

Smart Sheet Range For Excel

To Make Your Charts Dynamic

Collabion Charts
for SharePoint

Let's learn how to

fetch data from Excel dynamically,
in Collabion Charts.

What's the **necessity** for such a feature?

We have the answer in the next few slides...

Let's assume...

a company has it's **salesperson details** stored in an **Excel file**



	A	B	C	D	E	F	G	H	I
1	BusinessEntityID	EmployeeName	JobTitle	BirthDate	MaritalStatus	Gender	HireDate	SalesLastYear	Owned Shops
2	275	michael	Sales Representative	1/26/1959	S	M	7/1/2001	1750406.479	77
3	276	linda	Sales Representative	3/30/1970	M	F	7/1/2001	1439156.029	39
4	277	jillian	Sales Representative	9/29/1952	S	F	7/1/2001	1997186.204	76
5	278	garrett	Sales Representative	3/7/1965	M	M	7/1/2001	1620276.897	40
6	279	tsvi	Sales Representative	2/19/1964	M	M	7/1/2001	1849640.942	80
7	280	pamela	Sales Representative	1/6/1965	S	F	7/1/2001	1927059.178	38
8	281	shu	Sales Representative	4/10/1958	M	M	7/1/2001	2073506	79
9	282	josé	Sales Representative	1/11/1954	M	M	7/1/2001	2038234.655	74
10	283	david	Sales Representative	3/14/1964	S	M	7/1/2001	1371635.316	38
11	284	tete	Sales Representative	2/6/1968	M	M	11/1/2002	0	0
12	285	syed	Pacific Sales Manager	2/11/1965	M	M	4/15/2003	0	0
13	286	lynn	Sales Representative	4/18/1961	S	F	7/1/2003	2278548.978	40
14	287	amy	European Sales Manager	10/22/1947	M	F	5/18/2002	0	0
15	288	rachel	Sales Representative	8/9/1965	S	F	7/1/2003	1307949.792	40
16	289	jae	Sales Representative	4/18/1958	M	F	7/1/2002	1635823.397	40
17	290	ranjit	Sales Representative	10/31/1965	S	M	7/1/2002	2396539.76	40

Such a database is ever-changing, since new employees may join in or present employees may leave the company.

Collabion Charts can **dynamically update the chart** as per any updates in the source Excel file.

But we might face an issue
if we define a *static sheet range* for the Excel file.

i.e. if Collabion keeps on sourcing data from the same range, it would not update the chart with new data, added in the Excel sheet later.

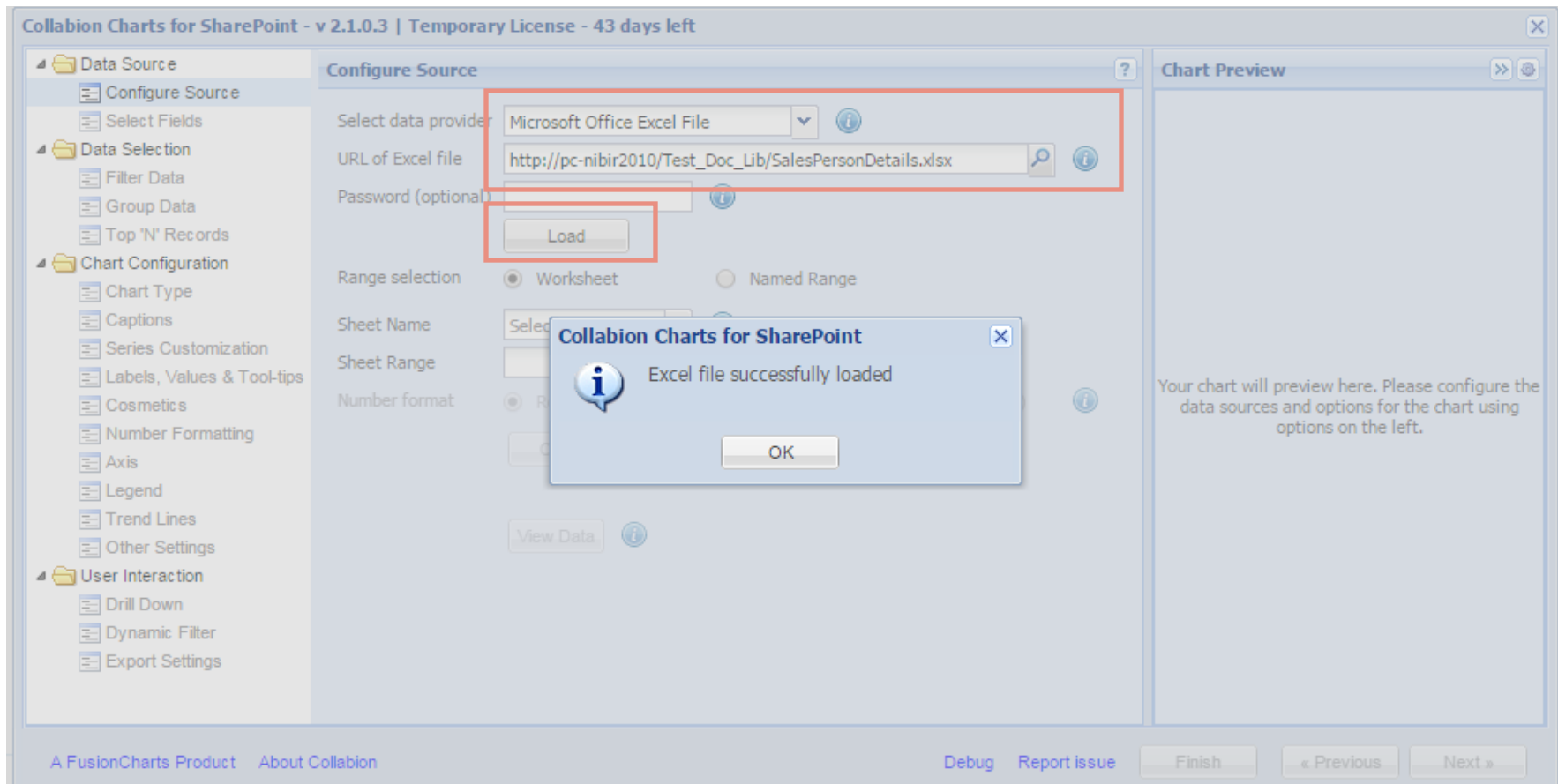
To avoid such a scenario,

Collabion Charts provides the user a simple yet powerful option – **smart sheet range selection from Excel sheets.**

But first, let's see what happens when we define

Static 'Sheet Range' For Excel

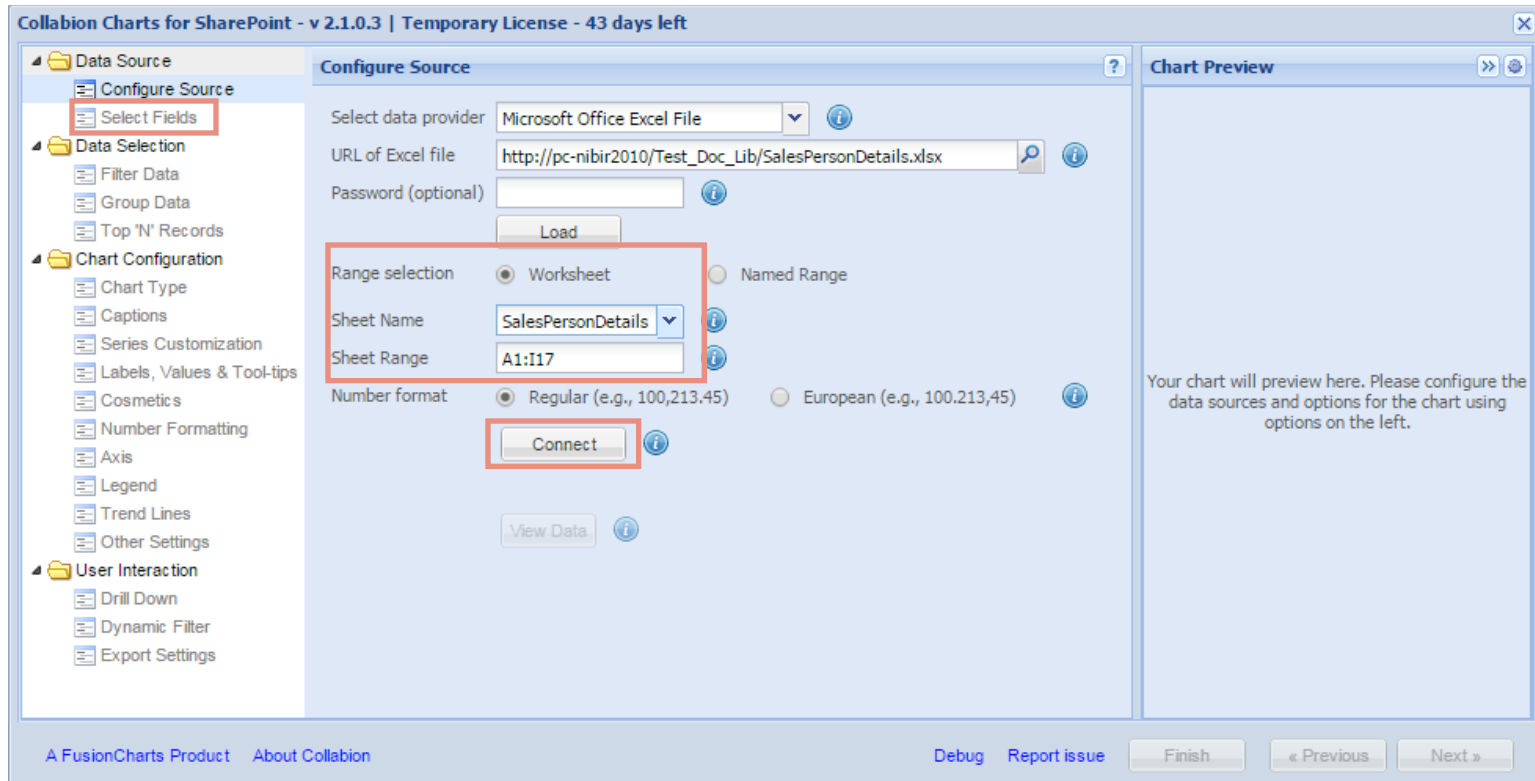
- Launch the Wizard
- Select **'Microsoft Office Excel File'** as the data provider.
- Specify the **URL of the Excel file**.
- Click on the **'Load'** button.



- Select **'Worksheet'** as the **'Range Selection'** option.
- Select your datasheet in the **'Sheet Name'** drop down list.

*Note that: **'Sheet Range'** text box has been auto-populated with only the range of cells containing the data (in this case, it is **A1:I17**).*

- Click on **'Connect'** and then go the **'Select Fields'** section.



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Data Source

- Configure Source
- Select Fields
- Data Selection**
 - Filter Data
 - Group Data
 - Top 'N' Records
- Chart Configuration**
 - Chart Type
 - Captions
 - Series Customization
 - Labels, Values & Tool-tips
 - Cosmetics
 - Number Formatting
 - Axis
 - Legend
 - Trend Lines
 - Other Settings
- User Interaction**
 - Drill Down
 - Dynamic Filter
 - Export Settings

Configure Source

Select data provider: Microsoft Office Excel File

URL of Excel file: http://pc-nibir2010/Test_Doc_Lib/SalesPersonDetails.xlsx

Password (optional):

Load

Range selection: ☒ Worksheet ☐ Named Range

Sheet Name: SalesPersonDetails

Sheet Range: A1:I17

Number format: ☒ Regular (e.g., 100,213.45) ☐ European (e.g., 100.213,45)

Connect

View Data

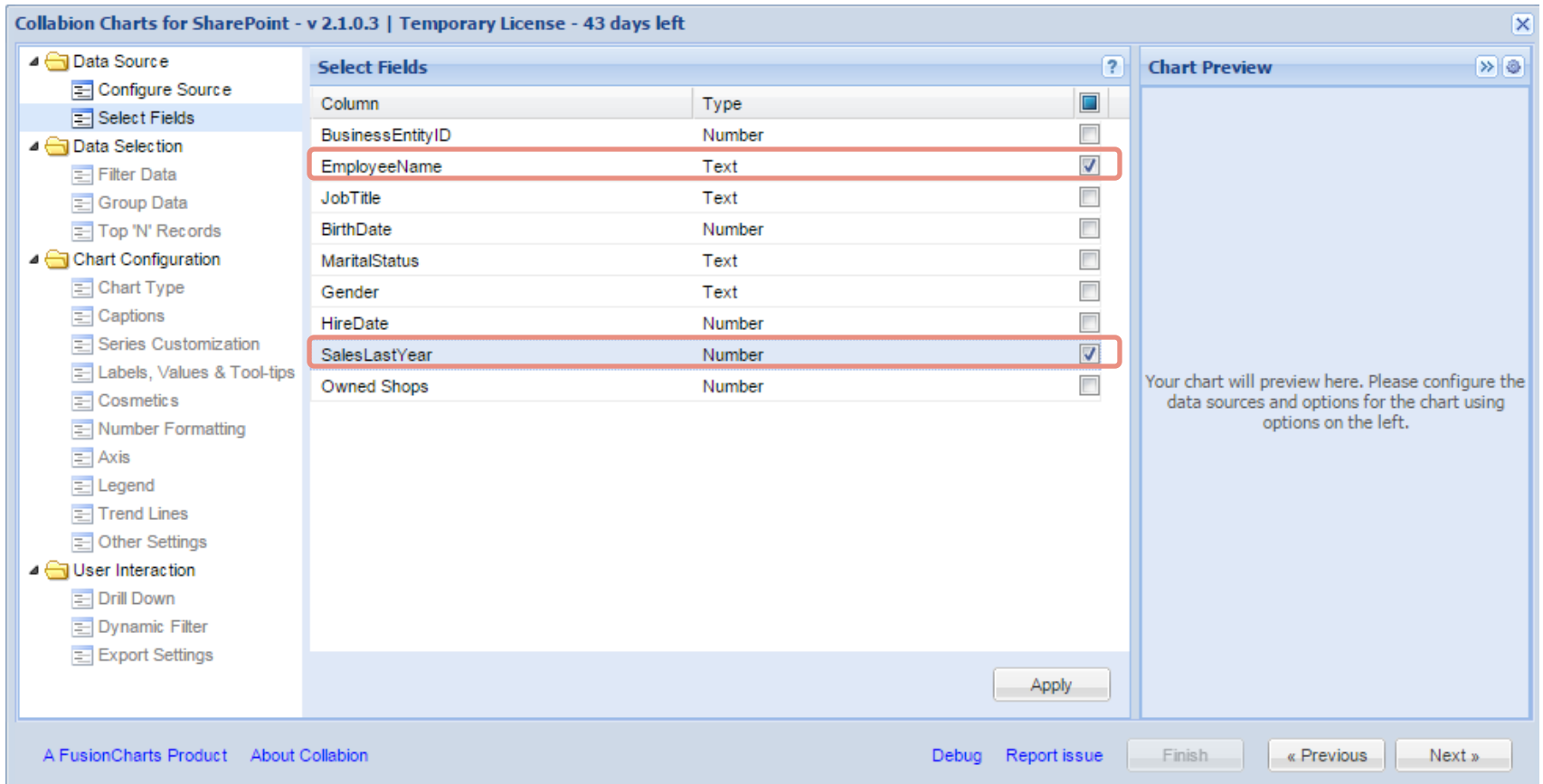
Chart Preview

Your chart will preview here. Please configure the data sources and options for the chart using options on the left.

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Debug Report issue Finish < Previous Next >

- In the **'Select Fields'** section, select the following two fields: *"EmployeeName"* and *"SalesLastYear"* to provide the chart plot values. Click on **'Apply'**.
(for the sake of simplicity, we are giving an example of a simple single series chart here)
- Complete all necessary settings in the **'Data Selection'**, **'Chart Configuration'** and **'User Interaction'** sections to generate the chart.



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- Other Settings

User Interaction

- Drill Down
- Dynamic Filter
- Export Settings

Select Fields

Column	Type	
BusinessEntityID	Number	<input type="checkbox"/>
EmployeeName	Text	<input checked="" type="checkbox"/>
JobTitle	Text	<input type="checkbox"/>
BirthDate	Number	<input type="checkbox"/>
MaritalStatus	Text	<input type="checkbox"/>
Gender	Text	<input type="checkbox"/>
HireDate	Number	<input type="checkbox"/>
SalesLastYear	Number	<input checked="" type="checkbox"/>
Owned Shops	Number	<input type="checkbox"/>

Apply

Chart Preview

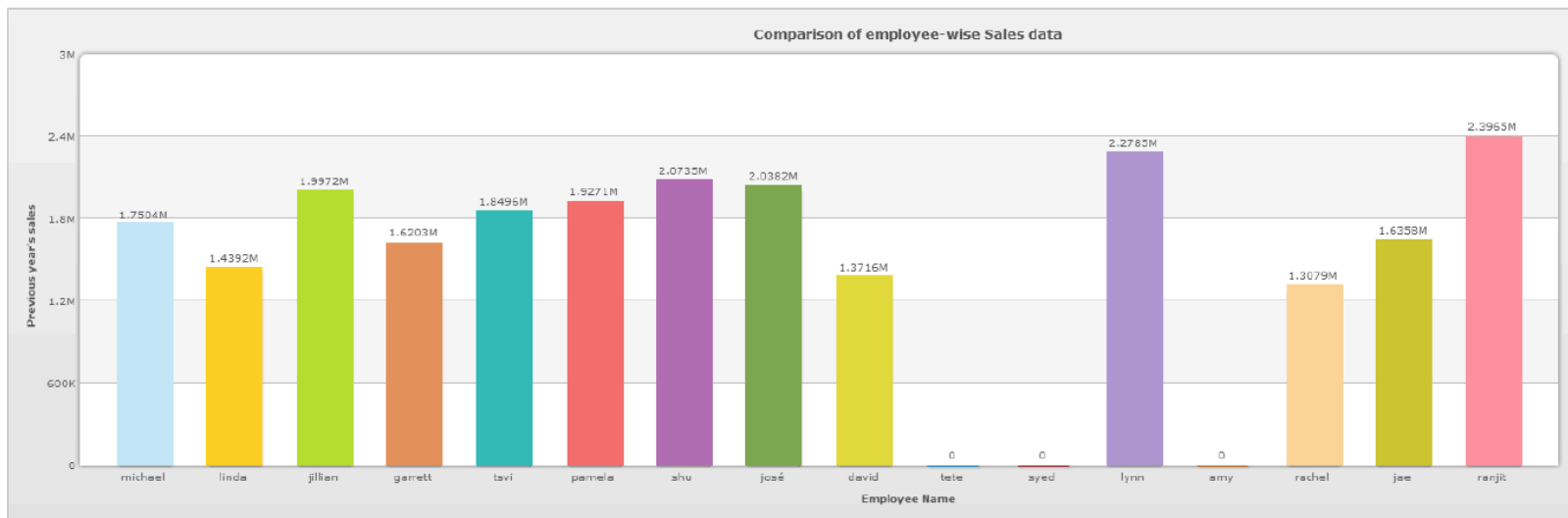
Your chart will preview here. Please configure the data sources and options for the chart using options on the left.

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... and your chart is generated!

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But what happens when your source Excel data is updated with new entries? Let's find out...

Suppose, we add two more columns to our excel datasheet.

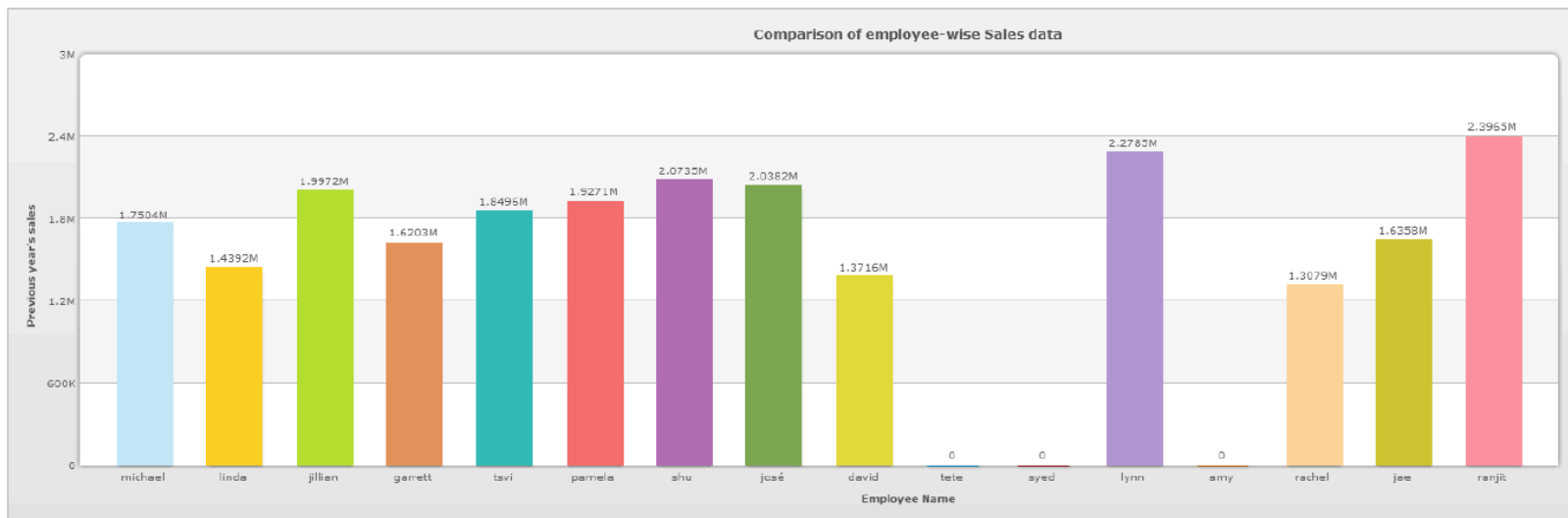
	A	B	C	D	E	F	G	H	I	J
1	BusinessEntityID	EmployeeName	JobTitle	BirthDate	MaritalStatus	Gender	HireDate	SalesLastYear	Owned Shops	
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10	283	david	Sales Representative	3/14/1964	S	M	7/1/2001	1371635.316	38	
11	284	tete	Sales Representative	2/6/1968	M	M	11/1/2002	0	0	
12	285	syed	Pacific Sales Manager	2/11/1965	M	M	4/15/2003	0	0	
13	286	lynn	Sales Representative	4/18/1961	S	F	7/1/2003	2278548.978	40	
14	287	amy	European Sales Manager	10/22/1947	M	F	5/18/2002	0	0	
15	288	rachel	Sales Representative	8/9/1965	S	F	7/1/2003	1307949.792	40	
16	289	jae	Sales Representative	4/18/1958	M	F	7/1/2002	1635823.397	40	
17	290	ranjit	Sales Representative	10/31/1965	S	M	7/1/2002	2396539.76	40	
18	291	Kevin	Sales Representative	4/18/1958	M	F	7/1/2002	1605823.397	40	
19	292	Stuart	Sales Representative	10/31/1965	S	M	7/1/2002	2396039.76	40	
20										

 New entries!

Refresh the SharePoint site containing the previously generated chart.

*Note that: The **chart is not displaying the new records** added in the Excel datasheet.*

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One way of making the chart reflect the data recently added to the Excel sheet is to launch the Collabion Charts wizard and manually re-select the data range. *Repetitive and cumbersome, isn't it?*

So move on to the next slides to see how Collabion can WOW you!

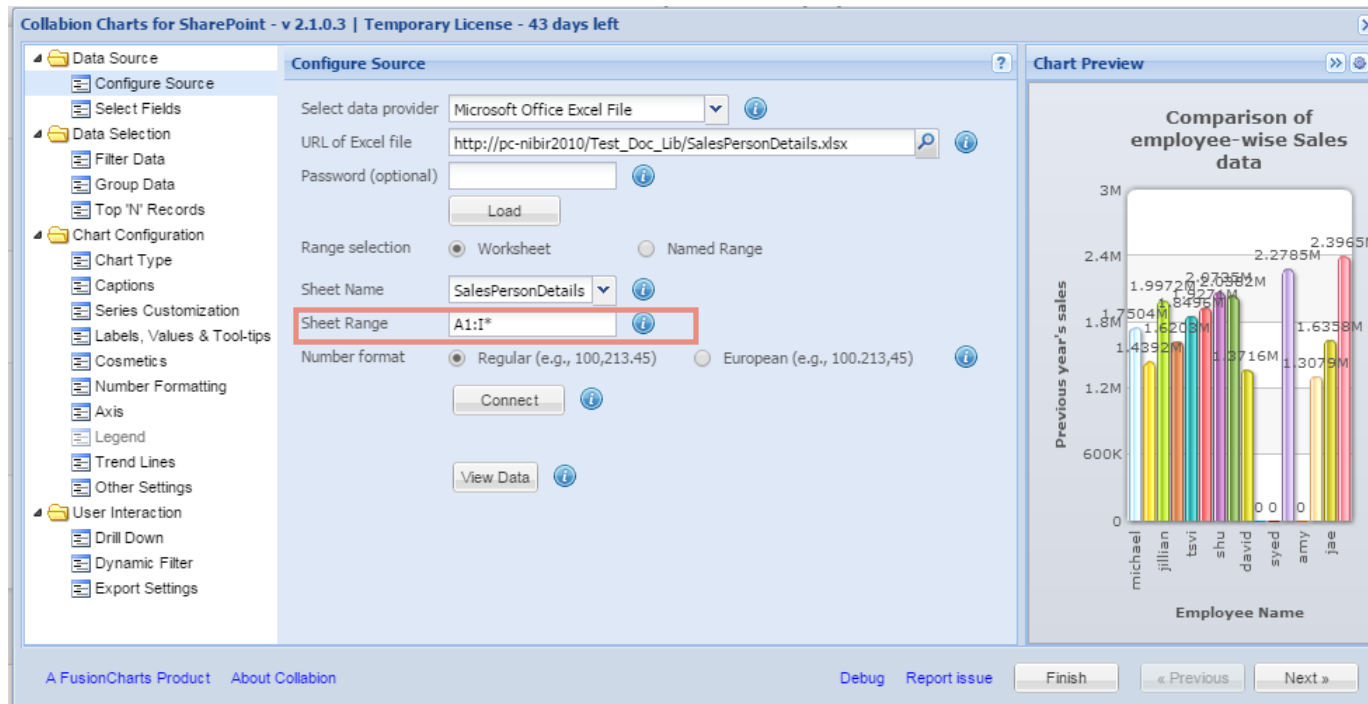
Smart 'Sheet Range' for Excel

- Launch the Collabion Charts wizard.

- In the 'Sheet Range' setting, **input the range as A1:I*** instead of the static auto-generated value.



Note this!



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Configure Source

Select data provider: Microsoft Office Excel File

URL of Excel file: http://pc-nibir2010/Test_Doc_Lib/SalesPersonDetails.xlsx

Password (optional):

Load

Range selection: ☒ Worksheet ☐ Named Range

Sheet Name: SalesPersonDetails

Sheet Range: A1:I*

Number format: ☒ Regular (e.g., 100,213.45) ☐ European (e.g., 100.213,45)

Connect

View Data

Chart Preview

Comparison of employee-wise Sales data

Previous year's sales

Employee Name

Employee Name	Sales (Previous Year)
michael	1.4892M
jillian	1.6208M
tsvi	1.8495M
shu	2.0735M
david	1.0716M
syed	2.2785M
amy	1.3079M
jae	2.3965M

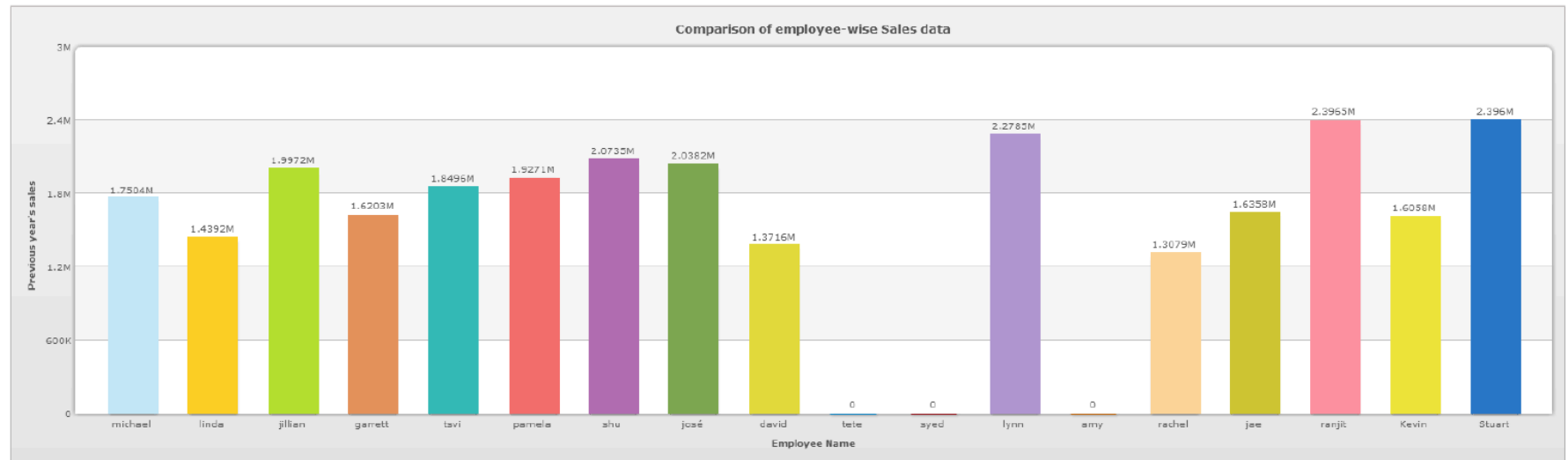
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- Click on 'Connect' and go to the 'Select Fields' section.
- Select the same fields as before i.e. "EmployeeName" and "SalesLastYear" and complete all the other sections in the wizard and generate the chart.

... and here is your chart!

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So, what's special about it?

Proceed to see...

We add two more rows to our excel datasheet.

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16	289	jae	Sales Representative	4/18/1958	M	F	7/1/2002	1635823.397	40	
17	290	ranjit	Sales Representative	10/31/1965	S	M	7/1/2002	2396539.76	40	
18	291	Kevin	Sales Representative	4/18/1958	M	F	7/1/2002	1605823.397	40	
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21	294	Dave	Sales Representative	10/31/1965	S	M	7/1/2002	1396039.76	40	
22										
23										



New entries!

Now, refresh the SharePoint site containing the previously generated chart.

See the difference?

*The **chart is displaying the new records** added in the Excel datasheet.*

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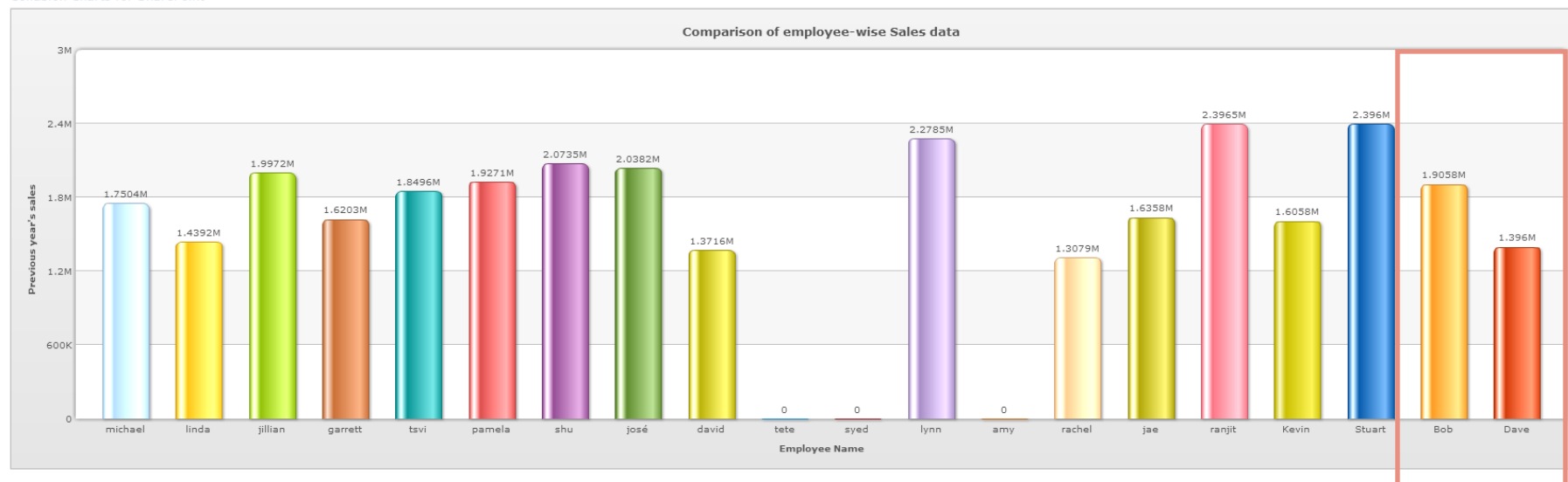


Chart updated



You can check by applying even more records to your excel datasheet and refreshing the page.

Every time you will get a chart reflecting the updated data!

No need to go through the entire chart generating process again.

WOW-some!

Isn't it?

Hope this was useful and fun!

We're anyway a shout away and always ready to hear you out.

Happy charting!!

www.collabion.com



info@collabion.com



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