

**Course Title:** Business Intelligence Using Office SharePoint Server 2007

**Duration:** 4 days

**Cost:** \$1,695

**Overview:** Learn how to create meaningful dashboards from your data, using SharePoint Server 2007's web parts, such as Key Performance Indicators and Excel. This course includes topics ranging from building pivot tables in Excel to publishing Excel, Cizer.Net and other report types in SharePoint Server 2007, as well as configuring the necessary data connections and web parts for building a dashboard.

**Prerequisites:** This class is geared towards the non-technical business user who is familiar with the basic features of Excel such as formatting, calculations and other commonly used functions. This class does not assume knowledge of Excel pivot tables, or any familiarity with Office SharePoint Server 2007.

**Materials:** Course manuals and any additional files are made available to students for download prior to the first day of class.

**Syllabus:** **DAY 1 - Getting familiar with B.I. and Office SharePoint Server 2007**

1. Preface
  - Instructor and company introduction
  - Overview of the course and databases used during the course
2. Business Intelligence
  - What is Business Intelligence?
3. Office SharePoint Services
  - Workflow
4. Office SharePoint Server Portal
5. Sites, Workspaces and Pages
  - Creating SharePoint Sites
    - ◆ Scenario: Create a Report Site
6. Report Site Overview
7. Dashboards
  - Excel Web Access
  - Key Performance Indicators (KPI) List
  - Cizer.Net Reporting Web Part
  - Filters
  - Related Information
  - Summary
  - Contact Details

## **DAY 2 - Dashboards, The Report Library and Data Connections**

1. Creating Dashboards
  - Dashboard Check in / Check Out
    - ◆ Scenario: Create a Dashboard
  - Tool Pane and Web Part Common Properties
  - Contact Details and Summary Web Parts
    - ◆ Scenario: Using Contact, Summary and Related Information Web Parts
  - Excel Web Part
    - ◆ Scenario: Create an Excel Web Part
  - Cizer.Net Reporting Web Part
    - ◆ Scenario: Create a Cizer.Net Reporting Web Part

## DAY 2 - Dashboards, The Report Library and Data Connections (continued)

- KPI Web Part
  - ◆ Scenario: Create a KPI Web Part
- Excel Web Part
  - ◆ Scenario: Create an Excel Web Part
- Edit Web Parts in a Dashboard
  - ◆ Scenario: Editing Web Parts
- Filtering Dashboards
- 2. Report Library
  - Access, navigation and definition
  - New, Upload, and Actions drop-down menus
  - Settings and Views
  - Report Properties and Permissions
  - Editing in Excel
  - Viewing in a web browser
  - Delete, Send To, Check Out, Upload, and Publish
  - Version History
  - Reference Library
- 3. Data Connections
  - ODC Files
  - Data Connection Library
  - Report Calendar
  - Reference Library

## DAY 3 - Excel and Office SharePoint Server 2007

1. Creating a Data Connection to an Excel Report
2. Creating Excel Reports Using Data from a SharePoint Connection
  - Pivot Table Field List
  - Measures and Values
  - Dimensions
  - Pivot Table Columns, Values, Rows, and Filters
    - ◆ Scenario: Create a Pivot Table
  - Pivot Table Advanced Options
    - ◆ Scenario: Displaying Values and Percentages
  - Conditional Formatting
    - ◆ Scenario: Applying Conditional Formatting
  - Sorting
    - ◆ Scenario: Sorting Pivot Table Data
  - Advanced Filters
    - ◆ Scenario: Applying Advanced Filters
  - Pivot Table Ribbon Options and Menu
3. Excel Charts
  - Displaying Charts in Excel
  - Chart Types: Benefits and Limitations
    - ◆ Scenario: Creating Pie and Doughnut Charts
    - ◆ Scenario: Creating Bar, Column Charts using Layouts
    - ◆ Scenario: Creating Line Charts and Using Chart Styles
    - ◆ Scenario: Creating Area Charts and Sorting Fields
    - ◆ Scenario: Creating Stacked Charts
    - ◆ Scenario: Creating Radar Charts and Moving Charts

## DAY 4 - Creating KPIs in Office SharePoint 2007

1. Overview of Key Performance Indicators
2. KPI Types
3. Creating KPIs
  - Using Manually Entered Information
    - ◆ Scenario: Create a KPI using Manually Entered Data
  - Using Data from an Excel Workbook
    - ◆ Scenario: Create a KPI using Data in an Excel Workbook with No Data Connections
    - ◆ Scenario: Create a KPI using Data from an Excel Pivot Table
    - ◆ Scenario: Create a KPI using an Excel Spreadsheet
  - Using Data from SQL Server 2005 Analysis Services
    - ◆ Scenario: Create a KPI from SQL Server 2005 Analysis Server
  - Using Data from a SharePoint List
    - ◆ Scenario: Create a KPI using Data in a SharePoint List
4. B.I. Part Creation Process
  - Reports
  - KPIs