

Course 50561A: Visualizing SharePoint Business Intelligence with No Code

Length: 5 Days

About this Course

No Code visualization means using the data structures that exist already to get the job done. You don't have the time or maybe the inclination to learn how to code but you need answers. I.T is always working through a backlog but your business situation is dynamic and rapidly changing and will not wait for any backlog. **In this course you will learn how to get those answers without submitting a request and waiting.**

Audience Profile

The target audience of this course is for Power Analysts, Report Designers, Team Leads, SharePoint Administrators, Business Intelligence Developers and Project Managers that will be tasked with the implementation, support, management or training needed to rapidly empower the users to take advantage of the exploding world of business intelligence. The amount of stored data in the US alone doubles every 8 months. The answers to our questions are in the data but we no longer have the luxury of waiting for the I.T. staff or others to develop the screens that give us the answers. I.T. needs to provide the infrastructure, security and maintenance without which any of this works. Microsoft provided the toolsets. Here we learn how do get to those answers which will guide you towards your goals.

At Course Completion

After completing this course, students will be able to perform all of the actions and answer all of the questions listed in Why this course may be for you (shown below).

Why this course may be for you:

- You have the infrastructure but getting reports generated out of I.T. just takes to long.
- Lack of insight into what has happened is hampering your ability to move forward.
- You need or want to use the web browser as your source of information so that it is as accessible as the Internet.
- You want to take advantage of the SharePoint deployment to manage the data connections, report objects, dashboards KPI's etc.
- You need to rapidly prototype reports for changing conditions
- You want to move from textual reports to graphical reporting.
- You are tasked with implementing Six Sigma type reports using Visio Data Driven objects
- Your organization wants to implement analysis based on automatically updating data

- You need to implement a “Single Source of The Truth” structure.
- You need to understand the effectiveness of the reports and dashboards from the perspective of the consumers by an easy social networking polling system.
- You need an understanding of the tools that are available and how to determine which is the target audience for those tools.
- You need to implement actionable dashboards to allow line managers to rapidly take action.

Course Outline

Module 1: Introduction

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

What you will get out of this module:

Introduction to the instructor and your peers.

A review of what we mean by NO CODE.

How to work in the course environment.

Lessons

- Welcome
- What does NO Code mean?
- How to get the most out of this course
- The course setup
- What is not covered

Lab: Introduction

- Explore the Course Environment

Module 2: Business Intelligence Overview

This module brings everybody up to the same point in their knowledge of Business Intelligence, what it is capable of, problems you may encounter and encouraging case studies.

What you will get out of this module:

What Business Intelligence can do for your organization?

What to watch out for in implementation.

What is a Business Intelligence Time Scope and what types of tools address each?

An understanding and appreciation for the effort I.T. put into the project.

Lessons

- Why Business Intelligence
- Why do Business Intelligence Projects fail?
- The Three Types of Business Intelligence Projects
- Business Intelligence Time Scopes
- Some Great Features in SQL for Business Intelligence

Lab: Business Intelligence Overview

- Examine and run a prebuilt SQL Integration Services Package that performs an Extract Transform and Load into a Data art.
- Examine the effects of the Proactive data cache to automatically update data.

Module 3: How to Match the Tool to the User

What you will get out of this module:

A set of taxonomies for classifying your users.

Think through your organization and determine where they are in the implementation cycle.

Knowing the two above will guide you in the tools to use for each group.

Lessons

- Determine the type(s) of users
- Determine the maturity of your organizational Business Intelligence
- The target of the tools
- High level overview of each tool

Lab: How to Match the Tool to the User

- Examine the toolsets
- Dashboard Designer
- Report Builder 3.0
- SharePoint Designer
- In Browser Customization

Module 4: The Data Mart/Warehouse

What you will get out of this module:

An understanding of the terminology.

Why a Data art/Warehouse is the best data storage mechanism for Business Intelligence.

An overview of SQL Server Analysis Services.

How to use SQL Management Studio to examine data.

Lessons

- What is a Data Mart?
- What is Microsoft Analysis Services?
- Business Intelligence Terminology
- A fast and easy way as a proof of concept

Lab: The Data Mart/Warehouse

- Create a Datamart using the UDM Wizard
- Use SQL Management Studio to browse the data

Module 5: Data Sources

What you will get out of this module:

An understanding of the concept of trusted data and why it is a must have concept.

The potential sources for data we can use in analytics.

The potential problems or costs that is associated with the data sources.

An examination of the creation process for a data source.

Lessons

- What is Trusted Data?
- Where can we pull data?
- What might we have to do?
- Using Social Networks
- The Data Sources

Lab: Data Sources

- Create data sources

Module 6: Business Intelligence in SharePoint

What you will get out of this module:

What the management features of SharePoint bring to the table for you.

Why SharePoint security simplifies your life.

How to use workflows in your Business Intelligence.

Lessons

- What does SharePoint add?
- How can workflows be used in Business Intelligence?
- Quick tour of terms

Lab: Business Intelligence in SharePoint

- Utilize the management capability features of SharePoint
- Examine security of stored objects
- Use a workflow in SharePoint

Module 7: SharePoint Business Center

What you will get out of this module:

Understanding why the Business Center is the correct template for use in Business Intelligence.

How to link other sites in your organization back to the Business Center.

How to use Social Networking in your Business Center to see how the users feel about the site and dashboards.

How and why you might want to add Sub sites into your Business Center.

How to customize the look and feel of the site.

Lessons

- Exploring the Business Center
- The built in features

- Adding other features
- Adding social network features to your internal Business Intelligence
- Creating Sub-Sites
- Customizing the Business Center

Lab: SharePoint Business Center

- Create a SharePoint Business Center
- Explore the features of the SharePoint Business Center
- Create a sub site
- Add Social Networking into your site

Module 8: PerformancePoint Services

What you will get out of this module:

An understanding of why PerformancePoint services is a service and not a server.

A good working knowledge of the excellent tool Dashboard Designer.

How to create each of the first class objects including the new cascading filter added by Service Pack 1.

How to deploy a Dashboard.

Lessons

- What is PerformancePoint Services (with Service pack 1)
- Dashboard Designer
- KPIs
- Filters
- Scorecards
- Dashboards
- Further Study

Lab: PerformancePoint Services

- Use PerformancePoint Services to create all of the PerformancePoint Objects
- Publish a Dashboard

Module 9: Excel Services

What you will get out of this module:

An understanding of why Excel Services is and what it is not.

How to use a Single Source of the Truth for your workbooks.

How to use a workbook as a data source for a KPI.

How to Publish workbooks to Excel Services.

How to utilize parameters in published workbooks.

Lessons

- What is Excel Services
- A Single Source of the Truth

- What Excel Services is not
- Publishing with Excel Services
- Interacting with published Excel workbooks

Lab: Excel Services

- Publish a Workbook to Excel Services
- Interact with the workbook
- Drive a KPI off a workbook

Module 10: PowerPivot in Excel and SharePoint

What you will get out of this module:

An understanding of what PowerPivot adds to Excel.

The advantages of using PowerPivot in SharePoint.

Publishing PowerPivot to SharePoint.

Lessons

- What is PowerPivot
- Using the Excel PowerPivot add in
- Using PowerPivot for SharePoint

Lab: PowerPivot in Excel and SharePoint

- Use PowerPivot in Excel
- Publish a PowerPivot enabled workbook to SharePoint

Module 11: Visio and Visio Services

What you will get out of this module:

An understanding of what Visio services enables in dashboards.

How to create and deploy a data driven Visio drawing.

Lessons

- What is Visio Services
- Using Data Connected Visio Drawings

Lab: Visio and Visio Services

- Create a data driven Visio drawing
- Publish the drawing to Visio Services

Module 12: SQL Reporting Services

What you will get out of this module:

The advantages of an Integrated installation between SQL Reporting Services and SharePoint Services.

How to utilize Report Builder 3.0.

How to create Graphs.

How to create Gauges.

How to generate Reusable Report Parts.

How to utilize maps in your reports.

Lessons

- Advantages of Integrated Installation
- Report Builder 3.0
- Creating Graphs
- Creating Maps
- Creating Gauges
- Creating reusable Report Parts

Lab: SQL Reporting Services

- Use Report Builder 3.0 to create graphs, gauges, maps and report parts
- Publish the objects to SharePoint

Module 13: Business Connectivity Services

What you will get out of this module:

Understand Business Connectivity Services.

Implement a BCS deployment.

Lessons

- What is Business Connectivity Services?
- Using BCS in SharePoint

Lab: Business Connectivity Services

- Use SharePoint Designer to create an External List with Business Connectivity Services
- Publish the External List into SharePoint

Prerequisites

Before attending this course, students should have:

- It is recommended that each student individually or as part of their team go to The Data Warehouse Institute (TDWI) and take their on line assessment to see where in the Business Intelligence life cycle they are at:
<http://tdwi.org/pages/assessments/benchmark-your-bi-maturity-with-tdwis-new-assessment-tool.aspx>
- A good idea of what direction their organization wants to go with Business Intelligence
- Or a desire to see what they can do once they have the infrastructure in place.
- Basic Microsoft interface skills such as working with Excel or in a browser window.