

COURSE SYLLABUS

COURSE TITLE:	50561A Visualizing SharePoint Business Intelligence with No Code
FORMAT:	Instructor-led
CERTIFICATION EXAMS:	None



This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs. Course content, prices, and availability are subject to change without notice.

ELEMENTS OF THIS SYLLABUS ARE SUBJECT TO CHANGE.

ABOUT THE COURSE

What do we mean by no code? It is a matter of perspective. In today's world the successful software vendor needs to develop software that is easily customizable by casual users. In the realm of business intelligence that means offering a variety of tools to different types of users that, depending on their experience, they can utilize to rapidly create the projection or dashboard that suits their needs. Microsoft has produced a great array of such tools that target different users. These tools are various wizards, dialog boxes, Infopath forms, webpage designers and so forth. In this five-day instructor-led course we utilize the built-in tools and do not write a single line of code!

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. IT, if you haven't already noticed, 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

This course is intended 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 U.S. 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 IT staff or others to develop the screens that give us the answers. IT needs to provide the infrastructure, security, and maintenance, without which none 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:

- ▶ Generate reports in a timely manner.
- ▶ Gain insight into what has happened and improve your organization's ability to move forward.
- ▶ Use the web browser as your source of information so that it is as accessible as the internet.
- ▶ Take advantage of the SharePoint deployment and manage the data connections, report objects, dashboards, KPIs, etc.
- ▶ Rapidly prototype reports for changing conditions.
- ▶ Move from textual reports to graphical reporting.
- ▶ Implement Six Sigma type reports using Visio data-driven objects.
- ▶ Implement analysis based on automatically updating data.
- ▶ Implement a "Single Source of The Truth" structure.



- ▶ Understand the effectiveness of the reports and dashboards from the perspective of the consumers by an easy social networking polling system.
- ▶ Understand the tools that are available and how to determine which is the target audience for those tools.
- ▶ Implement actionable dashboards to allow line managers to rapidly take action.

PREREQUISITES

Before attending this course, students must have:

- ▶ A good idea of what direction their organization wants to go with business intelligence.
- ▶ 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.

ADDITIONAL READING

To help you prepare for this class, review the following resources:

- ▶ Bruno Aziza and Joey Fitts, *Drive Business Performance: Enabling a Culture of Intelligent Execution* (Hoboken: John Wiley & Sons, Inc., 2008)
- ▶ Stephen C. Few, *Now You See It: Simple Visualization Techniques for Quantitative Analysis* (Oakland: Analytics Press, 2009)

MODULE 1: COURSE OVERVIEW

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: BUSINESS INTELLIGENCE OVERVIEW

Lessons

- ▶ Why Business Intelligence?
- ▶ Why do Business Intelligence Projects Fail?
- ▶ The Three Types of Business Intelligence Projects
 - Skills Needed
- ▶ Business Intelligence Time Scopes
 - What Happened Then?
 - What is Happening Now?
 - What Might Happen in the Future?
- ▶ Some Great Features in SQL for Business Intelligence

Lab 1: BUSINESS INTELLIGENCE OVERVIEW

- ▶ Examine and Run a Prebuilt SQL Integration Services Package That Performs an Extract Transform and Load into a Data Mart.
- ▶ Examine the Effects of the Proactive Data Cache to Automatically Update Data.

After completing this module, students will be able to:

- ▶ Understand what business intelligence can do for your organization.
- ▶ Know what to watch out for in implementation.
- ▶ Know what a Business Intelligence Time Scope is and what types of tools address each?
- ▶ Gain an understanding and appreciation for the effort IT put into the project.



50561A VISUALIZING SHAREPOINT BUSINESS INTELLIGENCE WITH NO CODE**MODULE 3: HOW TO MATCH THE TOOL TO THE USER****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 1: HOW TO MATCH THE TOOL TO THE USER

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

After completing this module, students will be able to:

- ▶ Gain a set of taxonomies for classifying your users.
- ▶ Think through your organization and determine where they are in the implementation cycle.
- ▶ Know what tools to use for each group.

MODULE 4: THE DATA MART/WAREHOUSE**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 1: THE DATA MART/WAREHOUSE

- ▶ Create a Data Mart Using the UDM Wizard
- ▶ Use SQL Management Studio to Browse the Data

After completing this module, students will be able to:

- ▶ Gain an understanding of the terminology.
- ▶ Understand why a data mart/warehouse is the best data storage mechanism for business intelligence.
- ▶ Gain an overview of SQL Server Analysis Services.
- ▶ Use SQL Management Studio to examine data.

MODULE 5: DATA SOURCES**Lessons**

- ▶ What is Trusted Data?
- ▶ Where Can We Pull Data From?
- ▶ What Might We Have to Do?
- ▶ Using Social Networks
- ▶ The Data Sources

Lab 1: DATA SOURCES

- ▶ Create Data Sources

After completing this module, students will be able to:

- ▶ Understand the concept of trusted data and why it is a must-have concept.
- ▶ Understand the potential sources for data we can use in analytics.
- ▶ Understand the potential problems or costs that are associated with the data sources.
- ▶ Gain an examination of the creation process for a data source.



MODULE 6: BUSINESS INTELLIGENCE IN SHAREPOINT

Lessons

- ▶ What Does SharePoint Add?
- ▶ How Can Workflows Be Used in Business Intelligence?
- ▶ Quick Tour of Terms

Lab 1: BUSINESS INTELLIGENCE IN SHAREPOINT

- ▶ Utilize the Management Capability Features of SharePoint
- ▶ Examine Security of Stored Objects
- ▶ Use a Workflow in SharePoint

After completing this module, students will be able to:

- ▶ Understand what the management features of SharePoint bring to the table for you.
- ▶ Understand why SharePoint security simplifies your life.
- ▶ Use workflows in your business intelligence.

MODULE 7: SHAREPOINT BUSINESS CENTER

Lessons

- ▶ Exploring the Business Center
- ▶ The Built-In Features
- ▶ Adding Other Features
- ▶ Adding Social Network Features to Your Internal Business Intelligence
- ▶ Creating Subsites
- ▶ Customizing the Business Center

Lab 1: SHAREPOINT BUSINESS CENTER

- ▶ Create a SharePoint Business Center
- ▶ Explore the Features of the SharePoint Business Center
- ▶ Create a Subsite
- ▶ Add Social Networking into Your Site

After completing this module, students will be able to:

- ▶ Understand why the Business Center is the correct template for use in Business Intelligence.
- ▶ Link other sites in your organization back to the Business Center.
- ▶ Use social networking in your Business Center to see how the users feel about the site and dashboards.
- ▶ Understand how and why you might want to add subsites into your Business Center.
- ▶ Understand how to customize the look and feel of the site.

MODULE 8: PERFORMANCEPOINT SERVICES

Lessons

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

Lab 1: PERFORMANCEPOINT SERVICES

- ▶ Use PerformancePoint Services to Create All of the PerformancePoint Objects
- ▶ Publish a Dashboard



50561A VISUALIZING SHAREPOINT BUSINESS INTELLIGENCE WITH NO CODE

After completing this module, students will be able to:

- ▶ Understand why PerformancePoint Services is a service and not a server.
- ▶ Have a good working knowledge of the excellent tool Dashboard Designer.
- ▶ Create each of the first-class objects including the new cascading filter added by Service Pack 1.
- ▶ Deploy a dashboard.

MODULE 9: EXCEL SERVICES**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 1: EXCEL SERVICES

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

After completing this module, students will be able to:

- ▶ Understand what Excel Services is and what it is not.
- ▶ Use a “Single Source of the Truth” for your workbooks.
- ▶ Use a workbook as a data source for a KPI.
- ▶ Publish workbooks to Excel Services.
- ▶ Utilize parameters in published workbooks.

MODULE 10: POWERPIVOT IN EXCEL AND SHAREPOINT**Lessons**

- ▶ What is PowerPivot?
- ▶ Using the Excel PowerPivot Add-In
- ▶ Using PowerPivot for SharePoint

Lab 1: POWERPIVOT IN EXCEL AND SHAREPOINT

- ▶ Use PowerPivot in Excel
- ▶ Publish a PowerPivot Enabled Workbook to SharePoint

After completing this module, students will be able to:

- ▶ Understand what PowerPivot adds to Excel.
- ▶ Understand the advantages of using PowerPivot in SharePoint.
- ▶ Understand publishing PowerPivot to SharePoint.

MODULE 11: VISIO AND VISIO SERVICES**Lessons**

- ▶ What is Visio Services?
- ▶ Using Data-Connected Visio Drawings

Lab 1: VISIO AND VISIO SERVICES

- ▶ Create a Data-Driven Visio Drawing
- ▶ Publish the Drawing to Visio Services

After completing this module, students will be able to:

- ▶ Understand what Visio Services enables in dashboards.
- ▶ Create and deploy a data-driven Visio drawing.



MODULE 12: SQL REPORTING SERVICES

Lessons

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

Lab 1: SQL REPORTING SERVICES

- ▶ Use Report Builder 3.0 to Create Graphs, Gauges, Maps and Report Parts
- ▶ Publish the Objects to SharePoint

After completing this module, students will be able to:

- ▶ Understand the advantages of an integrated installation between SQL Reporting Services and SharePoint Services.
- ▶ Utilize Report Builder 3.0.
- ▶ Create graphs.
- ▶ Create gauges.
- ▶ Generate reusable Report Parts.
- ▶ Utilize maps in your reports.

MODULE 13: BUSINESS CONNECTIVITY SERVICES

Lessons

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

Lab 1: BUSINESS CONNECTIVITY SERVICES

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

After completing this module, students will be able to:

- ▶ Understand Business Connectivity Services.
- ▶ Implement a BCS deployment.

Appendix A: How to Set Up a Test Environment

Appendix B: Business Intelligence Books/Blogs

