

## **SharePoint 2013 Business Intelligence**

### **Module 1: Course Overview**

This module explains how the class will be structured and introduces course materials and additional administrative information.

#### **Lessons**

Introduction

Course Materials

Facilities

Prerequisites

What We'll Be Discussing

#### **Lab 1: Course Overview**

None

After completing this module, students will be able to:

Successfully log into their virtual machine.

Have a full understanding of what the course intends to cover.

### **Module 2: The Business Intelligence Stack**

In this module we will first look at the three different ways in which business intelligence can be viewed. Then, we're going to look at the services SQL 2012 provides us and how they apply to business intelligence. We will then move to SharePoint 2013 and look at the SharePoint services to examine their relevance and how we can use them in business intelligence to surface data. In this section we will also cover the new business intelligence features available within the SharePoint 2013 release. Finally, we will take a brief look at PowerPivot, examining the new features and their significance. PowerPivot is covered in more detail in a later module.

#### **Lessons**

Business Intelligence in Three Ways

SQL 2012 Business Intelligence

New 2013 SharePoint Business Intelligence Features

New 2013 PowerPivot in Excel Features

#### **Lab 1: The Business Intelligence Stack**

SQL 2012 Multidimensional Model Basics

SQL 2012 Tabular Model Basics

After completing this module, students will be able to:

Browse the data within the cube using SQL Server Management Studio.

Browse data using Visual Studio 2013.

Connect to a tabular source, import tables, and explore the data.

### **Module 3: SharePoint 2013 Business Intelligence Center**

In this module, we will explore the new and improved 2013 SharePoint Central Administration site. We are going to cover specifically the new 2013 Business Intelligence Center template within SharePoint. We are also going to cover some things that generically apply to SharePoint that you can use within business intelligence. Permissions and Roles will be illuminated and the included Document Library and List apps will be explained.

#### **Lessons**

New 2013 SharePoint Central Administration

New 2013 Business Intelligence Center

Permissions and Roles

Included Document Library and List Apps

### **Lab 1: SharePoint 2013 Business Intelligence Center**

SharePoint 2013 Central Administration

SharePoint 2013 Business Intelligence Center (Optional)

After completing this module, students will be able to:

Explore the options and settings available within the new SharePoint 2013 Central Administration.

Create a new web application and business intelligence site while exploring the features of both.

### **Module 4: SharePoint 2013 Excel Services**

In this module, we will go over all the new 2013 Excel Services features, and we will explore the core components of Excel Services. We will cover Excel Web Access and its capabilities along with any differences you may encounter in the browser as opposed to the desktop client. There is coverage of the Power View add-in for Excel, and then lastly we will explain the save and share process and have a look at best practices.

#### **Lessons**

New 2013 Excel Services Features

Core Components

Excel Web Access (EWA)

What Excel Web Access is Not

Differences in the Browser vs. Desktop

SharePoint Libraries to Store Workbooks

Power View Add-in for Excel

The Save and Share Process

Excel Web App

Best Practices

### **Lab 1: SharePoint 2013 Excel Services**

Creating a Library to Hold Excel Workbooks

Exploring the Power View Add-in for Excel

Save and Share an Excel Workbook to a SharePoint Document Library

Add an Excel Web App to a Webpage

After completing this module, students will be able to:

Create a SharePoint library to hold Excel workbooks and explore trusted file locations.

Utilize the Power View add-in for Excel

Create an Excel workbook with a parameter and save it to a SharePoint document library.

Add Web Apps to a webpage.

### **Module 5: SharePoint 2013 PerformancePoint 2013**

In this module, we will give you an overview of the new 2013 PerformancePoint Services features. Dashboard Designer is explored along with many of the objects and connections available within.

#### **Lessons**

New 2013 Overview of PerformancePoint Services

Dashboard Designer

Data Sources

Indicators

KPIs

Visual Reports

Filters

Scorecards

Dashboards

### **Lab 1: SharePoint 2013 PerformancePoint 2013**

PerformancePoint Services Dashboard Designer Introduction and Data Source Configuration

Standard or Blank KPI Demonstration

Leaf KPI Demonstration

Objective KPI Demonstration

Visual Reports

PerformancePoint Filters

PerformancePoint Cascading Filters

Time Intelligence Filters

Scorecard Settings

Scorecards Filtered Using the Wizard

PerformancePoint Dashboards

After completing this module, students will be able to:

Explore the Dashboard Designer interface and know how to create and configure a data source.

Create and configure a standard KPI and a scorecard.

Create and configure a leaf KPI and a scorecard.

Create two blank KPI's and then roll them into an objective KPI.

Create and configure an analytic chart and an analytic grid, add them to a dashboard, deploy them to SharePoint, and explore the options available.

Create and configure a filter, and tie the filter into both the analytic chart and analytic grid created earlier.

Create and configure a cascading filter and then tie it into a new analytic chart and grid.

Create a Time Intelligence data connection, a Time Intelligence filter, and create a report using both.

Create four copies of the Objective Scorecard, configure settings in each of the four copies, and deploy them to SharePoint in a dashboard.

Create a new leaf KPI and use that KPI in two new scorecards, one with a filter configured, and one without.

Create a new dashboard with two pages and review editing options.

## **Module 6: SharePoint 2013 Visio Services**

Visio drawings can be extremely effective and in this module we cover the shared service that allows users to share and view them. We will go over all the new 2013 Visio Services features and also discuss data-connected drawings and how to configure them. There is also a section on viewing drawings within a browser.

### **Lessons**

New 2013 Visio Services Features

Visio Graphics Service

Visio Drawings in the Browser

Visio Web Access Web Part

Visio Drawings with Data Connections

## **Lab 1: SharePoint 2013 Visio Services**

Visio Drawing in the Browser

Visio Services Data-Connected Drawing

Dashboard Strategy Maps

After completing this module, students will be able to:

Create a drawing, upload the document to the Student BI Site documents library, and view the drawing in a browser.

Create a data-connected drawing and upload the document to the Student BI Site documents library.

Create an objective scorecard and matching strategy map, place them in a dashboard, and then upload the dashboard to the Student BI Site.

## **Module 7: PowerPivot**

PowerPivot is not a feature of SharePoint business intelligence, however, an Excel workbook with PowerPivot can be saved to a SharePoint site and then used in a business intelligence scenario. This module is intended as an overview of the product only and covers all the new features available in the 2013 release of the add-in.

### **Lessons**

New 2013 PowerPivot Features

PowerPivot and Excel

PowerPivot and SharePoint

Enterprise Business Intelligence and PowerPivot

Importing Data

Enriching Data

SharePoint Sharing

### **Lab 1: PowerPivot**

Import Data from SQL

Review and Edit the Imported Relationships

Hide Unused Columns

Create a PivotTable

After completing this module, students will be able to:

Use PowerPivot within Excel to import a table from SQL Server.

View the relationships existing within the imported tables from SQL Server and then import an additional table and configure a relationship between it and the existing.

Hide columns they don't want reflected in the resulting PivotTable.

Create a PivotTable within an existing worksheet.

## **Module 8: SharePoint 2013 Business Connectivity Services**

In this module we will explore the new features available within SharePoint 2013 Business Connectivity Services, how to configure the security, and clarify the terminology.

### **Lessons**

New 2013 Business Connectivity Service Features

What is Business Connectivity Services?

BCS Terminology

BCS Security

Using SharePoint Designer 2013 with BCS

Surfacing the BCS Data

### **Lab 1: SharePoint 2013 Business Connectivity Services**

Setting Permissions on the BDC Store

Exploring Content Types in SharePoint

Add a Document Library Tied to Content Types

Creating an External Content Type

Creating an External List

Configuring the Business Connectivity Services for a Host URL & Setting up a Profile Page

Add a Custom Action to a List

After completing this module, students will be able to:

Assign administrators and permissions on the BDC Metadata Store.

Explore the different content types available in SharePoint 2013 and learn how to locate them and their corresponding settings.

Create a document library, configure it to accept specific content types, and then learn how to delete the document library.

Create and configure a new external content type.

Create an external list associated with the new external content type created prior.

Create a new external content type and a new host URL, and then create an external list and profile page.

Add a custom action to an external list.

## **Module 9: Dashboards**

This module borrows from the three-day Microsoft course on Dashboards number 50596A. Monitoring, analyzing, and managing dashboards are discussed along with details on how to use them most effectively. This module does not cover Dashboard Designer as it is covered in more detail in the PerformancePoint Services module. Coverage of the Microsoft Report Builder 3.0 tool is brief as this course focuses on the SharePoint space.

## **Lessons**

Dashboard Migration

Three Types of Dashboards

Successful Dashboards

Tables or Graphs

Types of Graphs

Choosing a Chart Type

Key Performance Indicators

Pitfalls In Dashboard Design

Microsoft Report Builder 3.0

Plan Your Reports

Datasets

New 2013 SharePoint Designer Features

SharePoint Web Apps

## **Lab 1: Dashboards**

Explore the Report Builder 3.0 Interface (Optional)

Create an Embedded Data Source into SQL 2012 Engine (Optional)

Create an Embedded Data Source into SQL 2012 Analysis Services (Optional)

Create a Shared Data Source Using the Report Manager (Optional)

Create a Shared Dataset Using the Shared Data Source (Optional)

Three Methods for Connecting Dashboard Web Apps