Power Pivot, Part 3 of 5: Dashboards and Power View

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Meet the expert: Doug Ortiz is an independent consultant whose skillset encompasses multiple platforms including .NET, SharePoint, Office, SQL Server, and Business Intelligence. Doug has a master’s degree in relational databases and over 20 years of experience in IT, over half of which have been within .NET and SharePoint. His roles both in and outside of SharePoint have ranged from architecture, implementation, administration, disaster recovery, migrations, development, and automation of information systems.

Prerequisites: This course assumes that the users have an understanding of Microsoft Excel and how databases function. The user should have already viewed the Power Pivot: Data Models and Power Pivot: Basic Concepts courses before viewing this course.

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Course description: In this course we will look at Dashboarding concepts such as: What is a dashboard, creation guidelines, what a dashboard is not. We will look at what is a Pivot Chart and how it differentiates from "Pivot Chart and Pivot Table". Afterwards, we will finish by understanding KPIs and how to incorporate them into our PivotTable. Then we will review another Add-In named Power View, creating reports, navigating a Power View Report, filtering, grouping. Culminating with Charting and Mapping inside of Power View. Then we will discuss the considerations that should be looked upon when securing and sharing a Power Pivot Workbook. The options we have available for securing within Excel 2013 and sharing the Power Pivot Workbook within SharePoint 2013 and OneDrive.

Course outline:

Creating Dashboards
- Introduction
- What is a Dashboard?
- Dashboard Creation Guidelines
- What a Dashboard is Not
- Dashboarding in Power Pivot
- What is PivotChart?
- Demo: Create a Pivot Chart
- Demo: Pivot Chart - add Slicer
- Summary

PivotChart and Table
- Introduction
- PivotChart and PivotTable
- Demo: PivotChart & Pivot Table
- Demo: Chart & Table Slicers
- Creating "KPIs"
- Demo: KPIs
- Summary

Power View
- Introduction
- What is Power View?
- Creating a Power View Report
- Adding Views
- Applying Filters
- Demo: PowerView - enabling
- Demo: PowerView – creating
- Creating Tiles
- Charts
- Maps
- Demo: Slicers & Tiles
- Demo: Charts & Maps
- Summary

Sharing PowerPivot
- Introduction
- Considerations Before Sharing
- Securing the Workboook
- Securing the Workbook (cont.)
- Demo: Securing the Workbook
- Demo: Securing the Workbook 2
- Sharing the Workbook
- Demo: Sharing in SharePoint
- Demo: Sharing in the Cloud
- Summary