

**COURSE  
OVERVIEW**

# BUSINESS INTELLIGENCE WITH SHAREPOINT 2013 AND SQL 2012

## *Course Outline:*

### *Overview and Personal BI*

#### *Module 0 – Course Overview*

- *Introductions*
- *Course Agenda*
- *Housekeeping / Logistics*
- *Expectations*
- *Pre-requisites*

#### *Module 1 – Introduction to BI and Foundation Concepts*

- *Overview and Importance of BI*
- *BI Stack – Data to Presentation*
- *Step through and explain in summary form some important concepts which will be referred to throughout the course Data Warehouse/Data Mart*
  - *ETL*
  - *Cubes*
  - *Dashboards*
  - *KPIs*
  - *Scorecards*
  - *Reports*

#### *Module 2 – Microsoft BI Stack Overview*

- *Microsoft BI Strategy*
- *BI Stack Overview*
- *Personal BI*
  - *Excel*
  - *Power View*
- *Team BI*
  - *PowerPivot*
  - *Excel Services*
  - *Visio Services*

- *Reporting Services*
- *Corporate BI*
  - *SQL Server (Database,SSIS, SSAS)*
  - *PerformancePoint*
- *Security Considerations*
- *What's New in SQL 2008/2013*
- *The SharePoint BI Site Template*

### **Module 3 – Introduction to Data and Data Modelling**

- *The Importance of Data in BI*
- *Data Sources*
- *Securing Data*
- *Introduction to Data Modelling*
- *Tabular vs Multidimensional*
- *Building a Tabular Data Model*
- *Module Summary*

#### **Labs:**

- *Building a Data Model in Excel 2013*

### **Module 4 – Excel 2013 and Power View**

- *Overview*
- *Two Versions of Power View*
- *Reasons for Using Power View*
- *System Requirements*
- *Charts and Visualisations*
- *Filters, Slicers*
- *Sharing Power View Dashboards with SharePoint*

#### **Labs:**

- *Building a Power View Dashboard with Excel 2013*
- *Publishing to SharePoint*

### **Team BI Part 1**

### **Module 5 – Excel Services 2013**

- *Overview of Excel Services*
- *Features and Limitations*
- *Working with Data Connections (ODC)*
- *Working with Pivot Tables*
- *Creating a Dashboard with Filters, Slicers, Sparklines and Charts*
- *Importance of Named Ranges and Filters*
- *Publishing to SharePoint*
- *Excel Web Access and Filter Web Parts*
- *Module Summary*

**Labs:**

- *Create an Excel Dashboard*
- *Publish to Excel Services*
- *Working with the Excel Web Access Web Part*
- *Working with Filter Web Parts*

**Module 6 – Introduction to PowerPivot 2013**

- *Overview of PowerPivot – Usage and Features*
- *Introducing the PowerPivot UI*
- *Basic Concepts: Tables, Columns, Relationships, Expressions*
- *The Tabular Model*
- *Working with Data in PowerPivot*
  - *Data Sources including SharePoint Lists, Analysis Services Cubes, SQL Data*
  - *Creating the Data Model*
- *Introduction to DAX and Expressions*
- *Creating a PowerPivot Dashboard*

**Labs:**

- *PowerPivot UI*
- *Importing Data and Creating Relationships*
- *Working with DAX*
- *Build a PowerPivot Dashboard*

**Team BI Part 2**

**Module 7 – Introduction to PowerPivot for SharePoint 2013**

**Agenda:**

- *Overview of PowerPivot for SharePoint*
- *Preparing PowerPivot Reports for SharePoint*
- *Publishing PowerPivot Models to SharePoint*
- *The PowerPivot Gallery*
- *Managing PowerPivot Reports/Models*
- *Data Refresh*
- *Permissions and Roles*
- *Module Summary*

**Labs:**

- *Publishing your PowerPivot Model to SharePoint*
- *Working with the PowerPivot Gallery*
- *Working with Data Refresh*

**Module 8 – Introduction to SSRS and Report Builder**

**Agenda:**

- *Overview of Reporting Services (SSRS)*
- *Preparing for SSRS and Report Builder*
- *Scenarios for SSRS*

- *SSRS and SharePoint Integration*
- *Introduction to Report Builder*
- *Working with Data*
- *Creating a Report*
- *Publishing a Report*
- *Processing and Schedules*
- *Managing Reports in SharePoint*
- *Module Summary*

**Labs:**

- *Creating an SSRS Report with Report Builder*
- *Publishing to SharePoint*
- *Create a schedule.*

**Corporate BI**

**Module 9 – Introduction to PerformancePoint**

- *Overview of PerformancePoint Services*
- *Preparing for PerformancePoint*
- *Scenarios for PerformancePoint*
- *PerformancePoint and SharePoint Integration*
- *Introduction to Dashboard Designer*
- *Working with Data Sources*
- *Analytic Reports*
- *Working with KPIs and Scorecards*
- *Dashboards and Filters*
- *Publishing to SharePoint*
- *Linking Filters to Excel Reports*
- *Module Summary*

**Labs:**

- *Creating an Analytic Report in PPS*
- *Creating KPI and Scorecard in PPS*
- *Creating a Dashboard and using Filters*
- *Incorporating Excel with PerformancePoint*