

# Big Wins with "Business Intelligence Lite": High Value, Low Effort Solutions

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1

## Business intelligence (BI)

- Tapping into business data
- Presenting that data

2

## Business intelligence (BI)

- Tapping into business data
  - Business Data Connector (BDC)
  - Notoriously difficult to work with
- Presenting that data
  - Excel Services
  - Reporting
- Expensive & complex
  - Microsoft Office SharePoint Server 2007 Enterprise
  - Third party tools

3

## Business intelligence lite

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4

## Business intelligence lite

- Tapping into business data
  - Moving "file based" (Excel / Access) data to SP
- Presenting that data
  - Relying on Excel and Access
- Simple
  - Assuming you have Excel & Access skills
- "Free"
  - Most users have the clients already
  - Windows SharePoint Services v3

5

**Excel & Access → SharePoint**

## Why SharePoint instead of Excel?

- "One version of the truth"
  - Similar to an Excel workbook in a shared folder
- Multiple users can edit concurrently
  - Not possible with Excel
- Columns and controls
  - e.g. drop-down lists and date pickers
- Workflow around item additions & changes
- Version history of "rows" (SharePoint list items)
- "Row" (item) level security
  - Who can see/edit each row

7

## Move Excel data to a list

- Select list in Excel
  - Insert → Table
  - Table Tools \ Design Ribbon → Export
    - You must have Create List permission for site
- OR
- Site Actions → Create → Import Spreadsheet

8

## Move Access data to a list

- Open table in Access
- External Data → Export SharePoint List
  - Copies table to SharePoint

OR

- External Data → Move to SharePoint
  - Moves the table to SharePoint
  - Creates a linked table to the SharePoint list
  - The database continues to work, but is now storing its data in SharePoint

9

## Move data to SharePoint lists

- Why move shared databases to SharePoint
  - "One version of the truth"
  - Multiple users can edit concurrently
- BI Lite Question:  
What data currently exists in Excel or Access that can be moved to SharePoint?

10

## Move data to SharePoint lists

- Why move shared databases to SharePoint
  - "One version of the truth"
  - Multiple users can edit concurrently
  - Columns and controls
    - e.g. drop-down lists and date pickers
  - Alerts & workflow around item additions & changes
  - Version history of rows (now SharePoint items)
  - Recycle Bin for deleted item recovery
  - Row (item) level security
- BI Lite Question:  
What data currently exists in Excel or Access that can be moved to SharePoint?

11

## Move data to SharePoint lists

- Recommendations
  - Create & modify the views you need
    - Columns
    - Links to "edit item" command and edit menu
  - Watch out for which column becomes the "linked" field (Title by default). This is the first "Text" column which may or may not be what you really want.
  - Take the time to create the list "manually" then copy and paste the data into the datasheet view.
    - Allows you to name fields "better" than current state
    - Configure properties such as Description and Required
    - Choose additional data types & controls
    - Determine which field will become the "linked" field

12

## SharePoint → Excel & Access

### The datasheet view

- Actions → Edit in Datasheet
  - Requires Office web parts (2003 or 2007)
- Benefits
  - Easy editing of multiple columns/rows
  - Copy/paste
- Useful links in right-hand task pane
  - TIP: Train your users to expand the task pane!
  - TIP: The "Print With Excel" button is the "only" (headache-free) way to print a wide SharePoint list

## Working with the list in Access

- Actions → Open with Access
- Can append records to Access linked table
  
- External Data → Work Offline
  - Synchronize updates SharePoint List
  - Work Online returns to online state
  
- BI Lite Question:  
Which multi-user databases could benefit from offline access?

15

## Working with the list in Access

- Forms
- Queries
  - Action queries to delete, update records
- Reports
- Mail merge

16



## Analyze list data with Excel

- Actions → Export to Spreadsheet
- Create PivotTable or PivotChart
  
- In datasheet view, use Excel commands in the right-hand task pane

17

## Analyze list data with Excel

- Save Excel file
  
- Refresh data
  - Context menu
  - Table Tools \ Design Ribbon
- Refresh Pivots
  
- Tip: Save Excel file to a document library in the same site (rather than a file share)

18

## Sales pipeline example

- Requirements
  - Sales opportunity, value, "forecast" of closing
  - Secure so each sales person's data is "private"
  - Management can see all sales data to forecast revenues and cash flow
- Current state
  - Each sales person keeps track of data in separate Excel worksheets
  - Worksheets are submitted each Friday
  - Worksheets are combined and delivered to execs
  - Execs are "in the dark" until late Friday

19

## Sales pipeline example

- List with columns for data points
- Subfolders for each sales person
  - Yes, lists can have folders: Advanced Settings
  - Each folder is secured for that sales person
- Management view is a "flat" view
  - View settings: Folders → "Show all items without folders"
  - Grouped by salesperson
  - This view is exported to Excel for analysis
- Management can now look into forecasts in real time

20

## Workarounds

- Excel → Access
- Access → Excel
- Scheduled task to run Access & update data in SharePoint

21

## Next-level "BI Lite" steps

## Alerts and Workflows

- ▶ SharePoint alerts
  - ▶ The under-discoverable “Alert by View” feature
- ▶ SharePoint Designer workflows
  - ▶ Richer notifications (emails) – easier control of text

23

## Excel Without Excel

Excel Services

## Excel Services In A Nutshell

- Configure trusted locations
- Save worksheet to a trusted location
- If worksheet contains data connections
  - Save data connection and configure trusted location
- Excel Services renders worksheet in browser
- Rich but not complete functionality
  - Pivot tables but no drill-down
  - Parameters but not fully write-enabled
  - If you expect to rely heavily on Excel Services, know it's strengths and limitations. No third-party extensions (Microsoft intellectual property)

25

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26

## BI Lite

- Data
  - Out of "shared" and individual worksheets and databases and into SharePoint lists!
- Immediate benefits
  - Single authoritative source of data
  - Multi-user capability (unlike Excel)
  - Alerts, RSS, item-level security, recycle bin
- Working with data
  - Access: forms, reports
- Analysis
  - Excel Pivot Table & Pivot Chart reports

27