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SharePoint 2013: BI

Deep Dive Demo Guide

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# Setup Instructions

This script document provides the steps and directions necessary to perform the SharePoint 2013 BI demo using an on-premise virtual machine or in an Office 365 environment.

Visit [https://www.MicrosoftOfficeDemos.com](https://www.microsoftofficedemos.com/) for access to virtual machines to use with this demo guide.

Some demo steps will vary between the on-premise and online environments.

**Demo steps where the online environment is different from the on-premise environment are noted in green text.**

Some demo steps are not available in the online environment. These steps are formatted as orange text and marked as optional.

Specific notes and important details to the presenter are in red text.

## Connections and Login

### On-premise Connection

1. Obtain the VPN and Virtual Machine IP addresses.
2. Make VPN connection to the demo environment.
3. Connect to the SharePoint 2013 VM environment by making a remote desktop connection to the VM IP address.
4. Use the following login:
   1. User name: **contoso\garthf**
   2. Password: **pass@word1**

#### Optimal Performance for On-premise Demo

Internet connectivity is recommended for optimal demo experience. The following functionality is limited without Internet connectivity:

* Bing Maps – Power View report will not display rich geographical outlines without internet connection.
* Azure Data Marketplace – you will not be able to explore the data marketplace without internet connection.

### Online Connection

Obtain login information for your online tenant. This should include the demo (site collection) home page URL (for example, **https://BIDemo2013.sharepoint.com/sites/bicenter**), which is referred to as **<https://YourTenant.sharepoint.com/sites/bicenter>** in this script.

Currently unavailable features if you runthe demo in the Office 365 online environment (as of December 2012):

* Export of Power View report to PowerPoint
* PowerPivot Gallery
* PerformancePoint Services
* File size is limited to 10 MB
* BISM Data model is unavailable in online environment, so filtering in the customer satisfaction page will not function correctly

## Prepare Demo Content

### Download USFlightDelays.txt file (Online only)

1. Open Internet Explorer and navigate to the Documents library in the BICenter on your Office 365 tenant:

<https://YourTenant.sharepoint.com/sites/bicenter/documents>

1. Right-click **USFlightDelays.txt**, and from the context menu, click **Save target as**.
2. In the Save as dialog, navigate to a location available to you during the demo.
3. Click **Save**.
4. If prompted to Open, Open folder, or View downloads, click **x** to close the dialog.

### Set up Excel 2013 – to confirm the correct Add-ins are installed

1. Start **Excel 2013** client and open a **Blank workbook**.
2. On the Excel **File** tab, click **Options**.
3. In the left navigation of the Excel Options window, click **Add-Ins.**
4. In the **Manage** drop down,click **COM Add-Ins,** and then click **Go**.
5. In the COM Add-Ins window, ensure the following items are checked:
   * + - Microsoft Office PowerPivot for Excel 2013
       - Power View
       - Inquire
6. Click **OK**.
7. Minimize Excel.

### Remove BI from top navigation (online only)

1. Navigate to the BICenter on your Office 365 tenant.

<https://YourTenant.sharepoint.com/sites/bicenter>.

1. Form the Settings menu, click **Site settings**.
2. Under **Look and Feel**, click **Master page**.
3. On the Site Master Page Settings page, click **Alternate CSS URL**.
4. Click the **Specify a CSS file to be used by this site….** radio button.
5. Type the following into the All Channels text box:

/sites/bicenter/Style Library/ContosoBI.css

1. Click **OK**.
2. Confirm BI is not in top navigation.
3. In top navigation, click Reports Gallery and confirm BI does not display in top navigation.

### Add Executive Reports to top navigation (online only)

1. Navigate to the BICenter on your Office 365 tenant.

<https://YourTenant.sharepoint.com/sites/bicenter>.

1. Form the Settings menu, click **Site settings**.
2. Under **Look and Feel**, click **Navigation**.
3. On the Navigation Settings page, under Structural Navigation: Editing and Sorting section, click **Add Link**.
4. In the Navigation Link dialog box, enter the following values:
   * **Title**: Executive Reports

* **URL**: /sites/BICenter/Pages/ExecutiveReports.aspx

1. Click **OK** to close Navigation Link dialog box.
2. On Navigation Settings page, click newly created **Executive Reports** link under Global Navigation, and then click **Move Up** until the link is at the top of the list.
3. Click **OK** to close Navigation Settings page.
4. Confirm Executive Reports displays on top navigation.

## Prepare Internet Experience

### Set up Anne Wallace’s Internet Experience

1. Open Internet Explorer, navigate to the BICenter home page, and log in with AnneW’s credentials.

**On-premise**: <http://intranet.contoso.com/sites/BICenter/Dashboards/Executive%20Reports.aspx>

* **User name:** contoso\annew
* **Password:** pass@word1

**NOTE**: When logging into Internet Explorer as AnneW on-premise, the browser will try to redirect to a BI site not present and will produce a page not found error. This is a known issue. You will need to manually navigate to the Executive Reports page in the BICenter site.

**On-Line**:[https://YourTenant.sharepoint.com/sites/BICenter/Pages/Executive%20Reports.aspx](https://YourTenant.sharepoint.com/sites/Bicenter/Dashboards/Executive%20Reports.aspx)

* **User name:** annew@YourTenant.onmicrosoft.com
* **Password:** pass@word1

1. In top navigation of Executive Reports page, right-click **Customer Satisfaction**, and then click **Open in new tab**.

### Set up Garth Fort’s Internet experience

**Online –** Office 365 tenant does not allow multiple users logged into the same tenant in the same version of a browser. If running the demo online, you will need to log off AnneW’s Internet browsing session during the demo and then log in with Garthf. See script for more details.

**On premise** – you will need to run Internet Explorer as a different user.

1. Open Internet Explorer as a different user:
2. Click Windows **Start** menu, press **SHIFT** key, and then right-click **Internet Explorer**, and click **Run as different user**.
3. In Windows Security dialog box, enter the following login credentials:

User name: **contoso\garthf**

Password: **pass@word1**

1. Click **OK**.
2. Browse to Garth’s personal Newsfeed at <http://2013-sp/my/>
3. If prompted to be social, click **OK**.
4. Load Order Fulfillment Status page
5. In Internet Explorer, click New Tab.
6. Browse to the Order Fulfillment Status:

**On-premise**: <http://intranet.contoso.com/sites/BICenter/Dashboards/Order%20Fulfillment%20Status.aspx>

### Load US Air Carrier Flight Delays site

**On-premise**

1. In Garth Fort’s Internet Session, click New Tab.
2. Browse to the **US Air Carrier Flight Delays** page on the **Windows Azure Marketplace** site:

<https://datamarket.azure.com/dataset/oakleaf/us_air_carrier_flight_delays_incr>

1. Minimize the browser.

**Online**

1. Open a new session of Internet Explorer.
2. Browse to the **US Air Carrier Flight Delays** page on the **Windows Azure Marketplace** site:

<https://datamarket.azure.com/dataset/oakleaf/us_air_carrier_flight_delays_incr>

1. Minimize the browser.

### Sign in or log in to Yammer network

### If needed, see [Troubleshooting Yammer app Log in/Sign in issues](#_Troubleshooting__Yammer) for assistance with log in issues.

### If you haven’t signed in to a Yammer network before starting the SharePoint tenant, you will see Sign in to Yammer in any Yammer app.

### If you’ve signed into Yammer before starting SharePoint, you will see the Log in with Yammer option.

### To ensure the Yammer network will properly populate feeds during the demo, complete the following sign in/log in steps.

1. Navigate to the SharePoint tenant: https://<tenant>.onmicrosoft.com.
2. At the upper left, from the **Office 365 App Launcher** (), click **Yammer**.
3. In the address bar of the Log in or Sign in dialog, note the Yammer network being used.

[https://www.yammer.com/**<YammerNetwork>.**onmicrosoft.com/dialog/](https://www.yammer.com/%3cYammerNetwork%3e.onmicrosoft.com/dialog/)....

1. In the Yammer Log in dialog, enter GarthF’s credentials:

Email Address: [garthf@<YammerNetwork>.onmicrosoft.com](mailto:garthf@%3cYammerNetwork%3e.onmicrosoft.com)

Password: pass@word1

1. Click **Log In**.

**NOTE**: A yellow “Do you want Internet Explorer to remember this password” message may briefly display and then go away. This is known behavior.

**NOTE:** You may still see a Log in to Yammer prompt on Yammer app feeds on demo pages. If you log in to Yammer once, you should be able to click the link and the feed will populate.

# Business Intelligence Demo

## Scenario

This deep dive demo highlights how new business intelligence features in Office and SharePoint 2013 coupled with the SQL Server 2012 SP1, drive improved business insights across the enterprise.

Contoso Electronics is a worldwide consumer electronics retailer with over 1000 retail outlets and distribution centers. Profitability, customer satisfaction, and on-time delivery are key metrics for the company. President Anne Wallace utilizes a Microsoft Business Intelligence dashboard to monitor the health of Contoso, and, when needed, she utilizes SharePoint’s social network to assign resources for investigating and resolving business performance issues. Garth Fort, Contoso’s Business Manager, often uses Excel to address any concerns Anne may see in the dashboard. Garth can quickly use the enhanced BI features in Excel and SharePoint to identify causes for issues and concerns.

## Intended Audience

Primary: TDM

Secondary: BDM (IW Advocate)

## Goals

The goal of this demo is to show how Anne, the president of Contoso, and Garth Fort, a Contoso business manager can identify and solve business problems using the various business intelligence features built into Office and SharePoint 2013.

## Demo Outline

**Note**: As you complete this demo accept all security and content warnings.

| **Speaker Script** | **Steps** |
| --- | --- |
| **Introduction**  Welcome to the SharePoint 2013 BI demonstration.  BI allows **everyone across an organization** to **transform data** and **easily gain actionable business insights** using **tools they already know and love** - Excel and SharePoint 2013.  The Office and SharePoint 2013 story is all about accessing and combining large volumes of data from virtually any source to create powerful reports shared with the organization.  Use Excel 2013 to create a data model and perform rapid data analysis to discover insights through visual and interactive reports.  Upload the data to SharePoint libraries, and then use SharePoint 2013 to visually discover and share insights across all levels of the organization. | 1. Introduce the main value propositions for SharePoint 2013 BI:    1. Everyone can transform large amounts of data into actionable insights    2. Shared across the entire organization    3. Using tools they already know and love (Excel and SharePoint) |

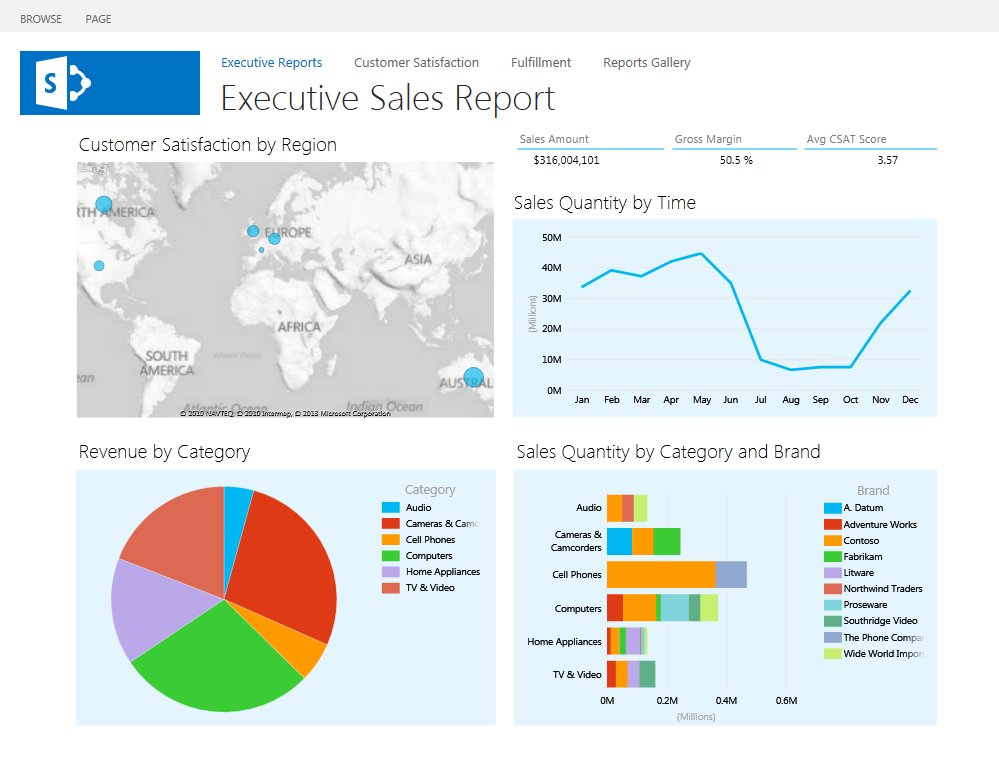
## Power View Dashboard Interaction in SharePoint 2013 (as Anne Wallace)

**NOTE**: Begin the demo in the Internet Explorer browser logged in as Anne Wallace (AnneW).

**Opening Screen**: Executive Sales Dashboard

**On-premise URL**: <http://intranet.contoso.com/sites/BICenter/Dashboards/Executive%20Reports.aspx>

**Online URL**: https://YourTenant.sharepoint.com/sites/BICenter/Pages/Executive%20Reports.aspx

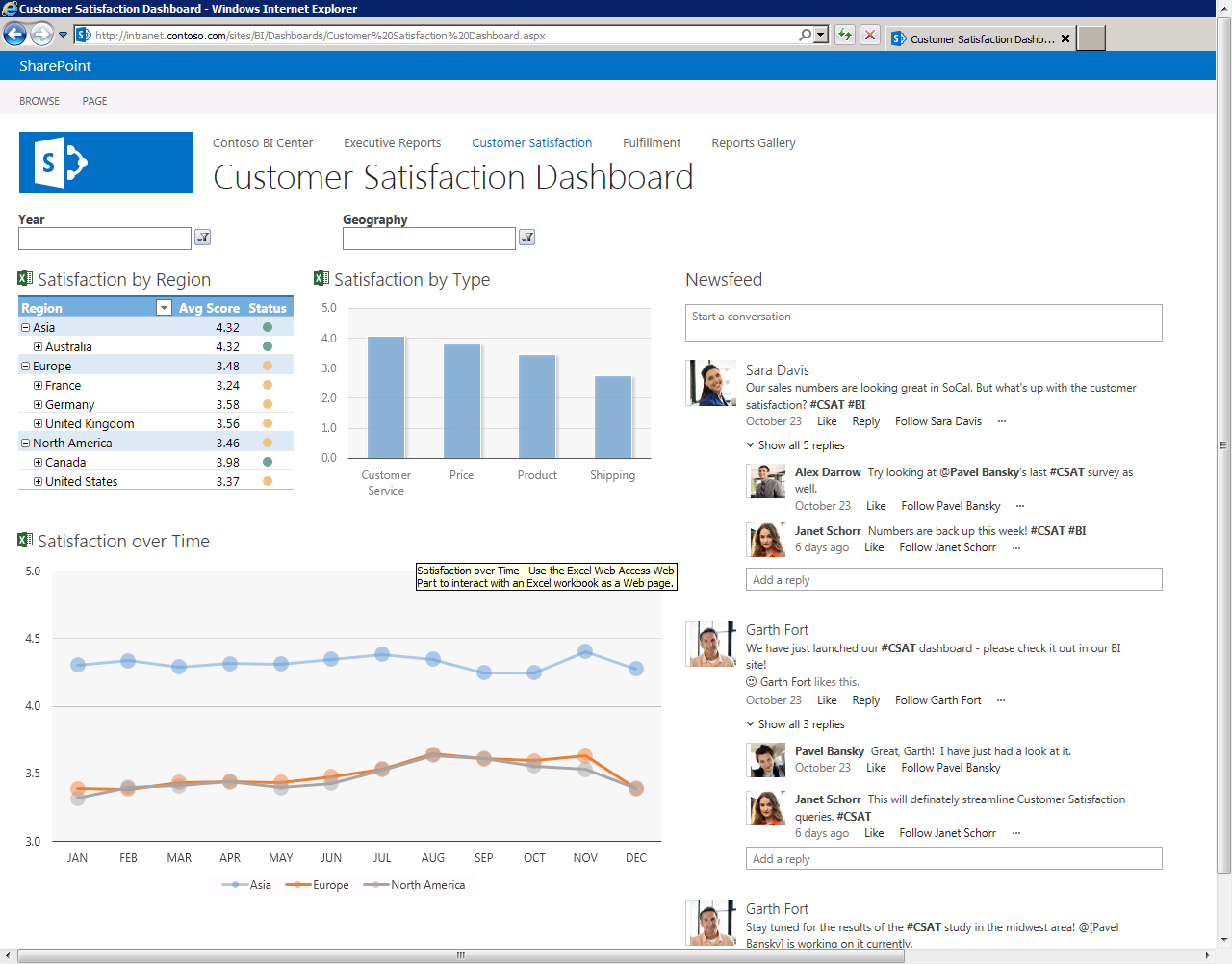


| **Speaker Script** | **Steps** |
| --- | --- |
| **Review Executive Reports**  I am Anne Wallace, the President of Contoso, and I regularly review the corporate **Executive Reports** created in Excel by Garth Fort, the Contoso Business Manager. The reports show an all-up view of the company’s **overall sales and satisfaction performance** worldwide using a combination of charts and graphs.  **Pie Chart (Revenue by Category)**  The **Revenue by Category** **pie chart** shows how much revenue each category brings in. I can click various pie wedges and see the other graphs and charts filter their results.  If I click the large green **Computers** wedge, I see all charts filter on the Computers category. In the filtered **Sales Quantity by Category and Brand,** I see that Contoso brings in a large amount of revenue.  **Horizontal Bar Chart (Sales Quantity by Category and Brand)**  On the **Sales Quantity by Category and Brand** stacked chart, each bar represents a Brand of electronics that Contoso carries. I hover over the **red** **Adventure Works** bar and note the **Sales Quantity** for **Computers** is **52,957.** Hovering over the **orange Contoso bar**, I note that Contoso’s **Sales Quantity** is **111,833**.  Now I’ll click the **Adventure Works red bar**. All of the graphs narrow scope to metrics for Computers sold by Adventure Works.  In the **legend,** I can click the orange Contoso bar to narrow the graphs to Contoso metrics for all products, including the pie charts slices.  I’ll click the orange bar in the Legend to reset the graphs.  **Line Chart** (**Sales Quantity by Time)** and **Average CSAT Score table**  The **Sales Quantity by Time line chart** shows a dip in Sales in July, Aug, Sept, and Oct.  I can filter the Line C hart by Month, by clicking the **Show Filters** button in the upper right corner.  In the Filters, I can select a specific **Month** and use the slider to view specific **Sales Amount** ranges.  For now, I’m interested in the low Average CSAT score, so I’ll clear any filters I’ve set.  **Average CSAT Score table**  The **Average CSAT Score** could be higher than **3.57** out of 5 with a high **gross margin** and **Sales Amount** of over $66 million.  I want to see how the US compares in Sales and Satisfaction.  **Map Report (Customer Satisfaction by Region)**  The **Customer Satisfaction by Region** **map** is powered by Bing maps to provide geographic information layered with relevant data. The circles represent CSAT scores.  I can review CSAT scores by hovering over the circles. Circle size correlates with CSAT score. A large CSAT circle, **Australia**, represents a high CSAT score, **4.32**. A small circle, **France**, represents a low CSAT score, **3.24**.  I’d like to focus exclusively on the United States this quarter, so I’ll click the dot representing the **United States**.  The Average CSAT Score is quite low especially when compared against the significant $166 million Sales Amount and the high Gross Margin. | **Review Executive Reports**   1. Note the following about the **Executive Sales Report**:  * It’s a dashboard of **customer satisfaction reports** and **sales performance charts**. * These reports show an all-up view of the company’s **overall sales and satisfaction performance** worldwide.   **Pie Chart**   1. Note the **Pie Chart** displays **Revenue by Category**. 2. Click various slices of the chart and note the various charts and graphs in the report updating. 3. Click the **Computers** slice (large green slice). 4. Note all charts filter data on Computers.   **Horizontal Bar Chart**   1. On horizontal bar chart, hover over red bar for **Adventure Works** and note **52,957 Sales Quantity**. 2. Hover over **Contoso orange bar** and note the **Sales Quantity** of **111,833** 3. On the horizontal bar chart, click **red Adventure Works** bar. 4. Note all charts now display Computer metrics for Adventure Works. 5. On the **Sales Quantity by Category and Brand Legend**, click **Contoso** and note all graphs change to display Contoso sales for all categories. 6. To reset the graphs, click a blank area on the **Sales Quantity by Category and Brand** chart.   **Line Chart** (**Sales Quantity by Time)** and **Average CSAT Score table**   1. In the **Sales Quantity by Time line chart**, note the diminishing Sales Quantity around July, Aug, Sep, and Oct. 2. To Filter on Month click **Show** **Filters** button in upper right corner of chart.    1. Expand **Month** filter.    2. Click **July, Aug, Sept** check boxes and show how line chart changes.    3. Click **Clear Filter** in upper right corner of Month filter. 3. To Filter on Sales Amount in table:    1. Expand **SalesAmount** filter.    2. Use slider to show the line graph updating.    3. Click **Clear Filter** in upper right corner of Sales Amount filter.   **Average CSAT Score table**   1. Note **Average CSAT Score** table, with high **Gross Margin** and **Sales Amount**, but low CSAT.   **Map Report (Customer Satisfaction by Region)**   1. On the **Customer Satisfaction by Region** map, note the CSAT circle. The size represents relative CSAT scores. 2. Hover over the blue dot representing **Australia** and note **4.32** CSAT score. 3. Hover over the smaller bubble representing **France** and note the lower **3.24** CSAT score. 4. To zoom in on just the United States, double-click the blue bubble for **United States**. 5. If Privacy Warning displays, click **Enable Content.** 6. Note the relatively small CSAT score bubble on **California**. 7. Click on the bubble for California and note the large amount of sales contributed by the state. |

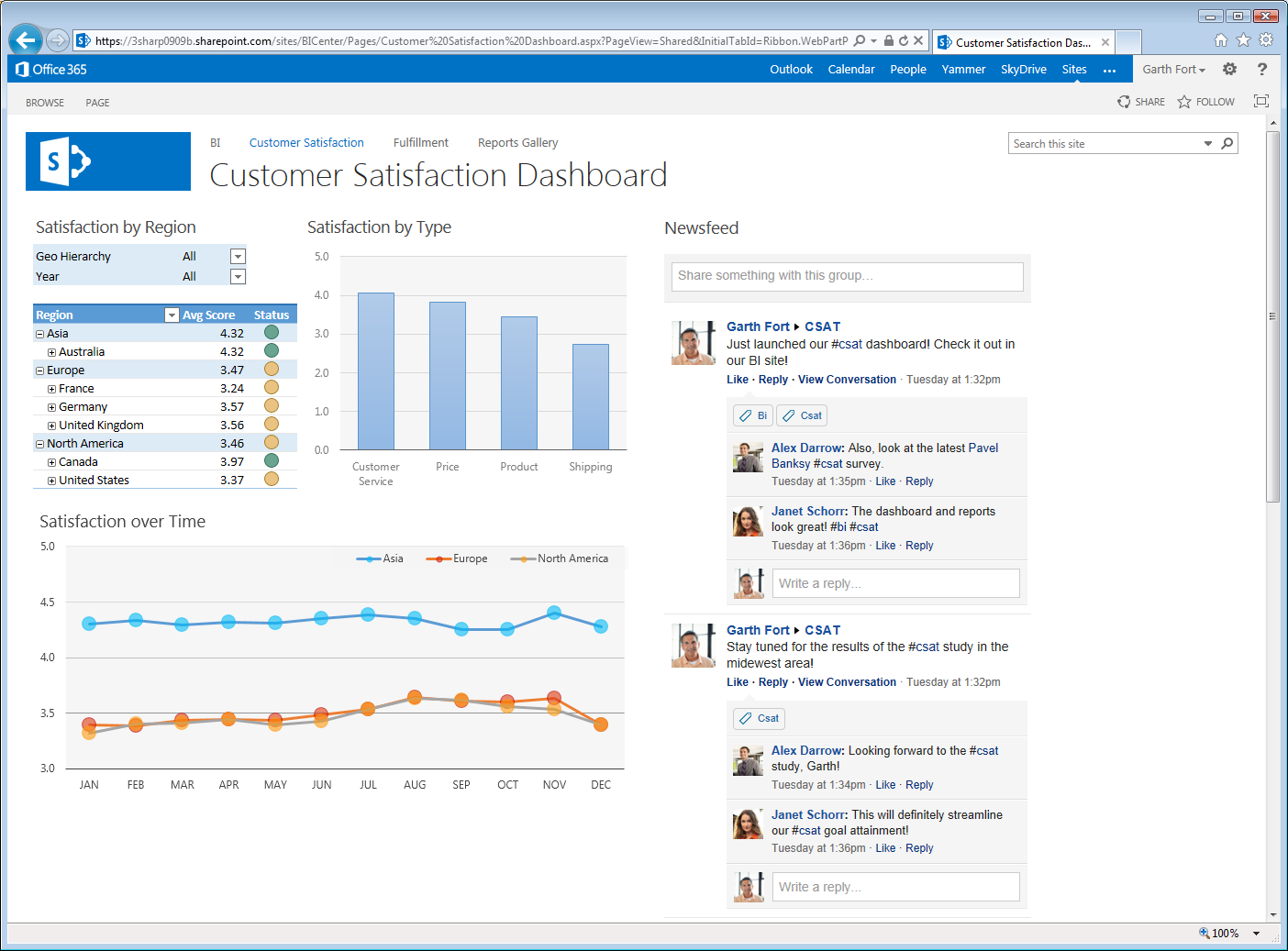
## Perform Customer Satisfaction Dashboard Analysis (as Anne Wallace)

**New Screen**: Customer Satisfaction Report

**On-premise URL**: <http://intranet.contoso.com/sites/BICenter/Dashboards/Customer%20Satisfaction%20Dashboard.aspx>



**Online URL**: https://YourTenant.shareponit.com/sites/BICenter/Pages/Customer%20Satisfaction%20Dashboard.aspx



| **Speaker Notes** | **Steps** |
| --- | --- |
| **Customer Satisfaction Report**  The Customer Satisfaction Report displays **customer satisfaction by region, type and month**. | **Customer Satisfaction Report**   1. In upper navigation, click **Customer Satisfaction**. 2. Note this report displays **customer satisfaction by region, type and month**. |
| **[OPTIONAL] Year and Geography Filters [On-premise]**  **Online Demo NOTE:** The following portion of the demo is unavailable if running the demo in Office 365.  I want to focus closer on the United States satisfaction metrics for the most recent years. I will filter on **Year** first - selecting **All** to show stats for all years.  And then I’ll filter **Geography** on **United States** by first filtering on **North America** and then filtering on United States.  **[End Optional Section for Year and Geography Filters]** | **[OPTIONAL] Year and Geography Filters [On-premise]**  **Online Demo NOTE:** The following portion of the demo is unavailable if running the demo in Office 365.   1. To filter on recent years:    1. Click **Year** filter**.**    2. In the **Select Filter Value(s)** dialog, click **All** check box, and then click **OK**. 2. To filter on United States:    1. Click **Geography** filter.    2. In **Select Filter Value(s)**, expand **North America** filter.    3. Click **United States** check box, and then click **OK**. 3. Note updated charts.   **[End Optional Section for Year and Geography Filters]** |
| **[OPTIONAL] Year and Geography Filters [Online]**  I want to focus closer on the United States satisfaction metrics for the most recent years. I will filter on Year first – removing the check from **2011** to show stats for just 2012.  And then I’ll filter Geography on **United States** by first filtering on North America and then filtering on United States.  **[End Optional Section for Year and Geo Hierarchy Filters]** | **[OPTIONAL] Year and Geography Filters [Online]**   1. To filter on recent years:    1. Click **Year** filter.    2. In the Filter dialog, expand **All**, and remove the check from **2011** check box to display only 2012 metrics.    3. Click **OK**. 2. To filter on United States:    1. Click **Geo Hierarchy** filter.    2. In Filter dialog, expand **All** filter.    3. Remove check from All filter check box.    4. Click **United States** check box, and then click **OK**. 3. Note updated charts.   **[End Optional Section for Year and Geography Filters]** |
| **Satisfaction over Time line graph** and **Satisfaction by Type**  The **Satisfaction over Time** shows the North America grey line is low and I see the **Customer Satisfaction Service** shows a low **Shipping** column.  **Satisfaction by Region table**  In the **Satisfaction by Region table**, I see the red **Status** for **United States**. I’ll expand the **United States** metric to see if I can see any issues with individual states. I see **California** and Texas display a red status, but I see California has the lowest **Average CSAT score** of **2.56.**  I suspect the low Shipping metric and low CSAT score are possibly related issues. | **Satisfaction over Time line graph** and **Satisfaction by Type**   1. In **Satisfaction over Time line chart**, note low orange **North America** line. 2. In **Satisfaction by Type** column chart note low **Shipping** column.   **Satisfaction by Region table**   1. Expand **United States** metric.   **Note**: In the online version you will see a problem with the list of states overlapping the Satisfaction over Time line chart.   1. Note **California** has the lowest **Average CSAT score** of **2.56.** |
| **Social Newsfeeds [On-premise]**  Now I’ll use SharePoint social features to identify key personnel that can address the issue at hand.  The Customer Satisfaction Dashboard page includes a social **Newsfeed.** We use this newsfeed to communicate changes, plans, events, or issues specifically related to customer satisfaction.  I’ll click in **Start a conversation text box** and type **@**in the text box.  When I type @, SharePoint displays the People I’m following.  Since Garth is not in the list of People I’m following, I’ll type **ga** after the @ symbol.  I now see **Garth Fort (Web Marketing Manager)** in the list under **Everyone**.  I’ll press **SPACE** bar, and then type **Please investigate low #C** in text box.  The hash mark (#) indicates a tag, so I can now see all of the tags beginning with C. I’ll just click **#CSAT** in the list and then press Space and complete the message: **scores in California.**  The final message will look as follows:  **@[Garth Fort] Please investigate low #CSAT scores in California.** | **Social Newsfeeds [On-premise]**   1. Note **Newsfeed** on right. 2. In **Start a conversation** text box, type **@**. 3. Note autocomplete on **People I’m Following**. 4. After @, type **ga**. 5. Note other names under Everyone. 6. Click **Garth Fort’s** name in the list. 7. Press **SPACE** and then type **Please investigate low #C.** 8. Note the drop down displays all tags beginning with C. 9. Click **#CSAT** in the list. 10. Press **SPACE**, and then complete the message**:**   **scores in California.**   1. When finished, press **ENTER** or click **Post.**   The final message will look as follows:  **@[Garth Fort] Please investigate low #CSAT scores in California.** |
| **Social Newsfeeds [Online]**  Now I’ll use Yammer social features to identify key personnel that can address the issue at hand.  The Customer Satisfaction Dashboard page includes a Yammer **Newsfeed.** We use this newsfeed to communicate changes, plans, events, or issues specifically related to customer satisfaction.  I’ll click Yammer in the App Launcher and in Yammer I’ll type **@ga** in the What are you working on? text box.  When I type @ga, Yammer displays the people in my organization beginning with Ga (Garth Fort and Garret Vargas)..  I’ll press **SPACE** bar, and then type **Please investigate low #CSAT scores in California** in text box.  When I click Post, I can see the message in the feed and the Csat topic listed below the message.  The final message will look as follows:  **@[Garth Fort] Please investigate low #CSAT scores in California.** | **Social Newsfeeds [Online]**   1. Note Yammer **feed** on right. 2. In Share something with this group text box, type **@**. 3. Note autocomplete on **Type to search for results**. 4. After @, type **g**. 5. Note names in autocomplete. 6. Click **Garth Fort’s** name in the list. 7. Press **SPACE** and then type **Please investigate low #CSAT scores in California** 8. When finished, click **Post.**   The final message will look as follows:   1. **@[Garth Fort] Please investigate low #CSAT scores in California.** |
|  | **On-premise Transition**   1. Close Annew’s Internet Explorer experience. 2. Maximize Garth Fort’s Internet Explorer. |
|  | **Online Transition**   1. Close Annew’s Internet Explorer experience. 2. Open Internet Explorer. 3. Navigate to the BI Center on your tenant: <https://YourTenant.sharepont.com/sites/bicenter> 4. When prompted for log in information use Garth Fort’s credentials:   **User name**: [garthf@YourTenant.onmicrosoft.com](mailto:garthf@YourTenant.onmicrosoft.com)  **Password**: pass@word1 |

## Visio Web Access, Excel Web Access (as Garth Fort)

**NOTE**: You will need to switch to the Internet Explorer logged in as Garth Fort (GarthF) for the next portion of the demo.

**Garth’s beginning Screen**: Personal Newsfeed page

**On-premise beginning URL**: <http://2013-sp/my>

**Online beginning URL**:

<https://www.yammer.com/YourTenant.onmicrosoft.com>

| **Speaker Notes** | **Steps** |
| --- | --- |
| **Personal Newsfeed [On-premise]**  I’m now Garth Fort, Contoso’s Business Manager.  I log into the **Contoso internal site** and click the **Newsfeed** link to open my personal Newsfeed. I see **Anne’s** message in the **Mentions** section. She has concerns regarding California CSAT scores and Shipping metrics.  **Personal Newsfeed [Online]**  I’m now Garth Fort, Contoso’s Business Manager.  I log into the **Yammer** network to open my personal Yammer feed. I see **Anne’s** message.. She has concerns regarding California CSAT scores and Shipping metrics.  **Visio Web Access (Order Fulfillment Status Form)**  The Contoso BI site contains an **Order** **Fulfillment Status form**. This form is a Visio diagram showing the status for Contoso’s fulfillment process. I see in this Visio diagram, that **Shipping** is indeed a concern.  I want to see more about this stage in the Order Fulfillment process.  I’ll click the **Order Fulfillment Status** web part title to open the file in Visio Web Access. Since the Visio diagram is connected to external data, I’ll need to **Allow Refresh** to obtain the latest information.  Now I can click the **Shipping** icon, and on the top navigation, I can click **Shape Info**.  The Shape Info dialog shows the **Avg Delivery Time** is **31** days. That’s a lot of time to deliver products.  I’ll click **Comments** in the top navigation to let Anne know I’m investigating the issue further. I click the **Shipping** icon and **Reply**, and then leave the following message:  **Investigating shipping issues now**  To investigate these issues further, I’ll press **CTRL** and then click the **Shipping** shape icon to open the Reports Gallery.  **Reports Gallery [Online]**  The **Reports Gallery** is a SharePoint document library that contains reports created in Excel.  In the **Reports Gallery,** I’llclick the **Contoso Sales and CSAT Analysis** reportto open it in Excel Services.  **Reports Gallery [On-premise]**  The **Reports Gallery** is a SharePoint PowerPivot library that contains reports created in Excel. I can scroll through the list and see the published Excel charts, graphs, and lists for each workbook.  As I hover over the various **Contoso Sales and CSAT Analysis** charts, I can see them in a larger view.  In the **Reports Gallery,** I’llclick the **Average CSAT Scores** for the Contoso Sales and CSAT Analysis reportto open it in Excel Services.  Excel Web Access supports many workbook interactions directly on the browser, making it an ideal tool for sharing interactive reports and dashboards. The majority of the web representation is identical to the functionality available in the Excel client.  **Excel Services**  In the workbook, I can review the published charts in the **View** section on the right side of the screen by clicking on them.  I’d like to investigate the **Average CSAT for Delivery Methods**, so I’ll click **Average CSAT Scores** pivot chart.  Let me **Filter** by **Quarters** and thenhighlight from **Q3 2011** to **Q3 2012** to get a year view.  **PivotCharts in the Browser**  I see that Shipping is low, so I wonder if it has something to do with the shipping method or the shipping carrier. I’ll do a **Quick Explore** on the **Shipping** bar and drill to **Shipping Method**.  Next Day Air CSAT score looks lowest. I wonder if any specific Shipping Carriers are having issues. I’ll use **Explore** to **Drill to *Shipping Carriers*** and I note the low **Coho Express CSAT Score**.  I can use Excel Web App feature within SharePoint to add more data to a published report. In the **Field** List, I’ll move the **ShippingMethod** field to the **LEGEND (SERIES)** area.  By adding the Shipping Method field to the legend, I can see that the **2 Day Delivery** and **Next Day Air** are the lowest CSAT scores and Coho Express seems to have the most shipping issues. These are our two most expedited shipping options, but yielding the lowest satisfaction scores. Something has surely gone wrong. | **Personal Newsfeed [On-premise]**   1. Open the browser window to **GarthF’s Newsfeed** page. 2. Click **Mentions**. 3. Note **AnneW’s post** regarding investigating the low California CSAT score.   **Personal Newsfeed [Online]**   1. Open the browser window to **GarthF’s Yammer home**page.   https://www.yammer.com/YourTenant.onmicrosoft.com   1. Note **AnneW’s post** regarding investigating the low California CSAT score.   **Visio Web Access (Order Fulfillment Status Form)**   1. Online demo – Navigate to Order Fulfillment Status Form at: <https://YourTenant.sharepont.com/sites/bicenter>/[Order Fulfillment Status](https://3sharpqa002r.sharepoint.com/sites/BICenter/Pages/Order%20Fulfillment%20Status.aspx)   On-Premise demo – Click **Order Fulfillment** tab.   1. Note that this is a **Visio diagram.** 2. Note the **red Shipping** icon. 3. Click the **Order Fulfillment Status** web part title to open the file in Visio Web Access. 4. If prompted for refresh, click **Allow Refresh**. 5. Click **Shipping** icon, and on the top navigation, click **Shape Info**. 6. Note **Avg Delivery Time** is **31 days**. 7. Click **Comments** in the top navigation. Note comments pane on right. 8. If necessary, move the report to the left by clicking and dragging to left. 9. Click the **Shipping** icon. Note the highlighted comments. 10. In the Reply box, type the following message:   **Investigating shipping issues now**   1. Click outside the Reply box to accept the comment. 2. Press **CTRL** and then clickthe **Shipping** shape icon to open the **Reports Gallery**.   **Reports Gallery [Online]**   1. Note the following about the Reports Gallery:  * It’s a document library * Reports were created in Excel  1. Click **Contoso Sales and CSAT Analysis** to open the workbook in Excel Web Services.   **Reports Gallery [On-premise]**   1. Note the following about the Reports Gallery:  * It’s a PowerPivot Gallery * Reports were created in Excel  1. In the Reports Gallery, hover over the various icons of **Contoso Sales and CSAT Analysis** panels. 2. Click **Average CSAT Scores** icon to open the workbook in Excel Web Services.   **Excel Services**   1. In the **View** section on right of page, click the various Views to display the reports. 2. Click **Average CSAT Scores** pivot chart. 3. Under **Filters**, on left of screen, click **Date** to expand the field. 4. Change **Filter** from Months to **Quarters**. 5. Select quarters **Q3 2011** to **Q3 2012.** 6. Note the low CSAT score bar for Shipping in the bar graph.   **PivotCharts in the Browser**   1. Click the **Shipping** bar, and then click the newly displayed magnifying glass icon to use **Quick Explore**. 2. In the **Explore** pop-up, click **Shipping Method**, and then click **Drill to *ShippingMethod***. 3. Click the **Next Day Air** bar, and then click **Quick Explore**. 4. In the **Explore** pop-up, click **Shipping Carrier**, and then click **Drill to *Shipping Carrier***. 5. Note low **Coho Express** CSAT Score. 6. In the right navigation, click **Field List**.     **NOTE**: you may need to scroll to the right and click the Field List icon to show the Field List.   1. Move the field **ShippingMethod** to **LEGEND (SERIES).** |

## Data Analysis in Excel 2013

In this section, you will open the Contoso Sales and CSAT Analysis workbook in Excel to perform various types of data analysis.

| **Speaker Notes** | **Steps** |
| --- | --- |
| I’d like to do further analysis in the Excel client, so I’ll click **Edit in Excel** under **Do More**.    **NOTE**: Because the file is large, opening the workbook in Excel may take some time, especially over a slow connection. If necessary, take time to reiterate what has just happened in the demo:   * Anne Wallace, Contoso President, used Excel 2013 reports in SharePoint to review Sales data and CSAT status. * Anne then used the Newsfeed social feature to leave Garth Fort, the Contoso Business Manager, a message asking him to investigate poor Shipping CSAT Scores in the United States, specifically California. * Garth investigated further by creating a PivotChart using Excel Web App in SharePoint 2013 to compare Sales and CSAT scores and has narrowed his investigation to issues with 2 Day Delivery and Next Day Air. * Now Garth will use Excel 2013 to create further reports outlining the cause of the low CSAT scores in California. | 1. In the **Filters** window, click **Do More** button, and then click **Edit in Excel.** 2. In the **We’re opening your workbook** dialog, click **My document opened successfully** when the workbook opens successfully. 3. Click **Edit Workbook** if prompted.      1. Click **Enable Content**, if prompted. 2. If Security Warning dialog displays, click **Yes**, to **continue with demo.** |
| This is the workbook I edited online. I want to show that the experience is the same on the SharePoint Server, on an Office 365 tenant, and in the Excel client.  **TimeLine**  As you can see on the Sales Analysis tab, I can click the Date slicer and change Months to **Quarters**. I can click **Q1** for **2011** and then pressing the **SHIFT** key, click **Q4** for **2012** and note the updated  **Quick Explorer**  And just like in Excel web access, I can click a cell, and use Quick Explore to Drill into the data. In this example, if I click the Audio cell, I can click Drill To Brand and see the various brands of Audio equipment.  **Shipping and CSAT sheet**  Remember this is the workbook I was using in Excel web access. This is the **Shipping and CSAT** sheet that I was using. In the browser you didn’t see the **Customers with the lowest satisfaction scores** table because it was not published with the table of data. | **Timeline**   1. In Excel, on the **Sales Analysis** sheet, in the **Date** slicer, click **Months**, and then click **Quarters**. 2. On the timeline, click **Q1** for **2011**. 3. Press the **SHIFT** key, and then click **Q4** for **2012**. 4. Note updated tables.   **Quick Explorer**   1. On Sales Analysis sheet, click **Audio**, and then click **Quick Explore**. 2. In the Explore dialog, click **Product**, and then click **Drill To Brand.** 3. Note updated brands for the Audio equipment. 4. Click **Shipping and CSAT** worksheet. 5. Note **Customers with Lowest CSAT Scores**. 6. Note it was not available in SharePoint because it was not published in Excel. |
| **Flash Fill**  The PivotTable data has already been exported as a flattened range of values in the **Customer List** tab. However, the customer address information is all concatenated in one column.  I can use **Flash Fill** to parse data from existing columns, such as filtering the **Customer List** on **Full Address** to identify customers in California with low satisfaction ratings. I’ll flash fill on **State** first. I see in **D4** (containing the full address for first customer) that the customer is from Washington. I click**E4**, type **WA**, and then press **ENTER**. The second customer is from California, so I’ll type **C** in **E5.** Excel suggests a flash fill. I like it so I’ll press **ENTER** to accept.  Want to see that again?  I’ll flash fill **City** now. I click in **F4**, type **Edmonds** for the city listed in Full Address, and then press **ENTER** to accept. Now in **D5**, I type **L** (for La Jolla), note the flash fill and press **ENTER** to accept the flash fill. | **Flash Fill**   1. Click the **Customer List** tab. 2. Note the city and state for the first three **Full Address** entries in the table (Edmonds, Washington, La Jolla, California, and Bellingham, Washington). 3. To flash fill the **State** column:    1. Click in cell **E4.**    2. Type **WA**, and then press **ENTER**.    3. In cell **E5**, type **C**,and then press **ENTER** when Excel shows the flash fill**.** 4. To flash fill on **City:**    1. Click in cell **F4.**    2. Type **Edmonds.**    3. Press **ENTER**.    4. In cell **F5**, type **L** and note flash fill list.    5. Press **ENTER** to accept flash fill. |
| **Quick Analysis**  This looks cool, but what can I do with data not in a PivotTable?  How about a Quick Analysis?  I’ll highlight the data in the table and use the **Quick Analysis** to perform quick calculations such as:   * **count items** * **create charts** **and tables** * **view conditional formats in place** * **apply conditional formats to the table**   The **Tables** option gives me two PivotTable choices. The first PivotTable option shows the number of customers by State, and the second Pivot Table shows number of customers by city.  Using the **Formatting** quick analysis, I can also see any **Duplicate Values** and **Unique Values**.  I’d like to highlight all of the **California** entries, so I’ll click the **Formatting** option, and then click **Text Contains**. I’ll enter **California** in the text box and then click **OK**. All addresses and States cells containing California are highlighted red.  If I click **Charts**, and then point to **Pie**, I can see that California has a significantly large piece of the dissatisfaction pie.  **NOTE:** You will use the following portion of this demo later to show features in the **Inquire** tab.  I’ll click in cell **F4** and type **# of dissatisfied customers** and then press **ENTER**. And in **F5** I’ll type **# in California**.  I’ll enter a count of total dissatisfied customers in cell **G4**:  **=COUNTA(C4:C103)**  I’ll enter a count of only California customers in cell **G5**.  **=COUNTIF(C3:C103, "California")**  Wow! California has over half of the dissatisfied customers in this list. I think I need to start talking with some customers. | **Quick Analysis**   1. To highlight the entire table:    1. Point cursor to upper **left *corner*** of table.    2. When diagonal arrow displays, click mouse button.   **NOTE**: You can also press **CTRL+A** to select the text.   1. C:\Users\robertac\AppData\Local\Temp\SNAGHTML1f7819db.PNGClick the **Quick Analysis** icon on the bottom-right corner of the selected range of cells. C:\Users\robertac\AppData\Local\Temp\SNAGHTML1f79eb6c.PNG 2. To show conditional formatting in place:    1. Click **Formatting** to show formatting options.    2. Point to **Duplicate Values.**    3. Point to **Unique Values.** 3. To apply conditional formatting to identify only California residents:    1. Click **Text Contains**.    2. In the **Text That Contains** popup, in the text box type **CA.**    3. Click **OK**. 4. Note the highlighted California cells. 5. To show PivotTables:    1. Click the **Quick Analysis** icon again.   **NOTE**: You may have to highlight the table again to access the Quick Analysis icon.   * 1. Click **Tables**, and then point to the **two PivotTable options** to show the pop ups, but don’t click on the icons.      1. To view chart options:    1. In the pop-up window, click **Charts.**    2. Hover over **Pie** and note the large chunk for **California**. 2. To add calculations:    1. Scroll to bottom of table.    2. Click in cell D**105,** type **# of dissatisfied customers,** and then press **ENTER.**    3. Click in cell **D106,** type **# in California**, and then press **ENTER**.    4. Click in cell **E105** and enter the following formula:   **=COUNTA(C4:C103)**   * 1. Click in cell **E106** and enter the following formula**:**   **=COUNTIF(C3:C103, "California")** |
| **[OPTIONAL] Suggest Related Data [On-premise]**  Flight delays data is not available in our Contoso database systems. Thanks to **PowerPivot’s Suggest Related Data** feature, I can discover external data in the public domain that might be related to the data in my existing data model. So, let’s see what kind of related data I can discover using this feature.  I see some good data, but I’m really after flight data. I’ll go directly to the Azure Marketplace and search for what I need.  **[End Optional Section for Suggest Related Data]** | **[OPTIONAL] Suggest Related Data [On-premise]**   1. To open PowerPivot, in Excel, on the **PowerPivot** tab, click **Manage**. 2. On the **Home** tab, in the **Get External Data** group, click **From Data Service.** 3. From Data Service list, click **Suggest Related Data**. 4. In **Suggest Related Data** window, if prompted to **enable the Recommendations Service and send data categories to Microsoft**, click **OK**. 5. Note list of **Data Feeds**. 6. Note you’d like to review Flight Delays specifically. 7. Click **X** in upper right corner to close window.   **[End Optional Section for Suggest Related Data]** |
| **Windows Azure Marketplace web site**  I have previously secured a text file displaying US flight delay statistics. I downloaded the data from the **Windows Azure Marketplace web site.** The data is a subset of actual flight delay statistics provided by the U.S. Federal Aviation Administration (FAA) Bureau of Transportation’s Research and Innovative Technology Administration.  I already downloaded a copy of this data earlier, so I’ll use PowerPivot to import the file into my BISM model.  Now, I’ll use **PowerPivot for Excel** to import the data into the existing data model.  **Import a text file of data**  I’ll **Get External Data** from **Other Sources**, and from this long list of **Data Sources** that Excel can import, I’ll click **Text File**.  I double-click the **flight delays text file** to open it, and since this is a tab-delimited text file, I’ll set the **Column Separator** to **Tab(t)**, and note the columns that now display. Finally, I click **Finish** to import the data, and after a successful import, I’ll click **Close**.  I’ll go ahead and double-click the **USFlightDelays** table label and change the name to a friendlier name, **US Flight Delays**.  This table shows **flight dates**, **destinations**, the **number of flights**, and the **number of delayed flights**. | **Windows Azure Marketplace web site**   1. Navigate to the **Windows Azure Marketplace** tab.   [**https://datamarket.azure.com/dataset/oakleaf/us\_air\_carrier\_flight\_delays\_incr**](https://datamarket.azure.com/dataset/oakleaf/us_air_carrier_flight_delays_incr)   1. Note the following about Windows Azure Marketplace purpose:  * Provides flight delay metrics for the US Flight Delays text file * Publically available data * A subset of actual flight delay statistics from FAA  1. Navigate back to the Excel spreadsheet.   **Import a text file of data**   1. On the Excel ribbon, click **PowerPivot** tab, and in the **Data Model** section, click **Manage**. 2. To import the US Flight Delays text file:    1. In **PowerPivot for Excel**, on the **Home** tab, in the **Get External Data** group, click **From Other Sources.**    2. In the **Connect to a Data Sources** dialog, in the **Relational Database** list, select **Text File** (at bottom of list) and click **Next**.    3. In the **Connect to Flat File** dialog, click **Browse**, and in the **Open** dialog, navigate to the USFlightDelays.txt.   **On-premise**: c:\demo\BI-demo.  **Online**: The location you saved the file to when preparing demo content.   * 1. Click the **USFlightDelays.txt** and click **Open**.   2. In the Table Import Wizard, in the **Column Separator** drop down, click **Tab (t)**.   3. Note the imported columns.   4. Click **Finish**.   5. Click **Close** after import completes successfully.  1. To rename the table, double-click the USFlightDelays tab label and type in the following name: **US Flight Delays** 2. Note the following columns: **DateKey,** **Dest, FlightCnt, DelayedFlightCnt.** |
| **Connect to the data model**  I really can’t do much with this data until I’ve connected it to the other data in the model. **Diagram View** shows how all of my tables are interconnected.  I want to see **where** in the US the flights originated and ended and **when** the flights took place. I’ll drag my new **USFlightDelays** table closer to the **Geography** and **Date** tables so making relationships is easier.  I’ll drag the **DateKey** from the **USFlightDelays** table and drop it on the **DateKey** in the Date **table**. This way I can build pivots on dates and associate US Flight Delays data with CSAT Scores and Online Sales data, which are also related to the DateKey.  Now I’ll use the **GeographyKey** to relate the **USFlightDelays** table to the **Geography** table to identify where flights originated and ended. | **Connect to the data model**   1. On **Home** tab, in **View** group, click **Diagram View**. 2. Drag **USFlightDelays** table closer to **Date** and **Geography** tables. 3. In **USFlightDelays** table, click **DateKey** and drag and drop it on the **DateKey** in the **Date** table. 4. In the **USFlightDelays** table, click the **GeographyKey** and drag and drop it on the **GeographyKey** in the **Geography** table. 5. On **Home** tab, in **View** section, click **Data View**. |
| **Adding equations and KPIs**  PowerPivot offers custom formula-like expressions, known as DAX, which define custom calculations in PowerPivot tables (*calculated columns*) and in Excel PivotTables (*measures*).  Using DAX, I’ll create a calculated column to add the **percentage flight delay** for each entry.  I can create a calculated column by clicking in the first cell under **Add Column**. I’ll type the open left bracket ([) and note the possible choices of fields in the workbook to choose. I want **DelayedFlightCnt**, so I’ll double-click it. Now, I’ll type the divisor sign (/) and another open bracket (**[**). I’ll double-click **[FlightCnt]** in the list. When I press **ENTER**, I like how PowerPivot auto fills the equation for me.  I’ll now double-click the column label and type **% Flight Delay**, and then press **ENTER**.  I’ll also sort the **% Flight Delay** column **Largest to Smallest**.  **Create a KPI**  I’d like to create a KPI to show when the % Flight Delays fall below a certain level of satisfaction. I’ll use Autosum to include an Average of the % Flight Delay.  Now I’ll **format** the Flight Delay % as a **percentage**.  Now I’ll **Create the KPI.** I’ll set the **Absolute Value** to **1** as the upper range. I’ll set the **low threshold** to **0.03** and the **high value** to **0.04**. These status thresholds indicate that any flight delays below 3% are in the green zone, and anything above 4% is in the red. Everything in between is yellow.  I can drag this slider left and right to expand the threshold and see more data.  **NOTE**: Feel free to customize this section of the demo according to presentation duration and business requirements. | **Adding equations and KPIs**   1. To add a calculated column:    1. Click first empty cell under **Add Column**.    2. Type **=** and note the cursor is now in **formula bar.**    3. Type **[** and note the list of possible choices in the workbook to choose from.    4. Double-click **[DelayedFlightCnt]** in list.    5. Type **/[.**    6. Double-click **[FlightCnt]** in list.    7. The following equation is now in the formula bar:   **=[DelayedFlightCnt]/[FlightCnt]**   * 1. Press **ENTER** to accept formula.   Note the formula results are automatically filled down the column.   1. To **rename** the column: 2. Double-click the **CalculatedColumn1** column label to highlight it. 3. Type **% Flight Delay.** 4. Press **ENTER** 5. To **sort** the table by % Flight Delay: 6. Click a cell in the **% Flight Delay** column. 7. In the **Sort and Filter** group, click **Sort Largest to Smallest**.   **Create a KPI**   1. To create a KPI based on flight delay percentage: 2. Click in first empty cell at bottom of **% Flight Delay** column.   C:\Users\robertac\AppData\Local\Temp\SNAGHTML1473a426.PNG   1. On the Home tab, in the **Calculations** group, click **AutoSum**, and then click **Average**. 2. Point at updated Average of % Flight Delay and note values in pop up dialog. 3. To **format** the Average of % Flight Delay as a percentage, on the **Home** tab, in the **Formatting** group, click the **%**. 4. To create the KPI: 5. Click the **Average of % Flight Delay** calculation, and then in the **Calculations** group, click **Create KPI**. 6. In the Key Performance Indicator (KPI) dialog, click **Absolute value** radio button and replace resulting value with **1**. 7. In **Define status thresholds**, click and slide the low threshold marker to **0.03** and slide the high threshold marker to **0.04**.   **NOTE**: You can adjust the width of the colored portions of the threshold slider by clicking and sliding the bi-directional arrows on either side of the bar.   1. Click the ribbon graphic that ensures the green is to the left (since lower percentage of delays is better).      1. Click **OK** to close the dialog. |

| **Speaker Notes** | **Steps** |
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| **Authoring a Power View Report in Excel**  I think I have a data model rich enough to address Anne’s Shipping and California CSAT concerns. I’ll use Excel Power View to build a report to present to her. An Excel Power View report provides a single location to offer up a variety of charts, graphs, and maps to view the data.  First, I’ll **Switch to the Workbook** and then on the **Insert** tab, I’ll click **Power View**. I’ll double-click the sheet name and change it to **CSAT Analysis** and then click the link titled **Click here to add a title** and title the Power View report **CSAT Analysis.**  The **Power View Fields** are on the right of the page.  **Create a bar chart**  I’ll add a bar graph displaying **Average CSAT Score by SatisfactionIndexType,** and **Shipping Method**.  I’ll start the bar chart by clicking the **StatisfactionIndexType** checkbox in the **CSAT Categories** table.  I’ll add the **Value** field from the **Average CSAT Score** hierarchy in the **CSAT Scores** table.  Now, I’ll add the **ShippingMethod** field from the ShippingMethod table, to the legend.  And to create the bar chart, I’ll click the table and from **Visualizations** on the **Design** tab, I’ll click **Bar**.  I can easily resize and move the graphic as needed.    **Create a scatter chart**  Now, I’ll add a scatter chart comparing and contrasting **DelayedFlightCnt, Average CSAT Score, and Flight Delay % by State**. To begin the scatter chart, I’ll expand **USFlight Delays** and click the **DelayedFlightCnt** check box.  Now I’ll click **Scatter** in the **Visualizations**. I’ll move the scatter chart to the bottom of the page and resize it to fit across the page.  The scatter chart offers me a variety of areas to display fields. The delayed flight count is currently the X Value. I’ll add the **CSAT Scores** to the **Y Value** and the **State** field to the **Details**. This provides a label for each circle on the plot. The final area to complete is the **Play Axis**. I’ll select to play the scatter chart on the **Year** form the Geography.  Now I click **Play** and the scatter chart displays the change in CSAT scores by delayed flights over the years.    **Visual Filtering with Slicers**  A slicer is simply a visual filter. I’m going to include visual filtering using Continent and ShippingCarrier slicers.  First, I’ll drag the **Continent** field from the **Geography** table and drop it to the left of the bar chart.  I’ll select **Slicer** from the Slicer group on the **Design** tab.  Now, I’ll add the **ShippingCarrier** field as a slicer.  **Previewing the Power View Report**  I can see in the bar graph that Shipping is low and specifically **Next Day Air** and **2 Day Delivery**.  I want to narrow my view to **North America.**  I’ll click **Play** on the scatter chart and I can see California CSAT reducing over time.  Now I can click through the **Shipping Carriers**, and then I’ll click Play on the scatter chart to see how the carriers are performing.  If I click back on Blue Yonder Fast, and then click the California bubble, I can see the beginning bubble is higher than the final bubble. I’ll click play and watch the significant decrease in CSAT.  Delayed Flight Counts are definitely playing a part in low CSAT scores in California. I can also see in this report that Shipping Carriers do have a role in the low CSAT scores. I’m ready to report my findings to Anne. | **Authoring a Power View Report in Excel**   1. Click **Switch to Workbook** icon in upper left corner to return to Excel workbook.   C:\Users\robertac\AppData\Local\Temp\SNAGHTML1f945b6d.PNG   1. On **Insert** tab, in **Reports** group, click **Power View**. 2. Rename the **Power View** sheet, by double-clicking on the sheet name and changing Power View to **CSAT Analysis**. 3. To add a title to the report, click the link titled **Click here to add a title** and type in **CSAT Analysis.**   **Create a bar chart**   1. To add **CSAT Categories**:    1. In the **Field List**, expand the **CSAT Categories** table.    2. Click **StatisfactionIndexType** check box. 2. To add the **Average CSAT Score** to the table:    1. In the **Field List**, expand the **CSAT Scores** table.    2. Expand the **Average CSAT Score** KPI.    3. Click **Value** check box. 3. To add a **ShippingMethod legend**:    1. In the **Field List**, expand the **ShippingMethod** table.    2. Click **ShippingMethod** check box. 4. To create the bar chart, click the table and on the **Design** tab in the Switch **Visualizations** section, click **Bar Chart**. 5. From the Bar Chart list, click **Clustered Bar.** 6. Resize the bar chart as needed.   **Create a scatter chart**   1. Click on the Power View report. 2. To begin the scatter chart, in the **Field List**, expand the **USFlightDelays** table and click the **DelayedFlightCnt** check box. 3. To create the scatter chart, click the new table and on the **Design** tab, in the **Switch** **Visualizations** group, click **Other Charts**. 4. In the Other Chart menu, click **Scatter**. 5. Move scatter chart to bottom of Power View report. 6. Resize scatter chart to fit across bottom of the report. 7. To add the remaining data, drag the following fields and drop them on the areas listed:  |  |  |  | | --- | --- | --- | | **Table in Field List** | **Field** | **Area** | | CSAT Scores | Average CSAT Score - Value | Y Value | | USFlightDelays | % Flight Delay | Size | | Geography | State | Details | | Date | Year | Play Axis |  1. To play the scatter chart, click **Play** button beside Year field in scatter chart.   **Visual Filtering with Slicers**   1. To add the Continent slicer:    1. In the Power View Fields, drag **Continent** field from **Geography** table and drop on the report.    2. With the newly added **Continent** field selected, from the **Design** tab in the **Slicer** group, click **Slicer**. 2. To add the ShippingCarrier slicer:    1. In the Power View Fields, drag **ShippingCarrier** field from **ShippingCarrier** table and drop on the report beside the Continent slicer.    2. With the newly added **ShippingCarrier** field selected, from the **Design** tab, in the **Slicer** group, click **Slicer**.   **Previewing the Power View Report**   1. Note low 2 Day Delivery and Next Day Air for Shipping. 2. In **Continent** slicer, click **North America**. 3. Click **Play** on the scatter chart and note the California CSAT reducing over time. 4. In Shipping Carrier, click **Blue Yonder Fast**, and then click **Play** on scatter chart. 5. Click Bar **Blue Yonder Fast** in the ShippingCarrier slicer. 6. Click **California** bubble on the scatter chart. 7. Note the relationship between the start bubble and the final bubble. 8. Click **Play** and note California’s decreasing CSAT over time.   **NOTE**: Feel free to customize this section of the demo to highlight the powerful visualizations of Power View |

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| **The final report will look as follows.** |

## Validate Workbook with Inquire and Share (as Garth Fort)

| **Speaker Notes** | **Steps** |
| --- | --- |
| **Excel Inquire**  Excel allows me to use the **Inquire** tab to analyze the workbook and formulas, check audit trail, and check for compliance. I need to save the file first, and then on the **Inquire** tab, I can click the **Workbook Analysis**, and then pick the items I want to analyze.  Now I’ll export the file, **Load the Export File** when complete, and note the formulas added to the **Flight Delay** table. | **Excel Inquire**   1. Click **File** in the top navigation. 2. In the Info window, click **Save As**. 3. In Save As window, click **Computer**, and then click **Browse**. 4. In the Save As dialog, save the file as **Contoso Sales and CSAT Analysis – Copy.** 5. On the **Inquire** tab, in the **Report** group, click **Workbook Analysis**. 6. Place a check in the following:  * **Hidden Sheets –** under Workbooks * **With numeric values –** under Formulas * **With textual constants –** under Formulas * **Named Items**  **-** under Ranges * **Warnings,** if any warnings are in the workbook  1. Click **Excel Export**. 2. In the **Save As** dialog, keep default File Name and click **Save**. 3. When the export is complete, click on **Load Export File**. 4. Click through the tabs. 5. On the **Numeric Formulas** tab, note the formulas added to the Flight Delay table. 6. Close the Analysis workbook. |
| **Share Workbook in SharePoint**  Now I know a cause of California’s poor **shipping performance KPI** (high percentage of delayed flights).  I’ve used Excel to perform a **Workbook Analysis** to identify any risks.  During the process, I’ve enriched the **workbook data model** by mashing up an external data source, and adding business metrics like **custom measures** and **KPIs**.  This workbook and the contained data model need not stay confined within my PC. In fact, others in my organization might want to leverage this enhanced data model to create new reports of their own, so I would like to share it with others in SharePoint. Additionally, I could send this workbook over to our IT department, who can extract the data model and convert it into a Business Intelligence Semantic Model (BISM) using Visual Studio and SQL Server Analysis Services for an even more scalable and robust solution.  Now I’ll save the workbook to Contoso’s BI SharePoint Reports Gallery document library, so others on my team can see the report.  The workbook looks identical here in Excel Services as it did earlier in Excel client application. | **Share Workbook in SharePoint**   1. To publish the Power View Report to SharePoint. 2. In Excel, on the **File** tab, click **Save As**. 3. **[On-premise]** In the **Save As** window, under **Places**, click **SharePoint**, and then click **Browse**.   **[Online]** In the Save As window, under Places, click the SharePoint icon for your Office 365 tenant, and then click **Browse**.   1. In the Save As dialog, click **Browser View Options**. 2. In Browser View Options, click **Sheets** in drop down. 3. In list of sheets, click **All Sheets**, and then click **OK.** 4. In Save As dialog, navigate to the **Reports Gallery**, if not selected by default**.**   **On-premise:**  http://intranet.contoso.com/sites/bicenter/PowerPivotGallery/Forms/Gallery.aspx  **Online:**  https://YourTenant.sharepoint.com/sites/bicenter/Reports%20Gallery/Forms/AllItems.aspx   1. Click **Save** to upload the workbook from Excel to SharePoint report gallery. 2. Browse to the **Reports Gallery** (by switching back in the active browser window).   **On-premise:**  http://intranet.contoso.com/sites/bicenter/PowerPivotGallery/Forms/Gallery.aspx  **Online:**  https://YourTenant.sharepoint.com/sites/bicenter/Reports Gallery/Forms/AllItems.aspx   1. If needed, click Internet Explorer **Refresh (F5)** to refresh the browser. 2. Note the newly uploaded workbook in the library view. 3. Click on the file name to open the document in Excel Services. 4. Click on all the document worksheets one by one at the bottom of the window to show contents, including the Power View sheet. |

| **Speaker Notes** | **Steps** |
| --- | --- |
| **[OPTIONAL] Export to PowerPoint**  **Online Demo NOTE:** The following portion of the demo is unavailable if running in Office 365.  If I create a Power View report in SharePoint, I can use the **Export to PowerPoint** option to create a slide presentation of the report.  It is as simple as creating the report and then clicking **Export to PowerPoint** from the **File** menu.  I’ve already created a Power View report in SharePoint. I’ll open that file and show how easy it is to create the PowerPoint presentation.  Exporting a Power View report from SharePoint to PowerPoint is just a matter of a few clicks.  You can save the PowerPoint file anywhere. As long as it can access the Power View report on the SharePoint server, the Power View reports in PowerPoint are interactive.  Here is the exported report in PowerPoint. The report isn’t a static image – it’s fully functional, right inside of PowerPoint, too.  **[End Optional Section for Export to PowerPoint]** | **[OPTIONAL] Export to PowerPoint**  **Online Demo NOTE:** The following portion of the demo is unavailable if running in Office 365.   1. In SharePoint navigate to the Reports Gallery.   **http://intranet.contoso.com/sites/BICenter/PowerPivotGallery**   1. Locate the **Satisfaction Index Analysis** report in the list. 2. Note this is a Power View report created in SharePoint. 3. Click the Satisfaction Index Analysis report to open it. 4. From **File** menu, click **Export to PowerPoint**. 5. On the Power View dialog, click Save when the export is complete. 6. In the **Save As** dialog, in the **File name** text box type **CSAT Analysis for Anne**, and then click **Save**.   **[End Optional Section for Export to PowerPoint]** |
| **Close out with a message to Anne [On-premise]**  I think I’ve got a pretty compelling story for Anne now.  I have a PowerPivot worksheet for her to review, I have a Power View report that I’ve uploaded to SharePoint. I’ll let her know about both reports via a post in the **Newsfeed** on the **BI CSAT page**. | **Close out with a message to Anne [On-premise]**   1. Switch to the **Customer Satisfaction** page, in Garth’s browser session.   On-premise:  <http://intranet.contoso.com/sites/BICenter/Dashboards/Customer%20Satisfaction%20Dashboard.aspx>   1. In the Newsfeed section, click **Add a reply**, type the following and then press **ENTER**.   **@AnneW, See Power View report in the Report Gallery for Shipping Issues results!** |
| **Close out with a message to Anne [Online]**  I think I’ve got a pretty compelling story for Anne now.  I have a PowerPivot worksheet for her to review, I have a Power View report that I’ve uploaded to SharePoint. I’ll let her know about both reports via a post in the **Newsfeed** on the **BI CSAT page**. | **Close out with a message to Anne [Online]**   1. Switch to the **Customer Satisfaction** page, in Garth’s browser session.   https://YourTenant.sharepoint.com/sites/BICenter/Pages/customer satisfaction dashboard.aspx   1. If Log in to Yammer displays, click the link and log in with Garthf’s credentials:   Email Address: [Garthf@YourTenant.onmicrosoft.com](mailto:Garthf@YourTenant.onmicrosoft.com)  Password: pass@word1   1. In the Yammer feed section, click **Write a reply**, type the following, and then click **Reply**.   **@AnneW - See Power View report in the Report Gallery for Shipping Issues results!** |
| **Summary**  In this demo of SharePoint 2013 BI, we have shown that the new BI features are powerful and flexible. With just a few clicks, users can analyze large amounts of data from various sources, visually explore that data, and effortlessly present and share reports - all within the familiar environment of Microsoft Excel 2013 and SharePoint 2013. |  |

# Reset Instructions

1. Close all browser windows and Excel files. Do not save changes.
2. Navigate to and log into the BI demo home page as the admin:

**On-premise:**

<http://intranet.contoso.com/sites/bicenter/>

User name: **contoso\admin**

Password: **pass@word1**

**Online:**

https://YourTenant.sharepoint.com/sites/bicenter/Reports%20Gallery/Forms/AllItems.aspx

Use the User Name and Password credentials established when you set up your tenant.

1. Remove uploaded workbook:
2. Navigate to the Reports Gallery.

**On-premise:**

http://intranet.contoso.com/sites/bicenter/PowerPivotGallery/Forms/Gallery.aspx

**Online:**

https://YourTenant.sharepoint.com/sites/bicenter/Reports%20Gallery/Forms/AllItems.aspx

1. Click beside the **Copy of Contoso Sales and CSAT Analysis.xlsx** to select the file.
2. On the **Files** tab, click **Delete Document.**
3. When prompted to **send the item(s) to the Recycle Bin**, click **OK**.
4. Reset Contoso Order Fulfillment Form Visio file (remove comments)
5. In Internet browser, navigate to the Contoso Order Fulfillment Status form.

**On-Premise**:

[http://intranet.contoso.com/sites/bicenter/ Dashboards/Order%20Fulfillment%20Status.aspx](http://intranet.contoso.com/sites/bicenter/dashboards/order%20fulfillment%20form.aspx)

**Online**:

https://YourTenant.sharepoint.com/sites/BICenter/Pages/Order%20Fulfillment%20Status.aspx

1. Click **Order Fulfillment Status** web part title to open the Visio diagram in Visio web access.
2. In top navigation, click **Comments**.
3. Click garthf’s **Investigating shipping issues, now** message.
4. Click the **X** beside the message to delete it.
5. Reset CSAT Newsfeed [**On-Premise**:]
6. Open Internet browser, and login to the BICenter CSAT page as AnneW.

<http://intranet.contoso.com/sites/BICenter/Dashboards/Customer%20Satisfaction%20Dashboard.aspx>

1. On the CSAT page, point at the **Please investigate low #CSAT scores**… message, and then click the **X** for **Delete this conversation**.
2. When Get rid of this conversation? displays, click **Delete it**.
3. Exit **Internet Explorer.**

**Remove Garthf’s Mentions [On-Premise]**

1. Open Internet browser, log into Garth Fort’s Newsfeed.

<http://2013-sp/my/default.aspx>

1. On the Newsfeed page, click **Mentions**.
2. On the **Please investigate low #CSAT scores…** message, click **Show Conversation**.
3. When prompted to **…remove it from your feed?** click **Delete it**.
4. Exit Internet Explorer.
5. Reset CSAT Newsfeed [Online]
6. Open Internet browser, and login to Yammer page as AnneW.

https://www.yammer.com/YourTenant.onmicrosoft.com

1. On Annew’s Home page, click the **More** link below the **Please investigate low #CSAT scores**… message, and then click **Delete**.
2. When Are you sure you want to delete this message? displays, click **OK**.
3. Exit **Internet Explorer.**

# Troubleshooting Yammer app Log in/Sign in issues.

If Yammer app Sign in is failing, add the following sites into your Trusted Sites list and restart the session.

* https://login.microsoftonline.com
* https://\*.sharepoint.com
* https://\*.yammer.com
* [https://\*.assets-yammer.com](https://*.assets-yammer.com)

See [SharePoint Server 2013 known issues](http://office.microsoft.com/en-us/help/sharepoint-server-2013-known-issues-HA102919021.aspx) for further details

The Yammer app log in will fail for the following reasons:

**Using incorrect log in credentials** - The Yammer app will encounter log in issues if you’ve logged into the Yammer network as a different person then the one you are using in the SharePoint tenant. For instance, logging into Yammer network as Garthf, but logging into SharePoint tenant as Katiej will cause log in issues when the Yammer app loads on a SharePoint page. You will need log out of KatieJ’s instance of SharePoint, log into the Yammer network as Garthf, and then log out of the network before using KatieJ’s credentials in SharePoint.

**Logging into the incorrect Yammer network** - When the Yammer app is added to a page, a Yammer network name is used to pull in the feed. Typically, this Yammer network name is the same as the SharePoint tenant name. If for some reason a different Yammer network name is used for the Yammer app and you use the SharePoint Tenant name, a Join Network dialog will display. The Join Network window will indicate which Yammer network the Yammer app is using.

**Example**: If the SharePoint tenant name is SPDemo09, but the Yammer app is pointing to the SPDemo05 Yammer network and you log in to the Yammer app using SPDemo09, log in will fail.

To log in to the correct network with the correct credentials:

1. Sign out of SharePoint tenant and close browser session.
2. Restart browser and log in to [https://www.yammer.com](https://www.yammer.com/%3ctenantName%3e.onmicrosoft.com).
3. If you are taken to an existing Yammer Network, click Accounts in upper right, and then click Log out.
4. If you are taken to a “Log in to the <YAMMER NETWORK NAME> Network dialog, in upper right corner, click **Return to yammer.com**.
5. Close all instances of the browser, even instances not used in the demo.
6. Restart browser and log in to SharePoint tenant and try to access the page with the Yammer app.
7. In the Yammer app, click **Log in with Yammer**.
8. In the address bar of the Log in dialog, note the Yammer network being used.

[https://www.yammer.com/**<YammerNetwork>.**onmicrosoft.com/dialog/](https://www.yammer.com/%3cYammerNetwork%3e.onmicrosoft.com/dialog/)....

1. In the Yammer Log in dialog, enter credentials used to log into the SharePoint tenant:
2. Click **Log In**.

**NOTE**: A yellow “Do you want Internet Explorer to remember this password” message will briefly display and then go away. This is known behavior.