PerformancePoint 2010 Designing and Implementing Scorecards and Dashboards

CTREC HILTON IT ACADEMY

BUILDING TRAINING SOLUTIONS FOR THE IT WORLD

Number of Days:	**3**
Format:	**Instructor-Led**
Class Code	**50465**

Recommended Course Sequence

Knowledge of prerequisites noted below.

Course content is subject to change without notice.

Course Description:

This instructor-led course provides students with the necessary knowledge to develop Scorecards and Dashboards using PerformancePoint 2010 in their own work environment. The course covers design theory, different types of dashboards, planning, deployment and security. Each of the first class objects such as Indicators, KPIs, Filters, Data Sources, and interconnecting them into scorecards and combining scorecards into dashboards is covered in depth. In addition peripheral knowledge that greatly enhances the design experience is provided including an overview of the Microsoft Business Intelligence stack, basic understanding of the hosting services for PerformancePoint 2010 which is SharePoint 2010, MDX queries and SQL Server Analysis Services.

Target Student:

This course is intended for Power Users, Developers and IT Professionals that will be involved with the design, development and maintenance of actionable performance measurements as displayed in a scorecard and dashboard.

Prerequisites:

Before attending this course, students should have:

- An understanding of the benefits of business intelligence.

Delivery Method:

Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

At Course Completion:

After completing this course, students will be able to:

- Discover, design and implement KPIs
- Understand the scoring methodologies used with indicators to change visual displays
- Decide on how to modify a scoring methodology
- Understand the role of SQL Server Analysis Services in measurement
- Be able to develop proper filters for easy end-user click to detail on dashboards
- Group Scorecards into Dashboards and link them together
- Modify the web page hosting the Dashboards for branding
- Implement Master Pages in Dashboards for consistency with company standards.
- Develop multiple-valued KPIs. For example This year Actual and Target and last Year Actual and Target at the same relative point in time
- Implement Time Intelligence features to query such as Year-To-Date, Last 6 Months etc.
- Use Excel Services and Excel Workbooks in Scorecards or as a data source

- Utilize the document management capabilities of SharePoint 2010 for PerformancePoint objects for versioning, document retention and reverting.
- Understand team development methodologies with developing PerformancePoint to reuse existing objects or to segment projects.
- Use workflows to approve scorecards and dashboards
- Develop Filters for Scorecards
- Use Dashboard Designer
- Work with views of SSAS Cubes to model data for proof of concept for KPIs
- Connect into Data Sources via data Connections
- Gain a generalized understanding of MDX to write basic queries
- Generate Visual Reports and tie them into Dashboards
- Utilize decomposition trees
- Understand what the advantages of having SharePoint as the platform are.
- Use dynamic hierarchies in Scorecards
- Secure all PerformancePoint objects
- Implement User Menus in Scorecards

Course Outline

Module 1: The Business Intelligence Stack

Lessons
SQL 2008R2 Business Intelligence Platform SQL Analysis Services SQL Reporting Services Performance Management Tools SharePoint 2010 Multidimensional Space MDX Data Mining Understanding the Terminology
Lab : The Business Intelligence Stack
Explore Business Intelligence Development Studio Connect into a SQL Server Analysis Services Cube Use SQL Server Management Studio Explore SharePoint 2010

Module 2: PerformancePoint Services 2010

Lessons
Integration with SharePoint Server 2010 Common Service Application Framework New PerformancePoint Features Storage Security Time Intelligence and Dynamic Filters Linking of Web Parts

▪ KPI Details Report ▪ Retired Features
Lab : PerformancePoint Services 2010
▪ Use SharePoint to create a site collection ▪ Configure Central Administration for PerformancePoint Services ▪ Create and Explore a PerformancePoint Business Intelligence Center

Module 3: Dashboards and Scorecards Overview

Lessons
▪ What is a Dashboard? ▪ What is a Scorecard? ▪ Scorecards in PPS ▪ KPI Collections ▪ Dashboard Design Guidelines ▪ Dashboards designed to Monitor ▪ Dashboards designed to Analyze ▪ Dashboards designed as Management views such as Six Sigma
Lab : Dashboards and Scorecards Overview
▪ Paper lab ▪ Design each of the three categories of dashboards ▪ Group Review ▪ Design your company dashboard.

Module 4: MDX (Optional Module)

Lessons
▪ What is MDX? ▪ MDX Query Editor ▪ Select Statement ▪ Key Concepts ▪ Sets ▪ Functions ▪ Time Intelligence
Lab : MDX (Optional Module)
▪ Understand the Cell ▪ Write a Tuple ▪ MDX Sets ▪ Write a SELECT statement ▪ Write a Function ▪ Implement Time

Module 5: Dashboard Designer

Lessons
▪ Dashboard Designer Internals ▪ Dashboard Designer Interface ▪ First Class Objects

▪ Main Window ▪ Properties ▪ Dashboard Designer Features
Lab : Dashboard Designer
▪ Create a Data Connection ▪ Create a Basic Dashboard ▪ Deploy the Dashboard ▪ Explore the Dashboard in PPS

Module 6: Data Connections

Lessons
▪ Data Sources ▪ Multidimensional ▪ Tabular ▪ Specific Sources ▪ SSAS ▪ Excel ▪ SharePoint List ▪ Time Intelligence
Lab : Data Connections
▪ Create a new Business Intelligence site for lab as a sub site ▪ Create a SQL Server Analysis Services Connection and use it as source ▪ Create a Data Connection using Excel Services ▪ Create a Data Source using Import Workbook ▪ Connect into a tabular SharePoint list as a Data Source

Module 7: Visual Indicators and Key Performance Indicators

Lessons
▪ Visual Indicators ▪ Categorizing Indicators ▪ Performance Measures ▪ KPI Characteristics ▪ KPI Details ▪ KPI Templates ▪ Formatting Numbers ▪ Data Mappings ▪ Calculation Metrics ▪ Scoring Patterns ▪ Banding Methods ▪ KPI Details Report ▪ Best Practices
Lab : Visual Indicators and Key Performance Indicators
▪ Create a custom Indicator ▪ Create several KPIs ▪ Create a basic Scorecard to host your KPIs

- Utilize a cube as a data source
- Create an objective KPI
- Create a multi-valued KPI

Module 8: Visual Reports and Filters

Lessons
Types of Reports Analytic Chart Analytic Grid Excel Services ProClarity Analytics SQL Server Reporting Services Filters Filtering Provider and Consumer Member Selection Named Set STPS to MDX Post Formula
Lab : Visual Reports and Filters
Create an Analytic Grid Create a Member Selection Filter Create an Analytic Chart Create a Strategy Map Create a Time Intelligence Filter Use Time Intelligence in a Report

Module 9: Scorecards

Lessons
Three Categories SSAS Template Standard Template Tabular Scorecards Data Sources Implementing Interactivity Display values Using Filters Deploying
Lab : Scorecards
Create a KPI for use in lab Add a dimension filter Wire up filters Compare the effects of filtering Change Scorecard Settings

Module 10: Dashboard Details

Lessons
▪ Dashboard Hierarchy ▪ Dashboard Variance ▪ Dynamic Dashboards ▪ Dashboard Interactivity
Lab : Dashboard Details
▪ Develop multiple Dashboards ▪ Change Deployed Dashboards ▪ Provide interactive Help for your Dashboards ▪ Monitor Dashboard Utilization ▪ Control Dashboard Updates

Additional Reading

To help you prepare for this class, review the following resources:

- Delivering Business Intelligence with Microsoft SQL Server
- CWL course 50263D Introduction to Microsoft Business Intelligence