

Implementing Business Intelligence with Excel Services

Duration: 2 days

Overview

This is a 2-day course designed to provide students with the knowledge and skills to use Excel Services to create business intelligence (BI) applications. In this course we cover the Excel Services components of SharePoint Server 2007. We use the Enterprise license of the product since the BI features are available only with that license. The course's primary focus is on the Excel Services components of the BI features in the SharePoint Server 2007 Enterprise version. Much of the information in this course will assist in your deployment of Excel Services with SharePoint Server 2007. Students learn through numerous instructor-led demonstrations and hands-on labs.

Since the focus of this course is on Excel Services functionality, this course does not cover what is new in Excel 2007, nor does it broadly cover Microsoft Office SharePoint Server 2007.

Prerequisites

Students taking this course should have the prerequisite knowledge or experience listed below.

- Basic knowledge of Office SharePoint Server 2007 Enterprise.
- Some knowledge of administering Office SharePoint Server 2007.
- An understanding of BI concepts such as Analysis Services, Key Performance Indicators (KPIs), and data analysis.
- Have Microsoft Office Excel 2007 implemented in your environment.
- A working knowledge of Microsoft Office Excel 2007.

Intended Audience

The course is designed for those who intend to design, implement, and manage an Excel Services deployment, and also build BI solutions using SharePoint Server 2007. Individuals in the job categories listed below will benefit from the knowledge gained in this course.

- Current SharePoint Server 2007 administrators
- Experienced administrators or have some knowledge of SharePoint Server 2007
- Data analysts or business intelligence consultants
- Business users
- Experienced Excel 2007 users
- Business managers and financial analysts who are interested in the functionality of KPIs in reports and BI Dashboards

Module 0: Introduction

This module begins by providing an overview of what is covered in this course, and then briefly covers the following topics:

- How business intelligence solutions empower decision makers
- Microsoft business intelligence components
- How business intelligence fits into information architecture
- How governance affects delivering business intelligence

Module 1: Excel Services Overview

Before business users can utilize Excel Services, administrators need to understand how it is incorporated in Microsoft Office SharePoint Server 2007 and used to leverage business intelligence features. This module covers the Excel Services components and how they are used to integrate business data to deliver BI solutions to business users. It covers the following lessons:

- Overview of Excel Services
- Excel Services architecture and its core components
- Using Excel Services with other BI features

Module 2: Working with Excel Services

This module covers the skills necessary to successfully deploy and work with Excel workbooks using Microsoft Office Excel Services. You will learn how to:

- Publish workbooks to the server
- Display data using Excel Web Access (EWA)
- Incorporate business metrics by using KPIs

Module 3: Introduction to SQL Server Analysis Services

In this module you learn how to use SQL Server Analysis Services (SSAS) 2005 as a source for data to render as Key Performance Indicators (KPIs). SSAS provides a premium data source for BI scenarios for both Excel client and Excel Services. You will also learn:

- The basics of SSAS 2005
- How to leverage the use of SSAS 2005 with Excel Services
- How to bring data together in dashboards

Module 4: Report Center

In this module you learn that Report Center is another BI feature available in SharePoint Server 2007. Report Center includes a document library called Reports Library that is tuned for storing and displaying BI reports such as Excel workbooks and reports built for SQL Reporting Services. You also learn how to:

- Configure Report Server SharePoint Integration
- Create, access, and manage reports
- Create dashboards with KPIs and filters

Module 5: Configure Excel Services

This module discusses how to configure Excel Services settings so users are able to store and access Excel workbooks from a centralized location. You will also learn:

- Use Excel Services components to integrate business data into trusted file locations
- Create a Trusted Data Connection Library
- Use Excel Calculation Services to perform operations such as opening workbooks, calculations, and returning the information from a requested range

Module 6: Security and Performance

This module reviews security and performance considerations for a Microsoft Office SharePoint Server 2007 deployment that includes Excel Services. You will learn:

- Excel Services security overview
- Plan authentication models
- Security threats
- Performance optimization
- Ways to scale up Excel Services
- Load balancing
- Resource requirements

Module 7: Capacity and Deployment Planning

This module discusses supported topologies and capacity planning. We consider topologies such as single-server, multiple servers, and extranet. In addition, we have an opportunity to discuss capacity planning for the Web front-end tier and application-server tier.