



# Creating Dashboards for Microsoft Project Server 2010

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# 1. Introduction

The purpose of this document is to provide sufficient detail to fully design and implement Business Intelligence Dashboards that support an Enterprise Project Management Solution (EPM), which consists primarily of Microsoft SharePoint Server 2010 and Microsoft Project Server 2010. It also includes detailed steps on how to replicate reports and dashboards included in the Project Server 2010 demonstration and evaluation pack available on the [Microsoft Download Center](#). The purpose is to help you easily create reports and dashboards for your environment with similar characteristics.

The target audience for this document is the business owner and report developers who are looking for a quick way to develop dashboards that will support an Enterprise Project Management Solution for their organization.

This document is not intended to provide a comprehensive technical description of each of those reporting methods. Each reporting tool has been documented in extensive detail in books or various online forums, albeit not often documented in the context of a Project Server deployment. Where possible, links to additional information have been provided. For additional information on Microsoft Project Server 2010 business intelligence, see [Business Intelligence in Project Server 2010](#).

## Installation Prerequisites

Prior to commencing the design of the Business Intelligence Dashboards that will support an Enterprise Project Management Solution (EPM), there are a number of prerequisites that need to be met. However, they are beyond the scope of this document. Here are links to additional information:

- Project Server 2010 Service Application must be installed and configured. See [Install and configure Project Server 2010](#) for more information.
- Project Server 2010 must be configured with a minimum set of custom fields. See [Appendix A](#).
- SQL Server Reporting Services must be installed in SharePoint Integrated mode. See [Initial Installation \(Reporting Services\)](#) for more information.
- Excel Services Service application must be installed and configured. See [Configure reporting for Project Server 2010](#) for more information.
- PerformancePoint Services Service Application must be installed and configured. See [Deploying PerformancePoint 2010 Soup to Nuts](#), a blog article, for more information.

## Document Structure

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This document is structured with the following major sections:

1. Understanding Report Types
2. Creating Reports
3. Creating Dashboards by using PerformancePoint Services
4. Creating a Dashboard by using Web Parts page

## 2. Understanding Report Types

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SharePoint Server 2010 and Project Server 2010 enables dashboard authors and users to easily view and use a variety of report types, including analytic charts and grids, Excel Services reports, SQL Server Reporting Services reports, and many others.

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This section provides an overview of the different kinds of reports that you might use in your EPM dashboard:

- Excel Services reports
- PerformancePoint analytic charts and grids
- SQL Server Reporting Services reports

The following report types can also be implemented part of an overall Business Intelligence strategy. However, they are beyond the scope of this document:

- Visio Services
- PowerPivot
- PerformancePoint Scorecard
- PerformancePoint Strategy Map
- PerformancePoint KPI Details Reports

### Excel Services Reports

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Excel Services reports are used to display Microsoft Excel spreadsheets or items that are in an Excel workbook, such as PivotTable reports, PivotChart reports, or a section in a worksheet. An Excel Services report might resemble the following image:

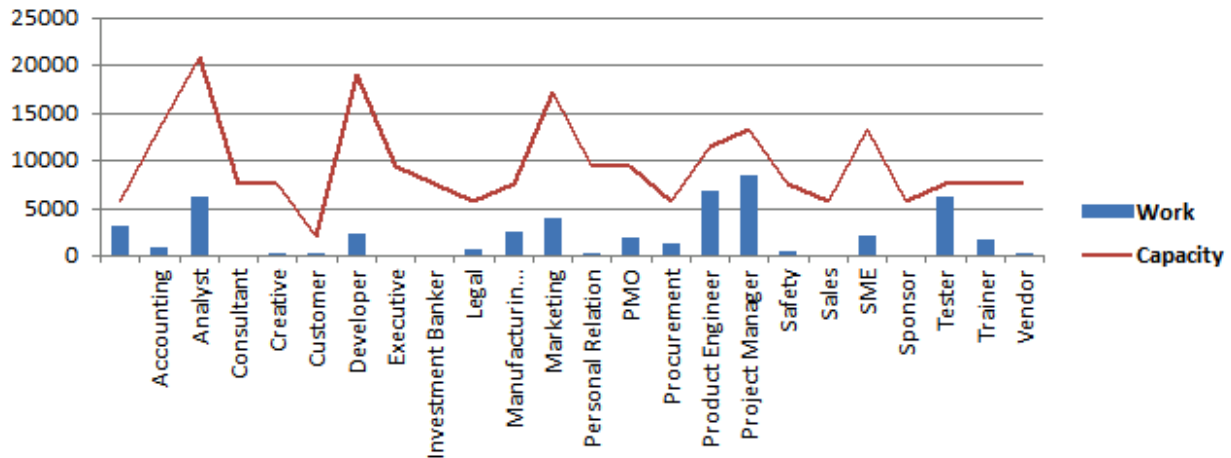


Figure 1: Excel Services Report Example

Excel Services reports can use data that is stored in Analysis Services, a SharePoint list, a table in SQL Server, an Excel workbook, or in Excel Services in Microsoft SharePoint Server 2010. Project Server 2010 includes ten default Excel Services reports for enterprise project management (EPM) reports:

- Simple Project List
- Milestones Due This Month
- Resource Capacity
- Issues and Risks
- Deliverables
- Timesheet Actuals
- Rejected Projects
- Top Projects
- Workflow Chart
- Workflow Drilldown

In addition, Project Server 2010 includes fourteen default Excel Services templates for enterprise project management (EPM) reports generated out of Analysis Services.

- Assignment Non Timephased
- Assignment Timephased
- Deliverables
- EPM Timesheet
- Issues
- MSP\_Portfolio\_Analyzer

- MSP\_Project\_SharePoint
- MSP\_Project\_Timesheet
- Project Non Timephased
- Resource Non Timephased
- Resource Timephased
- Risks
- Task Non Timephased
- Timesheet

Similar to analytic charts and grids, Excel Services reports are typically highly interactive. Users can click to see lower levels of detail. Users can export these reports to Microsoft PowerPoint or Excel and apply filters to them.

## PerformancePoint Analytic Charts and Grids

PerformancePoint Analytic charts and grids are used to display information in highly interactive charts and tables (known as grids). These reports enable dashboard users to quickly and easily explore complex data without having to write queries. An analytic chart might resemble a bar chart, as shown in the following figure:

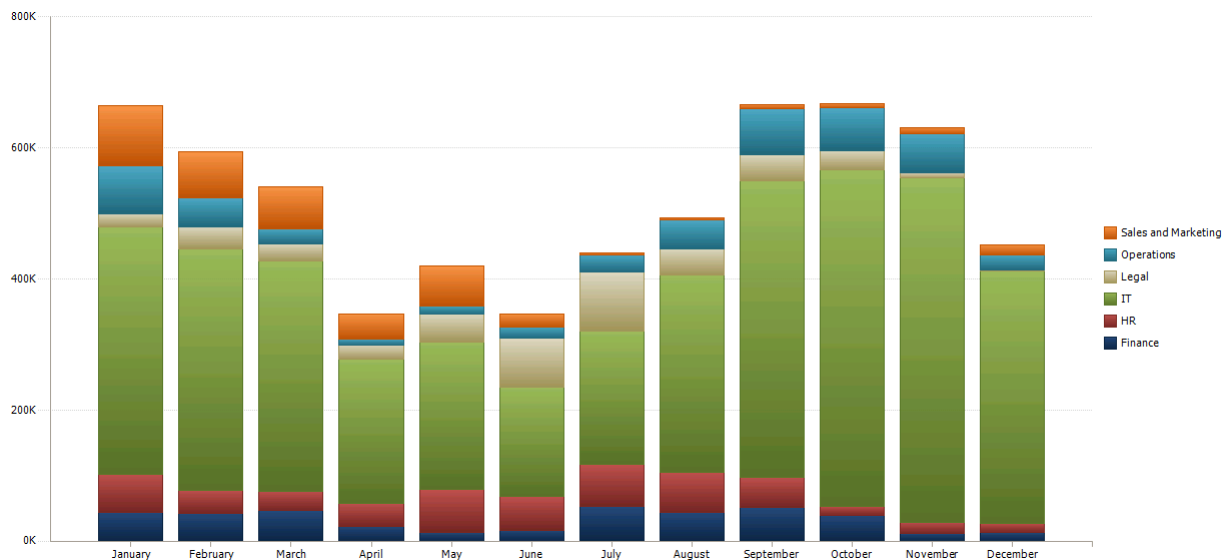


Figure 2: PerformancePoint Analytic Chart Example

Analytic charts and grids use data that is stored in Microsoft SQL Server Analysis Services. Project Server 2010 has the ability to build multiple databases for OLAP analyses by using SQL Server Analysis Services. Each database can be limited to a specific date range, with independent sets of projects and resources filtered by one or more departments. In addition, each Analysis Services database includes 14 default cubes for enterprise project management (EPM) reports.

Following are the fourteen EPM cubes:





- Assignment Non Timephased
- Assignment Timephased
- Deliverables
- EPM Timesheet
- Issues
- MSP\_Portfolio\_Analyzer
- MSP\_Project\_SharePoint
- MSP\_Project\_Timesheet
- Project Non Timephased
- Resource Non Timephased
- Resource Timephased
- Risks
- Task Non Timephased
- Timesheet

Users can add calculated measures to any of the cubes by using an MDX expression. For example, users can add a resource availability calculated measure to the Virtual Portfolio Analyzer cube.

These reports are highly interactive. Using a mouse, EPM Business Users can typically do all of the following in analytic charts and grids:

- Drill down or up to see lower or higher levels of detail.
- Sort items in ascending or descending order.
- Filter out empty rows or columns, isolate an item, or remove an item from the report view.
- Apply top or bottom members in a group.
- Apply value filters, such as items greater than or less than an amount that you specify.
- Pivot a grid, or change a grid to an analytic chart.
- Use Additional Actions, which are defined in the Analysis Services cube.
- Show or hide information that is included in the chart or grid.
- Work with pages of grid data (useful when a query returns a large set of results).
- Launch a Decomposition Tree to view more information about a particular report value.

## SQL Server Reporting Services Reports

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SQL Server Reporting Services reports are reports that have been published to Reporting Services. Reporting Services reports can resemble tables or charts, and they can include their own filters, which are sometimes called parameters.

A Reporting Services report might resemble the following image:



Figure 3: SQL Server Reporting Services Report Example

Reporting Services reports are typically highly interactive. Depending on how the reports are configured, dashboard users can explore data by clicking, sorting, and scrolling through pages. In addition, users can do the following:

- Preview, adjust, and print one or more pages in the report.
- Apply one or more parameters without having to rerun a query to the database. Parameters are built-in filters that are specific to the report.
- Export data as image files, Adobe PDF files, Web files, or other formats that Microsoft applications recognize.

## 3. Creating Reports

### Excel Services Reports

The following section provides detailed steps on how to create the following Excel Services reports:

Name	Type
KPI Department per %	Excel Services
Project Cost per Department	Excel Services



Resource Availability by Role	Excel Services
Timesheet Reconciliation List	Excel Services

Table 1: List of Excel Services Reports

## KPI Department per %

The KPI Department per % report is a histogram chart that displays traffic light weighted scores for each department.

This report is generated from a custom SQL Server table (IPMO\_DepartmentalKPIvalues) designed by Piet Remen from i-PMO that converts the project traffic light text values into weighted scores. The stored procedure is available in [Appendix B](#).

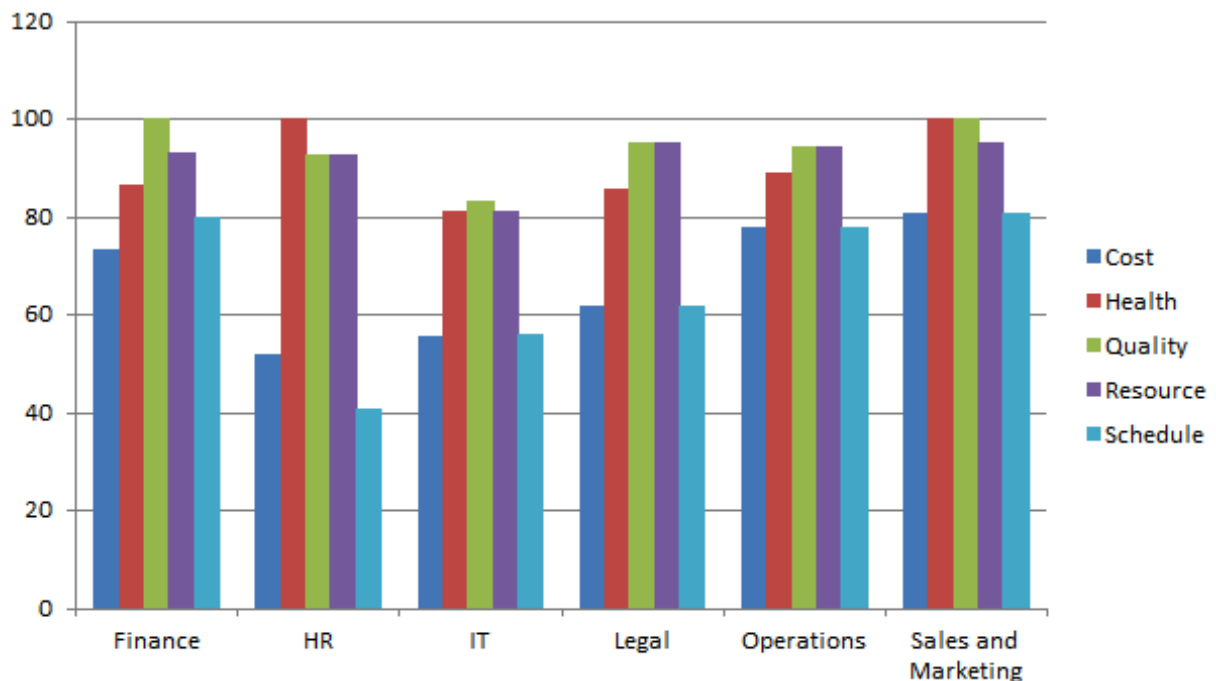

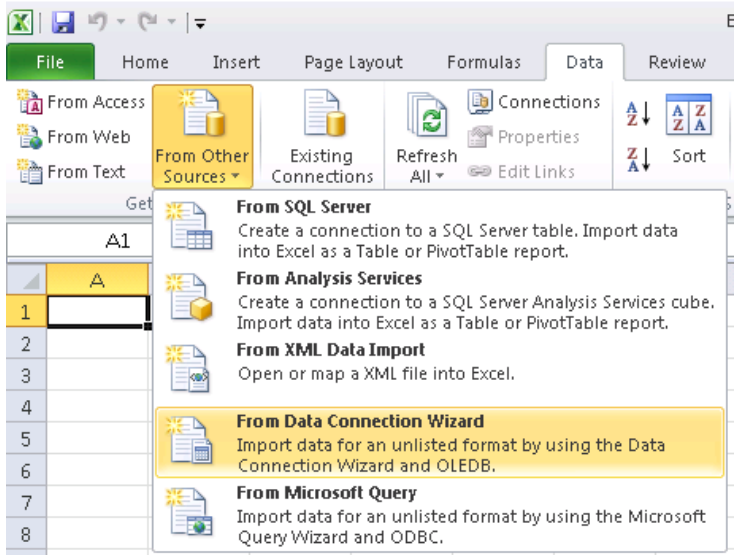
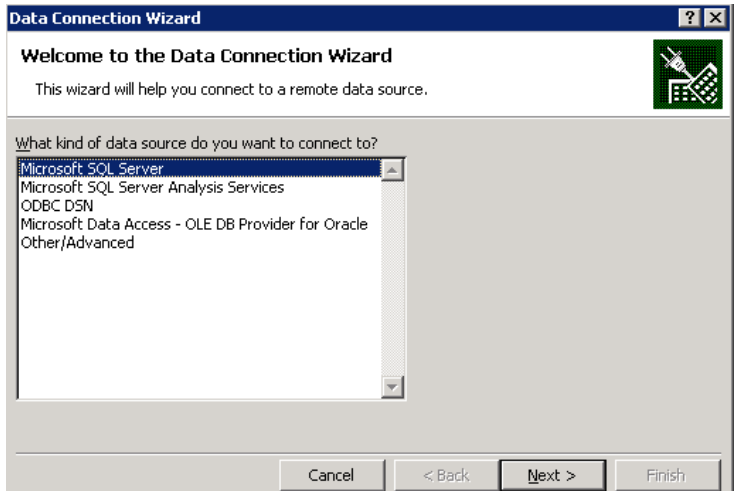


Figure 4: KPI Department per % report

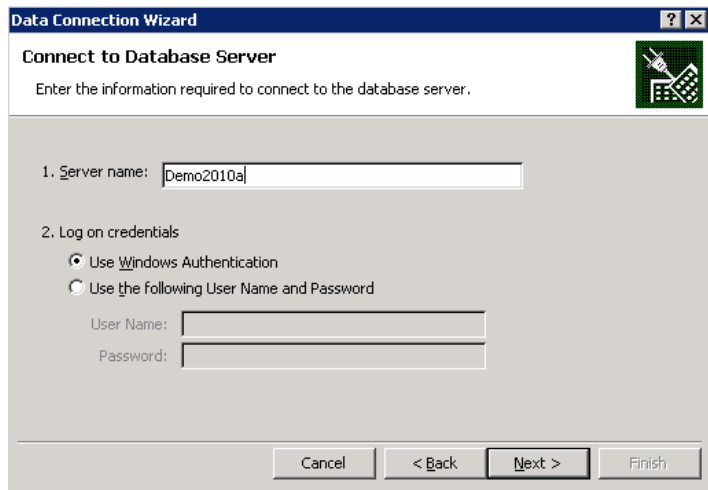
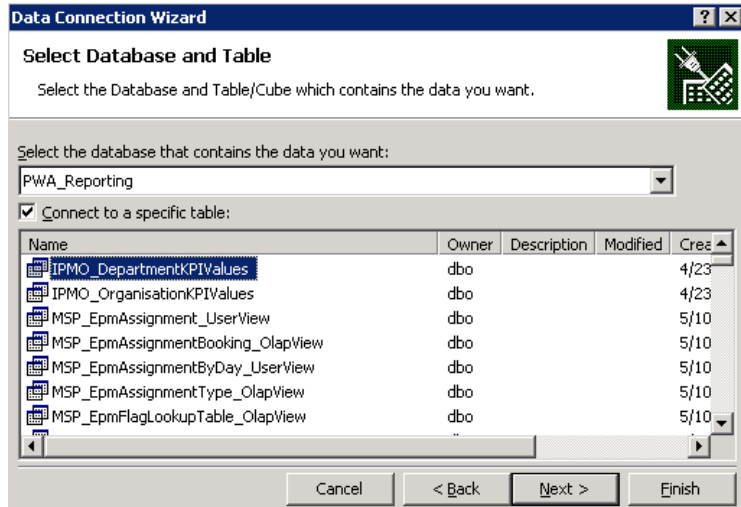
## Create Office Data Connection (.odc) File

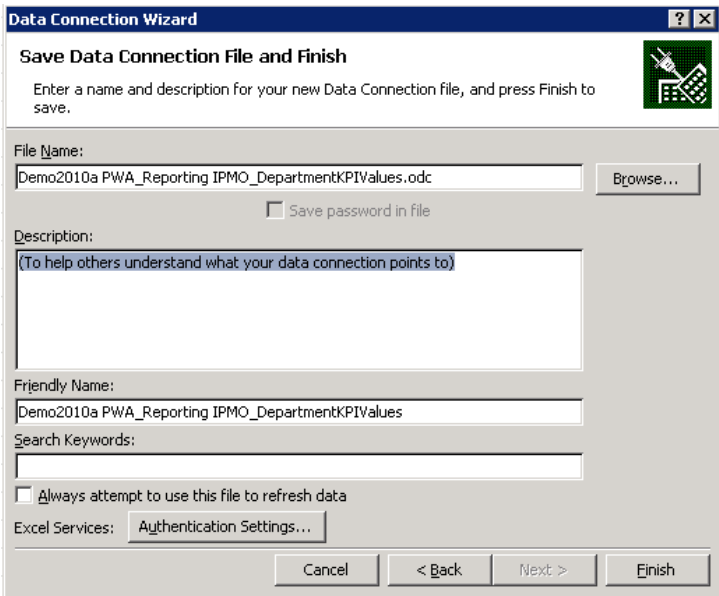
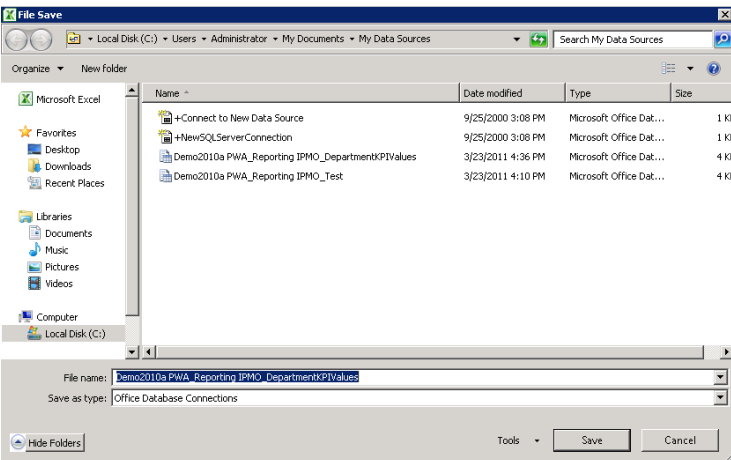
Prior to commencing the design of the report, it is required to create an Office Data Connection file to the custom table. Note that this step is not required for reports that use Excel Services templates reports that are included with the product.

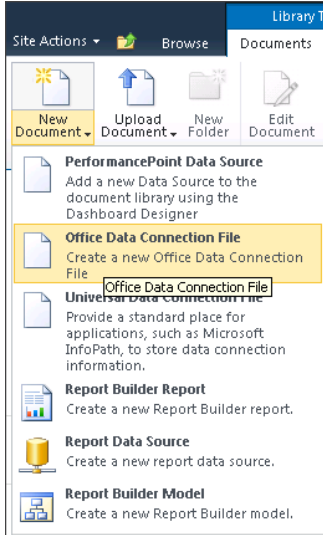
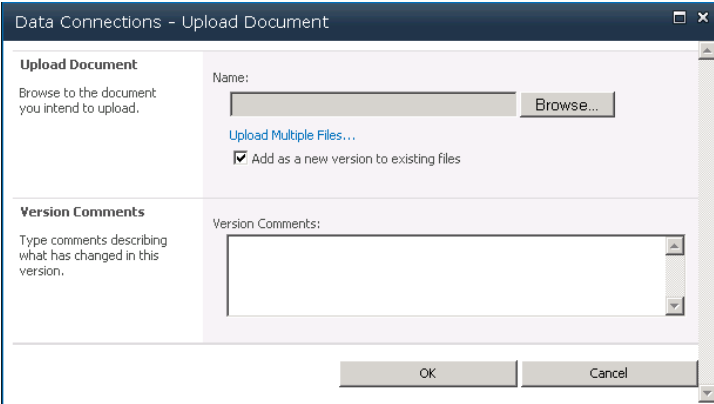
To create the Office Data Connection, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

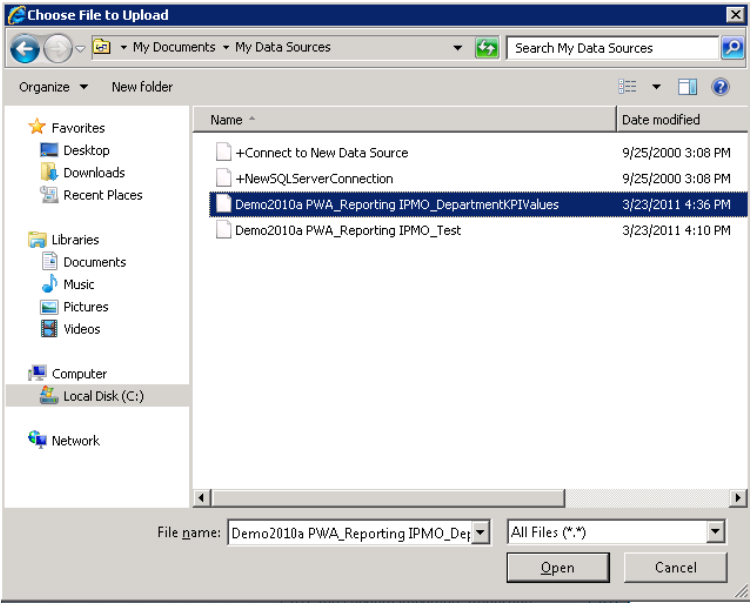
Create Office Data Connection		
Step	Action	Details
1	Start Excel 2010	 <p>The screenshot shows the Microsoft Excel 2010 'Starting' screen. It features the Excel logo, the word 'Starting', the Office logo, and a yellow gradient bar at the bottom with copyright information and a 'Cancel' button.</p>
2	On the Data tab, in the Get External Data group, click From Other Sources, and then click From Data Connection Wizard.	 <p>The screenshot shows the Excel ribbon with the 'Data' tab selected. The 'Get External Data' group is expanded, showing options like 'From Access', 'From Web', 'From Text', and 'From Other Sources'. The 'From Other Sources' dropdown menu is open, displaying options: 'From SQL Server', 'From Analysis Services', 'From XML Data Import', 'From Data Connection Wizard' (highlighted), and 'From Microsoft Query'.</p>
3	Select Microsoft SQL Server, and then click Next.	 <p>The screenshot shows the 'Data Connection Wizard' dialog box. It has a title bar 'Data Connection Wizard' and a subtitle 'Welcome to the Data Connection Wizard'. Below the subtitle, it says 'This wizard will help you connect to a remote data source.' A list box titled 'What kind of data source do you want to connect to?' contains the following options: 'Microsoft SQL Server', 'Microsoft SQL Server Analysis Services', 'ODBC DSN', 'Microsoft Data Access - OLE DB Provider for Oracle', and 'Other/Advanced'. The 'Next &gt;' button is highlighted.</p>



Create Office Data Connection		
Step	Action	Details
4	Enter the name of the server (by default, it is the network name of the computer) and a user account that has a valid login and database permissions. Click Next.	
5	Select a database, and then highlight the table you want to connect to (IPMO_DepartmentPKIValues in our example), click Next.	

Create Office Data Connection		
Step	Action	Details
6	Enter a name for the file, and then click Finish.	
7	<p>On the Data tab, in the Connections group, click Properties, and then click the Connection Properties button next to the connection name.</p> <p>On the Definition tab, click Export Connection File to see where the .odc is stored on your local machine. Write down the location and click Cancel.</p>	

Create Office Data Connection		
Step	Action	Details
8	In PWA, select Business Intelligence Center → Documents → Data Connections → New Document → Office Data Connection File	
9	Click Browse.	

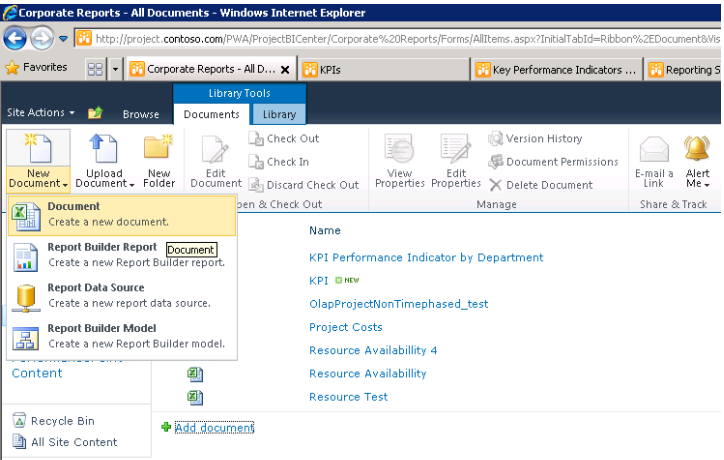
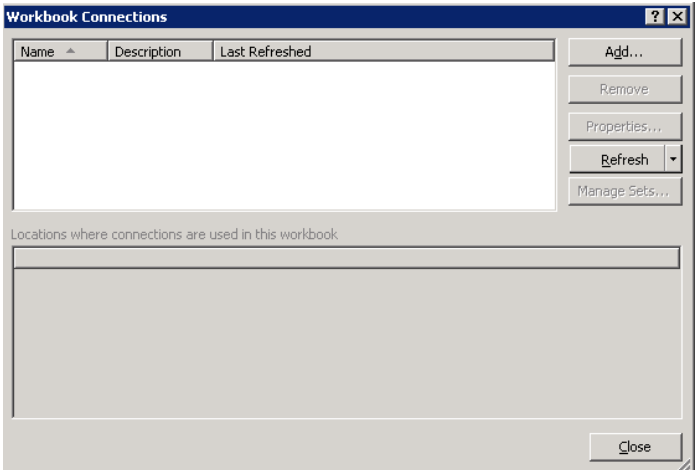
Create Office Data Connection		
Step	Action	Details
10	Browse to the location where you saved the .odc in step 7 → Click Open.	

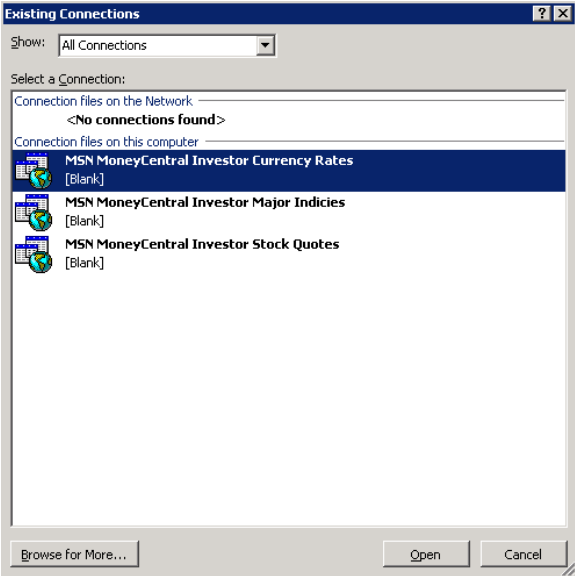
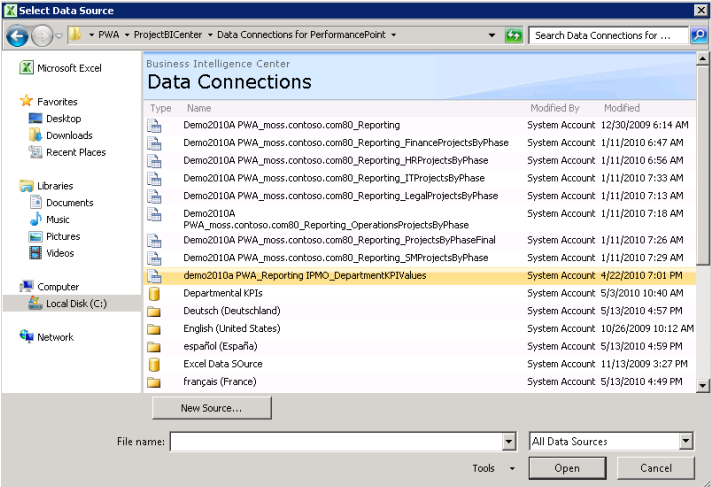




## Create Excel Services Report

To create the report, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

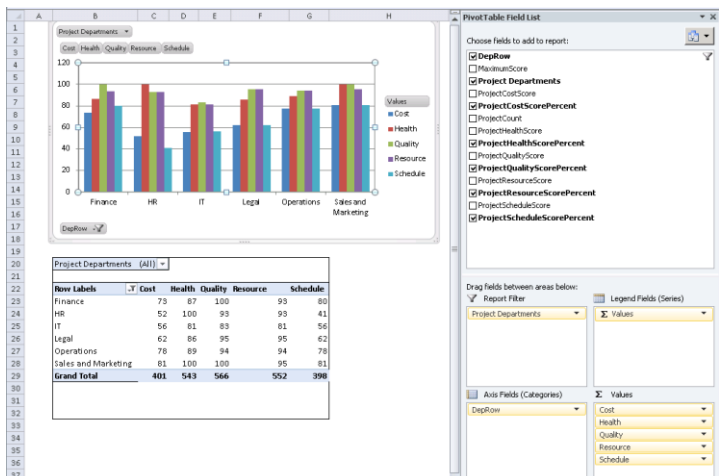

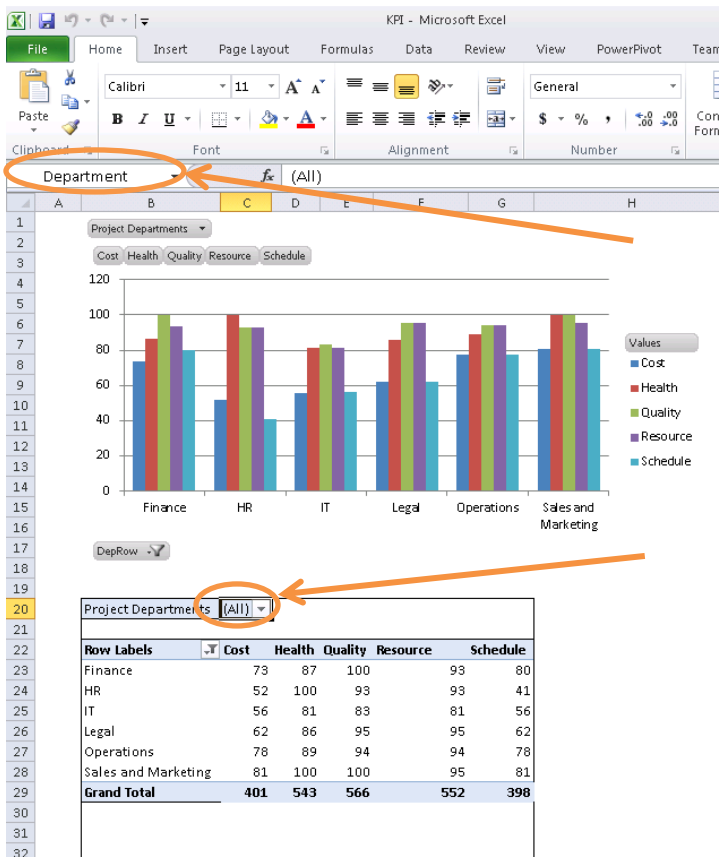
Create KPI Department per % Report		
Step	Action	Details
1	In PWA, select Business Intelligence Center → Documents → Document Library that will contain your Excel Services report (Corporate Reports in our example) → New Document → Create a new document.	
2	In Excel toolbar, select Data → Existing Connections → Add.	

Create KPI Department per % Report		
Step	Action	Details
3	Select Browse for More...	
4	Browse to Business Intelligence Center → Data Connections for PerformancePoint → Open demo2010a PWA_Reporting IPMO_DepartmentKPIValues.	

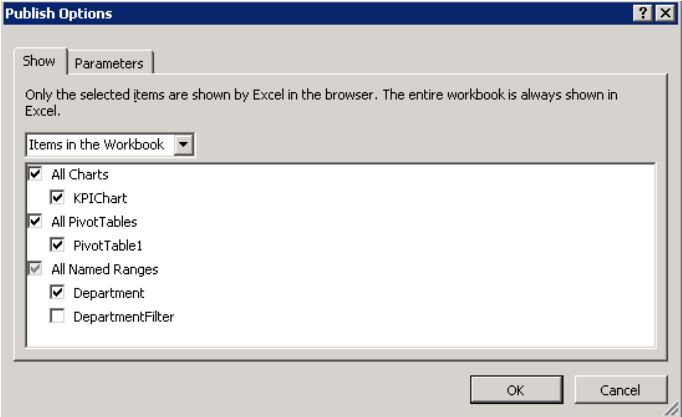

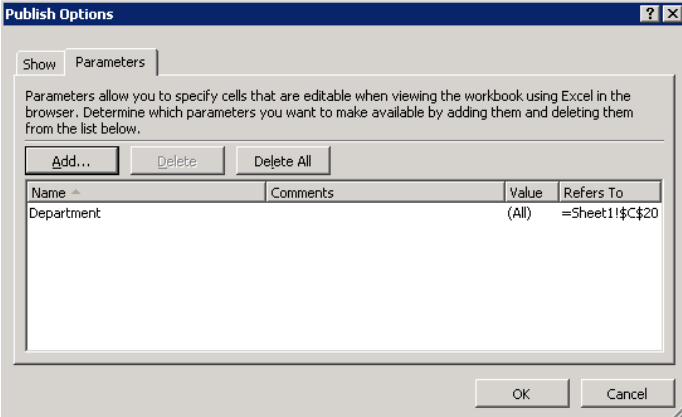
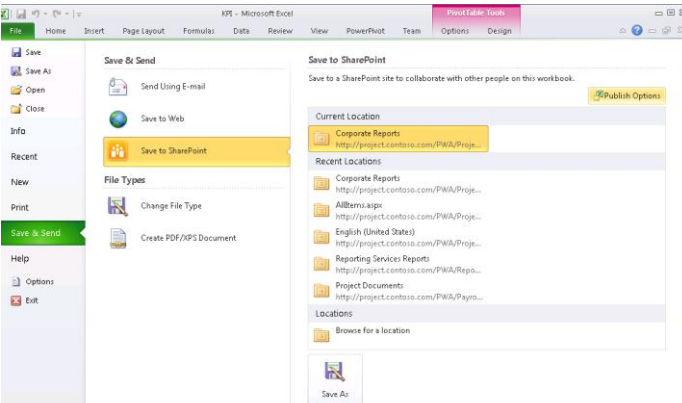


Create KPI Department per % Report		
Step	Action	Details
5	Select Data → Existing Connections and open demo2010a PWA_Reporting IPMO_DepartmentKPIValues.	
6	Select PivotTable Report → OK.	

## Create KPI Department per % Report

Step	Action	Details
7	Create PivotTable report and Chart	
8	 <b>Important Step!</b>  Rename cell name for Project Department filter (C20 in this example). This step is important as it ensures that the filter can be used as a parameter in PerformancePoint.	



Create KPI Department per % Report		
Step	Action	Details
9	Select File → Save & Send → Save to SharePoint → Publish Options → select all items in workbook you want to publish.	
10	 <b>Important Step!</b>  Select Parameters → Add Named Range you created in step 8 as a parameter → OK	
11	Save Excel file as KPI.xlsx in the document library that will store all your Excel Services reports (Corporate Reports in this example)	

## Project Cost per Department

The Project Cost per Department report is a histogram chart that displays Actual Cost, Cost and Baseline Cost for each department. This report is generated from the MSP\_Portfolio\_Analyzer cube that comes with Project Server 2010.

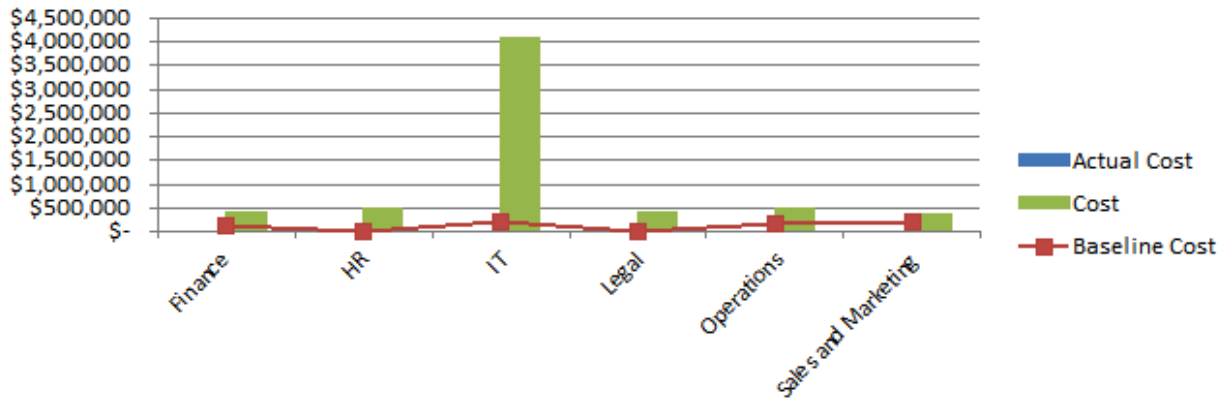
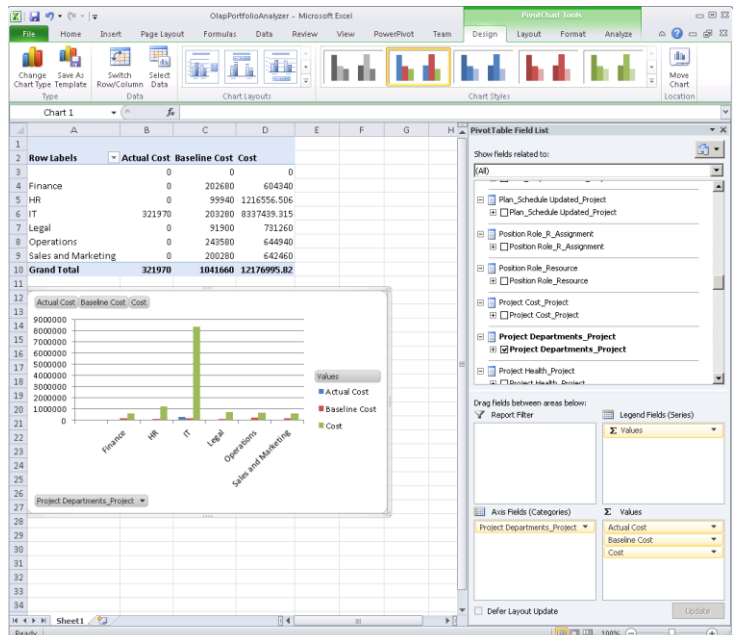
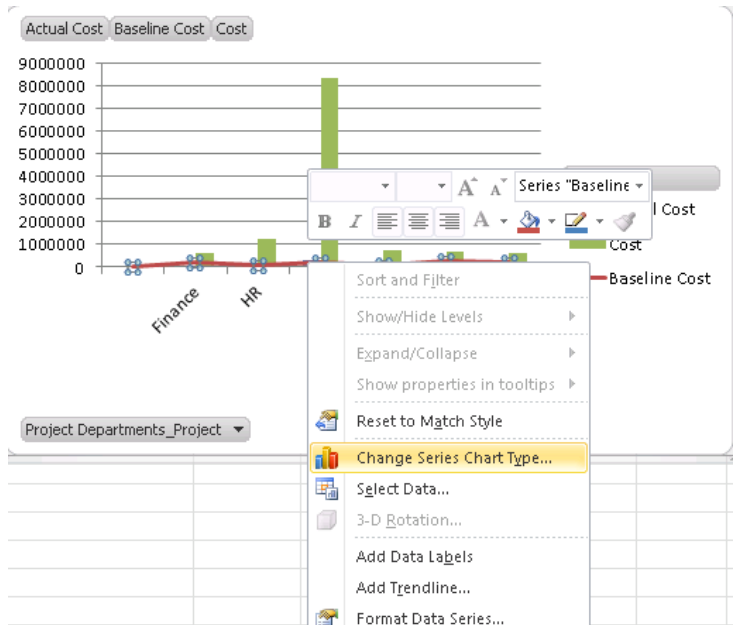


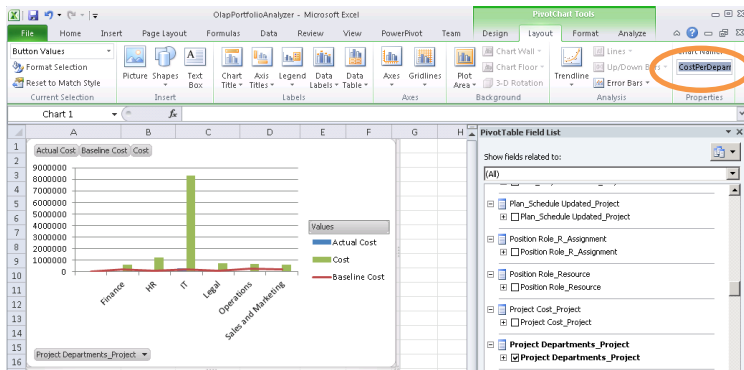
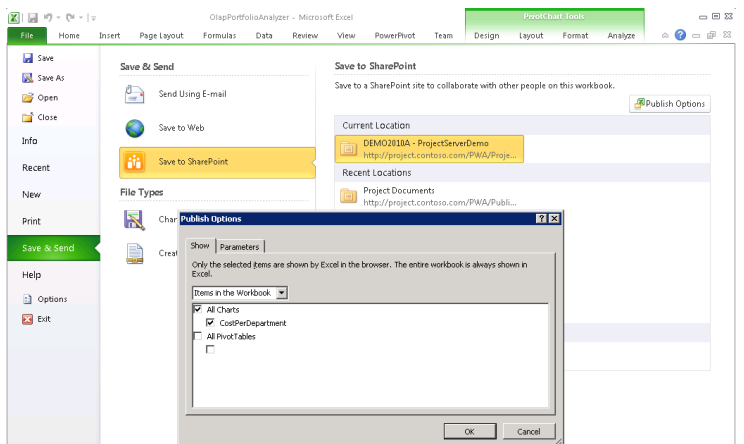
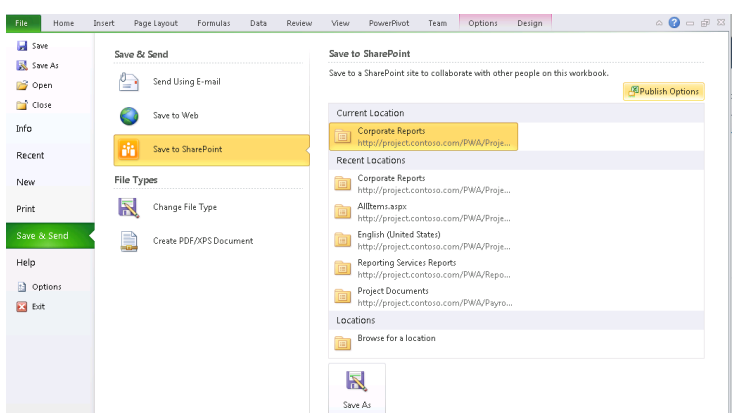
Figure 5: Project Cost per Department report

To create the report, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Project Cost per Department Report		
Step	Action	Details
1	In PWA, select Business Intelligence Center → Documents → Templates → English → <Name of your Cube> (Demo2010a in this example) → OlapPortfolioAnalyzer.	
2	Select Read Only → OK	



Create Project Cost per Department Report																																		
Step	Action	Details																																
3	Create PivotTable report and Chart as specified in the Details column.	 <p>The screenshot shows an Excel window with a PivotTable and a bar chart. The PivotTable has the following data:</p> <table><thead><tr><th>Row Labels</th><th>Actual Cost</th><th>Baseline Cost</th><th>Cost</th></tr></thead><tbody><tr><td>Finance</td><td>0</td><td>202680</td><td>694340</td></tr><tr><td>HR</td><td>0</td><td>99940</td><td>1216556.506</td></tr><tr><td>IT</td><td>321970</td><td>203280</td><td>8337439.315</td></tr><tr><td>Legal</td><td>0</td><td>91900</td><td>731260</td></tr><tr><td>Operations</td><td>0</td><td>243580</td><td>644940</td></tr><tr><td>Sales and Marketing</td><td>0</td><td>200280</td><td>642460</td></tr><tr><td>Grand Total</td><td>321970</td><td>1041660</td><td>12176995.82</td></tr></tbody></table> <p>The chart is a bar chart titled 'Actual Cost - Baseline Cost - Cost'. It shows three series: 'Actual Cost' (blue bars), 'Baseline Cost' (red bars), and 'Cost' (green bars). The Y-axis ranges from 0 to 9,000,000. The X-axis lists the departments: Finance, HR, IT, Legal, Operations, and Sales and Marketing. The 'Cost' series is significantly higher than the others for most departments.</p>	Row Labels	Actual Cost	Baseline Cost	Cost	Finance	0	202680	694340	HR	0	99940	1216556.506	IT	321970	203280	8337439.315	Legal	0	91900	731260	Operations	0	243580	644940	Sales and Marketing	0	200280	642460	Grand Total	321970	1041660	12176995.82
Row Labels	Actual Cost	Baseline Cost	Cost																															
Finance	0	202680	694340																															
HR	0	99940	1216556.506																															
IT	321970	203280	8337439.315																															
Legal	0	91900	731260																															
Operations	0	243580	644940																															
Sales and Marketing	0	200280	642460																															
Grand Total	321970	1041660	12176995.82																															
4	Modify Chart Type as required.	 <p>The screenshot shows the same chart with a context menu open over the 'Baseline Cost' series. The menu options are:</p> <ul style="list-style-type: none"><li>Sort and Filter</li><li>Show/Hide Levels</li><li>Expand/Collapse</li><li>Show properties in tooltips</li><li>Reset to Match Style</li><li><b>Change Series Chart Type...</b> (highlighted)</li><li>Select Data...</li><li>3-D Rotation...</li><li>Add Data Labels</li><li>Add Trendline...</li><li>Format Data Series...</li></ul>																																

Create Project Cost per Department Report		
Step	Action	Details
5	Select your chart → Data → Modify Chart Name.	
6	Select File → Save & Send → Save to SharePoint → Publish Options → select all items in workbook you want to publish.	
7	Save Excel file as Project Cost per Department.xlsx in the document library that will store all your Excel Services reports (Corporate Reports in this example).	

## Resource Availability by Role

The Resource Availability by Role report is a histogram chart that displays Work and Capacity for each resource role. This report is generated from the MSP\_Portfolio\_Analyzer cube that comes with Project Server 2010.



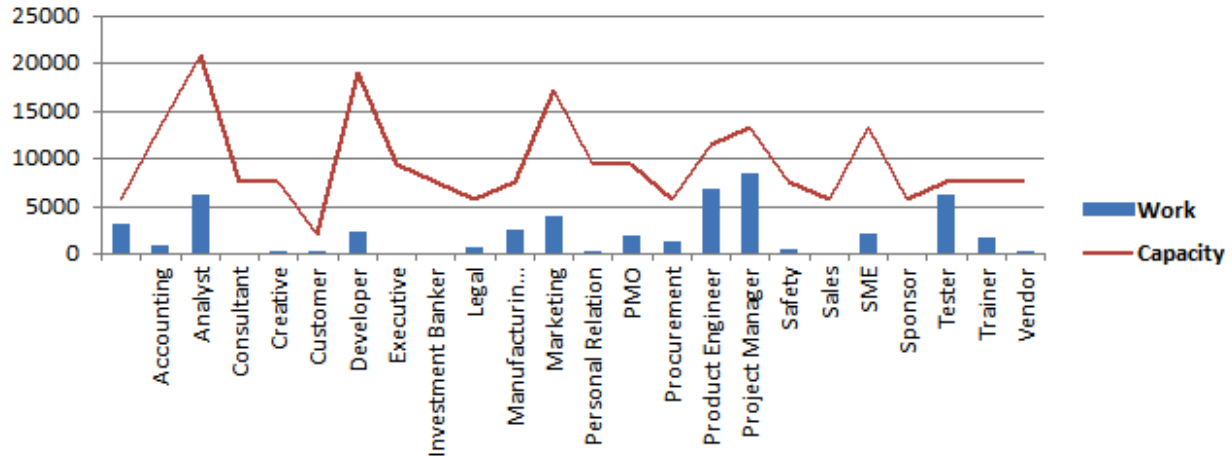
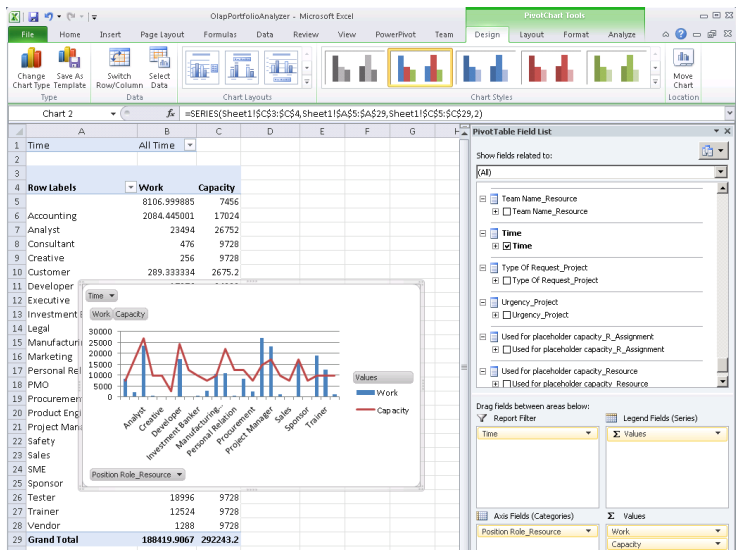

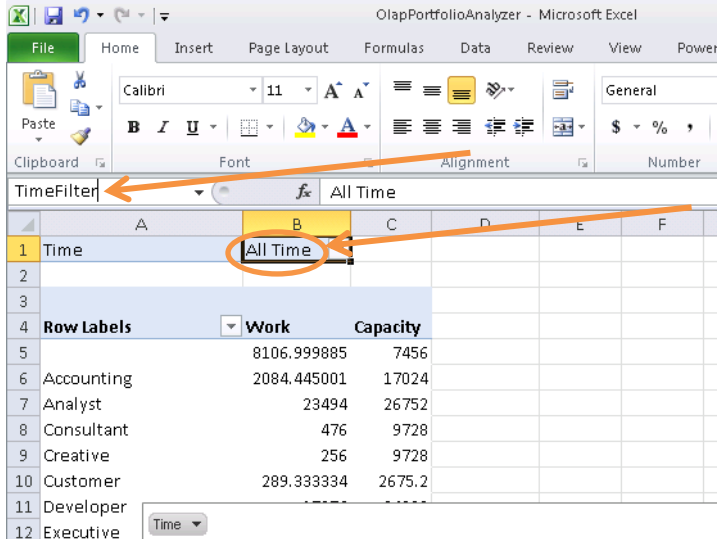
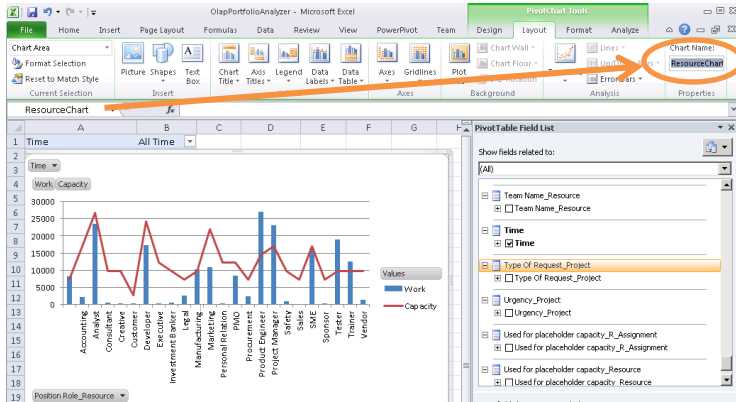


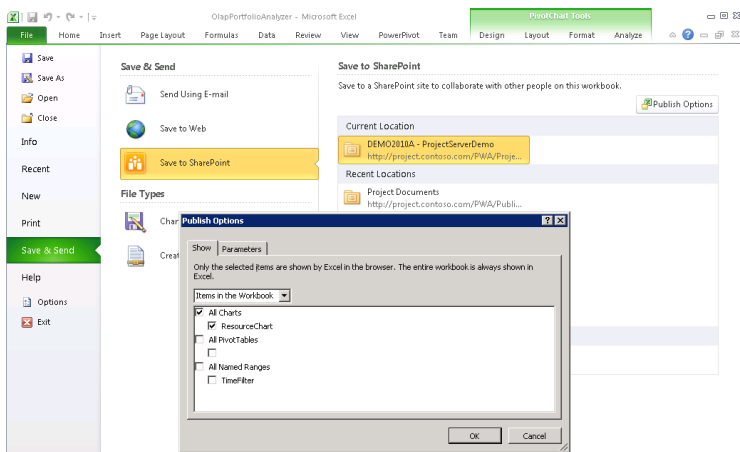
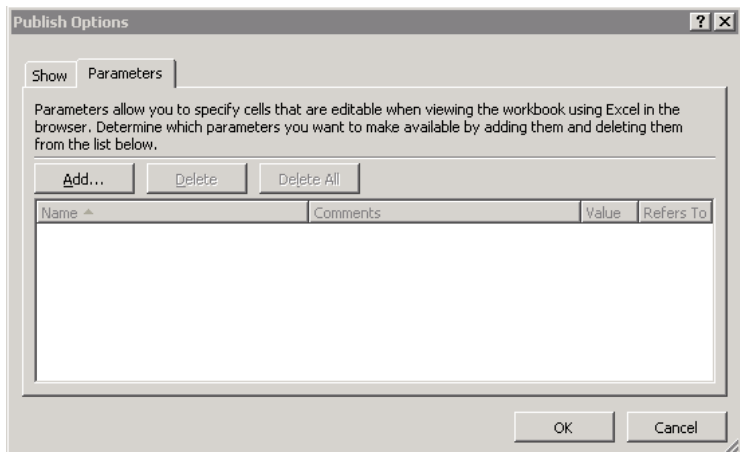
Figure 6: Resource Availability by role report


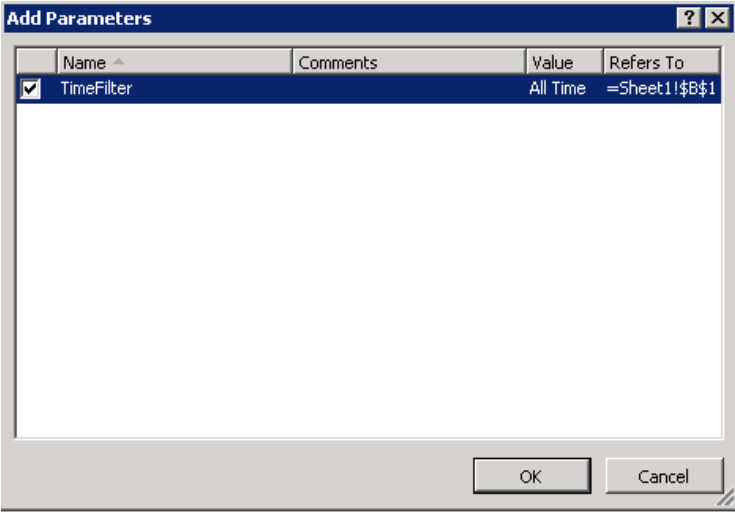
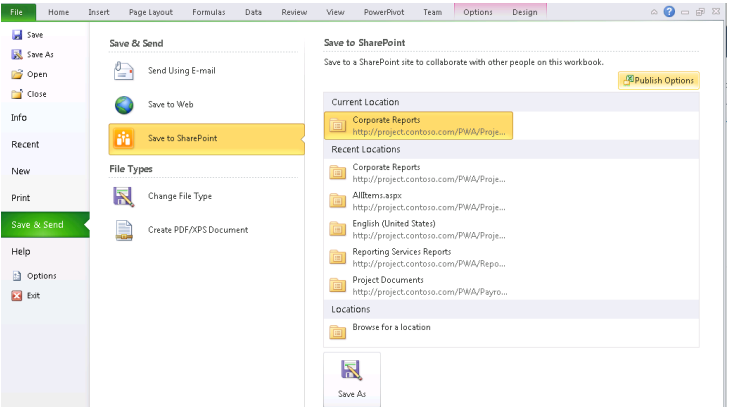
To create the report, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Resource Availability by Role Report		
Step	Action	Details
1	In PWA, select Business Intelligence Center → Documents → Templates → English → <Name of your Cube> → OlapPortfolioAnalyzer.	
2	Select Read Only → OK.	

## Create Resource Availability by Role Report

Step	Action	Details
3	Create PivotTable report and Chart.	
4	 <b>Important Step!</b>  Rename cell name for Time filter (B1 in this example). This step is important as it ensures that the filter can be used as a parameter in PerformancePoint.	
5	Select your chart → Data → Modify Chart Name.	

Create Resource Availability by Role Report		
Step	Action	Details
6	Select File → Save & Send → Save to SharePoint → Publish Options → select all items in workbook you want to publish.	
7	Select Parameters.	

Create Resource Availability by Role Report		
Step	Action	Details
8	 <b>Important Step!</b>  Add Named Range you created as a parameter → OK.	
9	Save Excel file as Resource Availability.xlsx in the document library that will store all your Excel Services reports (Corporate Reports in this example).	

## Timesheet Reconciliation List















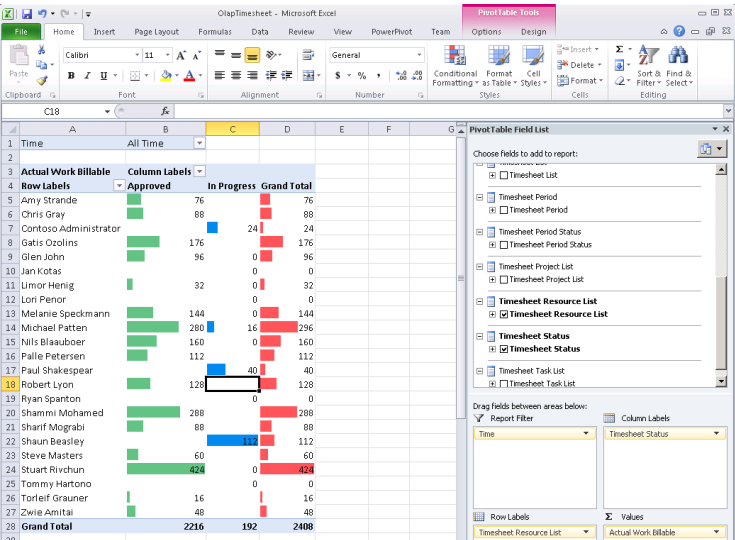

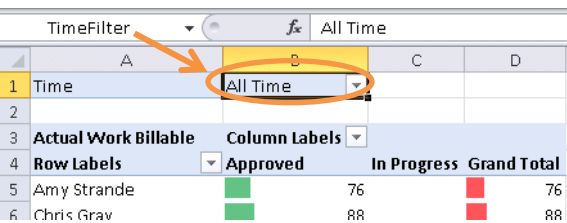
The Timesheet Reconciliation List report displays the approval of timesheet by Resource for a chosen time period. This report is generated from the Timesheet cube that comes with Project Server 2010.



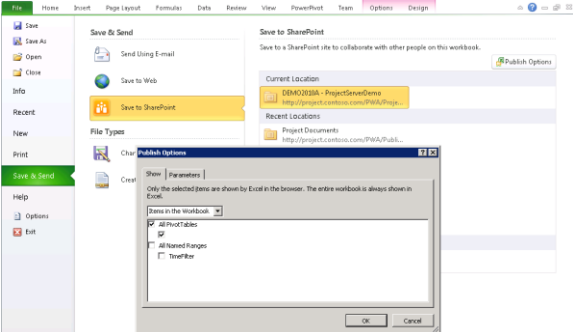

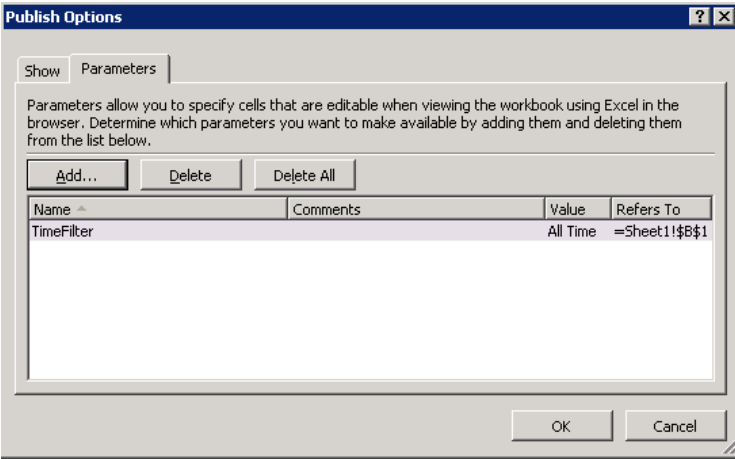
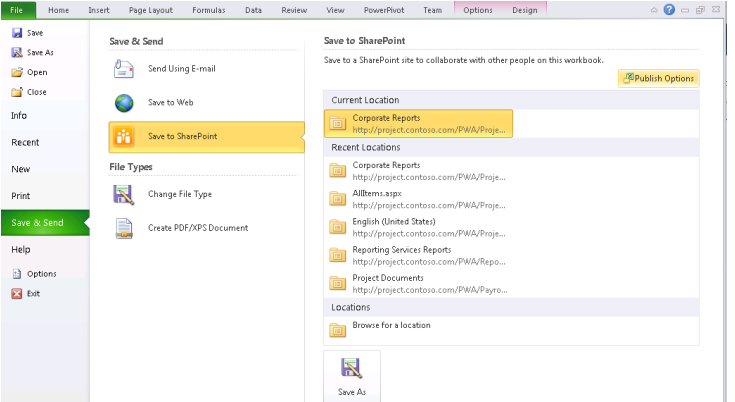
Actual Work Billable	Column Labels			
Row Labels	Approved	In Progress	Grand Total	
Amy Strande	<div></div>	76	<div></div>	76
Chris Gray	<div></div>	88	<div></div>	88
Contoso Administrator		<div></div> 24	<div></div>	24
Gatis Ozolins	<div></div>	176	<div></div>	176
Glen John	<div></div>	96	<div></div>	96
Jan Kotas		0	<div></div>	0
Limor Henig	<div></div>	32	<div></div>	32
Lori Penor		0	<div></div>	0
Melanie Speckmann	<div></div>	144	<div></div>	144
Michael Patten	<div></div>	<div></div> 280	<div></div> 16	296
Nils Blaauboer	<div></div>	160	<div></div>	160
Palle Petersen	<div></div>	112	<div></div>	112
Paul Shakespear		<div></div> 40	<div></div>	40
Robert Lyon	<div></div>	128	<div></div>	128
Ryan Spanton		0	<div></div>	0
Shammi Mohamed	<div></div>	288	<div></div>	288
Sharif Mograbi	<div></div>	88	<div></div>	88
Shaun Beasley		<div></div> 112	<div></div>	112
Steve Masters	<div></div>	60	<div></div>	60

Figure 7: Timesheet Reconciliation List report

To create the report, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Timesheet Reconciliation List Report		
Step	Action	Details
1	In PWA, select Business Intelligence Center → Documents → Templates → English → <Name of your Cube> → OlapTimesheet.	<div> <input type="checkbox"/> Type           Name         </div> <div>  OlapAssignmentNonTimephased   OlapAssignmentTimephased   OlapDeliverables   OlapEpmTimesheet   OlapIssues   OlapPortfolioAnalyzer   OlapProjectNonTimephased   OlapProjectSharePoint   OlapProjectTimesheet   OlapResourceNonTimephased   OlapResourceTimephased   OlapRisks   OlapTaskNonTimephased   OlapTimesheet         </div>
2	Create PivotTable report and Chart.	
3	 <b>Important Step!</b>  Rename cell name for Time filter (B1 in this example). This step is important as it ensures that the filter can be used as a parameter in PerformancePoint.	



Create Timesheet Reconciliation List Report		
Step	Action	Details
	Select File → Save & Send → Save to SharePoint → Publish Options → select all items in workbook you want to publish.	
	 <b>Important Step!</b> Select Parameters → Add Named Range you created in step 3 as a parameter → OK	
6	Save Excel file as Resource Timesheet Reconciliation List.xlsx in the document library that will store all your Excel Services reports (Corporate Reports in this example)	







## PerformancePoint Reports

---

This section explains how to create the following PerformancePoint Analytical Charts:

Name	Type
Forecasted Cost Chart	Analytic Chart
Risk and Issue Count Chart	Analytic Chart
Timesheet Chart	Analytic Chart

Table 2: List of PerformancePoint Charts

## Data Connections

---

Prior creating your various charts, a connection to the data source or sources must be created. All data used in PerformancePoint Services is external data, living in data repositories outside of PerformancePoint. After a data connection is established, users are able to use the data in the various PerformancePoint feature areas.

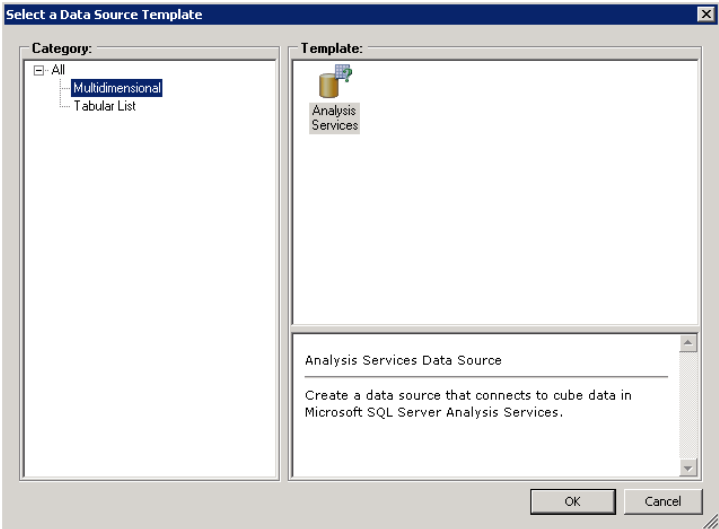
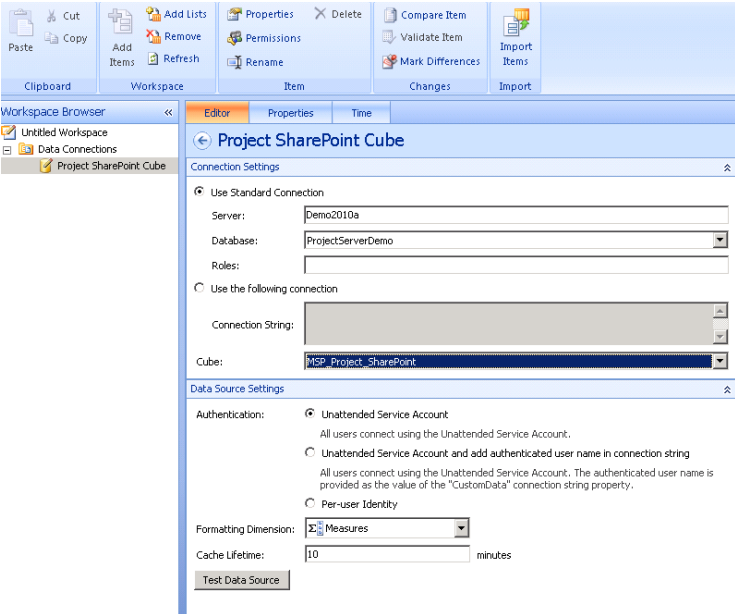
The following section provides detailed steps on how to create Analysis Services data connections for the following:

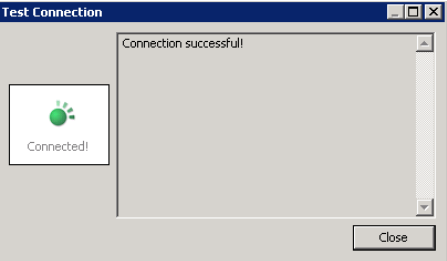
- Portfolio Analyzer Cube (MSP Portfolio Analyzer)
- Project SharePoint Cube (MSP\_Project\_SharePoint)
- Timesheet Cube (Timesheet)

To create the PerformancePoint Data Connections, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create PerformancePoint Data Connections		
Step	Action	Details
1	In PWA, select Business Intelligence Center → Data Connections.	
2	On Toolbar, select Documents → PerformancePoint Data Source.	
3	Wait few moments for Dashboard Designer to launch.	



Create PerformancePoint Data Connections		
Step	Action	Details
4	Select Multidimensional Category → Analysis Services Template → OK.	
5	Enter Server Name, Database Name and Cube (=MSP_Project_Analyzer) → Test Data Source.	

Create PerformancePoint Data Connections		
Step	Action	Details
6	If Connection Successful → Close → Save.	 <p>The screenshot shows a 'Test Connection' dialog box with a blue title bar. Inside, there is a green circular icon with a checkmark and the text 'Connected!'. To the right, a text box displays 'Connection successful!'. At the bottom right, there is a 'Close' button.</p>
7	Repeat steps 5 & 6 for other connections to Project SharePoint Cube (MSP_Project_SharePoint) & Timesheet Cube (Timesheet)	



## Analytical Charts

The following section provides detailed steps on how to create the following Analytical Charts:

- Forecasted Cost Chart
- Risk and Issue Count Chart
- Timesheet Chart

### Forecasted Cost Chart

The Forecasted Cost Chart displays the cost by project department for a chosen time period. This report is generated from the MSP\_Portfolio\_Analyzer cube that comes with Project Server 2010.

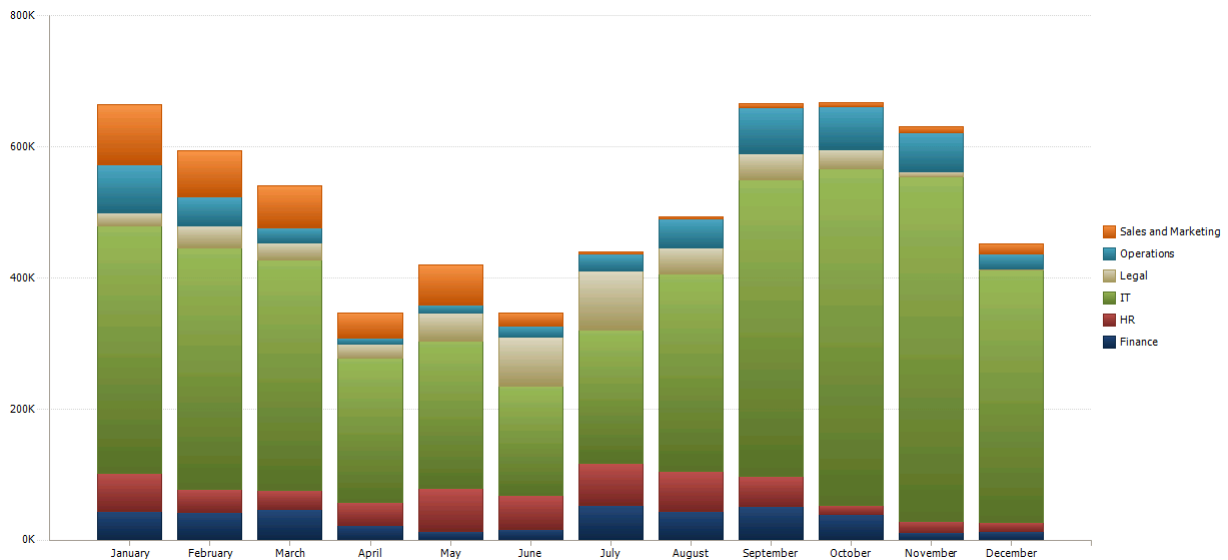
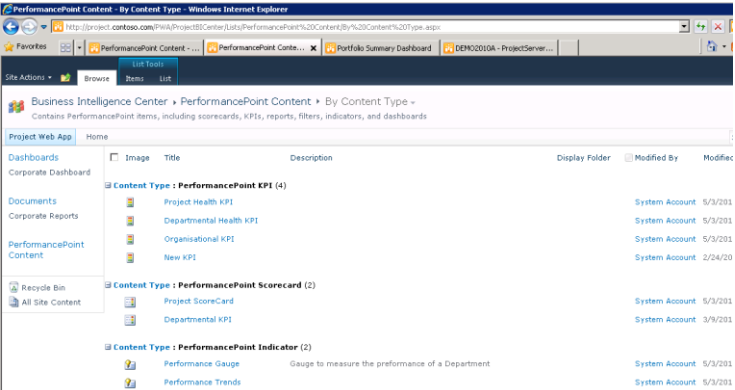
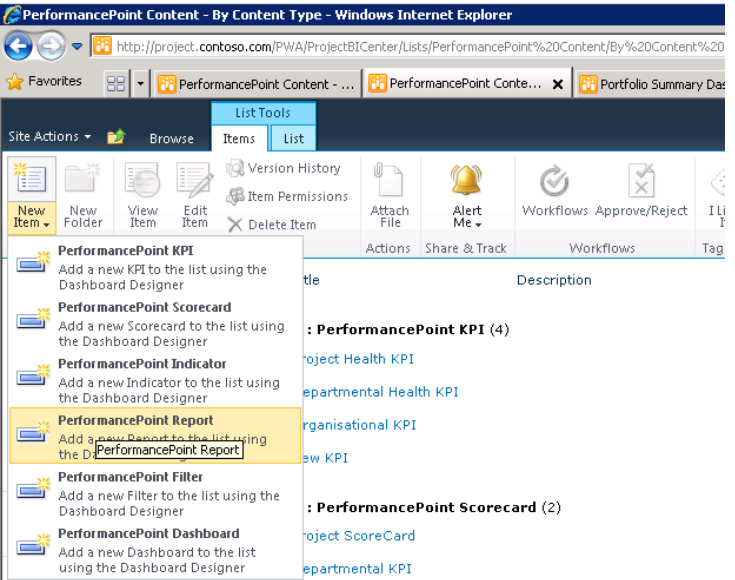
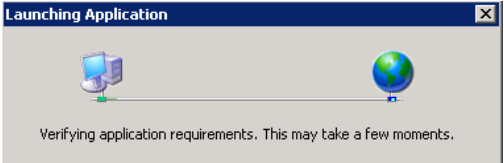
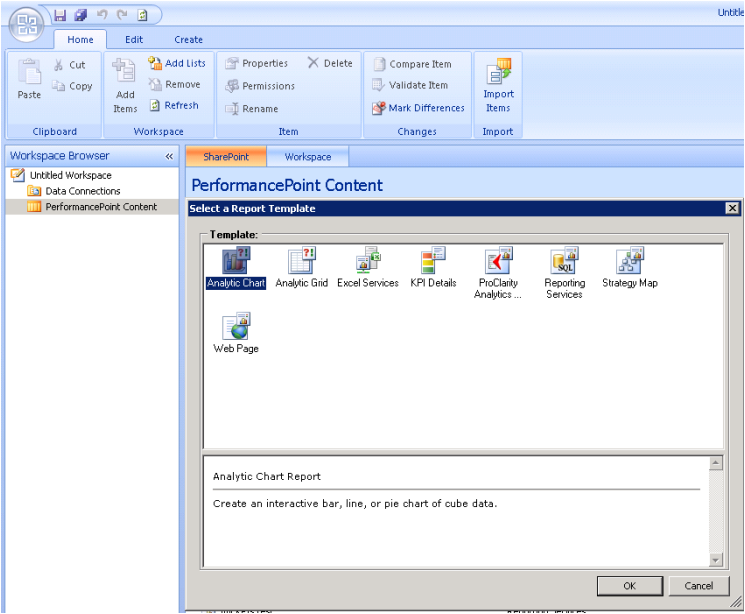
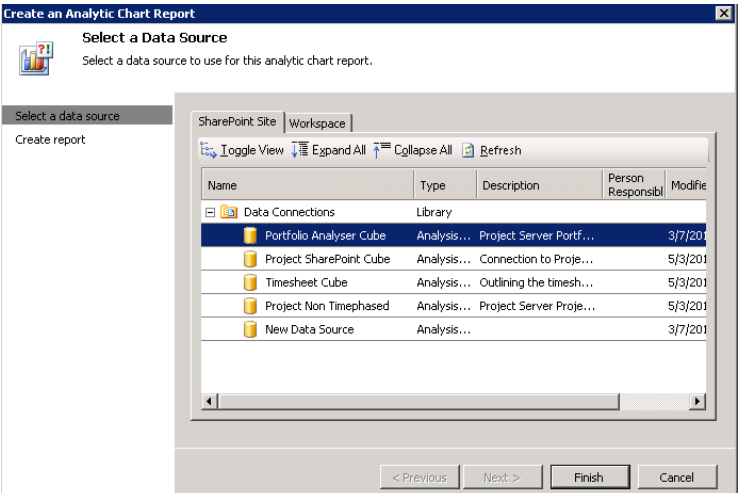
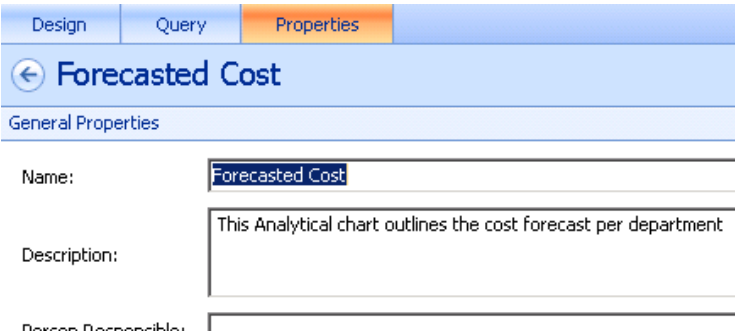
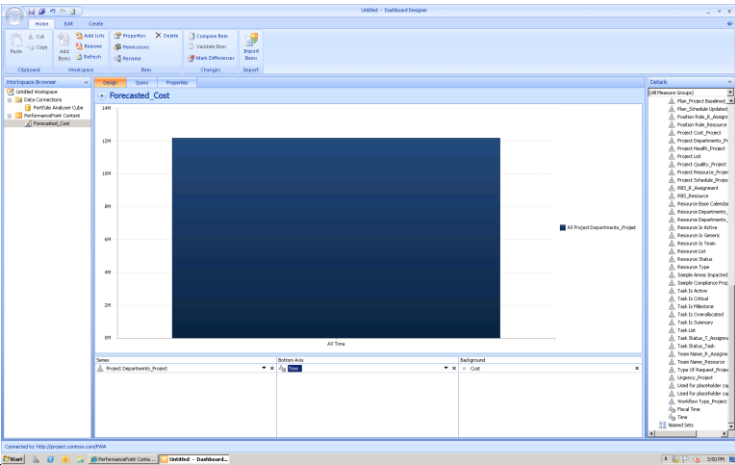
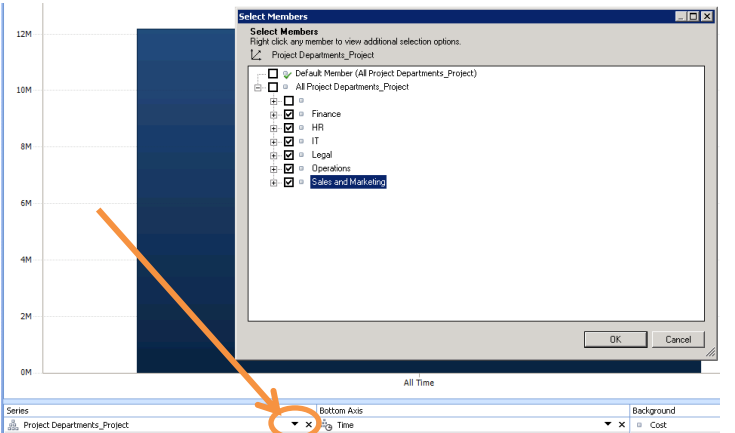


Figure 8: Forecasted Cost Chart

To create the report, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

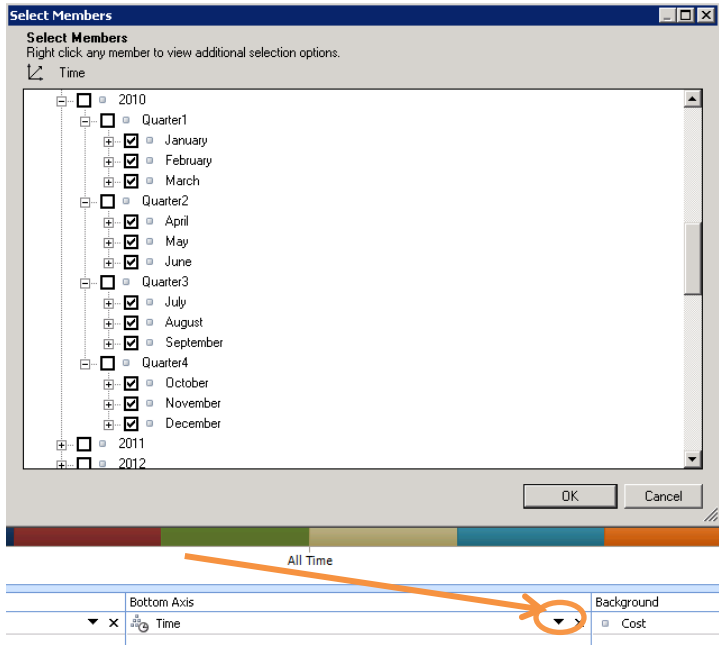
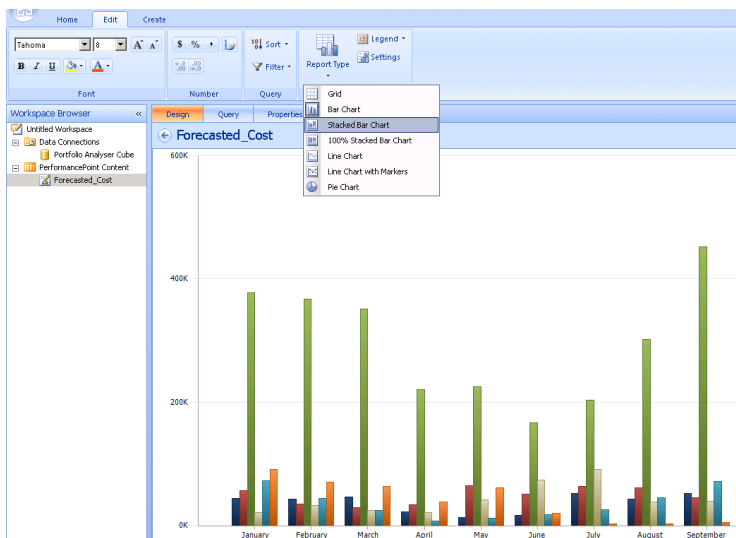
Create Forecasted Cost Chart		
Step	Action	Details
1	In PWA, select Business Intelligence Center → PerformancePoint Content.	
2	On Toolbar, select Items → PerformancePoint Report.	
3	Wait few moments for Dashboard Designer to launch.	

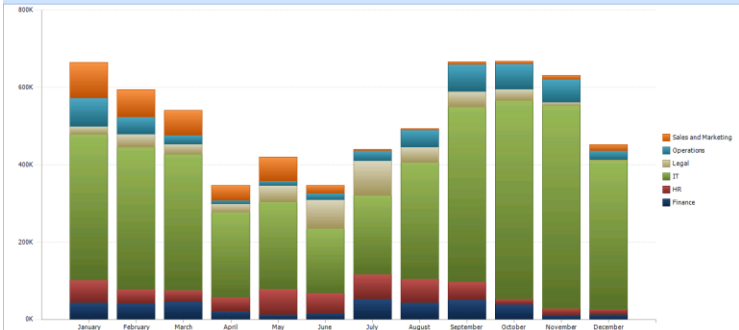
Create Forecasted Cost Chart		
Step	Action	Details
4	Select Analysis Chart → OK.	
5	Select Portfolio Analyzer Cube → Finish.	

Create Forecasted Cost Chart		
Step	Action	Details
6	Rename Report	
7	Add Measures and Dimensions. Refer to Details column.	
Creating Dashboards for Microsoft Project Server 2010	Modify Project Departments_Project Members. Refer to Details column.	





Create Forecasted Cost Chart		
Step	Action	Details
9	Modify Time Members. Refer to Details column.	 <p><b>Select Members</b> Right click any member to view additional selection options.</p> <p>Time</p> <ul style="list-style-type: none"> <li>2010 <ul style="list-style-type: none"> <li>Quarter1 <ul style="list-style-type: none"> <li>January</li> <li>February</li> <li>March</li> </ul> </li> <li>Quarter2 <ul style="list-style-type: none"> <li>April</li> <li>May</li> <li>June</li> </ul> </li> <li>Quarter3 <ul style="list-style-type: none"> <li>July</li> <li>August</li> <li>September</li> </ul> </li> <li>Quarter4 <ul style="list-style-type: none"> <li>October</li> <li>November</li> <li>December</li> </ul> </li> </ul> </li> <li>2011</li> <li>2012</li> </ul> <p>OK Cancel</p> <p>All Time</p> <p>Bottom Axis Time</p> <p>Background Cost</p>
10	Select Edit → Report Type → Stacked Bar Chart.	 <p>Home Edit Create</p> <p>Tahoma 8 A<sup>+</sup></p> <p>Font Number Query</p> <p>Workspace Browser</p> <ul style="list-style-type: none"> <li>Untitled Workspace</li> <li>Data Connections</li> <li>Portfolio Analyser Cube</li> <li>PerformancePoint Content</li> <li>Forecasted_Cost</li> </ul> <p>Design Query Properties</p> <p>Report Type</p> <ul style="list-style-type: none"> <li>Grid</li> <li>Bar Chart</li> <li>Stacked Bar Chart</li> <li>100% Stacked Bar Chart</li> <li>Line Chart</li> <li>Line Chart with Markers</li> <li>Pie Chart</li> </ul> <p>Forecasted_Cost</p> <p>600K</p> <p>400K</p> <p>200K</p> <p>0K</p> <p>January February March April May June July August September</p>

Create Forecasted Cost Chart																																																																																													
Step	Action	Details																																																																																											
11	Select Save → Close.	<div><div>DesignQueryProperties</div><div>Forecasted_Cost</div><table><thead><tr><th>Month</th><th>Finance</th><th>HR</th><th>IT</th><th>Legal</th><th>Operations</th><th>Sales and Marketing</th></tr></thead><tbody><tr><td>January</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>February</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>March</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>April</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>May</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>June</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>July</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>August</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>September</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>October</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>November</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr><tr><td>December</td><td>50</td><td>50</td><td>100</td><td>100</td><td>50</td><td>100</td></tr></tbody></table></div>	Month	Finance	HR	IT	Legal	Operations	Sales and Marketing	January	50	50	100	100	50	100	February	50	50	100	100	50	100	March	50	50	100	100	50	100	April	50	50	100	100	50	100	May	50	50	100	100	50	100	June	50	50	100	100	50	100	July	50	50	100	100	50	100	August	50	50	100	100	50	100	September	50	50	100	100	50	100	October	50	50	100	100	50	100	November	50	50	100	100	50	100	December	50	50	100	100	50	100
Month	Finance	HR	IT	Legal	Operations	Sales and Marketing																																																																																							
January	50	50	100	100	50	100																																																																																							
February	50	50	100	100	50	100																																																																																							
March	50	50	100	100	50	100																																																																																							
April	50	50	100	100	50	100																																																																																							
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June	50	50	100	100	50	100																																																																																							
July	50	50	100	100	50	100																																																																																							
August	50	50	100	100	50	100																																																																																							
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November	50	50	100	100	50	100																																																																																							
December	50	50	100	100	50	100																																																																																							

### Risk and Issue Count Chart

The Risk and Issue Count Chart displays the number of issues and risks by project department. This report is generated from the MSP\_Project\_SharePoint cube that is included with Project Server 2010.

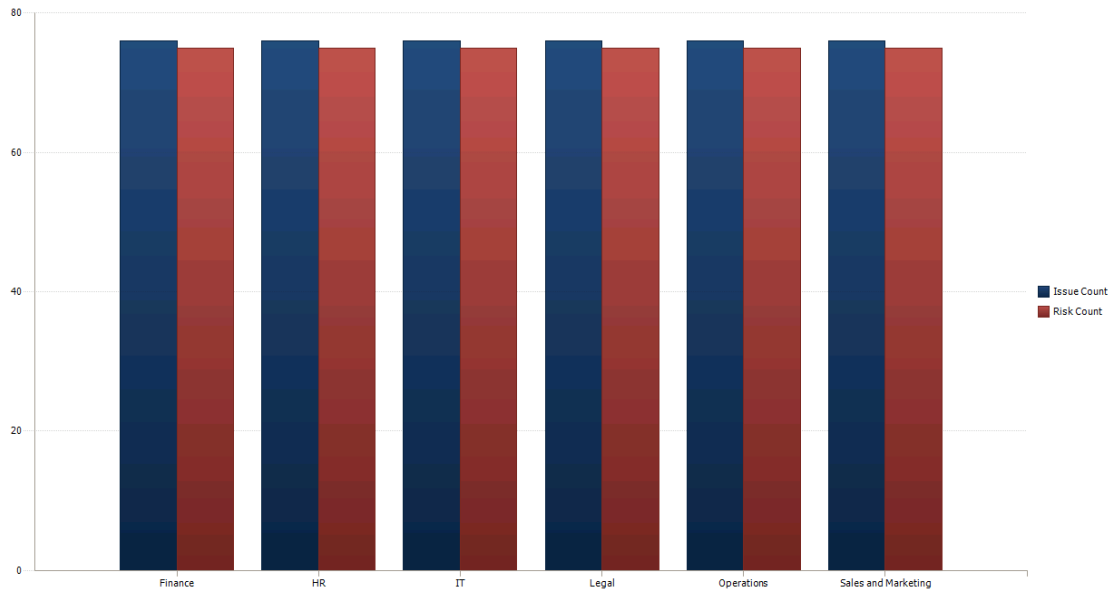
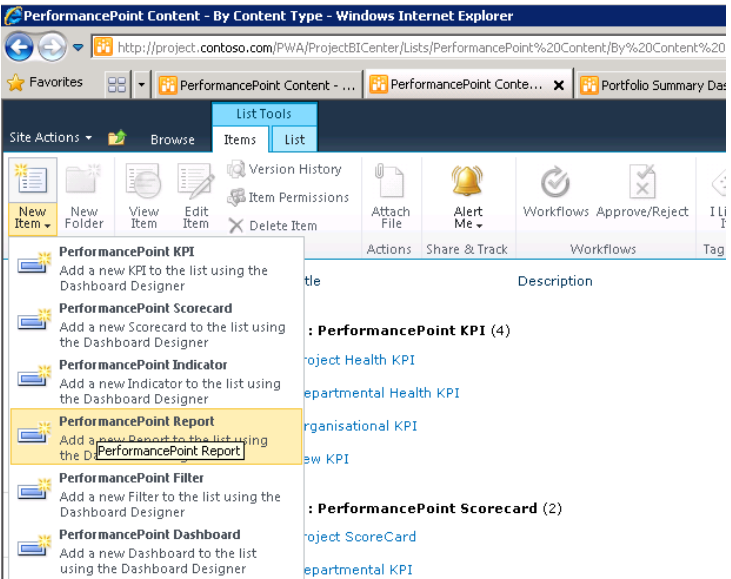
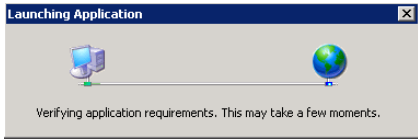
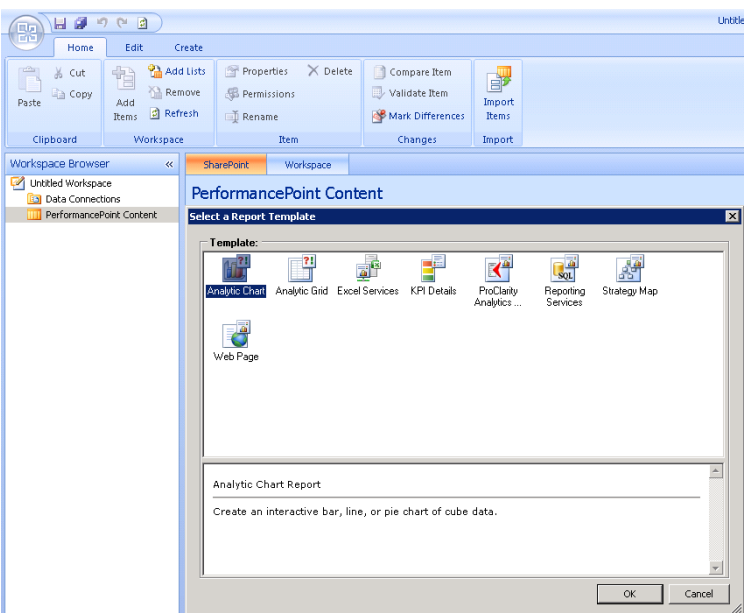
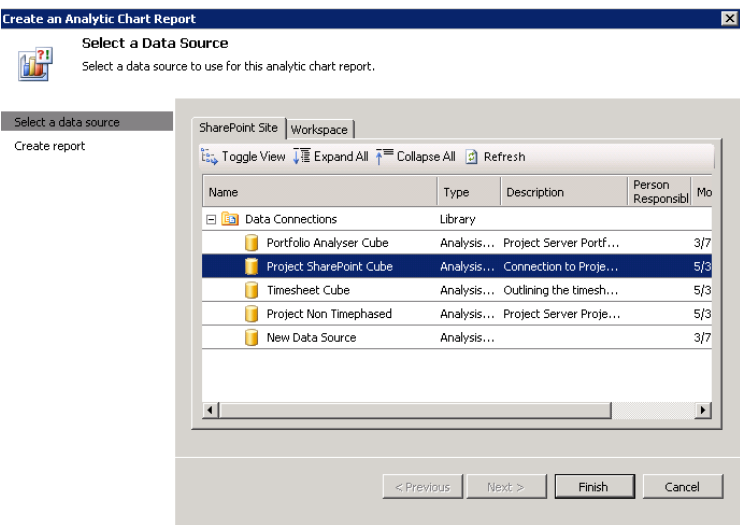
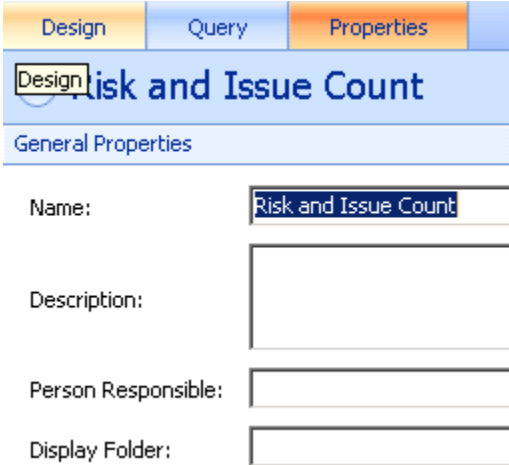


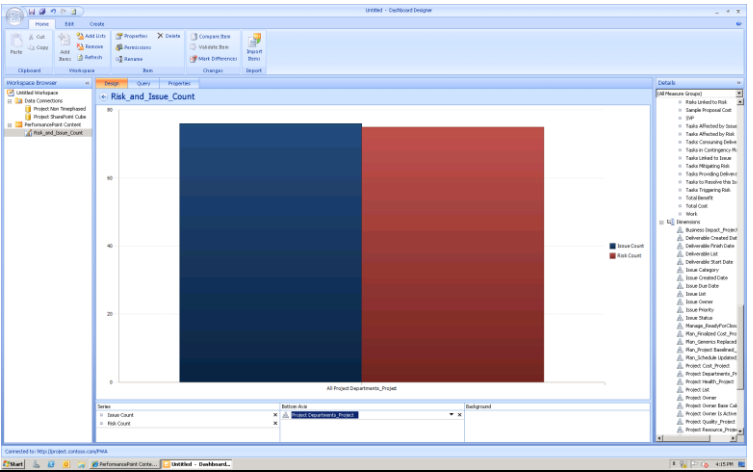
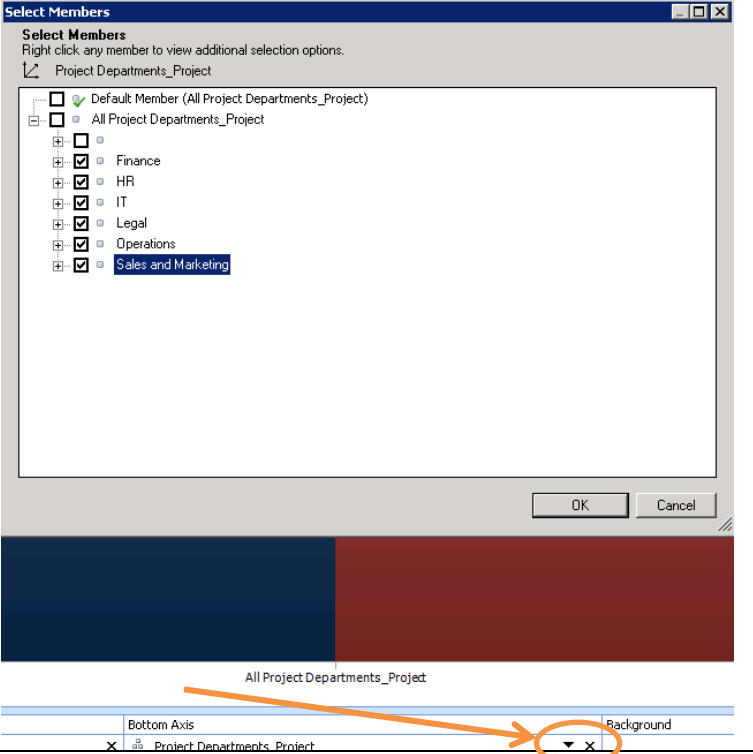
Figure 9: Risk and Issue Count Chart

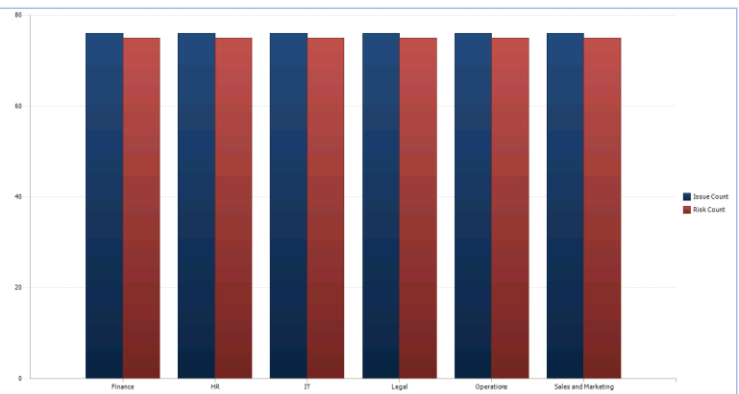
To create the report, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Risk and Issue Count Chart		
Step	Action	Details
1	In PWA, select Business Intelligence Center → PerformancePoint Content	<p>The screenshot shows the 'PerformancePoint Content' web application. The left sidebar shows the navigation tree with 'PerformancePoint Content' selected. The main content area displays a list of items categorized by type:</p> <ul style="list-style-type: none"> <li><b>Content Type : PerformancePoint KPI (4)</b> <ul style="list-style-type: none"> <li>Project Health KPI</li> <li>Departmental Health KPI</li> <li>Organizational KPI</li> <li>New KPI</li> </ul> </li> <li><b>Content Type : PerformancePoint Scorecard (2)</b> <ul style="list-style-type: none"> <li>Project ScoreCard</li> <li>Departmental KPI</li> </ul> </li> <li><b>Content Type : PerformancePoint Indicator (2)</b> <ul style="list-style-type: none"> <li>Performance Gauge</li> <li>Performance Trends</li> </ul> </li> </ul> <p>The table also includes columns for 'Image', 'Title', 'Description', 'Display Folder', 'Modified By', and 'Modfied'.</p>

Create Risk and Issue Count Chart		
Step	Action	Details
2	On Toolbar, select Items → PerformancePoint Report	
3	Wait few moments for Dashboard Designer to launch	
4	Select Analysis Chart → OK	

Create Risk and Issue Count Chart		
Step	Action	Details
5	Select Project SharePoint Cube → Finish	
6	Rename Report	

Create Risk and Issue Count Chart		
Step	Action	Details
7	Add Measures and Dimensions. Refer to Details column.	
8	Modify Project Departments_Project Members. Refer to Details column.	

Create Risk and Issue Count Chart																							
Step	Action	Details																					
9	Select Save → Close	 <table border="1"> <caption>Data for Risk and Issue Count Chart</caption> <thead> <tr> <th>Department</th> <th>Issue Count</th> <th>Risk Count</th> </tr> </thead> <tbody> <tr> <td>Finance</td> <td>75</td> <td>75</td> </tr> <tr> <td>HR</td> <td>75</td> <td>75</td> </tr> <tr> <td>IT</td> <td>75</td> <td>75</td> </tr> <tr> <td>Legal</td> <td>75</td> <td>75</td> </tr> <tr> <td>Operations</td> <td>75</td> <td>75</td> </tr> <tr> <td>Sales and Marketing</td> <td>75</td> <td>75</td> </tr> </tbody> </table>	Department	Issue Count	Risk Count	Finance	75	75	HR	75	75	IT	75	75	Legal	75	75	Operations	75	75	Sales and Marketing	75	75
Department	Issue Count	Risk Count																					
Finance	75	75																					
HR	75	75																					
IT	75	75																					
Legal	75	75																					
Operations	75	75																					
Sales and Marketing	75	75																					

## Timesheet Chart

The Timesheet Chart displays the Actual Work Billable for each Timesheet Status. This report is generated from the Timesheet cube that comes with Project Server 2010.

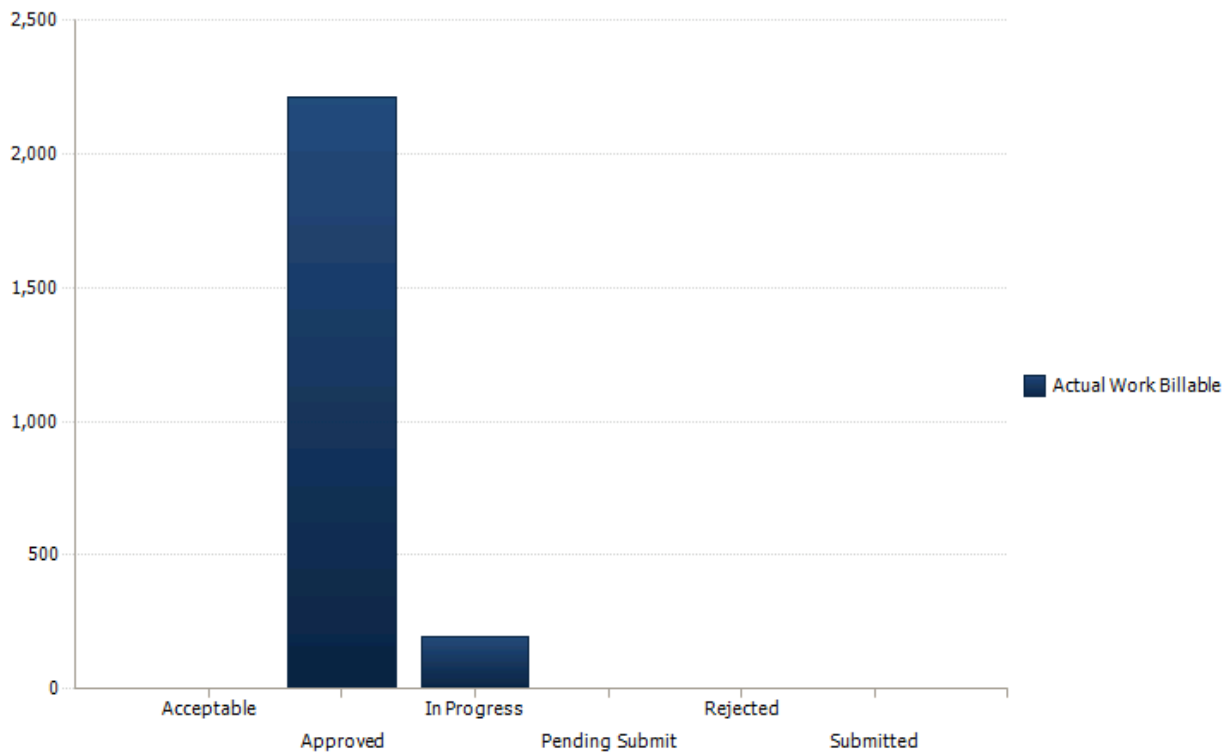
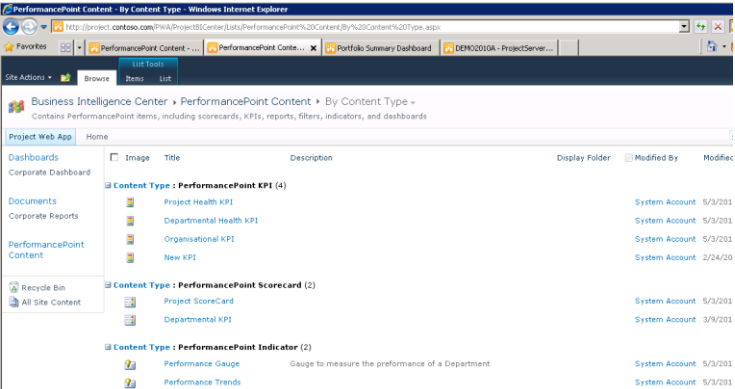
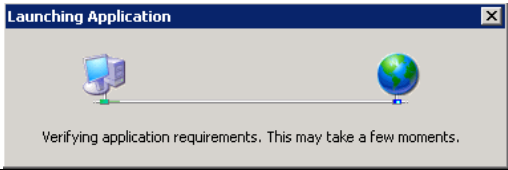
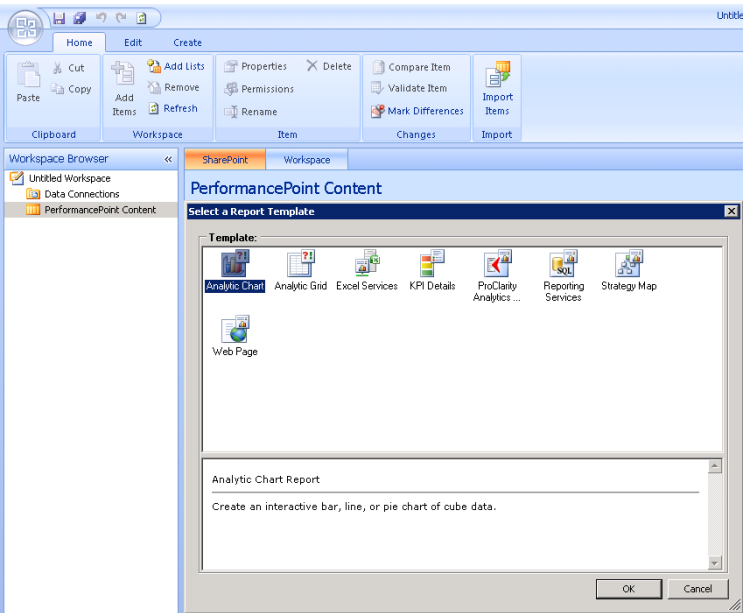


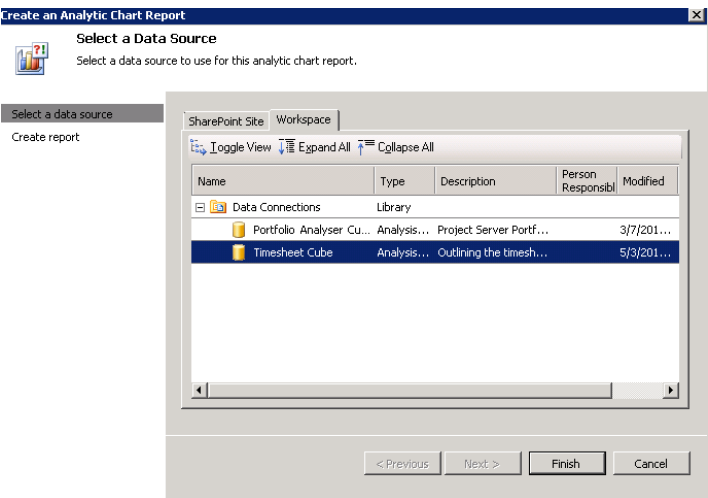
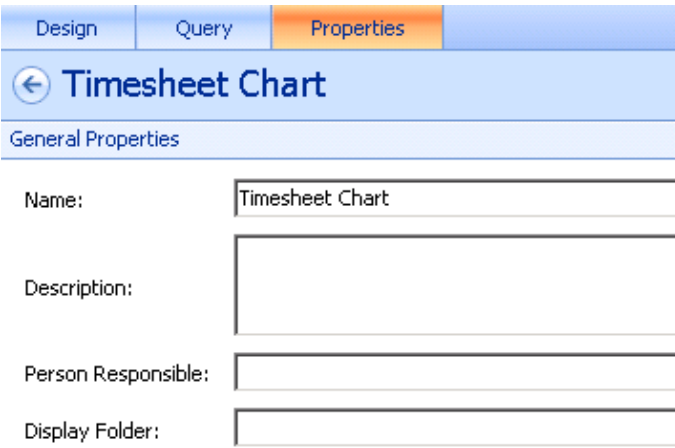
Figure 10: Timesheet Chart

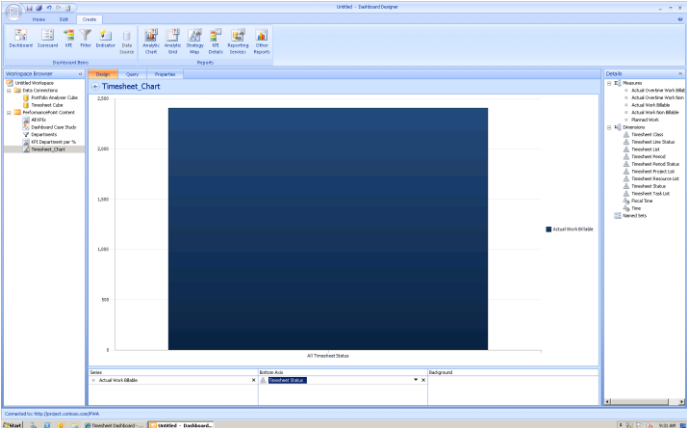
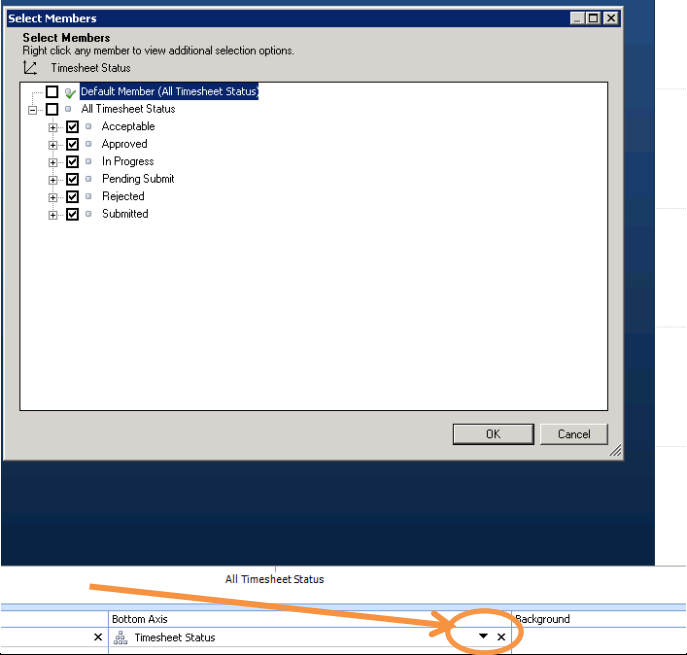
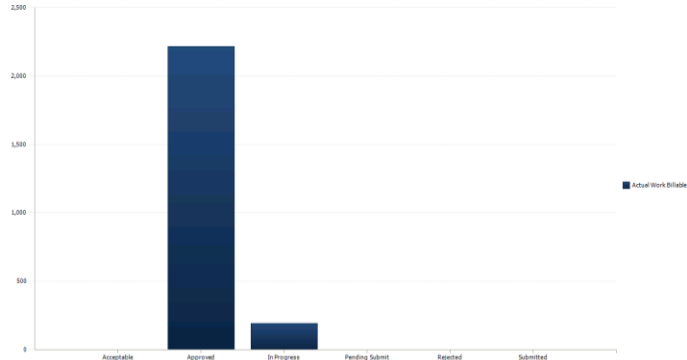
To create the report, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Timesheet Chart		
Step	Action	Details
1	In PWA, select Business Intelligence Center → PerformancePoint Content	
2	Wait few moments for Dashboard Designer to launch	
3	Select Analysis Chart → OK	





Create Timesheet Chart		
Step	Action	Details
4	Select Timesheet Cube → Finish	
5	Rename Report	

Create Timesheet Chart		
Step	Action	Details
6	Add Measures and Dimensions. Refer to Details column.	
7	Modify Project Timesheet Status Members. Refer to Details column.	
8	Select Save → Close	



## SQL Server Reporting Services Reports

This section explains how to create the following SQL Server Reporting Services reports:

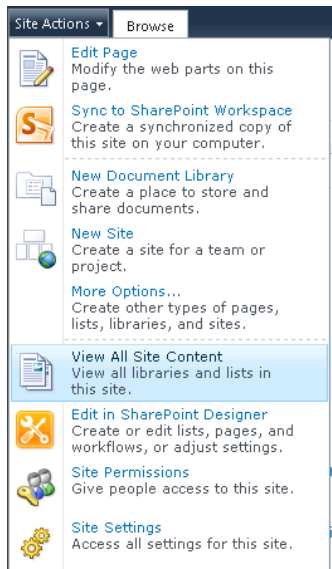
Name	Type
All KPIs	Reporting Services
Project by Department	Reporting Services

Table 3: List of SQL Server Reporting Services Reports

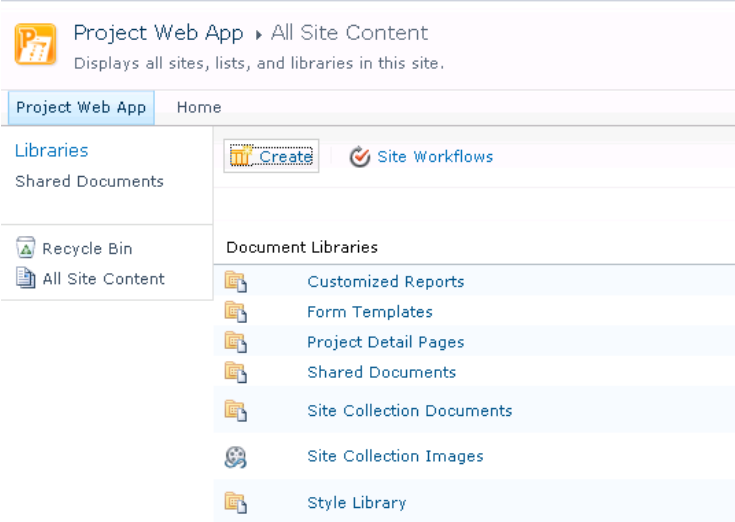
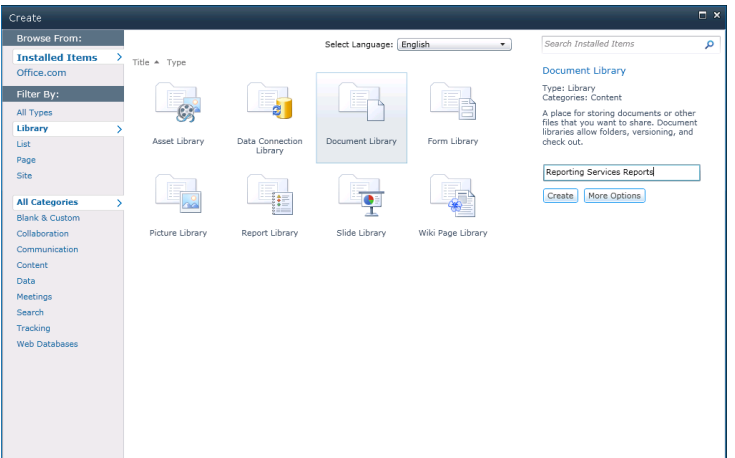
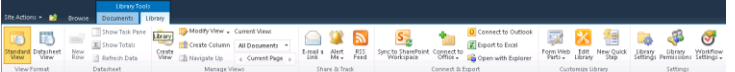
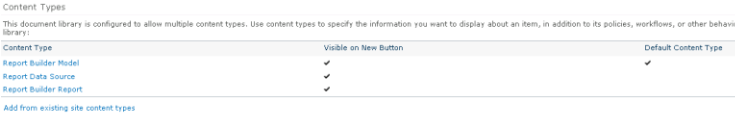
## Document Library

Prior creating your SQL Server Reporting Services Report, you must create a library that will store your shared data source (.rsds) files, report models (.smdl), and Report Builder report definition (.rdl) files. Adding a Report Builder Report, Report Model, and Report Data Source content type to a library enables the new command so that you can create new documents of that type. To add content types to a library, you must be a site administrator or have Full Control level of permission.

To create the document library, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Reporting Services Reports Document Library		
Step	Action	Details
1	In PWA, select Site Actions → View All Site Content	



Create Reporting Services Reports Document Library		
Step	Action	Details
2	Select Create	
3	Select Library on the left hand side → Document Library → Enter Name → Create	
4	On the Settings ribbon group, click Library Settings.	
5	In the Content Types section, select Report Builder Model, Report Data Source and Report Builder Report	

## SQL Server Reporting Services Reports

### Key Performance Indicators (KPIs)

The Key Performance Indicators (KPIs) report displays traffic light scores for each department.

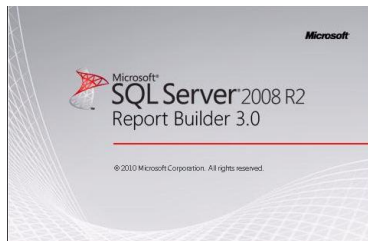
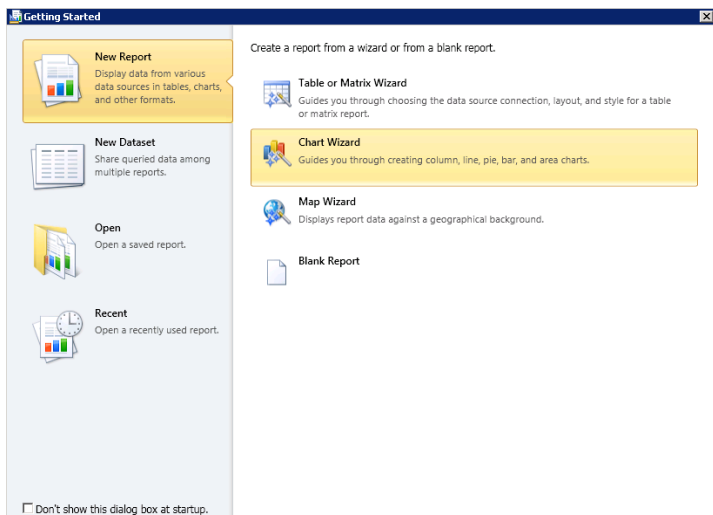


Figure 11: Key Performance Indicators (KPIs)

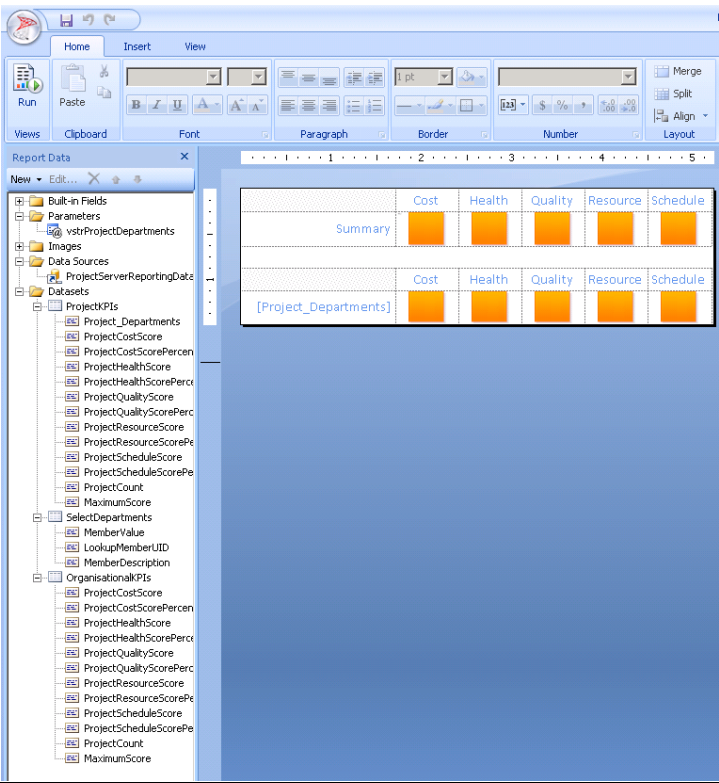
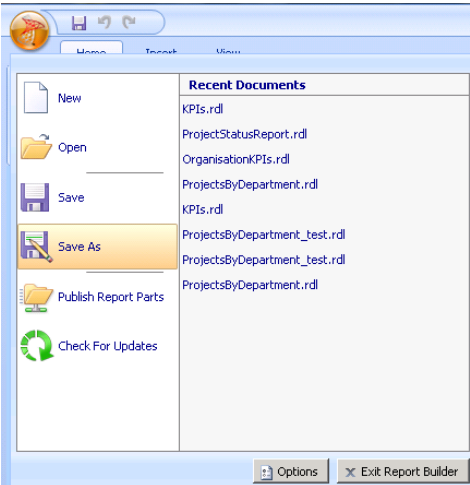
To create the report, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Key Performance Indicators (KPIs)		
Step	Action	Details
1	<p>Go to the document library you have just created that contains all your SQL Server Reporting Services reports – Reporting Services reports in our example.</p> <p>Select the Documents tab, click on New Document and select Report Builder Report.</p>	



Create Key Performance Indicators (KPIs)		
Step	Action	Details
2	Wait few moments for Report Builder 3.0 to launch	
3	Select Chart Wizard	

## Create Key Performance Indicators (KPIs)

Step	Action	Details
4	<p>Create your report.</p> <p>This section is not intended to provide a comprehensive technical description to create this report.</p>	 <p>The screenshot shows the 'Report Data' pane on the left with a tree view containing folders like 'Built-in Fields', 'Parameters', 'Data Sources', and 'Datasets'. The 'ProjectKPIs' dataset is expanded, showing various KPI fields. The main preview area on the right displays a table with columns: Cost, Health, Quality, Resource, and Schedule. The table has two rows: 'Summary' and '[Project_Departments]', each with orange square icons in the data cells.</p>
5	Save your report	 <p>The screenshot shows the 'Save As' dialog box. On the left is a sidebar with options: New, Open, Save, Save As (highlighted), Publish Report Parts, and Check For Updates. On the right is a list of 'Recent Documents' including KPIs.rdl, ProjectStatusReport.rdl, OrganisationKPIs.rdl, ProjectsByDepartment.rdl, KPIs.rdl, ProjectsByDepartment_test.rdl, ProjectsByDepartment_test.rdl, and ProjectsByDepartment.rdl. At the bottom are 'Options' and 'Exit Report Builder' buttons.</p>



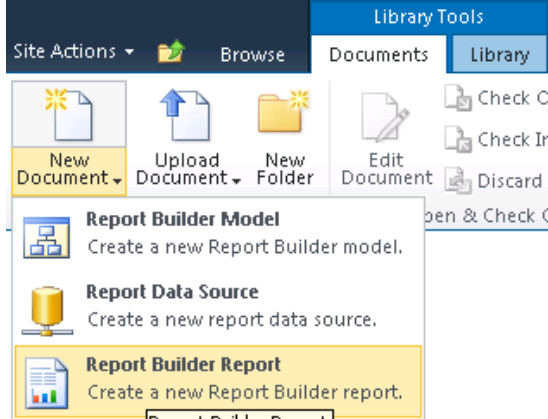
## Project by Department

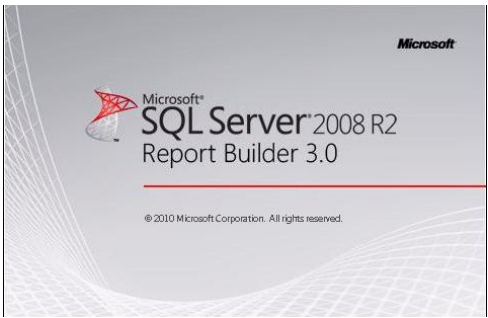
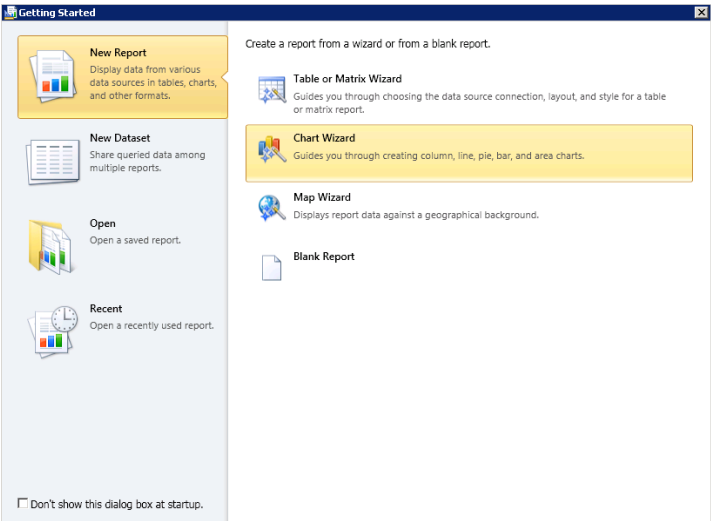
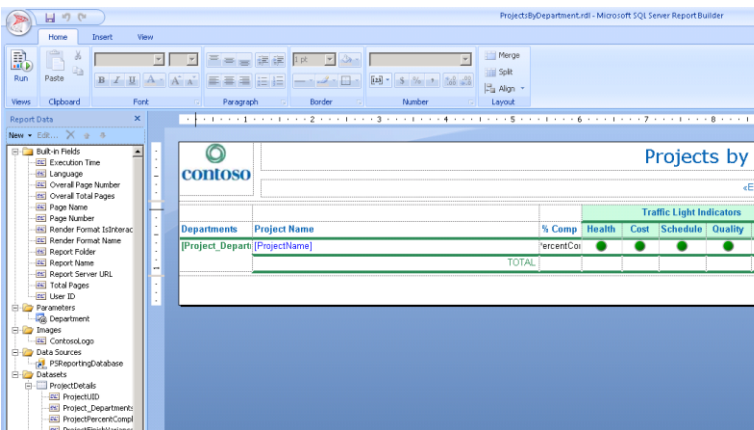
The Project by Department report groups projects by department and displays a number of data elements including traffic light indicators, cost and schedule information.

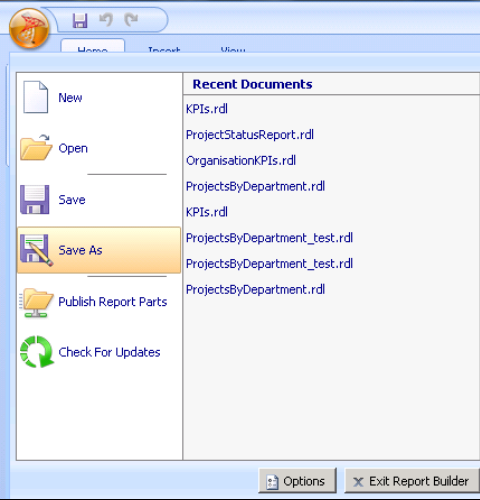
Departments	Project Name	% Comp	Traffic Light Indicators					Project Cost			
			Health	Cost	Schedule	Quality	Resource	Actual	Remaining	Baseline	Variance
IT	<a href="#">Apparel ERP Upgrade</a>	0 %	●	●	●	●	●	\$0	\$99,940		\$99,940
	<a href="#">Asset-Change Ownership</a>	0 %	●	●	●	●	●	\$0	\$101,060		\$99,940
	<a href="#">Automated Software Design Architecture Upgrade</a>	0 %	●	●	●	●	●	\$0	\$100,700		\$100,700
	<a href="#">Automated Software Installation</a>	0 %	●	●	●	●	●	\$0	\$129,040		\$129,040
	<a href="#">Catalog Publishing</a>	0 %	●	●	●	●	●	\$0	\$99,940	\$99,940	\$0
	<a href="#">Company Portal Database Migration</a>	0 %	●	●	●	●	●	\$0	\$139,760		\$139,760
	<a href="#">Compliance Database System Implementation</a>	0 %	●	●	●	●	●	\$0	\$62,180		\$62,180
	<a href="#">Content Filtering Firewall Design and Implementation</a>	0 %	●	●	●	●	●	\$0	\$139,400		\$139,400
	<a href="#">Corporate Web Site Server Software Upgrade</a>	0 %	●	●	●	●	●	\$0	\$99,940		\$0
	<a href="#">Data Exchange and Integration</a>	0 %	●	●	●	●	●	\$0	\$99,940		\$99,940
	<a href="#">Data Parsing Tool</a>	0 %	●	●	●	●	●	\$0	\$757,720		\$757,720
	<a href="#">Employee Retention Tracking System</a>	0 %	●	●	●	●	●	\$0	\$101,420		\$101,060
	<a href="#">EPM Software Implementation</a>	0 %	●	●	●	●	●	\$0	\$99,940		\$0
	<a href="#">ERP System Equipment Upgrade</a>	0 %	●	●	●	●	●	\$0	\$99,940		\$99,940
	<a href="#">ERP System Infrastructure Revision</a>	0 %	●	●	●	●	●	\$0	\$99,940		\$0
	<a href="#">Hub Upgrade</a>	0 %	●	●	●	●	●	\$0	\$129,040		\$129,040
	<a href="#">Identity Integration</a>	0 %	●	●	●	●	●	\$0	\$99,940		\$0

Figure 12: Project by Department

To create the report, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Project by Department		
Step	Action	Details
1	<p>Go to the document library you have just created that will contain all your SQL Server Reporting Services reports – Reporting Services reports in our example.</p> <p>Select the Documents tab, click on New Document and select Report Builder Report.</p>	 <p>The screenshot shows the 'Library Tools' tab selected in the top navigation bar. Below it, the 'Documents' tab is active. The 'New Document' button is highlighted, and its dropdown menu is open, showing three options: 'Report Builder Model' (with a description 'Create a new Report Builder model.'), 'Report Data Source' (with a description 'Create a new report data source.'), and 'Report Builder Report' (with a description 'Create a new Report Builder report.'). The 'Report Builder Report' option is highlighted in yellow.</p>

Project by Department		
Step	Action	Details
2	Wait for Report Builder 3.0 to launch	
3	Select Chart Wizard	
4	This section is not intended to provide a comprehensive technical description to create this report.	

Project by Department		
Step	Action	Details
5	Save your report	

## 4. Creating Dashboards by using PerformancePoint Services

This section includes detailed steps on how to replicate the dashboards included in the Project Server 2010 demonstration and evaluation pack available on the [Microsoft Download Center](#). Those dashboards were created by using PerformancePoint Services, which allows users to assemble a library of reporting assets which may then be combined into any number of project or portfolio dashboards. Additionally, PerformancePoint allows users to create reporting components that may be reused in multiple customized dashboards.

The purpose of this section is to help you easily create reports and dashboards for your environment with the following characteristics:

- Excel Services report from a custom SQL Server table.
- Excel Services report from “out of the box” Analysis Services cubes.
- SQL Server Reporting Services reports that use Report Designer 3.0
- PerformancePoint Analytical Chart from “out of the box” cubes.
- Dashboards incorporating Excel services, SQL Server Reporting Services, and PerformancePoint controlled with parameters.

The next sections of the document describe how to create the following dashboards.

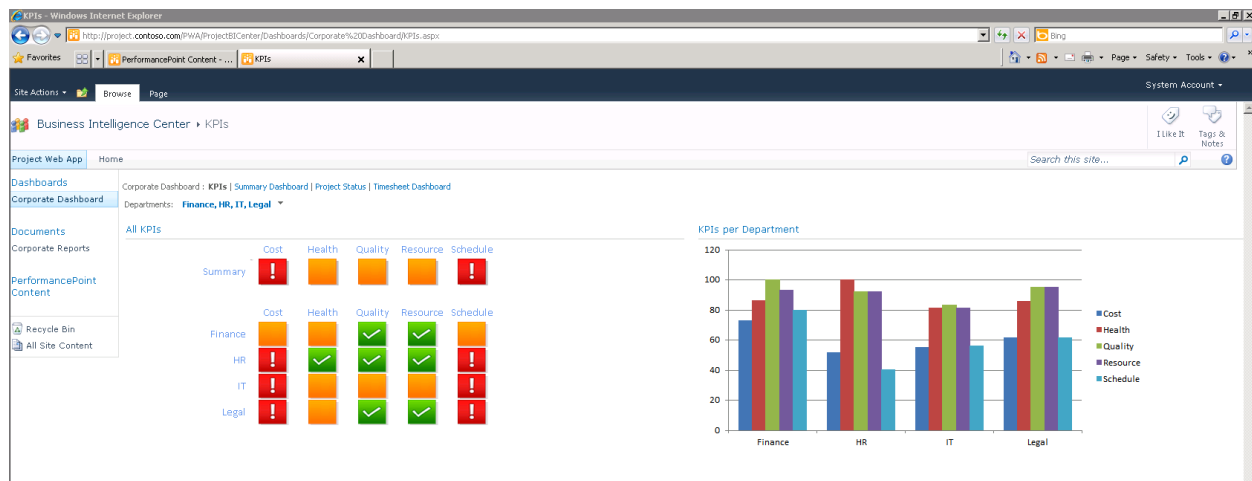


Figure 13: Example of a Dashboard Page 1 created with PerformancePoint

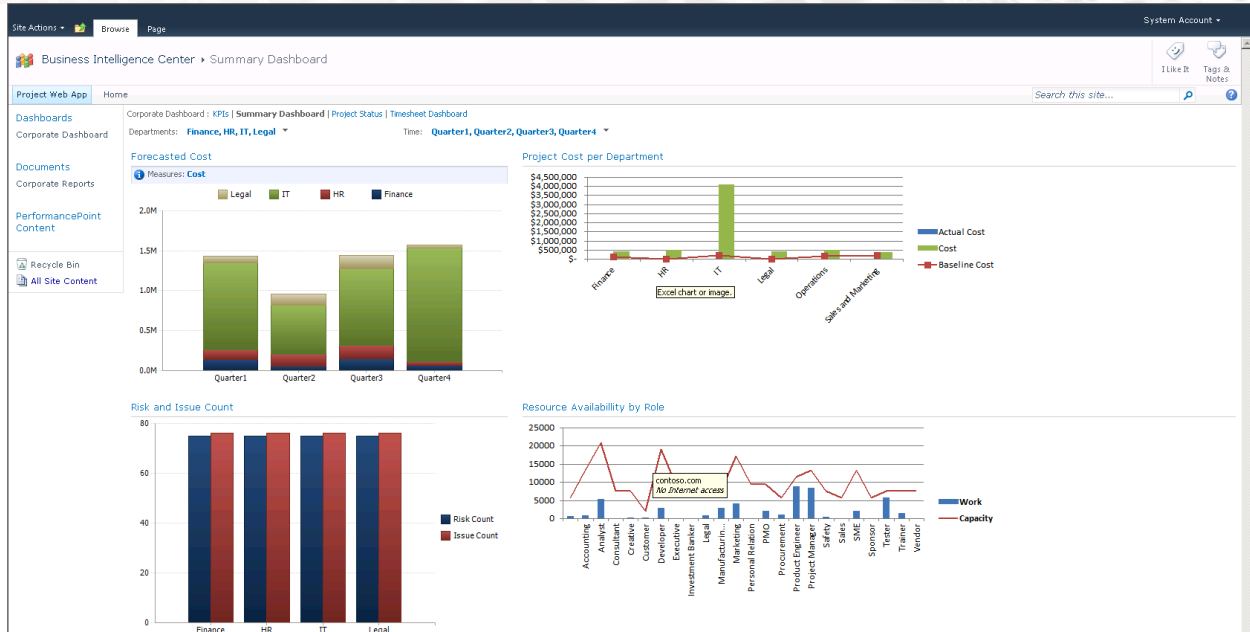


Figure 14: Example of a Dashboard Page 2 created with PerformancePoint

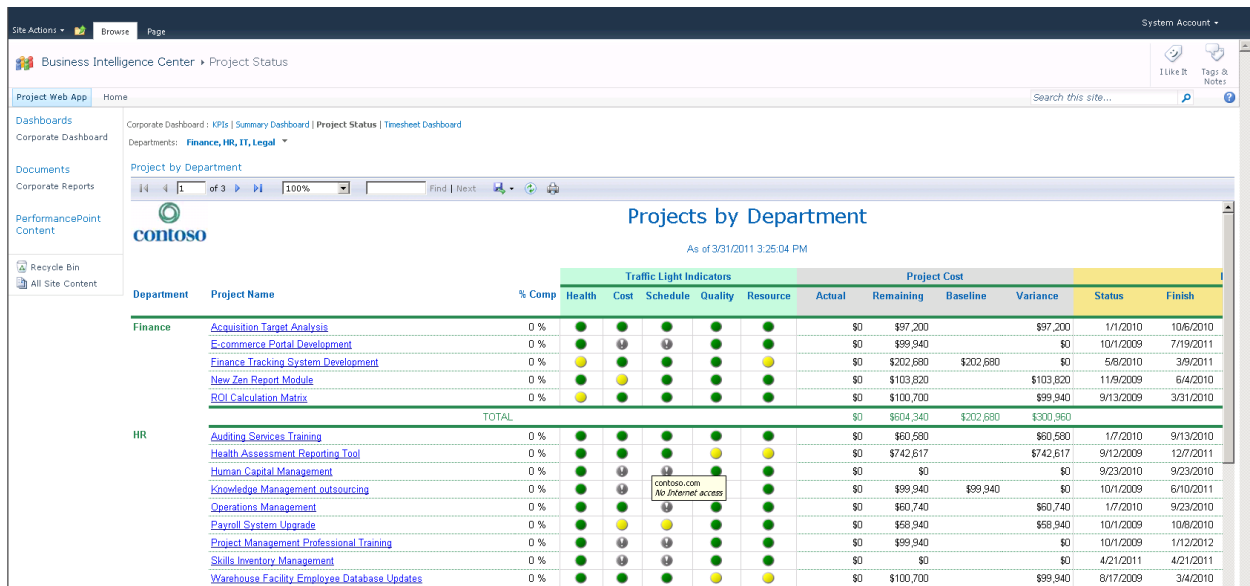


Figure 15: Example of a Dashboard Page 3 created with PerformancePoint

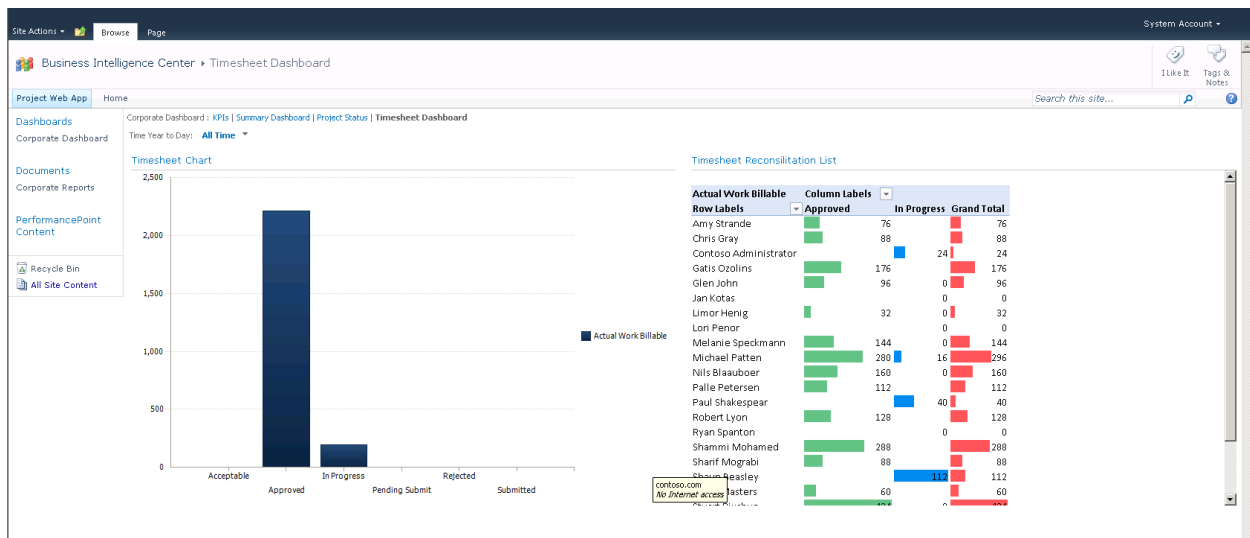


Figure 16: Example of a Dashboard Page 4 created with PerformancePoint

## PerformancePoint Reports

In order to use PerformancePoint to create dashboards, it is required to convert reports previously created into content types that can be consumed by PerformancePoint. The following section highlights how to perform that. Note that this is only required for Excel Services and SQL Server Reporting Services reports as PerformancePoint charts are by definition PerformancePoint content types.

## Filters

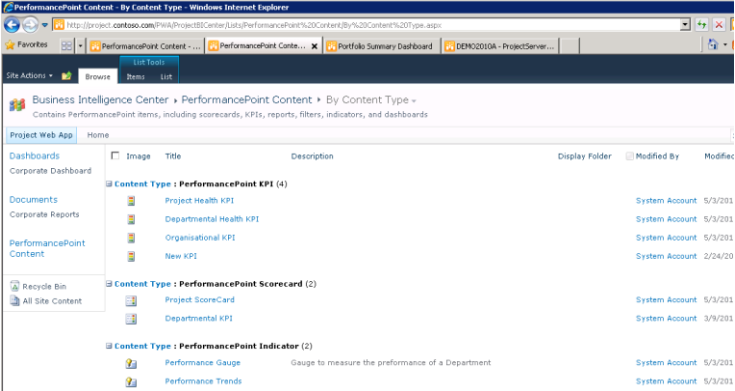
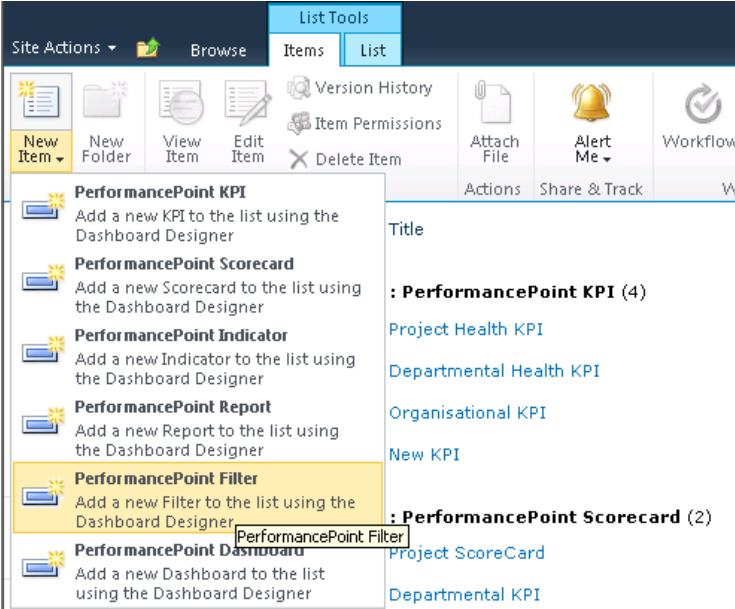
Users can use PerformancePoint Dashboard Designer to create many kinds of dashboard filters. For example, dashboard filters that are stand-alone dashboard items can be reused across multiple dashboards or across multiple pages in a dashboard. Analytic reports and scorecards can be created that use built-in filters to display particular information. This section explains how to create the following filters:




- Department
- Time

To create the filters, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

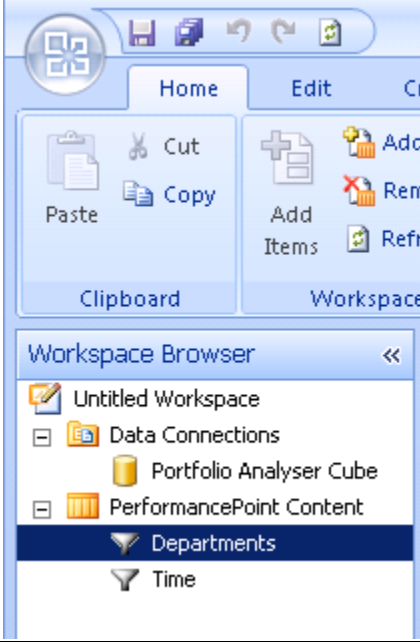
Create Filters		
Step	Action	Details



Create Filters		
Step	Action	Details
1	In PWA, select Business Intelligence Center → PerformancePoint Content	
2	On toolbar, select Items → New Item → PerformancePoint Filter	

Create Filters																										
Step	Action	Details																								
3	Select Portfolio Analyzer Data Connection → Next	<div><div>Filter Editor</div><div><div></div><div>Select a data source The data source will provide the values for the filter.</div></div><div><div>Select a data source</div><div>Select members</div><div>Select display method</div><div>Create a filter</div></div><div><div>SharePoint SiteWorkspace</div><div><div><div>Toggle ViewExpand AllCollapse All</div><table><thead><tr><th>Name</th><th>Type</th><th>Description</th><th>Person Responsible</th><th>Modified</th><th>Modified By</th></tr></thead><tbody><tr><td>Data Connec...</td><td>Library</td><td></td><td></td><td></td><td></td></tr><tr><td>Portfolio...</td><td>Analysis...</td><td>Project Server Portf...</td><td></td><td>3/7/201...</td><td>System ...</td></tr><tr><td>Timeshe...</td><td>Analysis...</td><td>Outlining the timesh...</td><td></td><td>5/3/201...</td><td>System ...</td></tr></tbody></table></div></div><div><div>&lt; Previous</div><div>Next &gt;</div><div>Finish</div><div>Cancel</div></div></div></div>	Name	Type	Description	Person Responsible	Modified	Modified By	Data Connec...	Library					Portfolio...	Analysis...	Project Server Portf...		3/7/201...	System ...	Timeshe...	Analysis...	Outlining the timesh...		5/3/201...	System ...
Name	Type	Description	Person Responsible	Modified	Modified By																					
Data Connec...	Library																									
Portfolio...	Analysis...	Project Server Portf...		3/7/201...	System ...																					
Timeshe...	Analysis...	Outlining the timesh...		5/3/201...	System ...																					
4	Select Dimension → Project Departments_Project.Project Departments_Project → Next	<div><div>Filter Editor</div><div><div></div><div>Select Members Select dimension members for the filter.</div></div><div><div>Select a data source</div><div>Select members</div><div>Select display method</div><div>Create a filter</div></div><div><div>Filter dimension: Project Departments_Project.Project Departments_Project</div><div>Select Dimension...</div><div>Filter members: Finance, HR, IT, Legal, Operations, Sales and Marketing</div><div>Select Members...</div><div>Default member selection (specified in the Select Members dialog box): </div><div><div>&lt; Previous</div><div>Next &gt;</div><div>Finish</div><div>Cancel</div></div></div></div>																								
5	Select Multi-Select Tree → Finish	<div><div>Filter Editor</div><div><div></div><div>Select Display Method Choose the style of control for the filter.</div></div><div><div>Select a data source</div><div>Select members</div><div>Select display method</div><div>Create a filter</div></div><div><div>List A drop-down list from which a single item can be selected</div><div>Tree A tree from which a single item can be selected</div><div>Multi-Select Tree A tree from which multiple items can be selected</div><div><div>&lt; Previous</div><div>Next &gt;</div><div>Finish</div><div>Cancel</div></div></div></div>																								



Create Filters		
Step	Action	Details
6	Repeat steps 3-5 to create filter for Time	 The screenshot shows the Microsoft Project Server 2010 interface. At the top, there is a ribbon with tabs for 'Home' and 'Edit'. Below the ribbon, there are two main sections: 'Clipboard' and 'Workspace'. The 'Workspace' section contains a 'Workspace Browser' pane. This pane lists several items: 'Untitled Workspace', 'Data Connections', 'Portfolio Analyser Cube', 'PerformancePoint Content', 'Departments', and 'Time'. The 'Departments' item is currently selected and highlighted in blue.

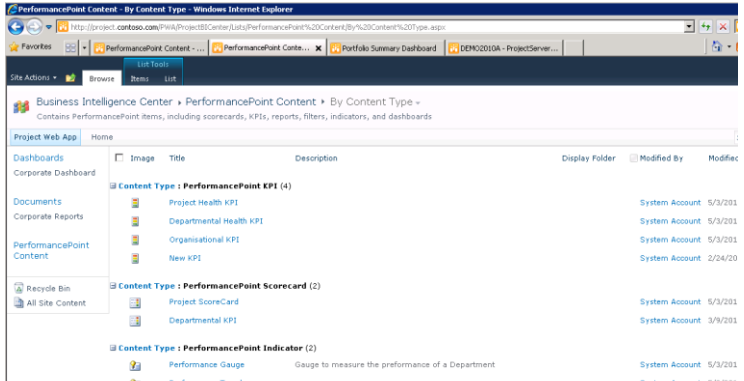
## Excel Services Reports

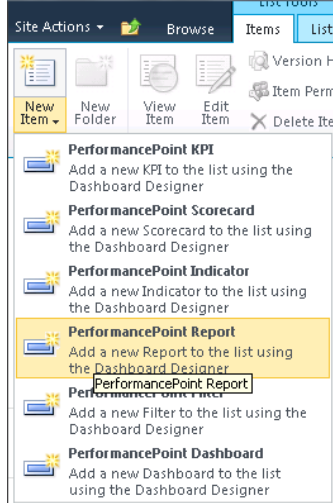
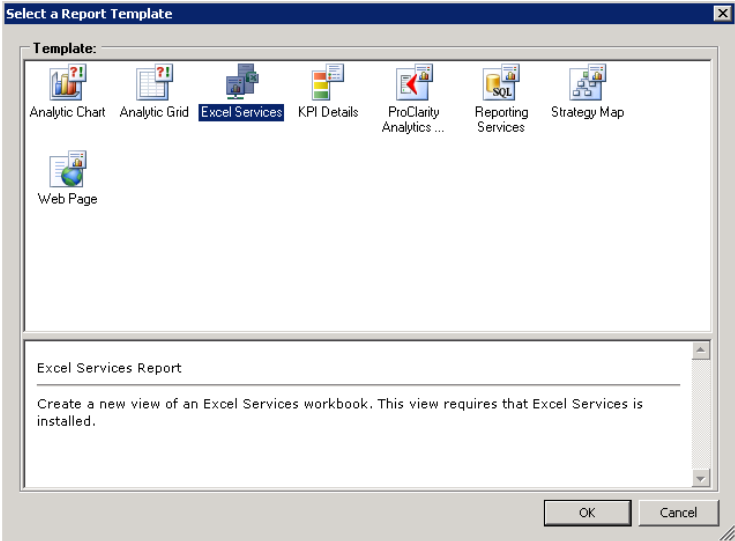
By using PerformancePoint Dashboard Designer, you can create Excel Services reports for your dashboards. An Excel Services report is a Microsoft Excel workbook that was published to Microsoft SharePoint Server 2010 by using Excel Services. Most Excel Services reports contain one or more charts and tables. When you add an Excel Services report to a PerformancePoint dashboard, you reuse an existing report that can contain views, such as PivotTable reports and PivotChart reports, which you cannot create by using Dashboard Designer. For more information, [see Create an Excel Services Report by using Dashboard Designer](#).

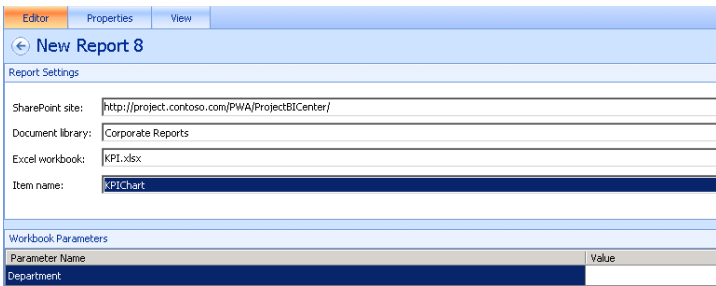
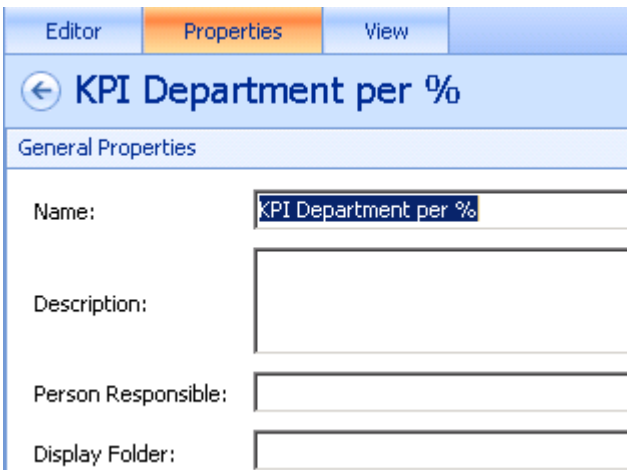
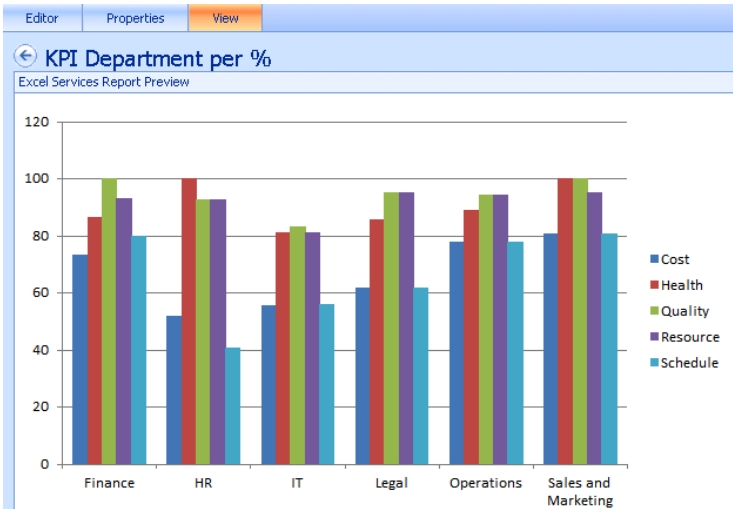
This section of the document highlights how to create PerformancePoint reports for the following Excel Services reports:

- KPI Department per %
- Project Cost per Department
- Resource Availability by Role
- Timesheet Reconciliation List

To create the reports, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Excel Services Reports		
Step	Action	Details
1	In PWA, select Business Intelligence Center → PerformancePoint Content	

Create Excel Services Reports		
Step	Action	Details
2	On toolbar, select Items → New Item → PerformancePoint Report	 <p>The screenshot shows the 'New Item' dropdown menu in the Project Server 2010 interface. The menu is open, displaying several options. The 'PerformancePoint Report' option is highlighted in yellow. The options include: PerformancePoint KPI, PerformancePoint Scorecard, PerformancePoint Indicator, PerformancePoint Report (highlighted), PerformancePoint Filter, and PerformancePoint Dashboard. Each option has a brief description of what it adds to the list using the Dashboard Designer.</p>
3	In the Select a Report Template dialog box → click Excel Services → click OK	 <p>The screenshot shows the 'Select a Report Template' dialog box. The 'Template:' section displays several icons representing different report templates: Analytic Chart, Analytic Grid, Excel Services (selected), KPI Details, ProClarity Analytics..., Reporting Services, and Strategy Map. Below the icons, the 'Excel Services Report' template is selected, and its description is visible: 'Create a new view of an Excel Services workbook. This view requires that Excel Services is installed.' The 'OK' button is highlighted.</p>

Create Excel Services Reports																																												
Step	Action	Details																																										
4	<p>Select the SharePoint site where the Excel Services report is hosted (Project BI Center in our case)</p> <p>Use the Document library list to select the document library where the Excel Services report is hosted (corporate reports in our case)</p> <p>Use the Excel workbook list to select the Excel Services report that you want to display (KPI.xls in our case)</p>	 <p><b>Report Settings</b></p> <p>SharePoint site: <input type="text" value="http://project.contoso.com/PWA/ProjectBICenter/"/></p> <p>Document library: <input type="text" value="Corporate Reports"/></p> <p>Excel workbook: <input type="text" value="KPI.xlsx"/></p> <p>Item name: <input type="text" value="KPIChart"/></p> <p><b>Workbook Parameters</b></p> <table><tr><th>Parameter Name</th><th>Value</th></tr><tr><td>Department</td><td></td></tr></table>	Parameter Name	Value	Department																																							
Parameter Name	Value																																											
Department																																												
5	Select Property Tab, enter name.	 <p><b>KPI Department per %</b></p> <p><b>General Properties</b></p> <p>Name: <input type="text" value="KPI Department per %"/></p> <p>Description: <input type="text"/></p> <p>Person Responsible: <input type="text"/></p> <p>Display Folder: <input type="text"/></p>																																										
6	Select View and ensure that report display properly. Save.	 <p><b>KPI Department per %</b></p> <p>Excel Services Report Preview</p> <p>Bar chart showing KPI values for five categories (Cost, Health, Quality, Resource, Schedule) across six departments (Finance, HR, IT, Legal, Operations, Sales and Marketing).</p> <table><tr><th>Department</th><th>Cost</th><th>Health</th><th>Quality</th><th>Resource</th><th>Schedule</th></tr><tr><td>Finance</td><td>75</td><td>85</td><td>100</td><td>95</td><td>80</td></tr><tr><td>HR</td><td>50</td><td>100</td><td>95</td><td>95</td><td>40</td></tr><tr><td>IT</td><td>55</td><td>80</td><td>85</td><td>80</td><td>55</td></tr><tr><td>Legal</td><td>60</td><td>85</td><td>95</td><td>95</td><td>60</td></tr><tr><td>Operations</td><td>75</td><td>90</td><td>95</td><td>95</td><td>75</td></tr><tr><td>Sales and Marketing</td><td>80</td><td>100</td><td>100</td><td>95</td><td>80</td></tr></table>	Department	Cost	Health	Quality	Resource	Schedule	Finance	75	85	100	95	80	HR	50	100	95	95	40	IT	55	80	85	80	55	Legal	60	85	95	95	60	Operations	75	90	95	95	75	Sales and Marketing	80	100	100	95	80
Department	Cost	Health	Quality	Resource	Schedule																																							
Finance	75	85	100	95	80																																							
HR	50	100	95	95	40																																							
IT	55	80	85	80	55																																							
Legal	60	85	95	95	60																																							
Operations	75	90	95	95	75																																							
Sales and Marketing	80	100	100	95	80																																							



Create Excel Services Reports		
Step	Action	Details
7	Repeat steps 3-6 for other reports: <ul style="list-style-type: none"> <li>Project Cost per Department</li> <li>Resource Availability by Role</li> <li>Timesheet Reconciliation List</li> </ul>	

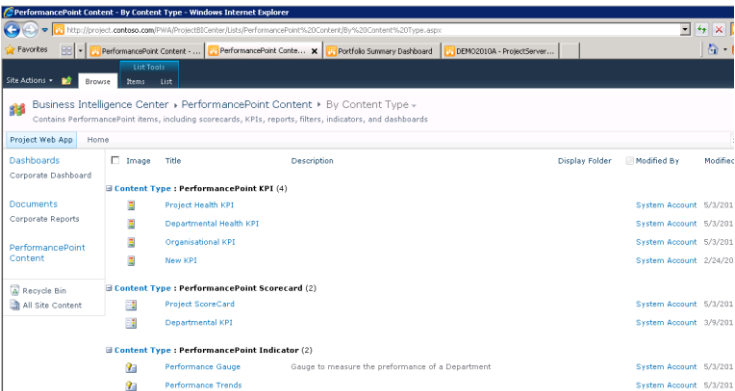
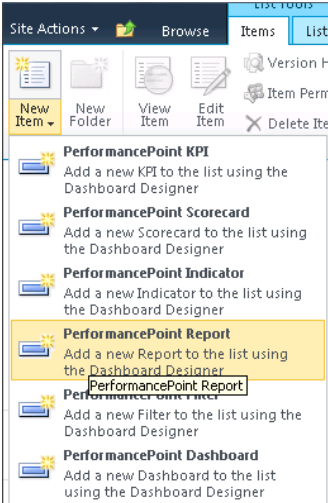
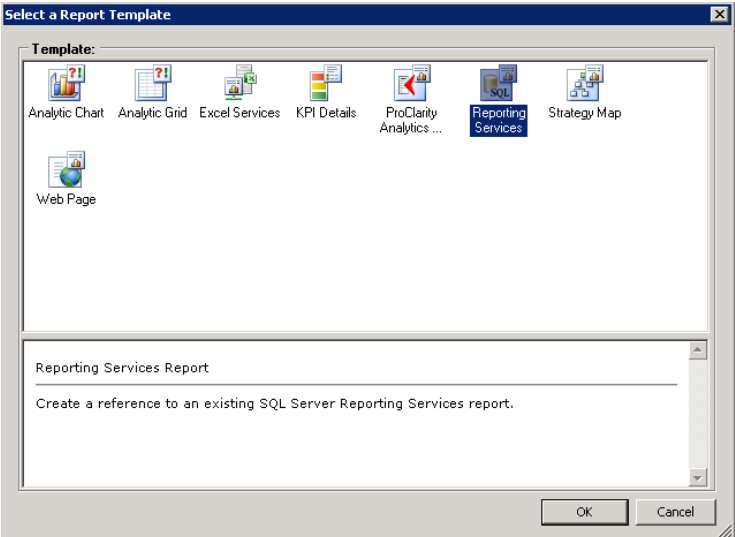
## SQL Server Reporting Services Reports

By using PerformancePoint Dashboard Designer, you can create Microsoft SQL Server Reporting Services (SSRS) reports for your dashboards. A Reporting Services report is a report that is published to SQL Server Reporting Services and contains one or more charts and tables. By adding a Reporting Services report to a PerformancePoint dashboard, you can reuse an existing report. For more information, see [Create a Reporting Services report by using Dashboard Designer](#).

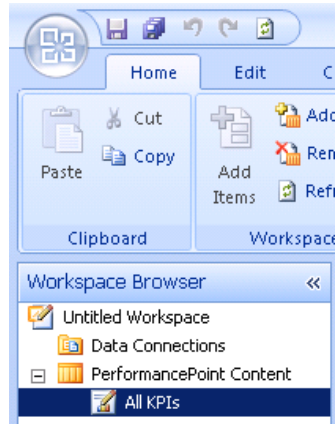
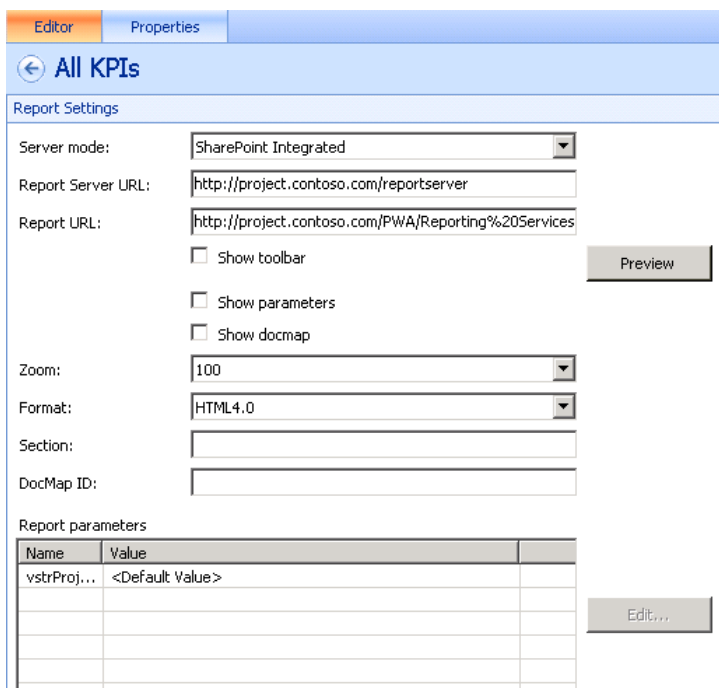
This section of the document highlights how to create PerformancePoint reports based on the following SQL Server Reporting Services reports:


- Key Performance Indicators (KPIs)
- Project by Department

To create the reports, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create SQL Server Reporting Services Reports		
Step	Action	Details
1	In PWA, select Business Intelligence Center → PerformancePoint Content	
2	On toolbar, select Items → New Item → PerformancePoint Report	
3	Select Reporting Services	



Create SQL Server Reporting Services Reports		
Step	Action	Details
4	Rename the report. All KPIs in our example.	
5	<p>Configure the report to display information by using SharePoint Integrated mode.</p> <p>In the Server name box, specify the Web site address (URL) for the server that hosts the report that you want to use.</p> <p>In the Report URL box, specify the complete address for the report that you want to use.</p> <p>Review the information in the Report parameters section.</p>	

Create SQL Server Reporting Services Reports		
Step	Action	Details
6	Repeat steps 3-5 for the Project By Department report.	 A screenshot of the SQL Server Reporting Services (SSRS) interface. The top ribbon shows 'Home' and 'Edit' tabs. Below the ribbon, there are two main sections: 'Clipboard' and 'Workspace'. The 'Workspace' section contains a 'Workspace Browser' pane on the left. This pane lists several items: 'Untitled Workspace', 'Data Connections', 'PerformancePoint Content', 'All KPIs', and 'Project by Department'. The 'Project by Department' item is currently selected and highlighted with a grey background.





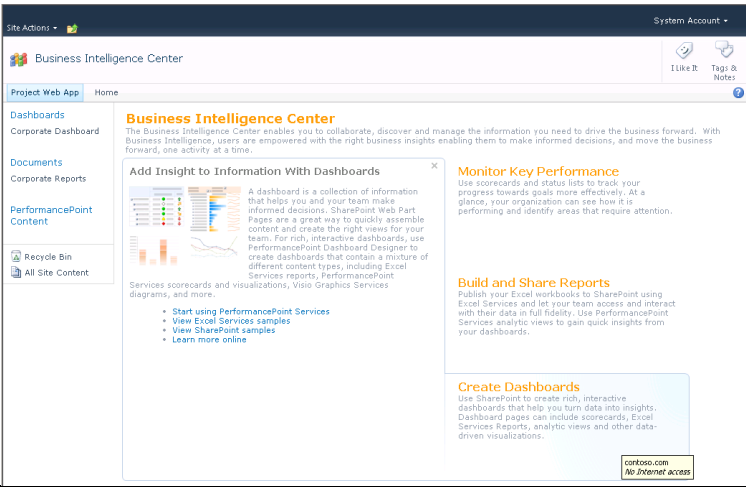
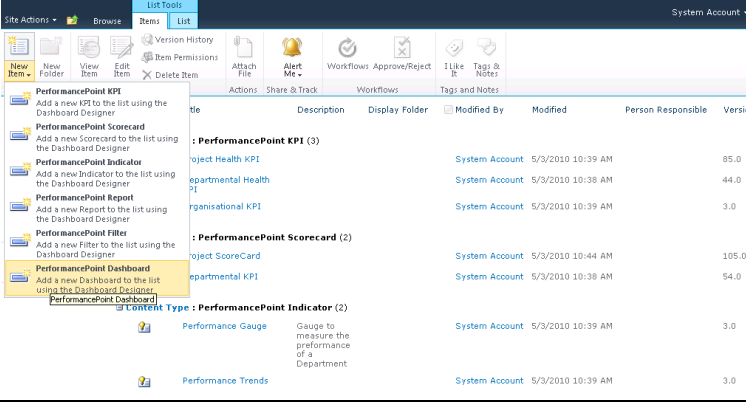
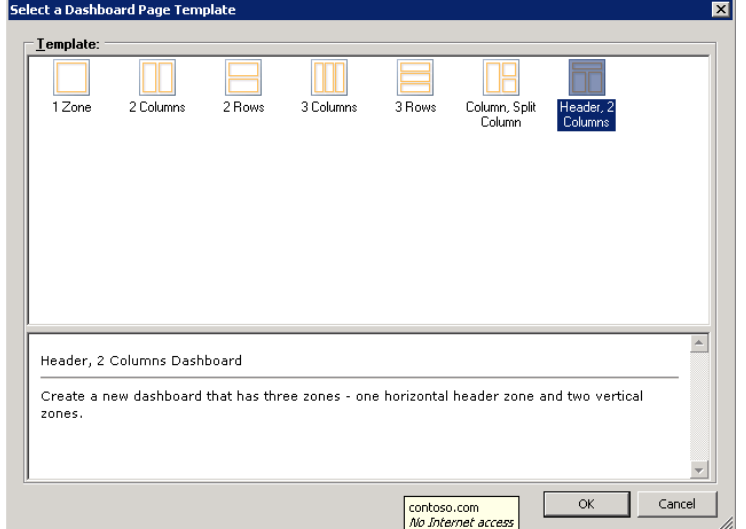
## Creating Dashboards with PerformancePoint Services

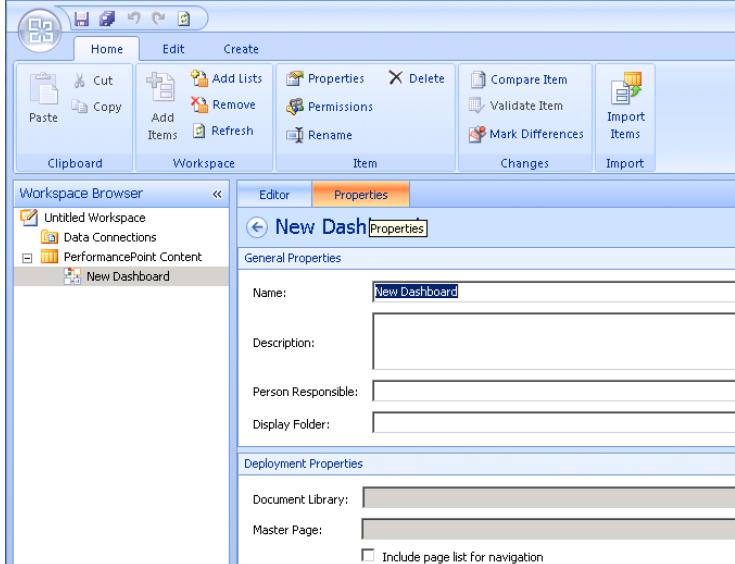
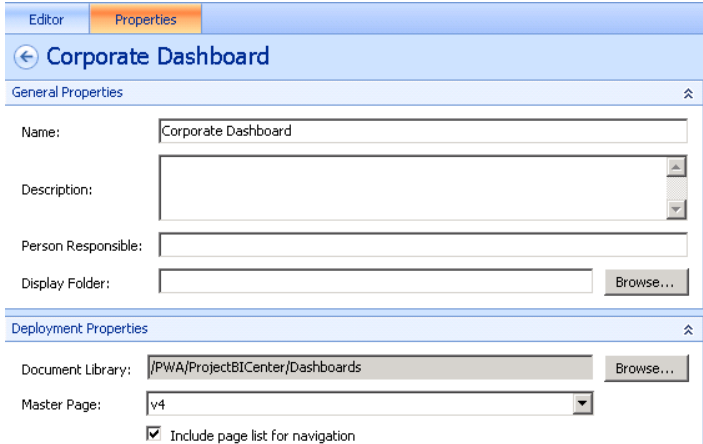
This section explains how to create and assemble the dashboard pages from the following PerformancePoint content created in the previous sections:

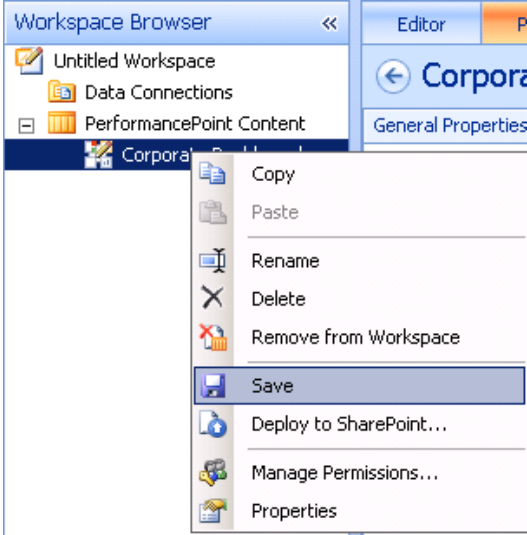
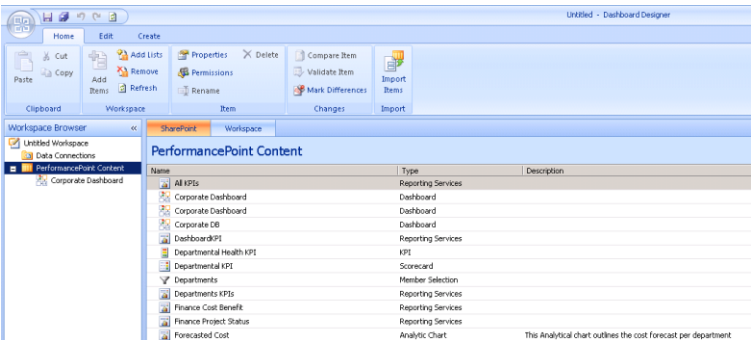
Dashboard Page Name	Report Name	Type
KPIs	KPI Department per %	Excel Services
Summary Dashboard	Project Cost per Department	Excel Services
Summary Dashboard	Resource Availability by Role	Excel Services
Timesheet Dashboard	Timesheet Reconciliation List	Excel Services
Summary Dashboard	Forecasted Cost Chart	Analytic Chart
Summary Dashboard	Risk and Issue Count Chart	Analytic Chart
Timesheet Dashboard	Timesheet Chart	Analytic Chart
KPIs	All KPIs	Reporting Services
Project Status	Project by Department	Reporting Services
[Multiple]	Time	Filter
[Multiple]	Department	Filter

Dashboard Designer allows users to create dashboard pages, by selecting a page template. Users can change the page layout template selected for each page, and then can add items to the pages.

To create the Dashboard, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Dashboard		
Step	Action	Details
1	From PWA, click on Business Intelligence Center and PerformancePoint Content.	
2	On the menu, select Items, New Items and PerformancePoint Dashboard.	
3	<p>Select a page layout for the dashboard page, and then click OK.</p> <p>You can select from seven different page layout templates.</p>	

Create Dashboard		
Step	Action	Details
4	In the center pane, click the Properties tab.	
5	In the Name box, type the name that you want to use for the dashboard. Select "Include page list for navigation"	

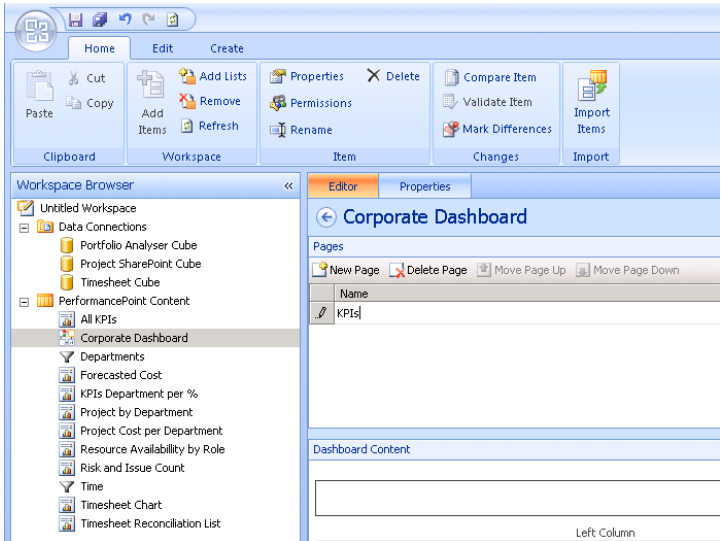
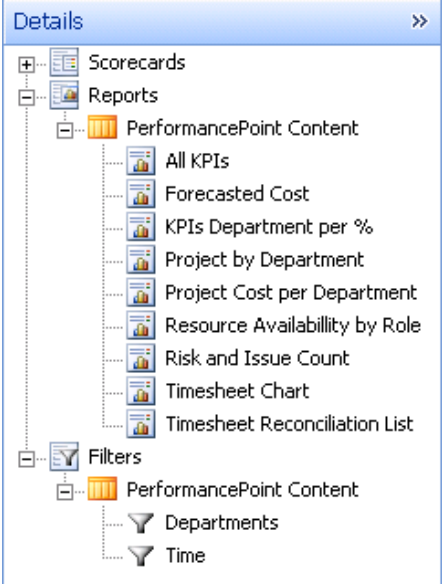
Create Dashboard		
Step	Action	Details
6	In the Workspace Browser, right-click the dashboard, and then click Save	
7	In the Workspace Browser, click on PerformanceContent. You will see all the PerformancePoint content created in the previous sections	



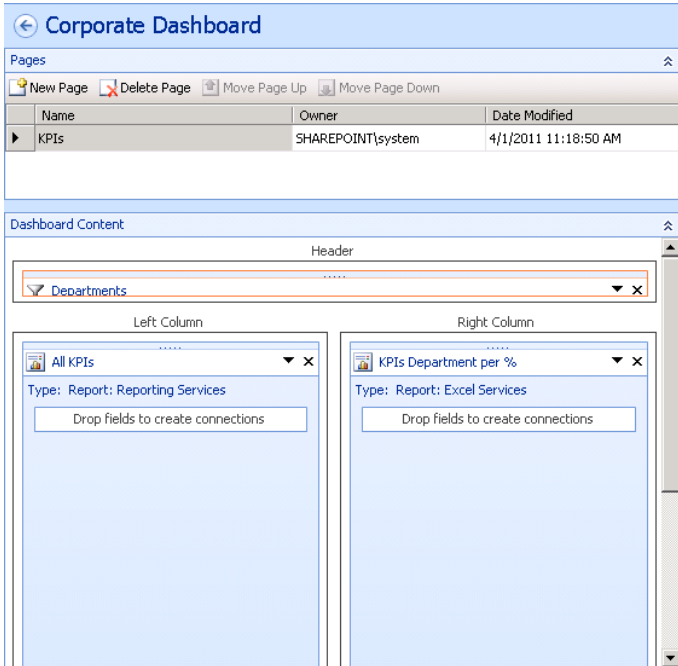
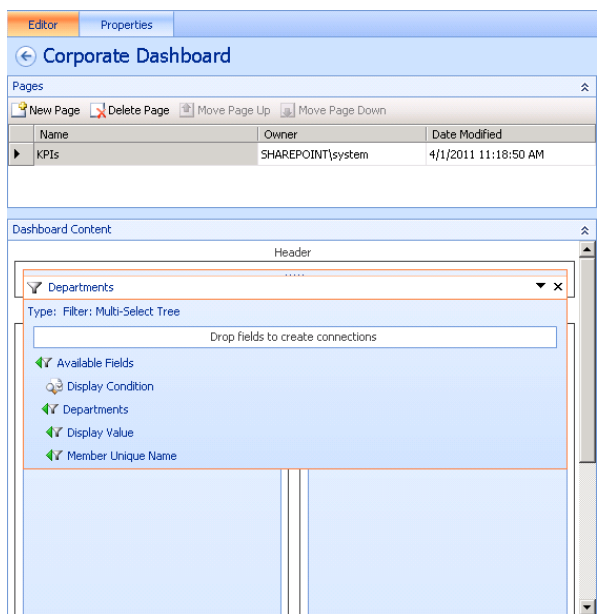
Create Dashboard																																																														
Step	Action	Details																																																												
8	Highlight all the PerformancePoint content you want to add on your Dashboard, and then click Add Items.	<div><div><div><div><div>Home</div><div>Edit</div><div>Create</div></div><div><div><div><div><div><div></div><div>Paste</div></div><div><div></div><div>Cut</div></div><div><div></div><div>Copy</div></div></div><div><div></div><div>Add Items</div></div><div><div></div><div>Remove</div></div><div><div></div><div>Refresh</div></div></div><div><div></div><div>Add Lists</div></div><div><div></div><div>Properties</div></div><div><div></div><div>Permissions</div></div><div><div></div><div>Rename</div></div><div><div></div><div>Delete</div></div><div><div></div><div>Compare Item</div></div><div><div></div><div>Validate Item</div></div><div><div></div><div>Mark Differences</div></div><div><div></div><div>Import</div></div></div></div><div><div>Clipboard</div><div>Workspace</div><div>Item</div><div>Changes</div><div>Import</div></div></div><div><div>Workspace Browser</div><div>«</div><div><div>Untitled Workspace</div><div>Data Connections</div><div><div>PerformancePoint Content</div><div>Corporate Dashboard</div></div></div></div></div><div><div>SharePoint</div><div>Workspace</div></div><div><div>PerformancePoint Content</div><table><tr><th>Name</th><th>Type</th></tr><tr><td>All KPIs</td><td>Reporting Services</td></tr><tr><td>Corporate Dashboard</td><td>Dashboard</td></tr><tr><td>Corporate Dashboard</td><td>Dashboard</td></tr><tr><td>Corporate DB</td><td>Dashboard</td></tr><tr><td>DashboardKPI</td><td>Reporting Services</td></tr><tr><td>Departmental Health KPI</td><td>KPI</td></tr><tr><td>Departmental KPI</td><td>Scorecard</td></tr><tr><td>Departments</td><td>Member Selection</td></tr><tr><td>Departments KPIs</td><td>Reporting Services</td></tr><tr><td>Finance Cost Benefit</td><td>Reporting Services</td></tr><tr><td>Finance Project Status</td><td>Reporting Services</td></tr><tr><td>Forecasted Cost</td><td>Analytic Chart</td></tr><tr><td>HR DEPT CostBenefit</td><td>Reporting Services</td></tr><tr><td>HR Project Status</td><td>Reporting Services</td></tr><tr><td>ITProjectStatus</td><td>Reporting Services</td></tr><tr><td>KPI Indicator Chart</td><td>Excel Services</td></tr><tr><td>KPIs Department per %</td><td>Excel Services</td></tr><tr><td>Legal Cost Benefit</td><td>Reporting Services</td></tr><tr><td>Legal Project Status</td><td>Reporting Services</td></tr><tr><td>Milestone this Month</td><td>Excel Services</td></tr><tr><td>Operations Cost Benefit</td><td>Reporting Services</td></tr><tr><td>Operations Project Status</td><td>Reporting Services</td></tr><tr><td>Organisational KPI</td><td>Reporting Services</td></tr><tr><td>Organisational KPI</td><td>KPI</td></tr><tr><td>Performance Gauge</td><td>Indicator</td></tr><tr><td>Performance Trends</td><td>Indicator</td></tr><tr><td>PPS Dashboard</td><td>Dashboard</td></tr><tr><td>Project by Department</td><td>Reporting Services</td></tr><tr><td>Project Cost per Department</td><td>Excel Services</td></tr></table></div></div>	Name	Type	All KPIs	Reporting Services	Corporate Dashboard	Dashboard	Corporate Dashboard	Dashboard	Corporate DB	Dashboard	DashboardKPI	Reporting Services	Departmental Health KPI	KPI	Departmental KPI	Scorecard	Departments	Member Selection	Departments KPIs	Reporting Services	Finance Cost Benefit	Reporting Services	Finance Project Status	Reporting Services	Forecasted Cost	Analytic Chart	HR DEPT CostBenefit	Reporting Services	HR Project Status	Reporting Services	ITProjectStatus	Reporting Services	KPI Indicator Chart	Excel Services	KPIs Department per %	Excel Services	Legal Cost Benefit	Reporting Services	Legal Project Status	Reporting Services	Milestone this Month	Excel Services	Operations Cost Benefit	Reporting Services	Operations Project Status	Reporting Services	Organisational KPI	Reporting Services	Organisational KPI	KPI	Performance Gauge	Indicator	Performance Trends	Indicator	PPS Dashboard	Dashboard	Project by Department	Reporting Services	Project Cost per Department	Excel Services
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Corporate DB	Dashboard																																																													
DashboardKPI	Reporting Services																																																													
Departmental Health KPI	KPI																																																													
Departmental KPI	Scorecard																																																													
Departments	Member Selection																																																													
Departments KPIs	Reporting Services																																																													
Finance Cost Benefit	Reporting Services																																																													
Finance Project Status	Reporting Services																																																													
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Performance Gauge	Indicator																																																													
Performance Trends	Indicator																																																													
PPS Dashboard	Dashboard																																																													
Project by Department	Reporting Services																																																													
Project Cost per Department	Excel Services																																																													
9	You are now ready to create your Dashboard Pages.	<div><div>Workspace Browser</div><div>«</div><div><div>Untitled Workspace</div><div><div>Data Connections</div><div><div>Portfolio Analyser Cube</div><div>Project SharePoint Cube</div><div>Timesheet Cube</div></div><div><div>PerformancePoint Content</div><div><div>All KPIs</div><div>Corporate Dashboard</div><div>Departments</div><div>Forecasted Cost</div><div>KPIs Department per %</div><div>Project by Department</div><div>Project Cost per Department</div><div>Resource Availability by Role</div><div>Risk and Issue Count</div><div>Time</div><div>Timesheet Chart</div><div>Timesheet Reconciliation List</div></div></div></div></div></div>																																																												

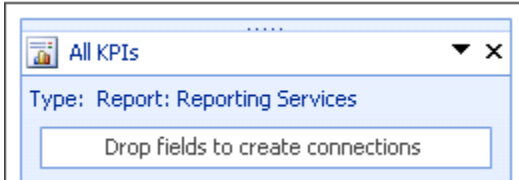
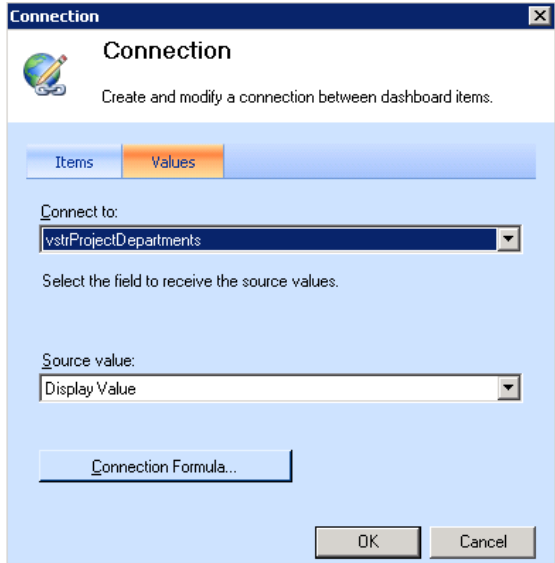
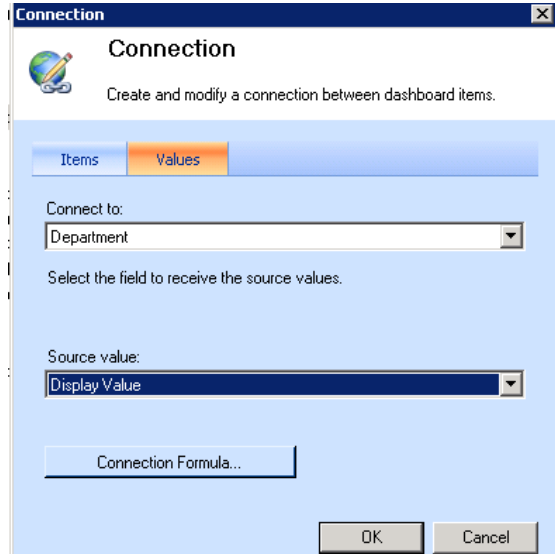
## Page 1 - KPIs

To create the KPIs page, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

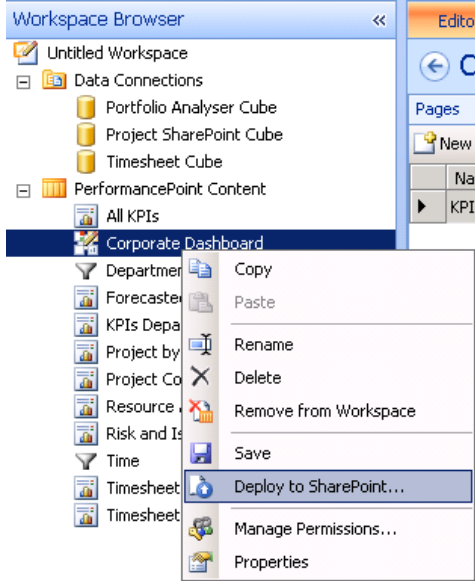

Create KPIs page		
Step	Action	Details
1	In the Workspace Browser, click on your Dashboard (Corporate Dashboard in our example). Select the Editor tab and rename Page 1.	
2	In the Details pane on the right hand side, expand Reports and Filters.	



Create KPIs page		
Step	Action	Details
3	Drag and drop All KPIs, PKIs Department per % and Department Filter.	 <p>The screenshot shows the 'Corporate Dashboard' interface. At the top, there's a 'Pages' section with a table listing 'KPIs' owned by 'SHAREPOINT\system' and last modified on '4/1/2011 11:18:50 AM'. Below this is the 'Dashboard Content' area, which includes a 'Header' section with a 'Departments' filter. The main content area is divided into two columns: 'Left Column' and 'Right Column'. The 'Left Column' contains a KPI titled 'All KPIs' of type 'Report: Reporting Services'. The 'Right Column' contains a KPI titled 'KPIs Department per %' of type 'Report: Excel Services'. Both KPIs have a 'Drop fields to create connections' button.</p>
4	Expand Departments filter and grab Department Field	 <p>The screenshot shows the 'Corporate Dashboard' interface with the 'Departments' filter expanded. The filter is now set to 'Type: Filter: Multi-Select Tree'. Below the filter, there's a list of 'Available Fields' that can be added to the KPI. The fields listed are: 'Display Condition', 'Departments', 'Display Value', and 'Member Unique Name'. The 'Drop fields to create connections' button is still present.</p>

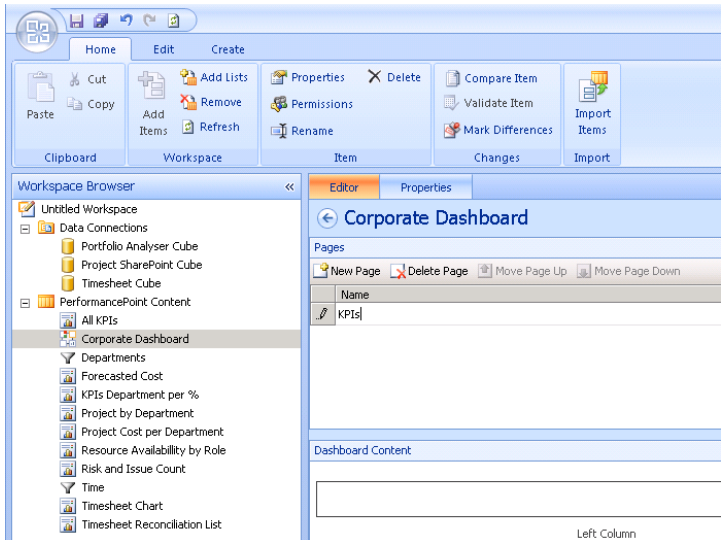
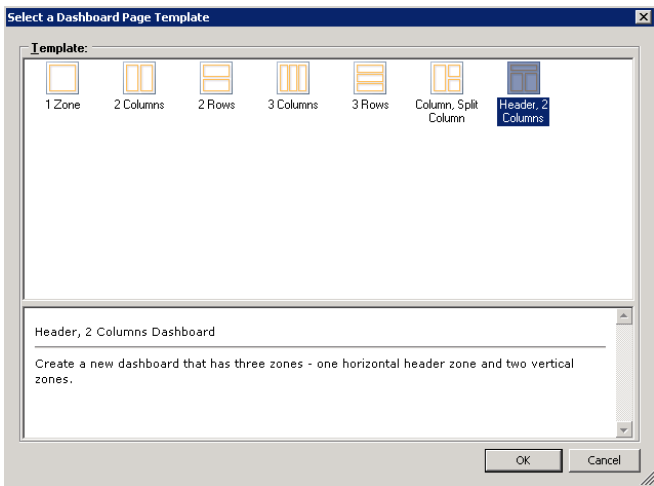
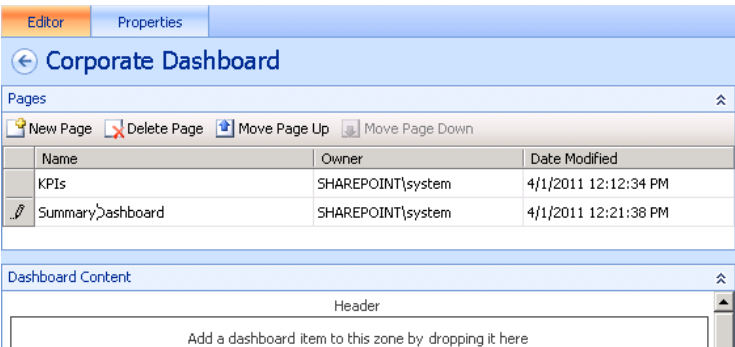
Create KPIs page		
Step	Action	Details
5	Drop Department field on “Drop Fields to create connections” for each of the two reports: All KPIs and KPI Department per %.	
6	For the All KPIs report, use the connection information specified in Details Column	
7	For the KPIs Department per % report, use the connection information specified in Details Column	



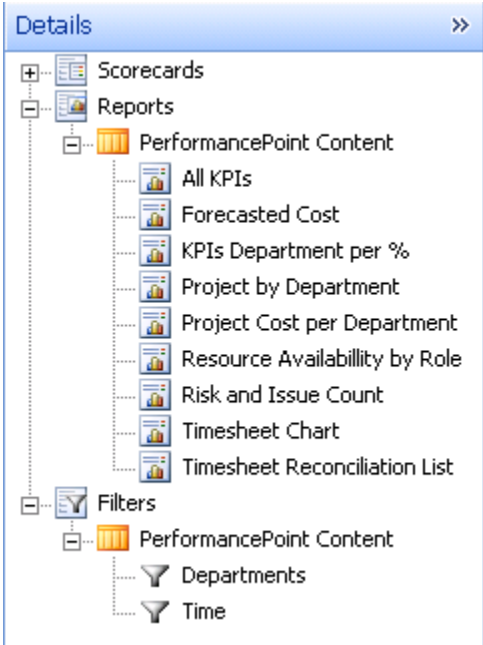
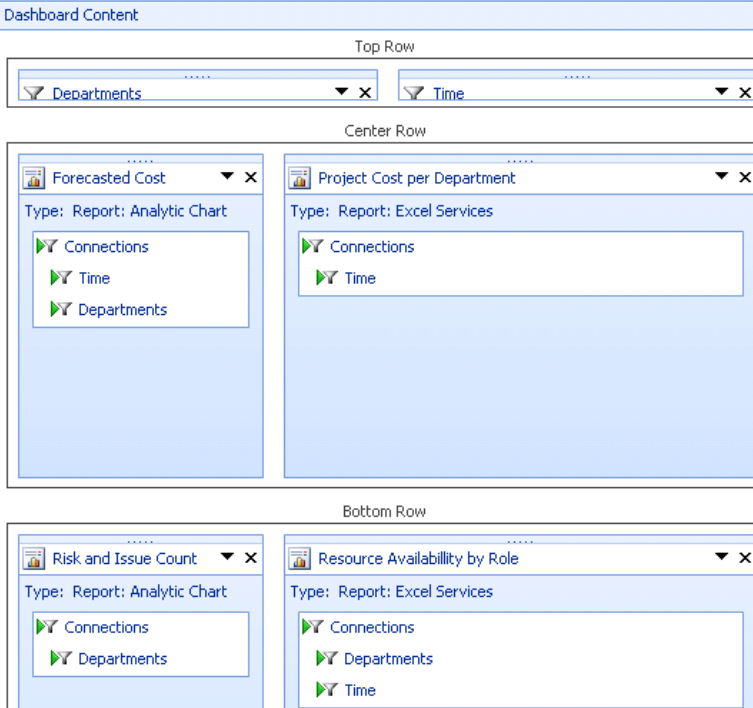
Create KPIs page		
Step	Action	Details
8	In the Workspace Browser, right-click on your Dashboard and select Deploy to SharePoint.	
9	Your KPIs page is now created.	

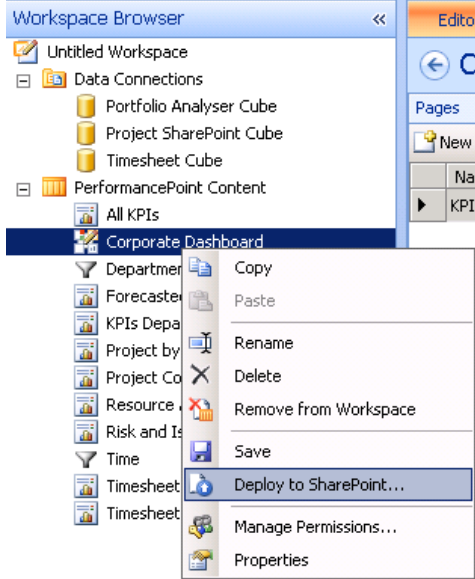

## Page 2 – Summary Dashboard

To create the Summary Dashboard page, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Summary Dashboard page		
Step	Action	Details
1	In the Workspace Browser, click on your Dashboard (Corporate Dashboard in our example). Select the Editor tab and click New Page.	
2	Select a page layout for the dashboard page, and then click OK.  You can select from seven different page layout templates.	
3	In the center pane, click the Editor tab and rename page 2 to Summary Dashboard.	



Create Summary Dashboard page		
Step	Action	Details
4	In the Details pane on the right hand side, expand Reports and Filters.	
5	<p>Drag and drop your PerformancePoint content as specified in the details column.</p> <p>For all Time and Departments filters, use Source Value = Member Unique Name.</p>	

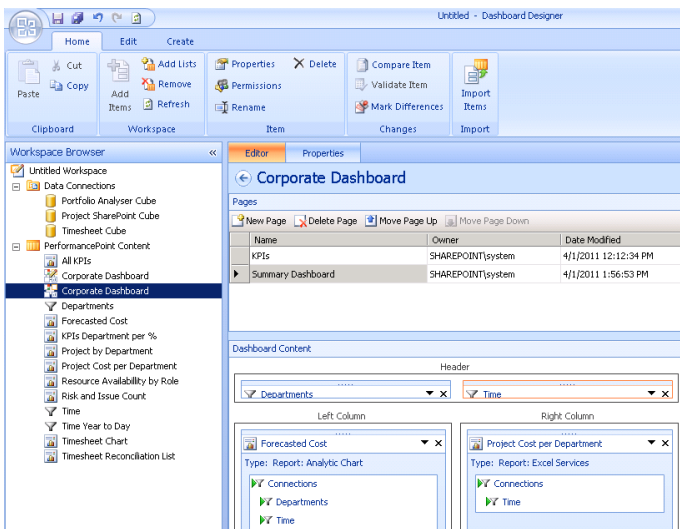
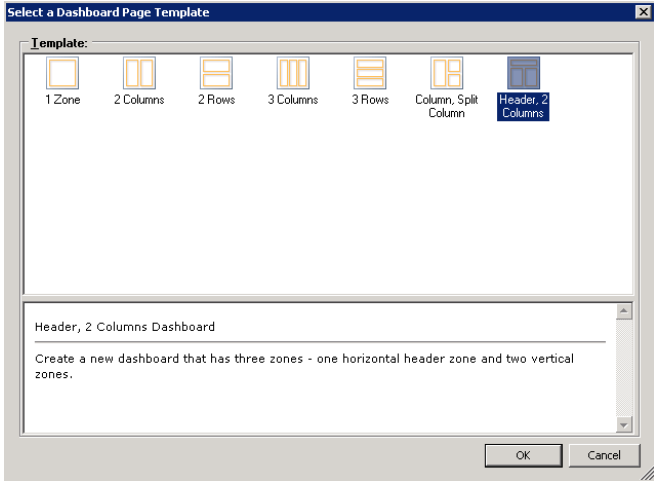
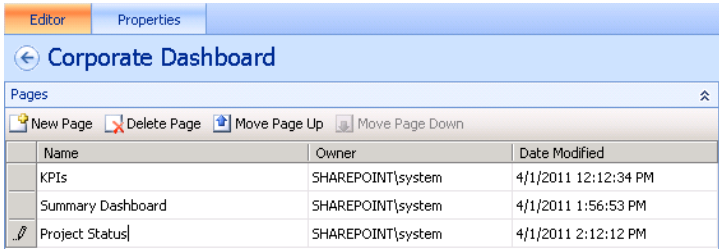
Create Summary Dashboard page		
Step	Action	Details
6	In the Workspace Browser, right-click your Dashboard and select Deploy to SharePoint.	
7	Your Dashboard Summary page is now created.	

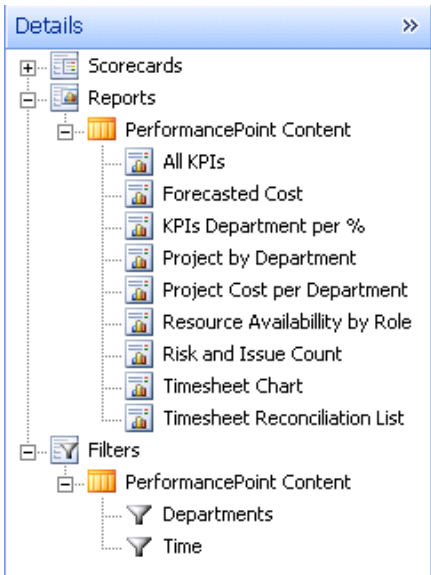
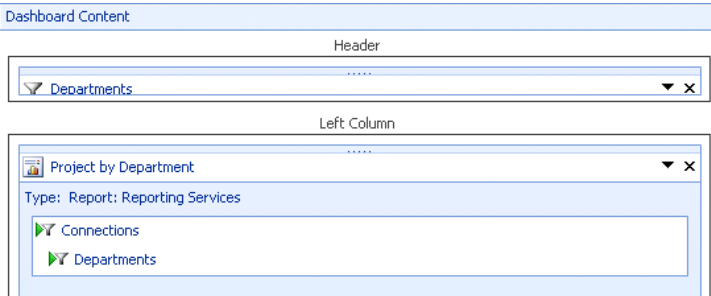
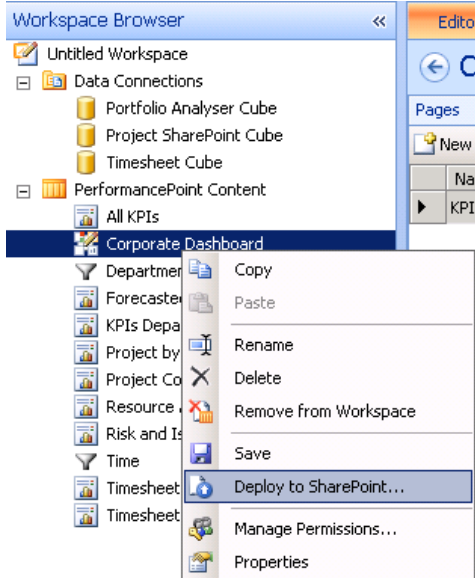
### Page 3 – Project Status

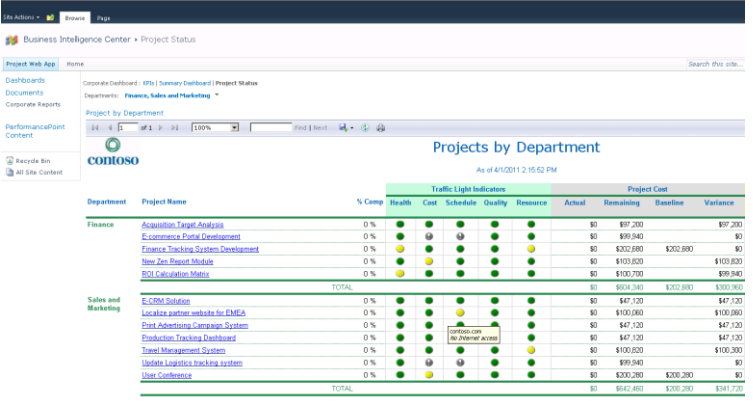
To create the Project Status page, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Project Status page		
Step	Action	Details



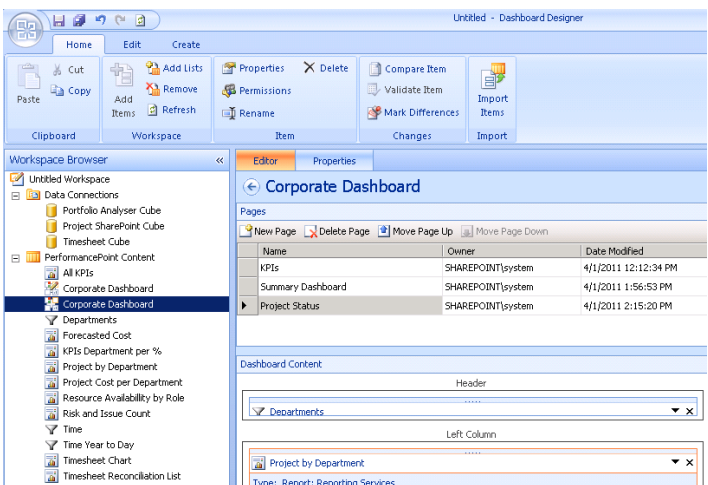
Create Project Status page		
Step	Action	Details
1	In the Workspace Browser, click on your Dashboard (Corporate Dashboard in our example). Select the Editor tab and click New Page.	
2	Select a page layout for the dashboard page, and then click OK.  You can select from seven different page layout templates.	
3	In the center pane, click the Editor tab and rename page 2 to Summary Dashboard.	

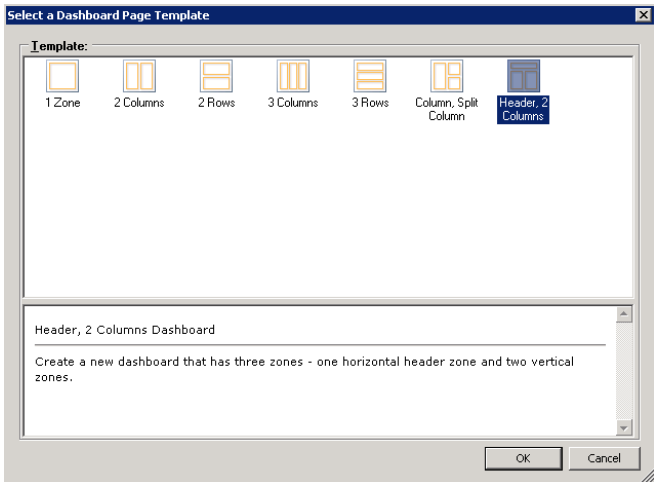
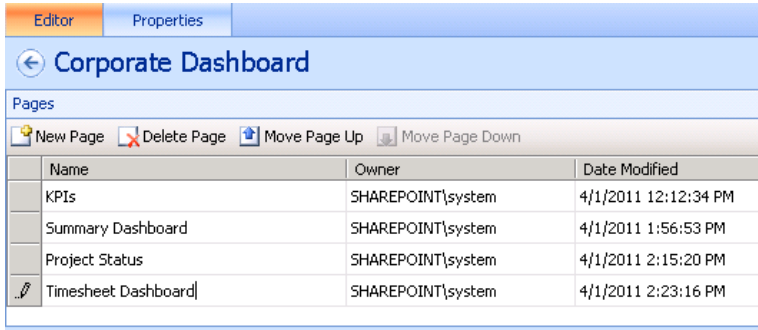
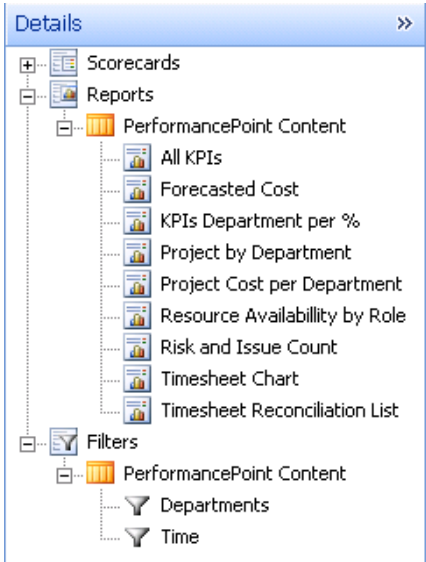
Create Project Status page		
Step	Action	Details
4	In the Details pane on the right hand side, expand Reports and Filters.	
5	<p>Drag and drop your PerformancePoint content as specified in the details column.</p> <p>For Departments filter, use Source Value = Display Value.</p>	
6	In the Workspace Browser, right-click on your Dashboard and select Deploy to SharePoint.	

Create Project Status page		
Step	Action	Details
7	Your Project Status page is now created.	

## Page 4 – Timesheet Dashboard

To create the Timesheet Dashboard page, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create Timesheet Dashboard page		
Step	Action	Details
1	In the Workspace Browser, click on your Dashboard (Corporate Dashboard in our example). Select the Editor tab and click New Page.	

Create Timesheet Dashboard page																	
Step	Action	Details															
2	<p>Select a page layout for the dashboard page, and then click OK.</p> <p>You can select from seven different page layout templates.</p>																
3	<p>In the center pane, click the Editor tab and rename page 2 to Summary Dashboard.</p>	 <table border="1"> <thead> <tr> <th>Name</th><th>Owner</th><th>Date Modified</th></tr> </thead> <tbody> <tr> <td>KPIs</td><td>SHAREPOINT\system</td><td>4/1/2011 12:12:34 PM</td></tr> <tr> <td>Summary Dashboard</td><td>SHAREPOINT\system</td><td>4/1/2011 1:56:53 PM</td></tr> <tr> <td>Project Status</td><td>SHAREPOINT\system</td><td>4/1/2011 2:15:20 PM</td></tr> <tr> <td>Timesheet Dashboard</td><td>SHAREPOINT\system</td><td>4/1/2011 2:23:16 PM</td></tr> </tbody> </table>	Name	Owner	Date Modified	KPIs	SHAREPOINT\system	4/1/2011 12:12:34 PM	Summary Dashboard	SHAREPOINT\system	4/1/2011 1:56:53 PM	Project Status	SHAREPOINT\system	4/1/2011 2:15:20 PM	Timesheet Dashboard	SHAREPOINT\system	4/1/2011 2:23:16 PM
Name	Owner	Date Modified															
KPIs	SHAREPOINT\system	4/1/2011 12:12:34 PM															
Summary Dashboard	SHAREPOINT\system	4/1/2011 1:56:53 PM															
Project Status	SHAREPOINT\system	4/1/2011 2:15:20 PM															
Timesheet Dashboard	SHAREPOINT\system	4/1/2011 2:23:16 PM															
4	<p>In the Details pane on the right hand side, expand Reports and Filters.</p>																





Create Timesheet Dashboard page		
Step	Action	Details
5	<p>Drag and drop your PerformancePoint content as specified in the details column.</p> <p>For Time filter, use Source Value = Member Unique Name.</p>	<p>The screenshot shows the 'Corporate Dashboard' editor. The 'Pages' section lists several dashboards, with 'Timesheet Dashboard' selected. The 'Dashboard Content' section shows a 'Header' with a 'Time' filter. Below the header, there are two columns: 'Left Column' and 'Right Column'. The 'Left Column' contains a 'Timesheet Chart' (Type: Report: Analytic Chart) with a 'Connections' list containing 'Time'. The 'Right Column' contains a 'Timesheet Reconciliation List' (Type: Report: Excel Services) with a 'Connections' list containing 'Time'.</p>
6	<p>In the Workspace Browser, right-click on your Dashboard and select Deploy to SharePoint.</p>	<p>The screenshot shows the 'Workspace Browser' with a tree view of the workspace. The 'Corporate Dashboard' is selected. A right-click context menu is open, showing options like 'Copy', 'Paste', 'Rename', 'Delete', 'Remove from Workspace', 'Save', 'Deploy to SharePoint...', 'Manage Permissions...', and 'Properties'. The 'Deploy to SharePoint...' option is highlighted.</p>

Create Timesheet Dashboard page																																																																																																																										
Step	Action	Details																																																																																																																								
7	Your Timesheet Dashboard page is now created.	<div><div><div>Site Actions</div><div>Business Intelligence Center • Timesheet Dashboard</div><div>Project Web App</div><div>Home</div><div>Corporate Dashboard • KPIs   Summary Dashboard   Project Status   Timesheet Dashboard</div><div>Year View to Date: All Time</div><div>Timesheet Chart</div><div>Timesheet Reconciliation List</div><div><div>Actual Work Billable</div><div>Column Labels</div><div>In Progress</div><div>Grand Total</div><table><tr><td>Amy Strande</td><td>76</td><td>76</td><td></td><td></td></tr><tr><td>Chris Gray</td><td>88</td><td>88</td><td></td><td></td></tr><tr><td>Corrado Administrator</td><td>24</td><td>24</td><td></td><td></td></tr><tr><td>Gates Orolins</td><td>176</td><td>176</td><td></td><td></td></tr><tr><td>Glen John</td><td>96</td><td>96</td><td></td><td></td></tr><tr><td>Jan Kotas</td><td>0</td><td>0</td><td></td><td></td></tr><tr><td>Lamor Henig</td><td>32</td><td>32</td><td></td><td></td></tr><tr><td>Lost Person</td><td>0</td><td>0</td><td></td><td></td></tr><tr><td>Melanie Speckmann</td><td>144</td><td>144</td><td></td><td></td></tr><tr><td>Michael Patten</td><td>280</td><td>16</td><td>296</td><td></td></tr><tr><td>Niki Krausner</td><td>148</td><td>16</td><td>164</td><td></td></tr><tr><td>Palle Petersen</td><td>112</td><td>112</td><td></td><td></td></tr><tr><td>Paul Shakespear</td><td>40</td><td>40</td><td></td><td></td></tr><tr><td>Robert Lyon</td><td>128</td><td>128</td><td></td><td></td></tr><tr><td>Ryan Spanton</td><td>0</td><td>0</td><td></td><td></td></tr><tr><td>Shamei Mohamed</td><td>288</td><td>288</td><td></td><td></td></tr><tr><td>Sharif Mograb</td><td>88</td><td>88</td><td></td><td></td></tr><tr><td>Corrado on the Internet Access</td><td>112</td><td>112</td><td></td><td></td></tr><tr><td>Stuart Rivchun</td><td>60</td><td>60</td><td></td><td></td></tr><tr><td>Stuart Rivchun</td><td>424</td><td>424</td><td></td><td></td></tr><tr><td>Tommy Hartono</td><td>0</td><td>0</td><td></td><td></td></tr><tr><td>Torleif Grauner</td><td>16</td><td>16</td><td></td><td></td></tr><tr><td>Zwie Amtal</td><td>48</td><td>48</td><td></td><td></td></tr><tr><td>Grand Total</td><td>2216</td><td>192</td><td>2408</td><td></td></tr></table></div></div></div>	Amy Strande	76	76			Chris Gray	88	88			Corrado Administrator	24	24			Gates Orolins	176	176			Glen John	96	96			Jan Kotas	0	0			Lamor Henig	32	32			Lost Person	0	0			Melanie Speckmann	144	144			Michael Patten	280	16	296		Niki Krausner	148	16	164		Palle Petersen	112	112			Paul Shakespear	40	40			Robert Lyon	128	128			Ryan Spanton	0	0			Shamei Mohamed	288	288			Sharif Mograb	88	88			Corrado on the Internet Access	112	112			Stuart Rivchun	60	60			Stuart Rivchun	424	424			Tommy Hartono	0	0			Torleif Grauner	16	16			Zwie Amtal	48	48			Grand Total	2216	192	2408	
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## 5. Creating a Dashboard by using a Web Parts Page

This section includes detailed steps on how to create a dashboard by using a SharePoint Server 2010 Web Parts page. This method does not allow users to assemble dashboards with the same ease as with PerformancePoint Services.

The purpose of this section is to help you easily create reports and dashboard for your environment with the following characteristics:

- Excel Services reports
- SQL Server Reporting Services reports
- Dashboards incorporating Excel Services and SQL Server Reporting Services reports

The next sections of the document will describe how to create the following dashboard:

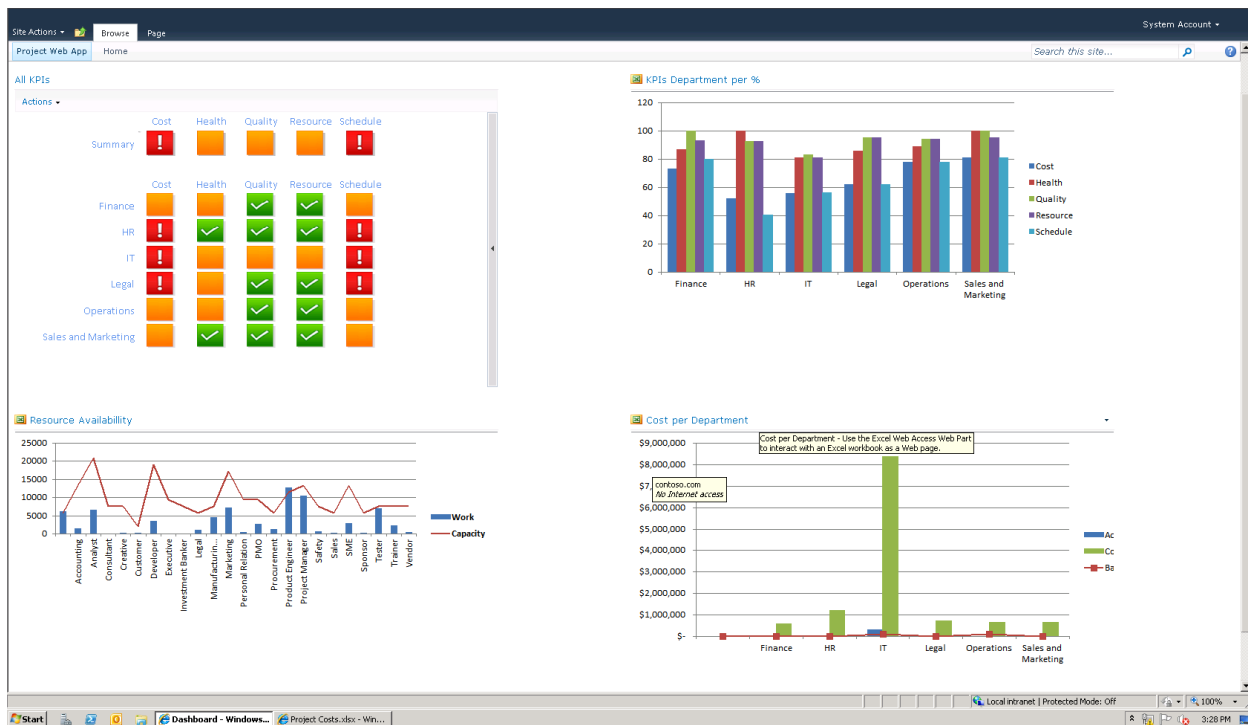


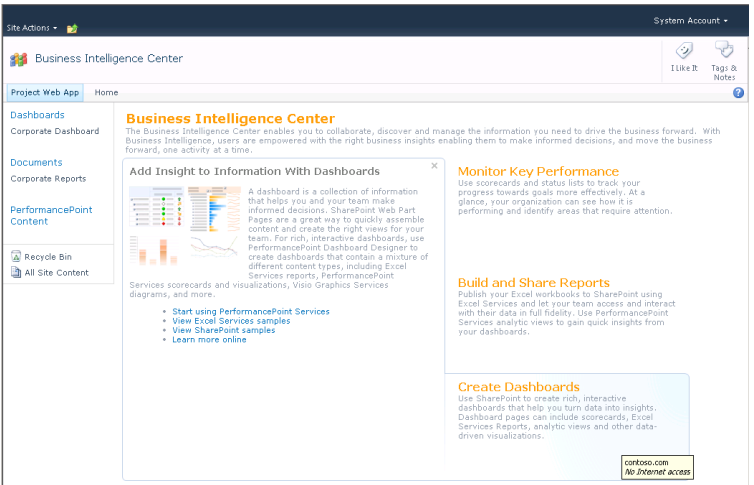
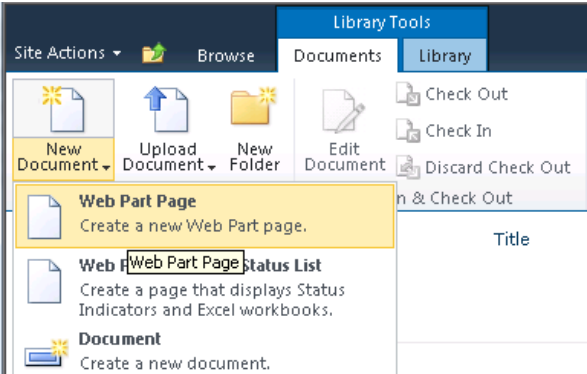
Figure 17: Example of a Dashboard page created with a Web Parts page

The above dashboard has the following characteristics:

Web Part Location	Web Part Name	Type
Left Corner	All KPIs	Reporting Services
Top Right	KPIs Department per %	Excel Services
Bottom Left	Resource Availability	Excel Services
Bottom Right	Cost per Department	Excel Services

## Creating a Dashboard by using a Web Parts Page

To create your dashboard, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

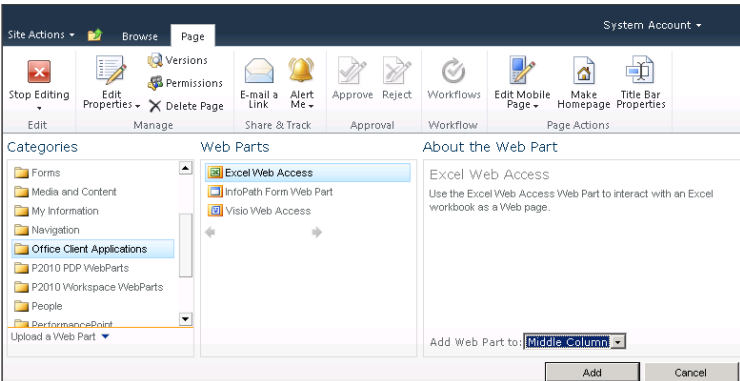
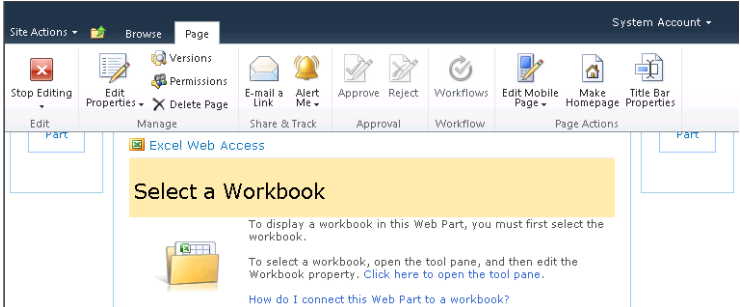
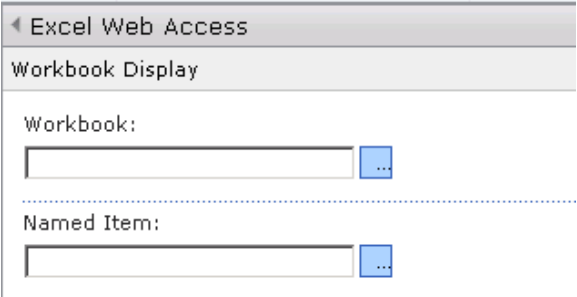
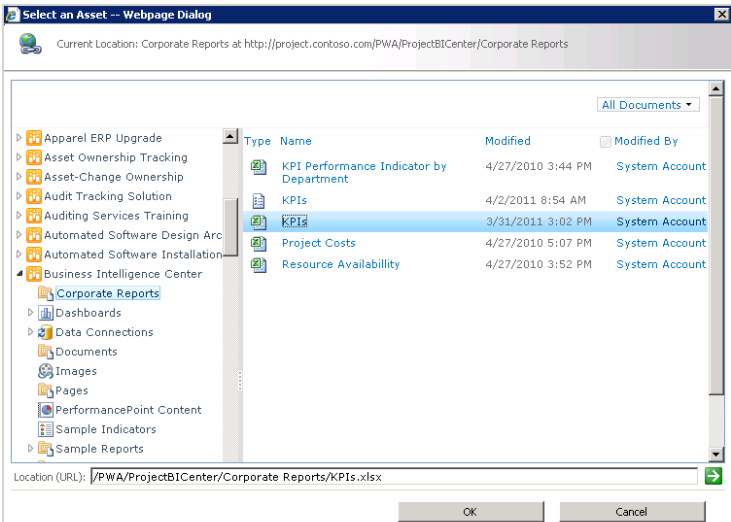
Create a Dashboard by using a Web Parts page		
Step	Action	Details
1	From PWA, click Business Intelligence Center and Dashboards	
2	On the menu, select Documents, New Document, and Web Part Page	



Create a Dashboard by using a Web Parts page		
Step	Action	Details
3	<p>Name your Dashboard page, select a page layout for the dashboard page, select a Document Library and then click Create.</p> <p>Note, you can select from eight different page layout templates.</p>	
4	You are now ready to Add a Web Part	

## Creating an Excel Services Web Part within a Web Parts page

To create your Excel Services Web Part, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create an Excel Services Web Part within a Web Parts page		
Step	Action	Details
1	Select the Office Client Applications category and the Excel Web Access Web Part and click Add.	
2	Click on link: "Click here to open the tool pane"	
3	Browse to the location where you store your workbook	
4	Select your Excel workbook.	

Create an Excel Services Web Part within a Web Parts page		
Step	Action	Details
5	Make sure you select the Named Item you want to display on the Web Part (Chart 1 in our example)	<div>Workbook Display</div> <div>Workbook Display</div> <div>Workbook:</div> <div>http://project.contoso.com/PW</div> <div>Named Item:</div> <div>Chart 1</div>
6	Select Tool and Title Bar options as specified in the Details column	<div>Toolbar and Title Bar</div> <div>Title Bar:</div> <div> <input type="checkbox"/> Autogenerate Web Part Title         </div> <div> <input checked="" type="checkbox"/> Autogenerate Web Part Title URL         </div> <div>Type of Toolbar:</div> <div>Navigation Only</div> <div>Toolbar Menu Commands:</div> <div> <input checked="" type="checkbox"/> Open in Excel, Download a Copy, Download a Snapshot         </div> <div> <input checked="" type="checkbox"/> Refresh Selected Connection, Refresh All Connections         </div> <div> <input checked="" type="checkbox"/> Calculate Workbook         </div> <div> <input type="checkbox"/> Named Item Drop-Down List         </div>

Create an Excel Services Web Part within a Web Parts page		
Step	Action	Details
7	Select Navigation and Interactivity options as specified in the Details column	<div> Navigation and Interactivity </div> <div> <b>Navigation:</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Hyperlinks</li> </ul> </div> <div> <b>Interactivity:</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> All Workbook Interactivity</li> <li><input type="checkbox"/> Typing and Formula Entry</li> <li><input checked="" type="checkbox"/> Parameter Modification</li> <li><input checked="" type="checkbox"/> Display Parameters Task Pane</li> <li><input checked="" type="checkbox"/> Sorting</li> <li><input checked="" type="checkbox"/> Filtering</li> <li><input checked="" type="checkbox"/> All PivotTable Interactivity</li> <li><input checked="" type="checkbox"/> Periodically Refresh if Enabled in Workbook</li> <li><input type="checkbox"/> Close Session Before Opening a New One</li> </ul> </div>



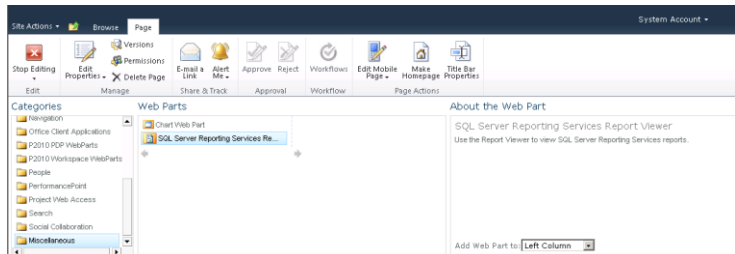
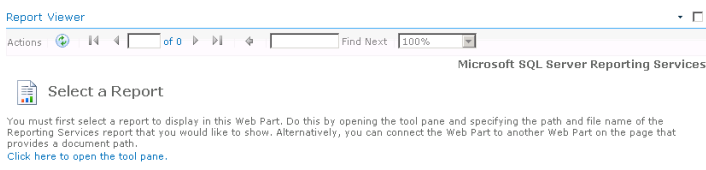
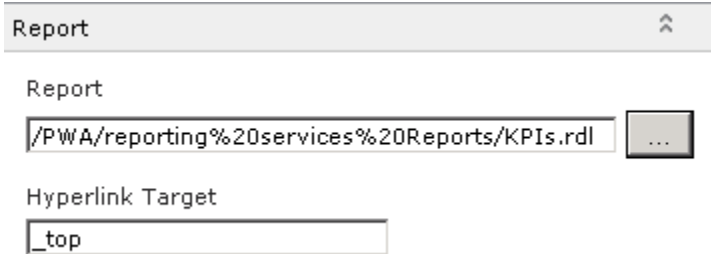









Create an Excel Services Web Part within a Web Parts page		
Step	Action	Details
8	Select Appearance options as specified in the Details column	<div> <div>[-] Appearance</div> <div>Title</div> <div>KPIs Department per %</div> <div>Height</div> <div>Should the Web Part have a fixed height?</div> <div> <input checked="" type="radio"/> Yes           <div>400</div> <div>Pixels</div> </div> <div> <input type="radio"/> No. Adjust height to fit zone.         </div> <div>Width</div> <div>Should the Web Part have a fixed width?</div> <div> <input checked="" type="radio"/> Yes           <div>650</div> <div>Pixels</div> </div> <div> <input type="radio"/> No. Adjust width to fit zone.         </div> <div>Chrome State</div> <div> <input type="radio"/> Minimized             <input checked="" type="radio"/> Normal         </div> <div>Chrome Type</div> <div>Title Only</div> </div>
9	Select Layout options as specified in the Details column	<div> <div>[-] Layout</div> <div> <input type="checkbox"/> Hidden         </div> <div>Zone</div> <div>Middle Column</div> <div>Zone Index</div> <div>0</div> </div>

Create an Excel Services Web Part within a Web Parts page		
Step	Action	Details
10	Select Advanced options as specified in the Details column. Click OK.	<div> <div> <div></div> <div>Advanced</div> </div> <div> <div><input checked="" type="checkbox"/></div> <div>Allow Minimize</div> </div> <div> <div><input checked="" type="checkbox"/></div> <div>Allow Close</div> </div> <div> <div><input checked="" type="checkbox"/></div> <div>Allow Hide</div> </div> <div> <div><input checked="" type="checkbox"/></div> <div>Allow Zone Change</div> </div> <div> <div><input checked="" type="checkbox"/></div> <div>Allow Connections</div> </div> <div> <div><input checked="" type="checkbox"/></div> <div>Allow Editing in Personal View</div> </div> <div>Export Mode</div> <div> <div>Export all data</div> <div></div> </div> <div>Title URL</div> <div> <div>http://project.contoso.com/PW</div> </div> <div>Description</div> <div> <div>Use the Excel Web Access Web</div> </div> <div>Help URL</div> <div> <div></div> </div> <div>Help Mode</div> <div> <div>Modeless</div> <div></div> </div> <div>Catalog Icon Image URL</div> <div> <div>/_layouts/images/ewr023.gif</div> </div> <div>Title Icon Image URL</div> <div> <div>/_layouts/images/ewr023.gif</div> </div> <div>Import Error Message</div> <div> <div>Cannot import this Web Part.</div> </div> <div>Target Audiences</div> <div> <div></div> <div></div> </div> <div> <div>OK</div> <div>Cancel</div> <div>Apply</div> </div> </div>
11	Repeat steps 1-11 for the Resource Availability and Cost per Department workbooks.	

## Creating a SQL Server Reporting Services Web Part within a Web Parts Page

To create your SQL Server Reporting Services Web Part, follow the steps outlined in the Action column. Should additional supporting information be required to complete an action, refer to the Details column:

Create your SQL Server Reporting Services Web Part within a Web Parts page		
Step	Action	Details
1	Select the Miscellaneous category and the SQL Server Reporting Services File Web Part and click Add.	
2	Click on the link: "Click here to open the tool pane"	
3	Browse to the location where you store your .rld file	

Create your SQL Server Reporting Services Web Part within a Web Parts page		
Step	Action	Details
4	Select View options as specified in the Details column.	<div>View </div> <div> <input type="checkbox"/> Auto-Generate Web Part Title         </div> <div> <input checked="" type="checkbox"/> Auto-Generate Web Part Detail Link         </div> <div>           ToolBar Items Visibility         </div> <div> <input checked="" type="checkbox"/> Show report builder menu item         </div> <div> <input checked="" type="checkbox"/> Show subscription menu item         </div> <div> <input checked="" type="checkbox"/> Show print menu item         </div> <div> <input checked="" type="checkbox"/> Show export menu item         </div> <div> <input type="checkbox"/> Show refresh button         </div> <div> <input type="checkbox"/> Show page navigation controls         </div> <div> <input type="checkbox"/> Show back button         </div> <div> <input type="checkbox"/> Show find controls         </div> <div> <input type="checkbox"/> Show zoom control         </div> <div> <input checked="" type="checkbox"/> Show ATOM feed button         </div> <div>           ToolBar Location         </div> <div> <div>Top </div> </div> <div>           Prompt Area         </div> <div> <div>Displayed </div> </div> <div>           Document Map         </div> <div> <div>Displayed </div> </div> <div>           Document Map Area Width         </div> <div> <div>200 Pixels </div> </div> <div> <input checked="" type="checkbox"/> Asynchronous Rendering         </div> <div> <input checked="" type="checkbox"/> Ping Server to Maintain Session         </div>
5	Select Parameters options as specified in the Details column.	<div>Parameters </div> <div>           vstr Project Departments         </div> <div> <input type="radio"/> Use Report Default Value         </div> <div> <input checked="" type="radio"/> Override Report Default         </div> <div> <div>Finance, HR, IT, Legal, Operations </div> </div>

Create your SQL Server Reporting Services Web Part within a Web Parts page		
Step	Action	Details
6	Select Appearance options as specified in the Details column.	<div> <div>Appearance</div> <div> <div>Title</div> <div>All KPIs</div> </div> <div> <div>Height</div> <div>Should the Web Part have a fixed height?</div> <div> <input checked="" type="radio"/> Yes           <div>400</div> <div>Pixels</div> </div> <div> <input type="radio"/> No. Adjust height to fit zone.           </div> </div> <div> <div>Width</div> <div>Should the Web Part have a fixed width?</div> <div> <input checked="" type="radio"/> Yes           <div>650</div> <div>Pixels</div> </div> <div> <input type="radio"/> No. Adjust width to fit zone.           </div> </div> <div> <div>Chrome State</div> <div> <input type="radio"/> Minimized           <input checked="" type="radio"/> Normal         </div> </div> <div> <div>Chrome Type</div> <div>Default</div> </div> </div>
7	Select Layout options as specified in the Details column.	<div> <div>Layout</div> <div> <input type="checkbox"/> Hidden         </div> <div> <div>Direction</div> <div>None</div> </div> <div> <div>Zone</div> <div>Left Column</div> </div> <div> <div>Zone Index</div> <div>1</div> </div> </div>



The purpose of this document is to provide sufficient detail to fully design and implement Business Intelligence dashboards that support an Enterprise Project Management Solution (EPM), which consists primarily of SharePoint Server 2010 and Project Server 2010. Specifically, this document examines the two main ways of creating dashboards by using:

- PerformancePoint Services
- SharePoint Web Parts page

PerformancePoint Services is a more comprehensive method for creating dashboards as it allows users to assemble a library of reporting assets which may then be combined into any number of project or portfolio dashboards. Also, it allows the creation of filters that can function on stand-alone dashboard items, across multiple dashboard items or across multiple pages in a dashboard.

It also includes detailed steps on how to replicate reports and dashboards included in the Project Server 2010 demonstration and evaluation pack available on the [Microsoft Download Center](#). The purpose is to help you easily create reports and dashboards for your environment with similar characteristics. For additional information on Microsoft Project Server 2010 business intelligence, see [Business Intelligence in Project Server 2010](#).

## 7. Appendix A – Enterprise Custom Fields

This section describes the minimum set of Enterprise Custom Fields that are required to create the Dashboards highlighted in this document.

### Project

Field name	Type	Mandatory	Lookup Table
Project Departments	Text	No	Finance HR IT Legal Operations Sales and Marketing
Project Health	Text	No	Green Yellow Red
Project Schedule	Text	No	Green Yellow Red
Project Cost	Text	No	Green Yellow Red
Project Quality	Text	No	Green Yellow Red
Project Resource	Text	No	Green Yellow Red

### Resource

Field name	Type	Mandatory	Lookup Table
Position Role	Text	No	Accounting Analyst Consultant Creative Customer Developed Executive Investment Banker



			Legal Manufacturing Marketing Personal Relation PMO Procurement Product Engineer Product Manager Safety Sales SME Sponsor Tester Trainer Vendor
--	--	--	---

## 8. Appendix B – IPMO Stored Procedures

### IPMO\_DepartmentalKPIvalues Stored Procedure

---

```
USE [PWA_Reporting]
GO
/***** Object: StoredProcedure [dbo].[IPMO_OrganisationalKPIValues]  Script Date: 03/08/2011
13:56:35 *****/
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO
-- =====
-- Author:
-- Create date: 22-April-2010
-- Company: i-PMO
-- Description: This stored procedure converts the project traffic light
-- text values into a weighted score where. The higher the score, the healthier
-- the indicator is.
--          "Green"      = 3
--          "Yellow"     = 2
--          "Red"        = 1
--          NULL         = 0
-- This means a the highest score a project traffic light indicator can ever
-- have is 3 and a minimum of 0. If we take the total projects for a department
-- and multiply that by 3, we get the maximum score. Then convert this value
-- by taking the aggregated organisation score, divide it by the number of projects,
-- multiplied by the max score(3) and multiply that value again by 100 to get the
-- percentage.
-- Formula = [TrafficLight Score]/([Number of Project in Organisation] * [Maximum Score Per Project]) *
100
-- =====
ALTER PROCEDURE [dbo].[IPMO_OrganisationalKPIValues]

AS
BEGIN
    -- SET NOCOUNT ON added to prevent extra result sets from
    -- interfering with SELECT statements.
    SET NOCOUNT ON;

    SELECT
        'Organisation' AS [Project Departments]
        ,SUM(CASE
            WHEN p.[Project Cost] = 'Green'
            THEN 3
            WHEN p.[Project Cost] = 'Yellow'
            THEN 2
```



```

        WHEN p.[Project Cost] = 'Red'
        THEN 1
        ELSE 0
    END) AS 'ProjectCostScore'
,SUM(CASE
    WHEN p.[Project Cost] = 'Green'
    THEN 3
    WHEN p.[Project Cost] = 'Yellow'
    THEN 2
    WHEN p.[Project Cost] = 'Red'
    THEN 1
    ELSE 0
END) / CONVERT(DECIMAL(12,6),(COUNT(p.ProjectUID) * 3)) AS
'ProjectCostScorePercent'
,SUM(CASE
    WHEN p.[Project Health] = 'Green'
    THEN 3
    WHEN p.[Project Health] = 'Yellow'
    THEN 2
    WHEN p.[Project Health] = 'Red'
    THEN 1
    ELSE 0
END) AS 'ProjectHealthScore'
,SUM(CASE
    WHEN p.[Project Health] = 'Green'
    THEN 3
    WHEN p.[Project Health] = 'Yellow'
    THEN 2
    WHEN p.[Project Health] = 'Red'
    THEN 1
    ELSE 0
END) / CONVERT(DECIMAL(12,6),(COUNT(p.ProjectUID) * 3)) AS
'ProjectHealthScorePercent'
,SUM(CASE
    WHEN p.[Project Quality] = 'Green'
    THEN 3
    WHEN p.[Project Quality] = 'Yellow'
    THEN 2
    WHEN p.[Project Quality] = 'Red'
    THEN 1
    ELSE 0
END) AS 'ProjectQualityScore'
,SUM(CASE

```

```

        WHEN p.[Project Quality] = 'Green'
        THEN 3
        WHEN p.[Project Quality] = 'Yellow'
        THEN 2
        WHEN p.[Project Quality] = 'Red'
        THEN 1
        ELSE 0
    END) / CONVERT(DECIMAL(12,6),(COUNT(p.ProjectUID) * 3)) AS
'ProjectQualityScorePercent'
    ,SUM(CASE
        WHEN p.[Project Resource] = 'Green'
        THEN 3
        WHEN p.[Project Resource] = 'Yellow'
        THEN 2
        WHEN p.[Project Resource] = 'Red'
        THEN 1
        ELSE 0
    END) AS 'ProjectResourceScore'
    ,SUM(CASE
        WHEN p.[Project Resource] = 'Green'
        THEN 3
        WHEN p.[Project Resource] = 'Yellow'
        THEN 2
        WHEN p.[Project Resource] = 'Red'
        THEN 1
        ELSE 0
    END) / CONVERT(DECIMAL(12,6),(COUNT(p.ProjectUID) * 3)) AS
'ProjectResourceScorePercent'
    ,SUM(CASE
        WHEN p.[Project Schedule] = 'Green'
        THEN 3
        WHEN p.[Project Schedule] = 'Yellow'
        THEN 2
        WHEN p.[Project Schedule] = 'Red'
        THEN 1
        ELSE 0
    END) AS 'ProjectScheduleScore'
    ,SUM(CASE
        WHEN p.[Project Schedule] = 'Green'
        THEN 3
        WHEN p.[Project Schedule] = 'Yellow'
        THEN 2
        WHEN p.[Project Schedule] = 'Red'
        THEN 1
        ELSE 0
    END) / CONVERT(DECIMAL(12,6),(COUNT(p.ProjectUID) * 3)) AS
'ProjectScheduleScorePercent'
    ,COUNT(p.ProjectUID) AS 'ProjectCount'

```



```
,COUNT(p.ProjectUID) * 3 AS 'MaximumScore'  
FROM PWA_Reporting.dbo.MSP_EpmProject_UserView AS p
```

```
END
```

## IPMO\_OrganisationalKPIvalues Stored Procedure

---

```
USE [PWA_Reporting]
GO
/***** Object: StoredProcedure [dbo].[IPMO_DepartmentalKPIValues]  Script Date: 03/08/2011
15:44:26 *****/
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO
ALTER PROCEDURE [dbo].[IPMO_DepartmentalKPIValues]
(
    @vstrProjectDepartments VARCHAR(2000) = NULL
)
AS
BEGIN
    -- SET NOCOUNT ON added to prevent extra result sets from
    -- interfering with SELECT statements.
    SET NOCOUNT ON;

    SELECT
        p.[Project Departments]
        ,SUM(CASE
            WHEN p.[Project Cost] = 'Green'
            THEN 3
            WHEN p.[Project Cost] = 'Yellow'
            THEN 2
            WHEN p.[Project Cost] = 'Red'
            THEN 1
            ELSE 0
        END) AS 'ProjectCostScore'
        ,SUM(CASE
            WHEN p.[Project Cost] = 'Green'
            THEN 3
            WHEN p.[Project Cost] = 'Yellow'
            THEN 2
            WHEN p.[Project Cost] = 'Red'
            THEN 1
            ELSE 0
        END) / CONVERT(DECIMAL(12,6),(COUNT(p.ProjectUID) * 3)) AS
        'ProjectCostScorePercent'
        ,SUM(CASE
            WHEN p.[Project Health] = 'Green'
            THEN 3
            WHEN p.[Project Health] = 'Yellow'
            THEN 2
            WHEN p.[Project Health] = 'Red'
            THEN 1
```



```

        ELSE 0
    END) AS 'ProjectHealthScore'
,SUM(CASE
    WHEN p.[Project Health] = 'Green'
    THEN 3
    WHEN p.[Project Health] = 'Yellow'
    THEN 2
    WHEN p.[Project Health] = 'Red'
    THEN 1
    ELSE 0
    END) / CONVERT(DECIMAL(12,6),(COUNT(p.ProjectUID) * 3)) AS
'ProjectHealthScorePercent'
,SUM(CASE
    WHEN p.[Project Quality] = 'Green'
    THEN 3
    WHEN p.[Project Quality] = 'Yellow'
    THEN 2
    WHEN p.[Project Quality] = 'Red'
    THEN 1
    ELSE 0
    END) AS 'ProjectQualityScore'
,SUM(CASE
    WHEN p.[Project Quality] = 'Green'
    THEN 3
    WHEN p.[Project Quality] = 'Yellow'
    THEN 2
    WHEN p.[Project Quality] = 'Red'
    THEN 1
    ELSE 0
    END) / CONVERT(DECIMAL(12,6),(COUNT(p.ProjectUID) * 3)) AS
'ProjectQualityScorePercent'
,SUM(CASE
    WHEN p.[Project Resource] = 'Green'
    THEN 3
    WHEN p.[Project Resource] = 'Yellow'
    THEN 2
    WHEN p.[Project Resource] = 'Red'
    THEN 1
    ELSE 0
    END) AS 'ProjectResourceScore'
,SUM(CASE
    WHEN p.[Project Resource] = 'Green'
    THEN 3

```

```

        WHEN p.[Project Resource] = 'Yellow'
        THEN 2
        WHEN p.[Project Resource] = 'Red'
        THEN 1
        ELSE 0
    END) / CONVERT(DECIMAL(12,6),(COUNT(p.ProjectUID) * 3)) AS
'ProjectResourceScorePercent'
    ,SUM(CASE
        WHEN p.[Project Schedule] = 'Green'
        THEN 3
        WHEN p.[Project Schedule] = 'Yellow'
        THEN 2
        WHEN p.[Project Schedule] = 'Red'
        THEN 1
        ELSE 0
    END) AS 'ProjectScheduleScore'
    ,SUM(CASE
        WHEN p.[Project Schedule] = 'Green'
        THEN 3
        WHEN p.[Project Schedule] = 'Yellow'
        THEN 2
        WHEN p.[Project Schedule] = 'Red'
        THEN 1
        ELSE 0
    END) / CONVERT(DECIMAL(12,6),(COUNT(p.ProjectUID) * 3)) AS
'ProjectScheduleScorePercent'
    ,COUNT(p.ProjectUID) AS 'ProjectCount'
    ,COUNT(p.ProjectUID) * 3 AS 'MaximumScore'
FROM PWA_Reporting.dbo.MSP_EpmProject_UserView AS p
WHERE (p.[Project Departments] IN (@vstrProjectDepartments)
OR @vstrProjectDepartments IS NULL)
GROUP BY
    p.[Project Departments]

END

```

## 9. References

- [Learn about PerformancePoint report types](#)
- [Create an Excel Services report by using Dashboard Designer](#)
- [Project 2010 Overview for Developer – Build Cube Service](#)
- [Create data connections \(PerformancePoint Services\)](#)





- [How to: Use an Office Data Connection \(.odc\) with Reports \(Reporting Services in SharePoint Integrated Mode\)](#)
- [How to: Add Report Server Content Types to a Library \(Reporting Services in SharePoint Integrated Mode\)](#)
- [Create a Reporting Services report by using Dashboard Designer](#)
- [Create an Excel Services report by using Dashboard Designer](#)
- [Create a dashboard page by using Dashboard Designer](#)
- [Create a dashboard page by using Dashboard Designer](#)

## Microsoft Project 2010 Resources:

### Product information

- Project 2010 product site: <http://www.microsoft.com/project>
- Project Team Blog: <http://blogs.msdn.com/project>

### End-User Product Help

- Project 2010 Help <http://office2010.microsoft.com/project-help>
- Project 2010 Help <http://office2010.microsoft.com/project-server-help>
- Demand Management for Project 2010 - <http://go.microsoft.com/?linkid=9739874>
- Business Intelligence for Project 2010 - <http://go.microsoft.com/?linkid=9726143>
- Upgrade and Migration to Project 2010 - <http://go.microsoft.com/?linkid=9676814>

### Interactive content - Videos & Sessions & Webcasts

- <http://www.microsoft.com/showcase/en/US/channels/microsoftproject>
- <http://www.microsoft.com/events/series/epm.aspx>

### Project Professional 2010 and Project 2010 Demo Image:

- Download: <http://go.microsoft.com/?linkid=9713956>
- Hosted Virtual Lab: <http://go.microsoft.com/?linkid=9713654>

### IT Professional related - TechNet

- Tech Center: <http://technet.microsoft.com/ProjectServer>
- Admin Blog: <http://blogs.technet.com/projectadministration>

### Developer related - MSDN

- Developer center: <http://msdn.microsoft.com/Project>
- Programmability blog: [http://blogs.msdn.com/project\\_programmability](http://blogs.msdn.com/project_programmability)

**Got Questions? Search or ask in the official Microsoft Forums!**

- <http://social.msdn.microsoft.com/Forums/en-US/category/projectserver2010,projectprofessional2010/>

#### **SharePoint 2010 Products**

- <http://sharepoint.microsoft.com>



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