

## SharePoint 2013 Training

Overview

### Business Intelligence

Intended for: **Business Users / Administrators / Architects / Power Users**

Prerequisites: **SharePoint Fundamentals Skills**

The goal of SharePoint Business Intelligence Class is to learn essential business intelligence features and different BI styles and tools.

- Understand business intelligence concepts and terminology
- Understand different business Intelligence styles, roles, products, and tools.
- Design reports in Excel utilizing pivot tables, slicers, spark lines, and conditional formatting
- Publish Excel reports to SharePoint Excel Services and understand all the SharePoint options
- Create tabular data models in Excel with PowerPivot and publish to SharePoint
- Utilize measures, hierarchies, perspectives, KPIs, and DAX in PowerPivot
- Use Report Builder to create and publish reports to SharePoint Reporting Services
- Use PerformancePoint Services to create reports on Analysis cubes
- Learn how to publish Visio Diagrams based on data sources into SharePoint

## SharePoint 2013 Business Intelligence

Outline

### 1. Introduction

- Information Collection, Analysis, and Delivery
- Business Intelligence Styles and Roles
  - Self Service and Business Reporting by Business Analysts

- Performance Monitoring and Scorecarding by Business Analysts
  - Parameterized and Operational Monitoring by IT
- Microsoft Products and how they interact
  - SQL
  - Client
  - SharePoint

## 2. Terminology

- Pivot table
- BI Models
  - Tabular model
    - DAX
    - Calculated columns
    - Measures and hierarchies
    - KPIs
  - Multidimensional model
    - Cube
    - Measures and Dimensions
    - MDX
- KPIs and ScorecardsWeb Applications, Content Databases, and Service Applications

## 3. Data Connections and Secure Store Service

- Data connections formats
  - Location
    - Embedded
    - Data connections libraries
  - Authentication
    - Windows authentication
    - Secure Store
- Data refreshes

## 4. Excel Services

- Roles
- Designing reports in Excel
  - What's not allowed
  - Tables and pivot tables
  - Slicers
  - Conditional formatting and sparklines
    - Color scales and data bars
    - Top bottom values
    - Icons

- Reports in SharePoint
  - Publishing options
    - Which sheets to publish
    - Permissions
    - Data refresh
  - Embedding reports
    - Excel access web part
    - REST api
  - Web parts and filters
- Excel service application settings
  - Architecture
  - Trusted locations
  - Trusted data connection libraries

## 5. Excel with PowerPivot

- Relationships between tables
- DAX
- Calculated columns
- Hierarchies
- KPIs
- Perspectives
- Manage PowerPivot Data Refresh

## 6. Reporting Services

- Tools comparison
- SharePoint Integration
- Report Builder
  - Data sources and data connections
  - Shared data sets
  - Report templates and web parts
  - Pull or push delivery
- PowerView
  - Consuming PowerPivot data models
  - Visualizations
- Configure Reporting Services Application

## 7. Performance Point Services

- Purpose
- Data sources
  - Analysis services
  - Other data sources: tables, SharePoint lists (many feature will not be available)

- Dashboard Designer
  - KPIs and KPI Details
  - Scorecards
  - Analytical Charts
  - Decomposition tree
  - Strategy map

## **8. Visio Graphics Service**

- Creating diagrams
- Data sources
- Publishing to SharePoint
  - Service application settings

## **9. Business Data Connectivity**

- External Content Types
- Editing the XML file directly
- Using Business Data List and Item Web Parts