

Introduction to Business Intelligence features

Several new features in Microsoft Office SharePoint Server 2007 allow you to share, control, and reuse business information. This article provides an overview of the new features, describes how the features relate to each other, and helps you find resources for more information.

In this article

- [Overview of Business Intelligence features](#)
 - [The Report Center](#)
 - [Excel Services](#)
 - [Connections to external data sources](#)
 - [Key Performance Indicators \(KPIs\)](#)
 - [Filter Web Parts](#)
 - [Dashboards](#)
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Overview of Business Intelligence features

Traditionally, the tools for accessing large amounts of unstructured data for the purpose of analysis were available only to people with years of experience in data warehousing or data mining. Publishing to the Web by using data from multiple sources is something historically restricted to developers and consultants. By using the new features available in Office SharePoint Server 2007, information workers can assemble data from multiple sources and publish that data on the Web.

Office SharePoint Server 2007 can link to business applications, such as SAP, Siebel, and Microsoft SQL Server 2005, allowing you to easily publish reports, lists, and key performance indicators (KPIs).

When you publish reports from the data in one of these systems, you provide strategic or operational data for decision-makers. Examples of reports include Microsoft Office Excel workbooks, a SQL Server

Reporting Services report, or a Microsoft Office Access report. Executives and line managers rely on timely and accurate reports to make informed decisions.

At the center of the new Office SharePoint Server 2007 Business Intelligence features is the Report Center. The Report Center is a site that provides a central location for storing reports that are common to a group, whether it is as small as a one team or as large as an entire organization.

 [Top of Page](#)

The Report Center

The Report Center site provides a central location for business-intelligence-related information. It contains special document libraries for storing reports, lists, and connections to external data sources. It also provides access to page templates and Web Parts to help you create pages and lists that contain business information. Within the Report Center, users can search for items by using categories, view a calendar of upcoming reports, and subscribe to reports that are relevant.

By default, one Report Center site is created under the top-level portal site. However, with the appropriate permissions, anyone can create a Report Center site within a team, department, or organization site.

All of the features described in this article are available in the Report Center site. However, each of the features can be accessed and used in any site and from any page within Office SharePoint Server 2007. This allows you to decide how you want to take advantage of the business intelligence features within your own Office SharePoint Server 2007 environment.

 [Top of Page](#)

Excel Services

Excel Services enables you to store an Excel workbook on a server and then publish any part of that workbook on a Web page. Users need only a browser to view and interact with the live data. The workbook is published on the Web page by using the Excel Web Access (EWA) Web Part.

One advantage of publishing workbooks in a Web Part is that all of the calculation occurs on the server. As a result, the business logic in the workbook is never exposed. Another advantage is that there is only one copy of the workbook, and it is stored in a central, secure place.

From the Web page, you can give users "view only" rights to limit access to the workbook. For example, you can prevent users from opening a workbook by using Excel or control what they are allowed to view.

You can also create a snapshot of a workbook, rather than publishing it in interactive mode.

 [Top of Page](#)

Connections to external data sources

In addition to using external data sources in Excel workbooks, you can use data from other business applications, such as SAP and Siebel, in SharePoint lists, pages, and Web Parts.

Administrators usually create the system connections and can store them in a Data Connection Library in the Report Center. That way, the central pool of connections can easily be accessed and reused by anyone with permissions. However, you can create and store data connections anywhere in the Office SharePoint Server 2007 system.

By using connections to external data sources, you can build Web Pages and SharePoint lists that allow users to interact with the data in the external source without ever leaving the SharePoint page.

 [Top of Page](#)

Key Performance Indicators (KPIs)

A Key Performance Indicator (KPI) is a visual cue that communicates the amount of progress made toward a goal. KPIs are valuable for teams, managers, and businesses to evaluate quickly the progress made against measurable goals. By using SharePoint KPIs, you can easily visualize answers to the following questions:

- What am I ahead or behind on?
- How far ahead or behind am I?
- What is the minimum I have completed?

Each area of a business may choose to track different types of KPIs, depending on the business goals they are trying to achieve. For example, to increase customer satisfaction, a call center might set a goal to answer a specific number of calls within a shorter period of time. Or the sales department might use KPIs to set performance goals, such as the number of new sales calls made per month.

KPIs are created by using KPI lists and then are displayed by using special KPI Web Parts. You can store KPI lists in the Report Center or in any other site in Office SharePoint Server 2007, where they can be reused by anyone with permissions to access them.

For more information about KPIs, see [Create and publish Key Performance Indicators \(KPIs\)](#).

 [Top of Page](#)

Filter Web Parts

Filters allow you to display only the subset of data that you are interested in viewing. For example, a data set can contain five years' history of multiple products for the entire country/region. By using filters, you can display something more meaningful, such as only one sales region, only one product, or only the current year.

Office SharePoint Server 2007 has 10 Filter Web Parts that enable you to enter or choose one or more values to change the contents of one or more Web Parts on a page to display exactly the information you need.

For example, the Current User Filter Web Part automatically filters information based on who is logged on to the computer. This is useful when you want to display only information, such as customer accounts or tasks, that is currently assigned to that user.

Another way to use filters is to display a workbook in an Excel Web Access Web Part and link that workbook to a filter that allows people to choose a product for which they want to view information. In addition, you can link the Filter Web Part to more than one Web Part on the page. As a result, when a different product is selected in the Filter Web Part, all other Web Parts on the page are updated to reflect the currently selected product.

 [Top of Page](#)

Dashboards

Dashboards are tools that are used to communicate status and to drive action. An Office SharePoint Server 2007 dashboard is a Web page template that allows you to assemble and display information from disparate sources such as reports, charts, metrics, and key performance indicators.

You can create your own dashboard page by using various Web Parts, or you can add Web Parts to pages that already exist in your site. However, if you are creating a dashboard on a new page, starting with the template may be faster. It is just a starting point — you can add or delete items and change the appearance of the page after you create it.

The following Web Parts are included with the dashboard page template.

Web Part	Provides the ability to
Excel Web Access	Add an Excel workbook, worksheet, or worksheet range.

KPI List	Display a KPI List (optional).
Apply Filters (button)	Display the Apply Filters button.
Related Information	Have links related to other page items.
Summary	Describe information about plans and status.
Contact Details	List the name of the person to contact about the page.

 [Top of Page](#)