Dashboard Design
Making Reports Pop

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Microsoft Dashboard Tools

- **Excel**
  - Simple Accessible
  - Visual options
  - Interactivity

- **Reporting Services**
  - Moderate to advanced skills
  - Very flexible
  - Advanced visuals
  - Programmable

- **Performance Point**
  - Specialized design UI
  - Interactive
  - Ad-hoc visuals
  - Cross-product

- **Power View**
  - Coming soon
  - Enterprise only
  - Not programmable
  - Highly-interactive
  - Rich visuals
  - Rich exploration
Excel Dashboards

• Desktop for simplicity
  • Row limits
  • Data sprawl
• Analysis Services for data scalability
• PowerPivot for scalable business data modeling
• SharePoint/Excel Services for collaboration
• New visuals
  • Filter, sort
  • Charts, pivot table, conditional formatting
  • Sparklines, indicators, slicers
Excel Reports

add-in visuals from BonaVista Systems
Demonstration

• SharePoint dashboard & reporting tools
  • Excel visualization
  • PowerPivot
  • PerformancePoint
Reporting Services

• Professional IT reports
  • Programmable, advanced flexibility
• Evolution of SSRS self-services reporting
  • Report Builder [3.0]
  • Report parts
  • Shared datasets
Dashboard Reports

Internet Sales Dashboard Nov 22 2011

Orders
- FY 2003: 55,983
- FY 2004: 55,983

Prod Gross Profit Margin
- July 2002: 908.24%
- August 2003: 63.46%
- September 2003: 65.15%
- October 2003: 67.60%
- November 2003: 63.07%
- December 2003: 89.56%
- January 2004: 101.51%
- February 2004: 99.41%
- March 2004: 100.36%
- April 2004: 93.78%

Internet Revenue (MIL)
- FY 2003: 22.24M / 50.00M

Calendar Year Category
- CY 2003
  - Accessories
  - Bikes
  - Clothing
  - Components
- CY 2004
  - Accessories
  - Bikes
  - Clothing
  - Components

Customer Locations
- FY 2003
  - Accessories: 14
  - Bikes: 3
  - Clothing: 1
  - Components: 1
- FY 2004
  - Accessories: 7
  - Bikes: 3
  - Clothing: 1
  - Components: 1

Graphs showing sales trends and customer locations.
SSRS Advanced Design Skills

- Dynamic Visibility
- Composite Report Items
- Expressions
- Filters
- Grouping
- Parameters
- Report Actions
SSRS Charting

• Multi-area

• Multi-series

• Repeated regions
Interactive & Synchronized Report Items

<table>
<thead>
<tr>
<th>Calendar Year</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2001</td>
<td>Accessories, Bikes, Clothing, Components</td>
</tr>
<tr>
<td>CY 2002</td>
<td>Accessories, Bikes, Clothing, Components</td>
</tr>
<tr>
<td>CY 2003</td>
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<tr>
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</tr>
</tbody>
</table>

**CY 2001 Bikes sales**

Sales for different categories in CY 2001 are shown in the graph. The highest sales were in September, with a peak of around $2,500,000. The lowest sales were in January and August, with a low of around $1,000,000. The sales for other months were in between, with a general trend of increasing from March to September and decreasing thereafter.
Scorecard & Indicators

• KPI Indicators

• Business Scorecard
Spatial & Map Reports
Demonstration

• Designing SSRS dashboard components
  • Report parameters
  • Gauge panel
  • Business scorecard with KPI indicators
  • Sparkline report
  • Interactive chart
  • Thumbnail map with interactivity
Enabling Self-service Reporting

- Shared data sources
- Semantic models
- Report parts
- Report Builder [3.0]
- Deployment planning
Deployment Planning

• Each target folder is SharePoint library
Deploying Report Parts

- Any data region or container
- All dependent objects are deployed & attached
Demonstration

• Planning deployment & setting targets
• Designing report parts
• Deploying & saving report parts
Enabling Self-service Reporting

- Shared data sources
- Semantic models
- Report parts
- Report Builder [3.0]
- Deployment planning
Demonstration

- Run Report Builder [3.0]
- Find report parts
- Assemble report
Thank You

Resources

Contact Paul
My Blog
Books & Blogs

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SolidQ.com/journal
FlowingData.com
PerceptualEdge.com