You saw in Chapter 7 that Microsoft Office Excel does not, by itself, bring as much capability to the table of collaboration as Word, Outlook, or Access. Because Microsoft has decided to deprecate synchronization between Excel and SharePoint lists, your initial impression may be that the only value Excel can offer might lie in its ability to help you create lists from other data sources. Perhaps if you can export other data into an Excel format or maybe read it into Excel, you might subsequently export it to a new SharePoint list. Similarly, you might transfer the data from a SharePoint list to an Excel worksheet so that you can save it perhaps as a CSV file that other applications might then import. Not to say that these capabilities do not add value, but for a tool as popular as Excel has become, you may expect more.

The good news is that there is more. The bad news is that to use the features discussed in this chapter, you need to be running the Enterprise version of SharePoint Server 2010 with Excel Services turned on. You cannot run Excel Services on SharePoint Foundation 2010 alone. Therefore, if you are fortunate enough to have the Enterprise version, you will want to read this chapter, which examines how to publish Excel spreadsheets to SharePoint. Then, from within SharePoint, you’ll be able not only to view the data already in the worksheet, but also to update the data in the worksheet while protecting your format and calculation formulas with parameters. Some of the other benefits of publishing an Excel spreadsheet using SharePoint’s Excel Services include the following:

- You can now make your spreadsheet available to anyone who has access to your SharePoint site through a browser. Users with access do not need to have Excel on their desktops.
- You can publish just the parts of your spreadsheet that you want others to see. You can hide your staging data and formulas.
- You can limit viewers’ interaction with your spreadsheet to selected cells with parameters.

I will also demonstrate how you can create dashboards with Excel and work with data cubes. Finally, the chapter will close with a brief look at using the Report Center together with Excel Services, KPIs, and more.
Configuring Excel Services

Typically, the task of configuring Excel Services falls to your SharePoint administrator. However, you may be curious about how to turn Excel Services on in case you need to go to your SharePoint administrator with additional requests to expand your use of Excel Services to new sites and libraries. Therefore, this section briefly lists the steps required to accomplish this task. First, your SharePoint administrator must open your SharePoint Central Administration site.

1. Select Central Administration from the left navigation panel.
2. Select Manage service applications from the Application Management group in the main panel.
4. On the next page, click Trusted File Locations. You need to tell SharePoint the location of the library that holds the Excel files so that IIS trusts opening and displaying those files.
5. On the Excel Services Trusted File Location page, check for your site location. Note that if your SharePoint administrator has already added a parent site and selected Yes to Trust Children, you may not have to do a thing. Otherwise, click Add Trusted File Location.
6. On this page, the Address section expects the URL of the document library or network folder where you will store the Excel files you plan to access. With whatever address you enter, you must select a location type. If you plan to store your Excel files in a SharePoint document library, select Microsoft SharePoint Foundation. If you are using a network folder or a web folder, use the UNC or HTTP option, respectively.
7. You can leave most of the other options on this page on their default settings. However, you should change the setting Allow External Data to the option Trusted data connection libraries only and embedded.
8. Click the OK button to complete your definition of the Trusted File Location.

Note If you have different sites that need their own document library for storing Excel files for use with Excel Services, you must repeat the preceding steps, creating a Trusted File Location for each one.

At this point, your administrator has enabled Excel Services for your document library. If you plan to use simple Excel workbooks with self-contained data, you are set to continue. However, if you want to use an Excel workbook that connects to an external data source, first you must create a data connection library. In addition, data connection libraries are only available for sites built with the Enterprise edition of SharePoint Server 2010. I will talk more about working with data connections later in this chapter.