

# Introduction to Business Insights

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Your organization probably stores data in a variety of formats, such as databases, e-mail messages, and spreadsheet files. Business insights or Business intelligence (BI) is the process of aggregating, storing, analyzing, and reporting on that data in order to make informed business decisions. Microsoft Office SharePoint Server 2007 provides a number of tools that can help you extract data from a variety of sources and present that data in ways that facilitate analysis and decision making.

## Protect and share your data with Excel Services

Have you ever created a workbook in Microsoft Office Excel or another spreadsheet program, given it to your coworkers, and later found several new versions of the workbook, and thus several versions of "the truth"? With Office SharePoint Server 2007, Excel Services, and Microsoft Office Excel 2007, you can publish a workbook to a server, lock it down, and make it available in a document library, a Report Center, a dashboard, and a scorecard. Users can then view and interact with the workbook in their browsers.

For example, the Report Center on the Adventure Works site provides interactive reports such as this breakeven analysis.

Excel Web Access - BreakEven [1]

Open | Update | Find

	A	B	C	D	E
1	<b>Breakeven Analysis</b>				
2	<b>Adventure Works</b>				
3					
4	<b>Sales</b>				
5			Sales price per unit		
6			Sales volume per period (units)		
7			<b>Total Sales</b>		
8					
9	<b>Variable Costs</b>				
10			Commission per unit		
11			Direct material per unit		
12			Shipping per unit		
13			Supplies per unit		
14			Other variable costs per unit		

Navigation: Break Even Analysis | Charts

Users can access the workbook directly from their browsers — they don't need Excel — and they can perform routine operations such as refreshing or recalculating the workbook without changing the underlying data.

## Manage your business data with a Report Center

A Report Center is a specialized type of site designed to serve and manage business intelligence data. Adventure Works uses a Report Center as a central location for several key items, including the reports discussed in the previous section, a dashboard that displays a variety of important business information, data connection libraries, and key performance indicators (KPIs). The following sections describe those features.

## Bring data together from several sources with a dashboard

As part of its Report Center, Adventure Works uses a business intelligence dashboard. Dashboards, also known as multi-report summary pages, contain one or more Web Parts, such as business data Web Parts, Excel Web Access Web Parts, and KPIs that you can filter. Dashboards provide a unified but flexible view of data and content from several sources. For example, the Excel 2007 workbook mentioned earlier in this article plus a KPI Web Part reside in the Adventure Works Sales Information dashboard. This figure shows part of the page.

The screenshot displays a dashboard titled "Sales Information". It features a "Sales Performance Indicators" section with a table of KPIs and a "Breakeven Analysis" section with an Excel Web Access component.

Indicator	Goal	Value	Status
Breakeven trends	30.00	1,500.00	🟢
Q1 Sales	\$2,225,000	\$2,320,000	🟢
Q2 Sales	\$2,225,000	\$2,190,000	🔴
Q3 Sales	\$2,225,000	\$2,220,000	🟡
Q4 Sales	\$2,225,000	\$2,255,000	🟢

**Breakeven Analysis**  
Breakeven analysis of Adventure Works sales.

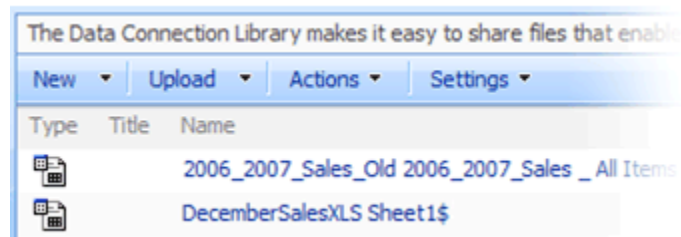
Excel Web Access - BreakEven [1]

Open | Update | Find

	A	B	C	D	E
1	<b>Breakeven Analysis</b>				
2	Adventure Works				
3					
4	Sales				
5			Sales price per unit		
6			Sales volume per period (units)		
7	Total Sales				

## Connect to data quickly and easily with data connection libraries

Data connection libraries give your users a way to share, manage, and discover connections to external data sources. Users don't need to know technical details such as connection strings. The data connection library in the Adventure Works Report Center allows users to connect to a variety of critical workbooks and other data sources. This figure shows the library.



## Track progress with key performance indicators

Key performance indicators (KPIs) are quantifiable measurements that gauge business success. You can use the KPI Web Part to display KPIs from Microsoft SQL Server 2005 Analysis Services, Office Excel 2007, SharePoint lists, or manually entered data. Adventure Works uses KPIs to show sales trends at a glance, including breakeven trends or overall profitability. This figure shows the Adventure Works KPIs.

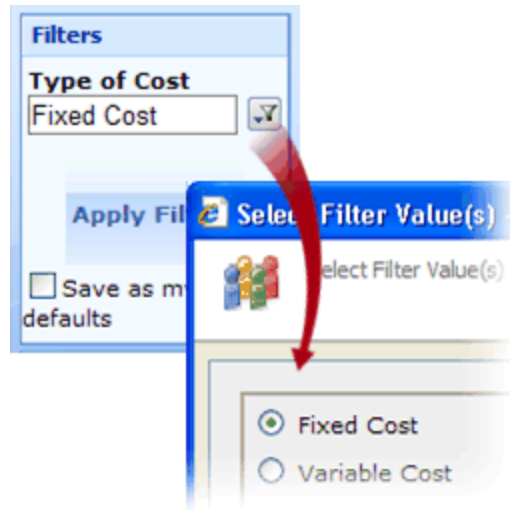
**Sales Performance Indicators**

 Show Only Problems

Indicator	Goal	Value	Status
Breakeven trends	30.00	1,500.00	
Q1 Sales	\$2,225,000	\$2,320,000	
Q2 Sales	\$2,225,000	\$2,190,000	
Q3 Sales	\$2,225,000	\$2,220,000	
Q4 Sales	\$2,225,000	\$2,255,000	

## See just the data you want with Filter Web Parts

Filter Web Parts connect to Web Parts that contain one or more sets of data and allow you to change your view of the data. For example, Adventure Works uses a Filter Web Part on its dashboard. Users can apply a variety of filters to the data in the breakeven analysis, such as filtering by fixed or variable costs.



## Use the Business Data Catalog to find data stored in back-end business applications

Finally, Office SharePoint Server 2007 provides another powerful feature called the Business Data Catalog. The Business Data Catalog allows an Office SharePoint Server 2007 site to pull data from line-of-business applications such as Microsoft SQL Server, Siebel, SAP, file shares, Web sites, Microsoft Exchange Server 2007, and Lotus Notes. You can then use Web Parts to view, share, and work with that data in a variety of ways. For example, you can display the user interface of the line-of-business application, or open a Microsoft Office InfoPath 2007 form.

You can also use the Enterprise Search feature in Office SharePoint Server 2007 to search the data in your Business Data Catalog. Now your employees can quickly find and use information in your back-end systems with the same tools they use to search the Web.