TanDuc ITS
Tan Duc TD&T Group

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55103: Creating and Sharing Interactive Dashboards with PowerPivot, Power View and SharePoint Server

Duration: 02 days

In this two-day instructor-led course, students will learn how to create and share interactive dashboards using Excel PowerPivot, Power View, and SharePoint. Students will walk through the development of a dashboard project with the steps, concepts, formulas, and functions that are used explained in detail.

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AUDIENCE

This course is targeted at business intelligence developers and Power Users that are currently, or are in process of, developing Excel dashboards.

AT COURSE COMPLETION

- Understand best practices for success in business intelligence.
- Understand how to choose between tables or graphs and what makes each unique.
- Understand key performance indicators.
- Explain and avoid pitfalls in dashboard design.
- Understand what makes an effective dashboard.
- Import data into the model.
- Create relationships between tables in the data model.
- Mark a table as a date table.
- Create calculated fields.
- Create a KPI in PowerPivot.
- Add pivot tables from PowerPivot.
- Add pivot charts from PowerPivot.
- Enhance the dashboard with a linked table.
- Format dashboards with color.
- Understand the options provided with Power View.
- Use maps with Power View.
- Save to SharePoint.

COURSE OUTLINE

Module 1: Course Overview

This module explains how the class will be structured and introduces course materials and additional administrative information.

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: Dashboard Principles

In this module we will explore the elements needed for effective and efficient dashboard building. We will cover best practices for success in business intelligence, and also examine visualization types, along with the pros and cons associated with each, and common pitfalls, so you'll know what to avoid when designing dashboards.

Lessons

- Best Practices for Success in Business Intelligence
- It Is All in the Numbers
- Tables or Graphs
- Types of Graphs
- Key Performance Indicators
- Pitfalls in Dashboard Design
- Group Exercise and Discussion

Lab: Dashboard Principles

- None

After completing this module, students will be able to:

- Understand best practices for success in business intelligence.
- Understand how to choose between tables or graphs and what makes each unique.
- Understand key performance indicators.
- Explain and avoid pitfalls in dashboard design.
- Understand what makes an effective dashboard.

Module 3: Sourcing the Data

In this module we will explore importing data, creating relationships, and utilizing date tables. We will also create and configure calculated columns, calculated fields, and KPIs.

Lessons

- Importing the Data
- Relating the Data in the Model
- Date Table
- Enriching the Data

Lab: Sourcing the Data

- Importing Data into the Model
- Relating Tables in the Data Model
- Mark a Table as a Date Table
- Creating Calculated Fields
- Creating a KPI in PowerPivot

After completing this module, students will be able to:

- Import data into the model.
- Create relationships between tables in the data model.
- Mark a table as a date table.
- Create calculated fields.
- Create a KPI in PowerPivot.

Module 4: Creating the Excel Dashboard

In this module we will create an Excel dashboard. We will explore how to create and configure pivot tables and pivot charts using PowerPivot, and we'll also cover how to create a custom table, add that table to the data model, and configure the results to format conditionally.

Lessons

- Adding the Pivot Tables from PowerPivot
- Adding the Pivot Charts from PowerPivot
- Enhancing the Dashboard with a Linked Table
- Formatting with Color

Lab: Creating the Excel Dashboard

- Adding Pivot Tables from PowerPivot
- Adding Pivot Charts from PowerPivot
- Enhancing the Dashboard with a Linked Table
- Formatting with Color

After completing this module, students will be able to:

- Add pivot tables from PowerPivot.
- Add pivot charts from PowerPivot.
- Enhance the dashboard with a linked table.
- Format dashboards with color.

Module 5: Adding Power View Maps and Sharing

In this module we will explore Power View. We will explain the interface and cover the tables and charts available. Lastly we will demonstrate how to share your dashboards using SharePoint.

Lessons

- Power View in Excel 2013
- Power View User Interface
- Tables
- Charts
- Maps
- Sharing Dashboards

Lab 1: Adding Power View Maps and Sharing

- Using Maps with Power View
- Saving to SharePoint

After completing this module, students will be able to:

- Understand the options provided with Power View.