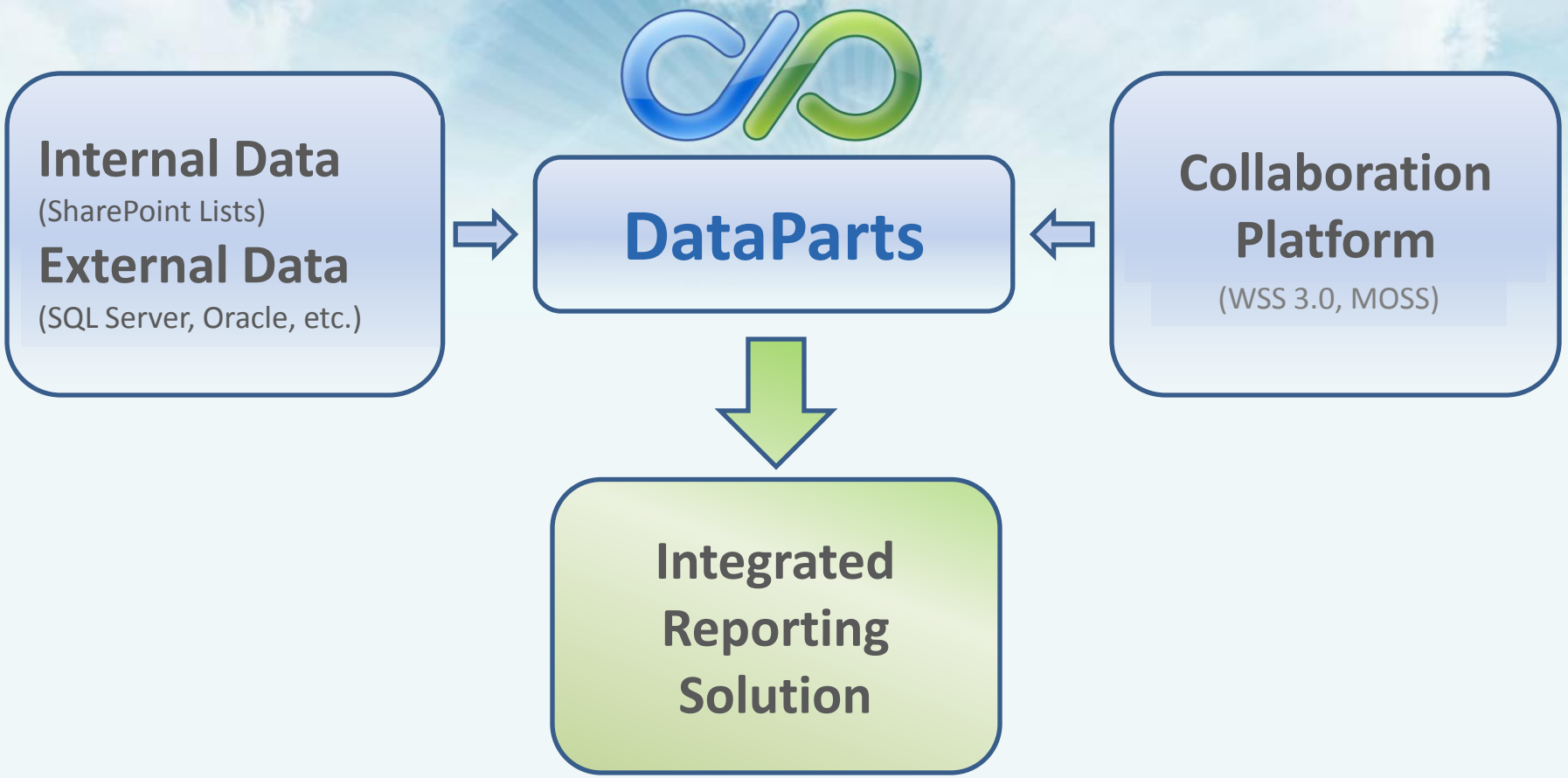
- Business Card style
- Ideal for images
- Useful to show details

DataParts Maps



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

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

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

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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http://www.softwarefx.com/webinars/0709-SharePoint2007/ViewOnline/

DataParts Licensing

- Small Business (Up to 100 Users)
- Medium Business (Up to 1000 Users)
- Enterprise (1000+ Users)

- Trial Version
  www.SoftwareFX.com/DataParts

Contact Information

Software FX

Tomas Tezak

Product Manager

tomast@softwarefx.com

561-999-8888 ext:284

Ivan Giugni

VP of Products

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DataParts Website

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