

Configuring Project Server 2007 with Excel Services 2007

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Prerequisites

This document assumes that you have already done the following tasks:

1. Installed Microsoft Office SharePoint Server 2007 (MOSS)
 - a. Started the following two services:
 - i. Excel Calculation Services
 - ii. Office SharePoint Server Search
2. Installed Microsoft Office Project Server 2007 (on the same server as above)
 - a. Started the following service:
 - i. Project Application Service

Start services in the table below:

Service	Comment	Status
Document Conversions Launcher Service		Stopped
Document Conversions Load Balancer Service		Stopped
Excel Calculation Services		Started
Office SharePoint Server Search		Started
Project Application Service		Started
Windows SharePoint Services Search	Required on Farm, not running	Stopped
Windows SharePoint Services Web Application		Started

3. Created a Shared Service Provider

Shared Services Provider successfully created

All shared services have been successfully created and configured! These shared services include:

- Project Server Shared Service
- Business Data Catalog
- Office SharePoint Server Search
- Excel Services
- User Profile Application
- Session State

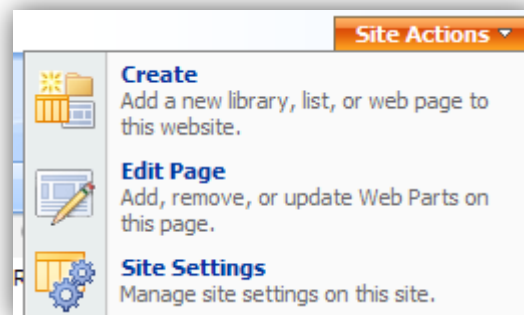
Finished Product

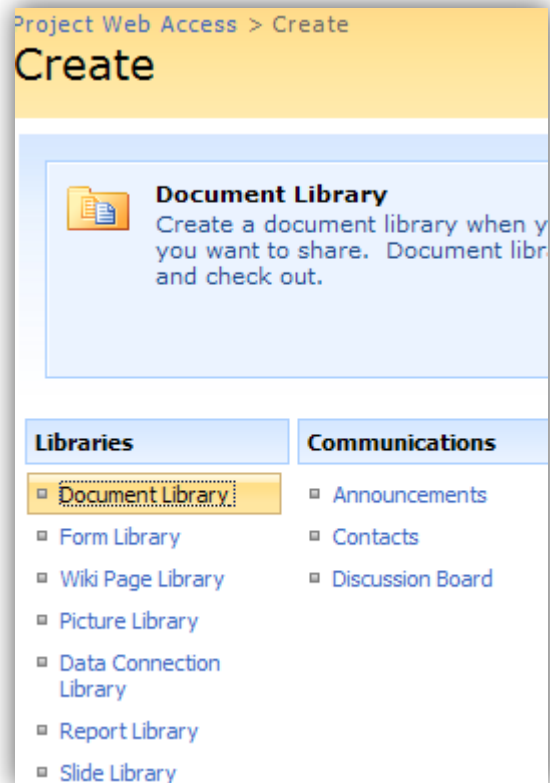
When you are finished, you will have a report that looks like this with your Project Web Access (PWA) site:

Row Labels	Column Labels				2006 Total
	2006 Quarter1	2006 Quarter2	2006 Quarter3	2006 Quarter4	
Allen Tony	176	24			200
Barker Rob		161	272	314	747
Berry Jo			7	1	8
Budget Capital				0	0
Budget Expense				0	0
Daly Jim			80	88	168
DBA				408	408
Generic Local Resource	210	1,636	792	1,048	3,686
Kahn Wendy		4			4
Kotas Jan	148	1,091	1,065	1,622	3,926
Lee Mark				36	36
Nixon Toby				76	76
Osborn Stu	104	764	1,196	1,282	3,346
Process Engineer		187	221	120	528
Purcell Sean			80	171	251

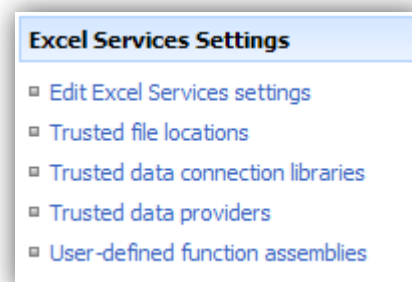
The following describes the step by procedure to configure a “bridge” between Project Server and Excel Services:

1. Go to newly created PWA site, go to Site Actions -> Create

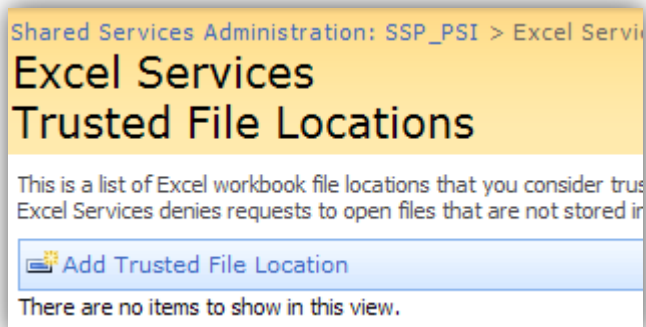


2. Select **Document Library**3. Give the library a name for instance **Excel Reporting Templates**, ensure the **Microsoft Office Excel spreadsheet template** is selected. Click **CREATE**.

- 4.
- Copy the url of the Document Library, for instance:
<http://chrisfie00/DemoDB/Excel%20Reporting%20Templates/>
 - Go to the Shared Service Provide (SSP) Administration page
 - Click on **Trusted file locations**



5. Click on **Add Trusted File Location**



6.
 - Paste the URL of the document library created earlier in the Address field.
 - Check **Children trusted** if you want

Address
The full Windows SharePoint Services location, network file share or Web folder address of this trusted location.

Location Type
Storage type of this trusted location:
 Windows SharePoint Services
 UNC
 HTTP

Trust Children
Trust child libraries or directories.
 Children trusted

Description
The optional description of the purpose of this trusted location.

7. Under Calculation Behavior Select **Automatic**

Volatile Function Cache Lifetime
The maximum time (in seconds) that a computed value for a volatile function is cached for automatic recalculations.

Valid values: -1 (calculated once on load); 0 (always calculated); from 1 through 2073600 (24 days).

Workbook Calculation Mode
The calculation mode of workbooks in Excel Calculation Services. All other settings except the File setting override the workbook settings.
 File
 Manual
 Automatic
 Automatic except data tables

- 8.
- Under External Data -> Allow External Data, select **Trusted data connection libraries and embedded**
 - Uncheck **Refresh warning enabled**
 - Click OK button at the bottom of the page

Allow External Data

Allow data connections to be processed from:

- None
- Trusted data connection libraries only
- Trusted data connection libraries and embedded

Warn on Refresh

Display a warning before refreshing external data for files in this location.

- Refresh warning enabled

Stop When Refresh on Open Fails

Stop the open operation on a file in this location under the following circumstances: The file contains a Refresh on Open data connection and the file cannot be refreshed while it is opening and the user does not have an Open user right to the file.

- Stopping open enabled

External Data Cache Lifetime

The maximum time (in seconds) that the system can use external data query results.

9. You should now have the following page

Shared Services Administration: SSP_PSI > Excel Services Tr

Excel Services Trusted File Locations

This is a list of Excel workbook file locations that you consider trustworthy. Excel Services denies requests to open files that are not stored in one of

[Add Trusted File Location](#)

Address	Location Type	Trust Children
http://chrisfie00/DemoDB/Excel%20Reporting%20Templates/	Windows SharePoint Services	Yes

- 10.
- Go back to your PWA site; go to Site Actions -> **Create**
 - Select **Data Connection Library**

Libraries

- [Document Library](#)
- [Form Library](#)
- [Wiki Page Library](#)
- [Picture Library](#)
- [Data Connection Library](#)
- [Report Library](#)
- [Slide Library](#)

11.
 - Enter a name, for instance *Excel Reporting Template Connection Library*
 - Under Display this data connection library, select No
 - Click **Create**
 - Copy URL, for instance:
<http://chrisfie00/DemoDB/Excel%20Reporting%20Template%20Connection%20Library/>

Name and Description

Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this data connection library.

Name:

Description:

Navigation

Specify whether a link to this data connection library appears in the Quick Launch.

Yes No

Data Connection Version History

Specify whether a version is created each time you edit a file in this data connection library. [Learn about versions.](#)

Yes No

12.
 - Go to the SSP Administration page
 - Click on **Trusted data connection libraries**
 - Click **Add Trusted Data Connection Library**

Excel Services Settings

- [Edit Excel Services settings](#)
- [Trusted file locations](#)
- [Trusted data connection libraries](#)
- [Trusted data providers](#)
- [User-defined function assemblies](#)

13.
 - Paste the URL of the Connection library created earlier (do not include /Forms/AllItems.aspx!)
 - Click OK

Address

The document library address of this data connection library.

Description

The optional description of the purpose of this data connection library.

14. ■ Save the following command in a .bat file:
 @SET UTILS_ROOT=C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN
- "%UTILS_ROOT%\stsadm" -o set-ecssecurity -ssp SSP_PSI -AccessModel Delegation
- Change the location of the STSADM exe if needed
 - Execute the .BAT command file
 - Please check the following for Excel Services' security settings:
- [http://technet.microsoft.com/en-us/library/cc263284\(TechNet.10\).aspx](http://technet.microsoft.com/en-us/library/cc263284(TechNet.10).aspx)
- <http://msdn.microsoft.com/en-us/library/bb758869.aspx>
15. Restart IIS using the following command:
 IISRESET /RESTART

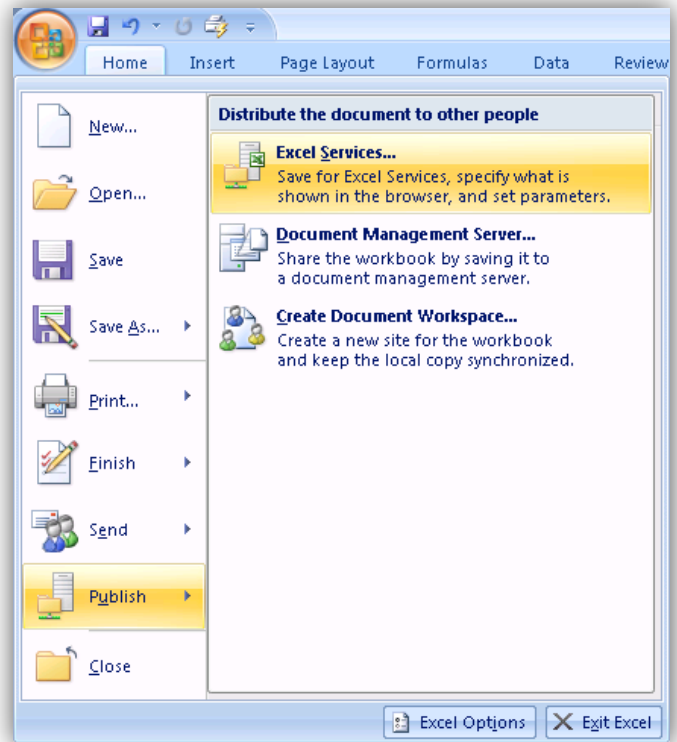
```
D:\P12\stsadm>echo off
Operation completed successfully.
Press any key to continue . . . _
```

Next I will describe the procedure to create an Excel Report and publish it to Excel Services:

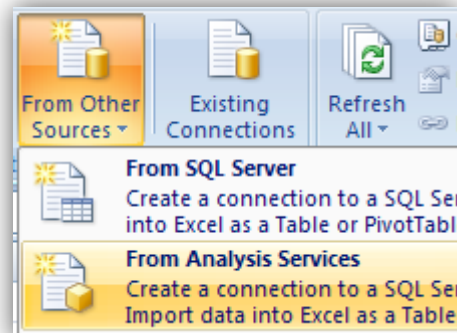
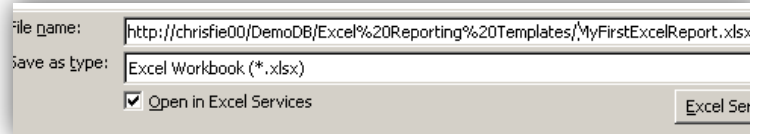
16. ■ Ensure the PWA Cube has been built
- Note the Analysis Services server name and database name

Build Status	
Cube build request completed successfully.	
Analysis Services Server:	<input type="text" value="CHRISFIE00\SQL"/>
Analysis Services Database to be created:	<input type="text" value="Demodb"/>
Extranet URL:	<input type="text"/>
Description:	<input type="text"/>

- 17.
- Open Excel 2007
 - We will publish this workbook up to the server.
 - File -> Publish -> click Excel Service



- 18.
- Enter a name for the template and prefix with the URL of the Document Library created earlier in PWA
 - For instance:
<http://chrisfie00/DemoDB/Excel%20Reporting%20Templates/MyFirstExcelReport.xlsx>
 - Click **Save**
- 19.
- Go to Data -> Get **External Data From Other Sources**
 - Select **From Analysis Services**



20. ■ Enter server name and proper credentials
 ■ Click NEXT

1. Server name: CHRISFIE00\SQL

2. Log on credentials

Use Windows Authentication

Use the following User Name and Password

User Name:

Password:

21. ■ Select proper AS database
 ■ Choose the Cube you want to create a Pivot Table against, **MSP_Portfolio_Analyzer** for instance.
 ■ Click NEXT

Select the database that contains the data you want:

Demodb

Connect to a specific cube or table:

Name	Description	Modified
Assignment Non Timephased		12/6/2006 11:27:01 PM
Assignment Timephased		12/6/2006 11:27:01 PM
Deliverables		12/6/2006 11:27:02 PM
EPM Timesheet		12/6/2006 11:27:01 PM
Issues		12/6/2006 11:27:01 PM
MSP_Portfolio_Analyzer		12/6/2006 11:27:01 PM
MSP_Project_Timesheet		12/6/2006 11:27:02 PM
MSP_Project_WSS		12/6/2006 11:27:02 PM
Project Non Timephased		12/6/2006 11:27:02 PM
Resource Non Timephased		12/6/2006 11:27:02 PM
Resource Timephased		12/6/2006 11:27:02 PM
Risks		12/6/2006 11:27:02 PM
Task Non Timephased		12/6/2006 11:27:01 PM
Timesheet		12/6/2006 11:27:01 PM

- 22.
- Prefix the file name with the URL of the Connection Library created earlier on the PWA site.
 - For instance:
http://chrisfie00/DemoDB/Excel%20Reporting%20Template%20Connection%20Library/CHRISFIE00_SQL_Demodb_MSP_Portfolio_Analyzer.odc
 - Check **Always attempt to use this file to refresh data** option
 - Click Finish

Data Connection Wizard

Save Data Connection File and Finish

Enter a name and description for your new Data Connection file, and press Finish to save.

File Name:
 CHRISFIE00_SQL Demodb MSP_Portfolio_Analyzer.odc

Save password in file

Description:
 (To help others understand what your data connection points to)

Friendly Name:
 CHRISFIE00_SQL Demodb MSP_Portfolio_Analyzer

Search Keywords:

Always attempt to use this file to refresh data

Excel Services: [Authentication Settings...](#)

- 23.
- You should get a confirmation page similar to this ->
 - Click OK

Web File Properties

Project Web Access

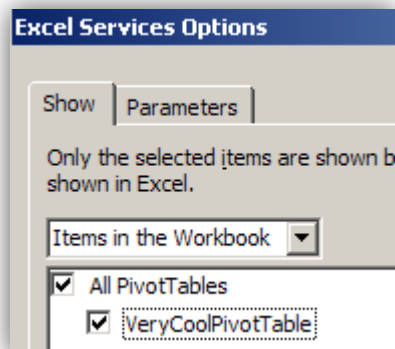
Excel Reporting Template Connection Libra

Title	CHRISFIE00_SQL Demodb MSP_Portfolio_Analyzer
Description	CHRISFIE00_SQL Demodb MSP_Portfolio_Analyzer
Keywords	CHRISFIE00_SQL Demodb MSP_Portfolio_Analyzer
Connection Type	
UDC Purpose	

24. ■ Create the proper Pivot Table desired
- Leverage the cool formatting features of Excel 2007 ☺

Work	Column Labels				2006 Total
Row Labels	2006	Quarter1	Quarter2	Quarter3	Quarter4
Allen Tony	176	24			200
Barker Rob		161	272	314	747
Berry Jo			7		8
Budget Capital					0
Budget Expense					0
Daly Jim			80	88	168
DBA					408
Generic Local Resource	210	1,636	792	1,048	3,686
Kahn Wendy		4			4
Kotas Jan	148	1,091	1,065	1,622	3,926
Lee Mark					36
Nixon Toby					76
Osborn Stu	104	764	1,196	1,282	2,346
Process Engineer		187	221	120	528
Purcell Sean			80	171	251
Ray Mike			8	4	12
Rowe Todd			19	121	140
Smith Ben		51	189	120	360
Steen Heidi			7	1	8
Team Auto Product	168	716	641	661	1,187
Team Executive	16	536	168	343	1,063
Team HR				200	200
Team IT Support				16	16
Team Maintenance	4	28		328	360
Team Marine Product	88	715	571	773	1,147
Team Portable Product	40	749	536	821	1,147
Team Production	4				4
Team Quality Assurance	4	560		12	576
Team SW Development				44	44
Unassigned Resource					0
Weber Martin				112	112
Woods John				16	16
Grand Total	962	7,222	5,853	8,738	22,774

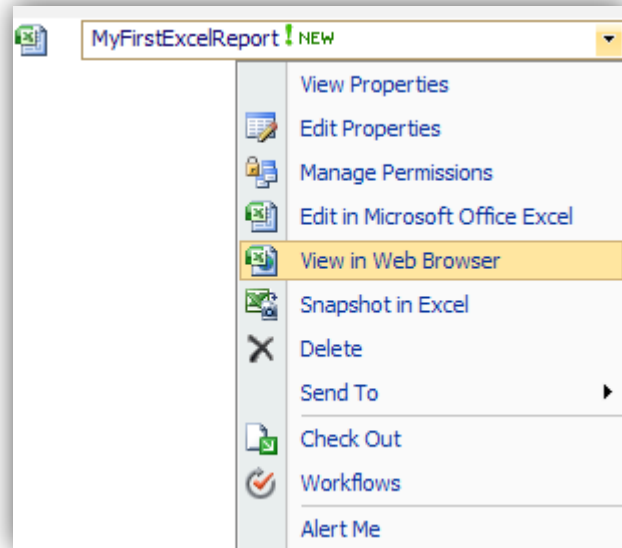
25. ■ Under Save As, click on Excel Services Options
- Under the Show tab, select Items in the Workbook, select the PivotTable created
- Click OK
- Save worksheet



26. ■ Go back to PWA -> Document Library created earlier and you should see your workbook



27. ■ Right click and select **View in Web Browser**



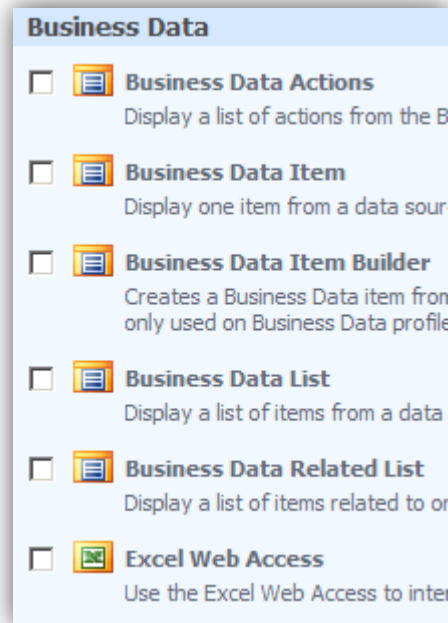
28. ■ Congratulation, you have just rendered your first Excel report using Excel Services! 😊 😊 It's all web based and no need for Excel client.

 A screenshot of a web browser displaying an Excel report. The browser address bar shows 'Project Web Access > Excel Reporting Templates'. The report is titled 'Work' and shows data for the year 2006, broken down by quarter. The data is presented in a table with row labels and column labels.

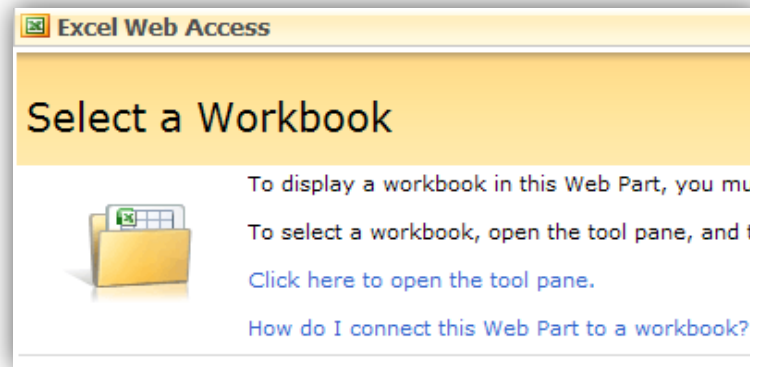
Row Labels	Quarter1	Quarter2	Quarter3	Quarter4	2006 Total
Allen Tony	176	24			200
Barker Rob		161	272	314	747
Berry Jo			7	1	8
Budget Capital				0	0
Budget Expense				0	0
Daly Jim			80	88	168
DBA				408	408
Generic Local Resource	210	1,636	792	1,048	3,686
Kahn Wendy		4			4
Kotas Jan	148	1,091	1,065	1,622	3,926
Lee Mark				36	36
Nixon Toby				76	76
Osborn Stu	104	764	1,196	1,282	3,346

Do the following to embed the newly created Excel report in an existing PWA page:

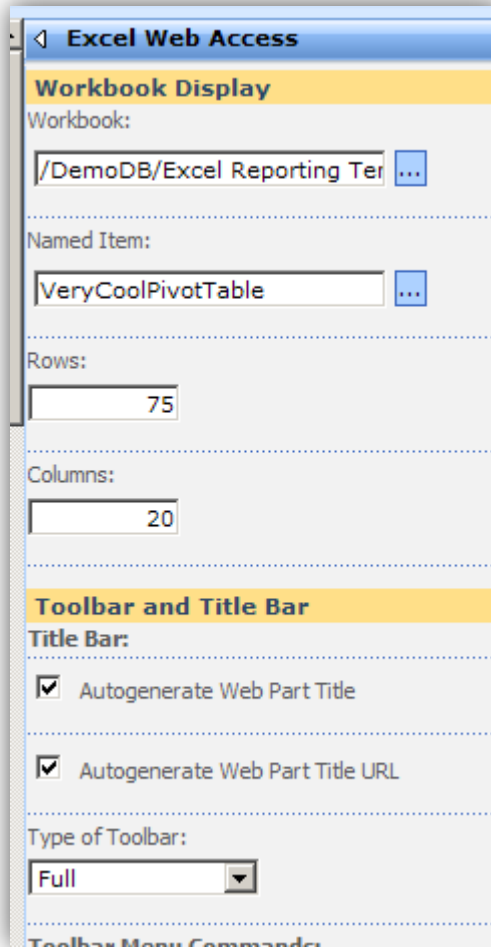
29. ²
- Go back to PWA
 - On the page where you want to add your Excel report, click on **Edit Page**
 - Click **Add a Web Part**
 - Under Business Data select **Excel Web Access** (EWA)
 - Click ADD



- 30.
- Click here to open the tool pane



31.
 - Select the Excel workbook created earlier
 - Select the pivot table created earlier
 - Click APPLY



32.
 - Congratulation you have just embedded an Excel Report in your PWA site!!!

