

Creating a Custom Excel Report – SOLABS SharePoint

Overall Steps:

1. Locate & Download the required Excel dataset file(s) from your Sharepoint onto your local computer
2. Create a combined Excel Dataset File
 - a. **NOTE:** If you are working with only 1 dataset, this combining step is NOT required!
3. Create reports in the Excel Dataset File
 - a. Create pivottables from the datasets to create more complex reports
OR
 - b. Filter the datasets and hide columns to create simple table reports
4. Save the new Excel Report & Dataset file
 - a. Title it something meaningful. Ex. Process Analytics
5. Upload your new Excel Report file back to your SharePoint
6. Use the new Excel Report & Dataset file directly in SharePoint
 - a. *Click it to open and use it in your browser
 - i. **NOTE:** When you open it in your web browser – MAKE SURE to *Click Data-> Refresh All Connections
 - ii. This ensures the datasets are refreshed and any pivottables are refreshed
OR
 - b. Download a copy to your local computer

GOAL: For the following scenario

- 1- Create a custom ECreating a Custom Excel Report – SOLABS SharePoint excel report to see;
 - o All of the Process Tasks associated with all QM APPs (CAPA, Deviation, etc)
 - o Add the MANAGER of the user who executed the task to the report (for filtering)
- 2- Requires 2 Datasets;
 - o **Dataset 1:** Ds Process Tasks PROD (under ‘QM APPs Datasets)
 - o **Dataset 2:** Ds Setup User Inventory PROD (under ‘Core Datasets -> Setup Section’)

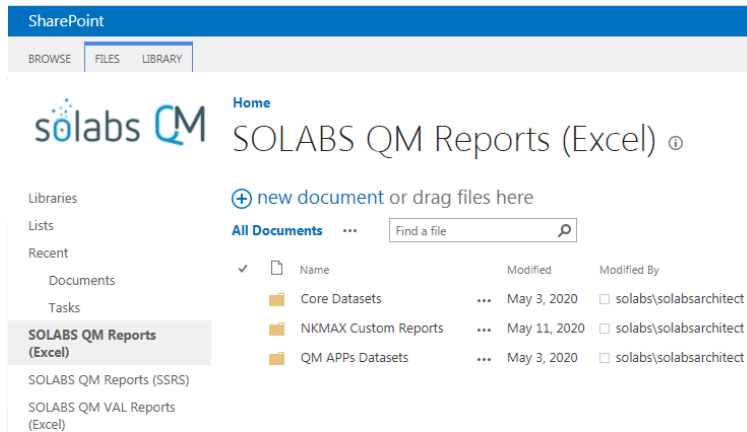
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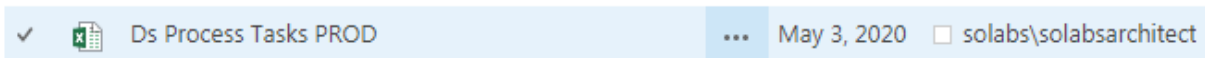
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1- Locate Excel Dataset File(s) on your Sharepoint

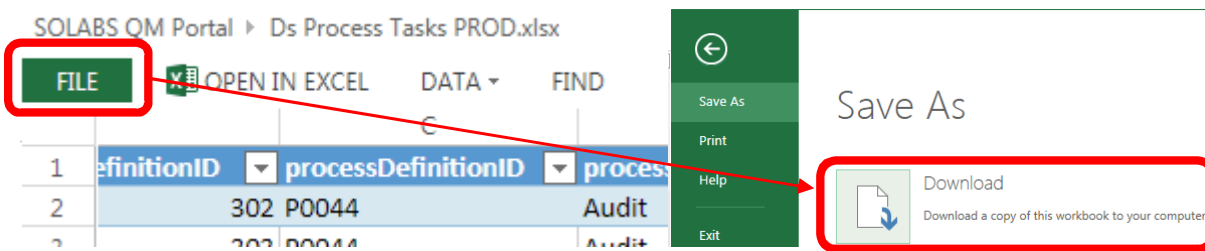
1. Log in to your SharePoint
2. **NOTE:** *Excel Dataset Files from your PRODUCTION environment are found under the ‘SOLABS QM Reports (Excel)’ folder (on the left panel)



3. Locate the dataset file(s) required
 - a. **Dataset 1:** Ds Process Tasks PROD (under ‘QM APPs Datasets’)
 - i. Go to folder ‘QM APPs Datasets’
 - ii. Open the dataset file ‘Ds Process Tasks PROD’



- iii. File will open in your browser
- iv. Download the file
 1. *Click ‘FILE’ in the ribbon
 2. *Click ‘Download’
- v. File will be downloaded into your ‘Downloads’ folder on your local computer

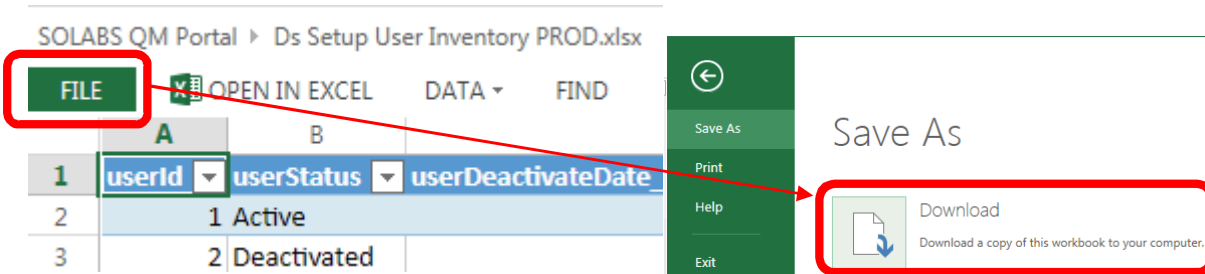


- b. **Dataset 2:** Ds Setup User Inventory PROD (under ‘Core Datasets -> Setup Section’)
 - i. Go to folder ‘Core Datasets -> Setup Section’
 - ii. Open the dataset file ‘Ds Setup User Inventory PROD’

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- iii. File will open in your browser
- iv. Download the file
 - 1. *Click 'FILE' in the ribbon
 - 2. *Click 'Download'
- v. File will be downloaded into your 'Downloads' folder on your local computer



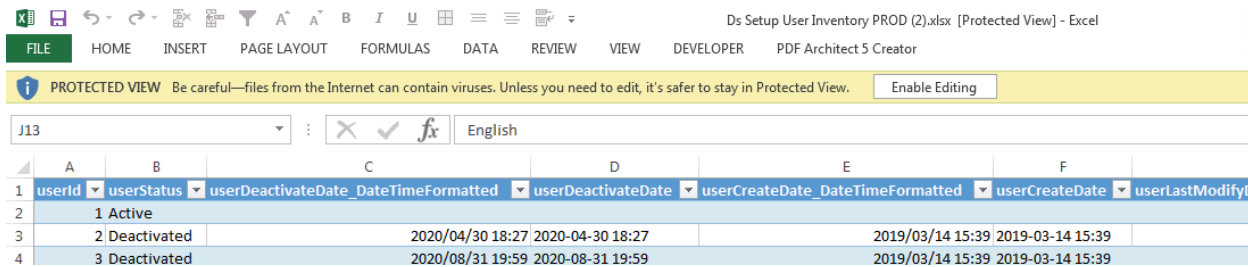
2- Create a Combined Excel Dataset File (with all dataset worksheets into 1 workbook together)

NOTE: If you are working with only 1 dataset, this combining section is NOT required!

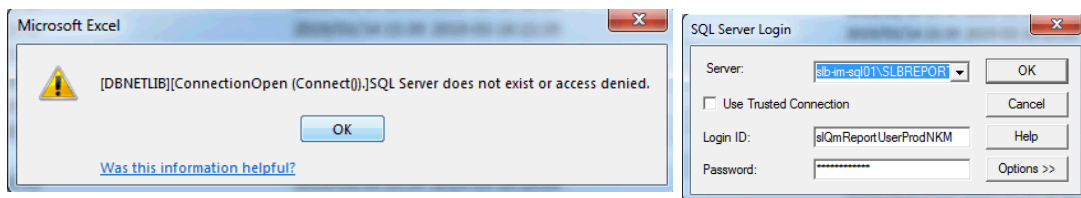
- 1. Open the 2 downloaded datasets from your 'Downloads' folder

NOTE: When you open them, you will get the 'Protected View' yellow ribbon

- 2. *Click 'Enable Editing'



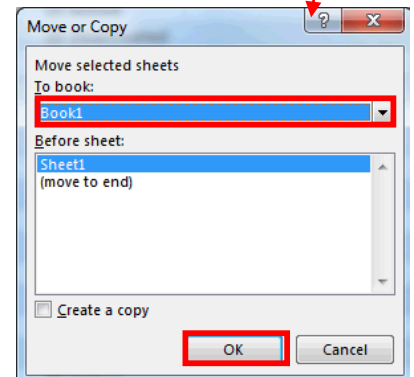
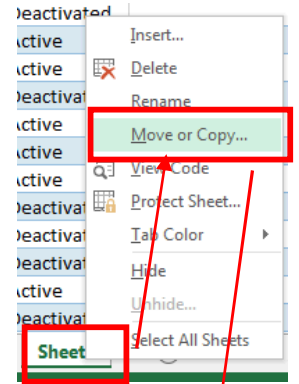
- 3. The file will then RE-OPEN and attempt to connect to the server
 - o *THIS WILL ERROR! –
 - o *Click 'OK' on the 1st popup, *Click 'Cancel' on the 2nd popup



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Now BOTH dataset files are open!

4. Create a NEW Blank Excel Workbook
5. Move the Dataset Worksheets into this NEW Blank workbook
6. In each of the 'Dataset Files'
 - a. **MOVE** the dataset worksheet into the NEW Blank Excel workbook
 - b. Right*Click the worksheet
 - c. *Select 'Move or Copy...'
 - d. In the Form that appears;
 - i. In the dropdown menu -> select the NEW Blank Excel Workbook (Book1)
 - e. *Click 'OK'



7. All required Datasets are now in 1 combined Excel Workbook
8. NAME the Sheets accordingly (**NOT REQUIRED** but helps users understand)
 - a. DS Process Tasks
 - b. DS Setup User Inventory



✓ We have assembled all the data, now we can create the custom reports desired!

3- Create custom reports in the New Excel Dataset File

3.1- Add Formulas to Expand Datasets

For the scenario we need to add the 'Manager' to the 'Process Tasks'

1. In the 'Process Tasks' worksheet
2. Find the next available column to the right
3. **Add a NEW COLUMN: Manager**
 - Create a 'VLOOKUP' formula to locate the MANAGER from the 'DS Setup User Inventory' worksheet based on the userId who executed the process task

NOTE: Add as many columns as desired to expand the data

AE	AF	AG	AH	AI
ProcessDelayFromIssue	currentProcessDelayFromStart	currentProcessDelayFromIssue	currentProcessDelayFromTaskStart	Manager
	441			#N/A
0				Stephen Chen
0				Stephen Chen

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3.2- Create custom Excel Reports in the new Excel Dataset File

Options:

- ✓ Insert new worksheets
- ✓ Create Pivottables from the datasets
- ✓ Filter or hide columns from the tables to create simple table reports
- ✓ Duplicate sheets for 2 different reports from the same dataset

NOTE: Any filters SAVED in the report file will stay filtered when opened in SharePoint!

Ex. Below, Pivottable report connected to the expanded 'DS Process Tasks'

- Provides by Manager, the users who executed tasks & which process they touched
- Very basic report

	A	B	C	D	E	F	G	H
1	Manager	processTaskUser	processName	processInstanceID	processStatus			
2	☒ Cathey Esler	☒ Daniel Chou	☒ Deviation	DEV-000199	CANCELLED			
3			Deviation Total		CLOSED			
4	Cathey Esler Total				OPEN			
5	☒ Elmer Huey-Nazareno	☒ Erin Trainor	☒ Document Control					
6		☒ Kimberly Sales	☒ CAPA					
7			☒ Change Control					
8			☒ Document Control					
9	Elmer Huey-Nazareno Total							
10	☒ Erin Trainor	☒ Kimberly Sales	☒ CAPA					

4- Save the NEW Excel Report File

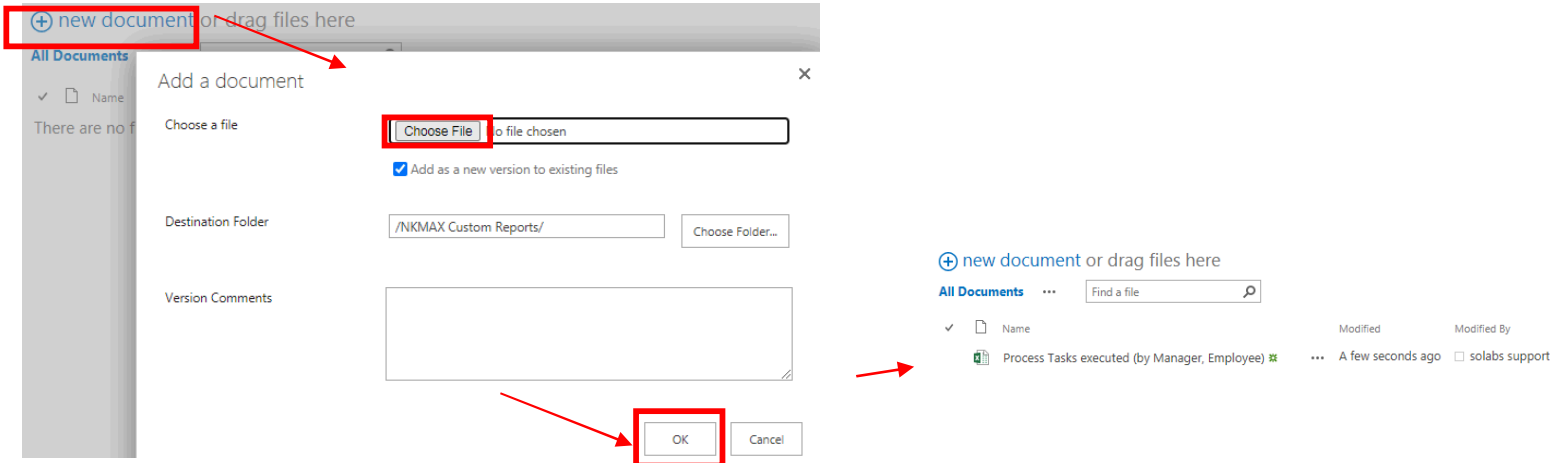
1. Save the completed NEW Excel Report File
 - a. Save it somewhere on your local computer, ex. desktop or downloads
 - b. Save it with a meaningful name
 - c. Ex. Process Tasks executed (by Manager, Employee)

5- Upload your new Excel Report & Dataset file back to your SharePoint

- 1- Open your SharePoint
- 2- Determine which folder to upload the New Excel Report File
 - a. Typically stored under a folder 'Custom Reports'
 - b. This is to separate what is 'Custom' vs. 'Core'
- 3- *Click '+ new document' (see print screen on next page)
 - a. In the form that appears;
 - b. *Click 'Choose File' and select the New Excel report file saved in step #4
 - c. *Click OK

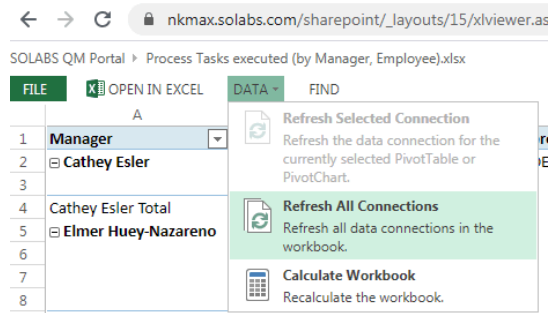
✓ **New Custom Excel Report File will be uploaded to your SharePoint! Ready to use!**

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6- Use the new Excel Report & Dataset file directly in SharePoint

1. **Use in WEB BROWSER:** *Click it to open and use it in your browser
 - a. **NOTE:** MAKE SURE to *Click Data-> Refresh All Connections
 - b. This ensures the datasets are refreshed and any pivottables are refreshed



OR

2. Download a copy to your local computer
 - a. Go to 'FILE->Download'
 - b. Then you can use it like a regular Excel workbook

