

**Recursive Creativity LLC**

**Dynamic Excel Reporting**

**Excel Data Connections**

**Kansas City Office Geeks Presentation**

**May 7, 2009**

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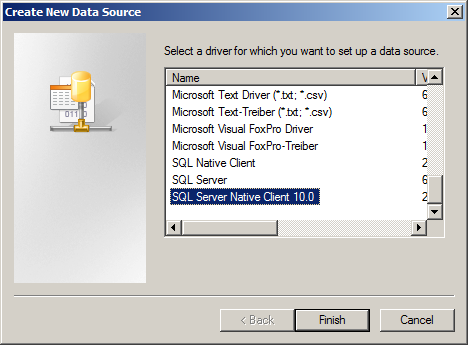
**DSN-less Connection**

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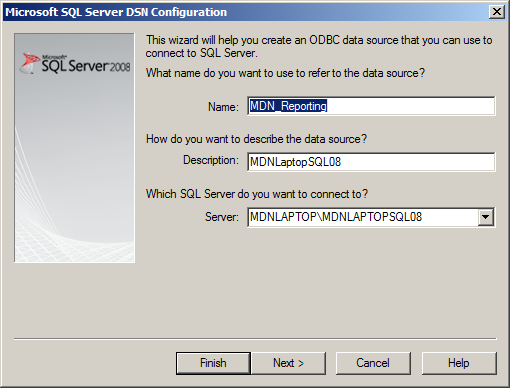
Under Administrative Tools, double-click on Data Sources (ODBC).

1. Click on second tab, **System DSN**
2. Click on **Add**
3. Select “**SQL Native Client 10.0**” from list



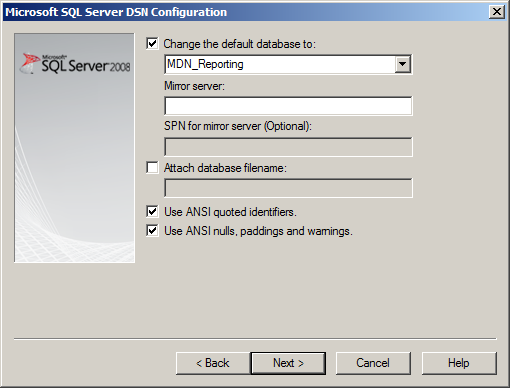
SQL Server 2008 was used in this presentation so all nomenclature will pertain to it.

1. Click **Finish**
2. Provide details:

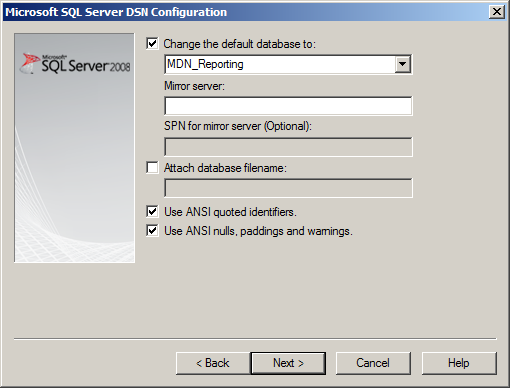


Good practice is to use name of Default Database as Name above.

1. Click **Next >**
2. Click **Next >**
3. Check and choose default database



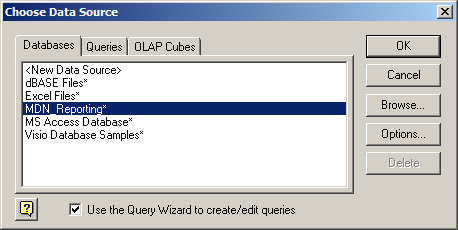
1. Click **Next >**
2. Click **Finish.**



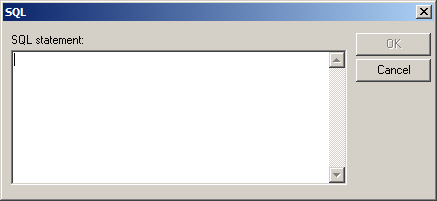
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These are the directions for creating a connection to an external source in Excel 2007 using MS Query.

1. Open **Excel**
2. Click on **Data** tab
3. Click on **From Other Sources** in **Get External Data** section
4. Select **From Microsoft Query**
5. Choose DSN setup in previous step above: (MDN\_Reporting in this example)



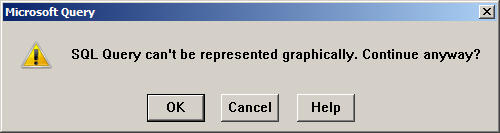
1. Click **OK**
2. Click **Cancel**
3. Click **Yes**
4. Click **Close**
5. Click **SQL** button 
6. Enter SQL statement in window:



For purposes of this demo, “exec usp\_LoadBillingData” was entered. A good practice is to use Stored Procedures so that code is on server and not embedded in spreadsheet. If code, server, database, etc. changes you need not worry about which version of the spreadsheet users or managers are using.

If you want to play around use “SELECT \* FROM DATABASE”. However, be forewarned that in Excel 2007, it will most likely accommodate all columns (fields) and dump more than 1,000,000 records (rows) on the current sheet. Saving such a file may eat up the available space on your harddrive…..that is if it doesn’t lock up your PC by using all available RAM and then using your PageFile for whatever remaining space it needs.

1. Click **OK**
2. Click **OK**

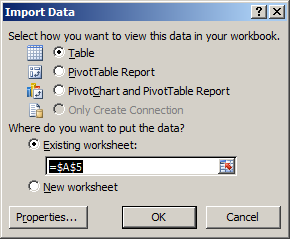


At this point the data returned from the SQL statement should appear in MS Query.

1. Go to Excel and pick the tab and cell Data Table will start in

(Good practice is to start on line 5 or greater to allow for Heading, Column Formulas such as Subtotals or Totals, etc.)

1. Return to **MS Query**
2. Click **File**
3. Click **Return Data to Microsoft Excel**
4. Make choices:



This example will use data to create Table (also known as DataTable) in cell A5 of current sheet/tab.

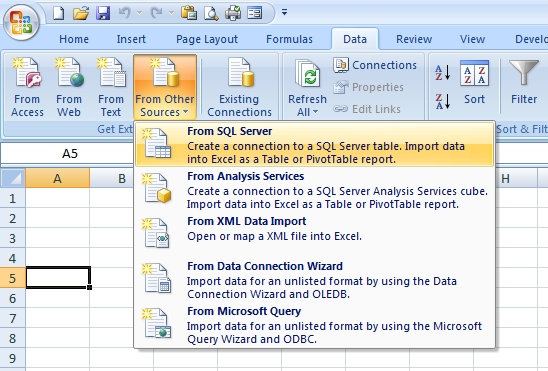
1. Click OK.

Please note that whatever field/column names or aliases are used in the SQL statement will be your column headers for the Data Table in Excel. Thus, consider using aliases and be as descriptive as possible.

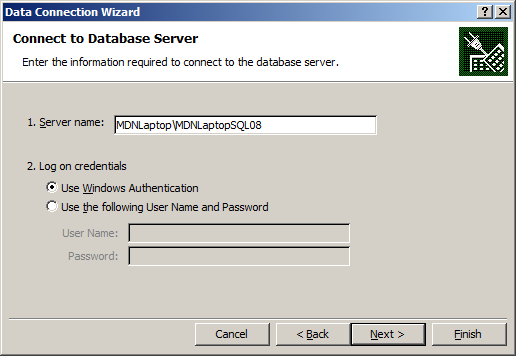
[**DSN-less Connection – Create Data Connection**](#TableOfContents)

These are the directions for creating a connection to an external source in Excel 2007 without setting up a DSN.

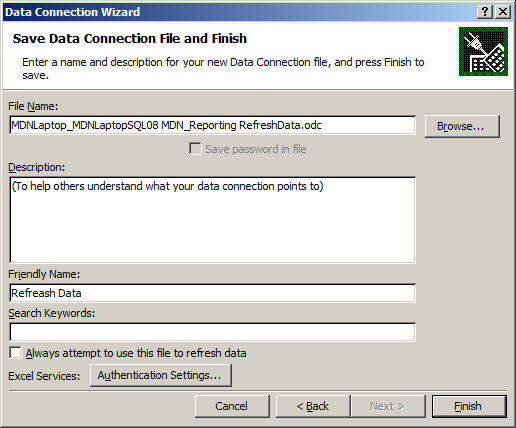
1. Open Excel and either create a tab for the data table or navigate to the tab/sheet data table will reside on. Best Practice: always place Data Table in row 5 or greater. This allows for Headers, Notes, Subtotals or other stats/computations above the Data Table. Advantages to this include:
   1. The Data Table may be too large to print all rows, but having certain information above the data allows for printing page 1 for the summary, or the summary data can be used in graphs, links, etc.
2. Click on **Data** tab
3. Click on **From Other Sources** in Get External Data section
4. Click on From SQL Server



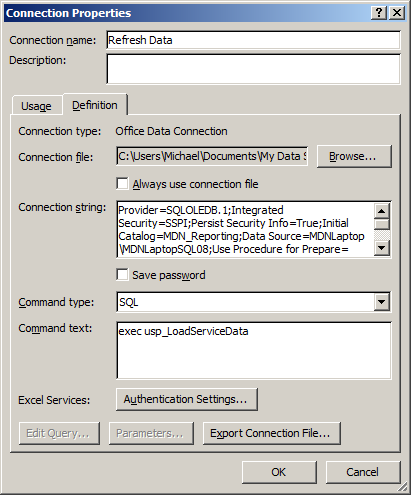
1. Enter Server Name and SQL Named Instance



1. Click **Next >**
2. Select database from drop-down menu
3. Uncheck **Connect to a specific table:**
4. Click **Next >**
5. Make changes to file name as necessary (I add the Friendly Name)
6. Enter **Friendly Name**



1. Click **Finish**
2. Click **OK**
3. Click **Properties…**
4. Click **Definition** tab
5. Click drop-down menu for **Command Type:** and change to SQL
6. Enter SQL statement in **Command Text:**



1. Click **OK**
2. Click **OK**

To refresh Data Table, click anywhere within the Data Table and right-click mouse, select **Refresh.**

I make it a good practice to freeze panes in the first column and row underneath column headers.

1. Select **View** tab in Ribbon
2. In Window section, click on **Freeze Panes**
3. Click on **Freeze Panes** choice in menu.

Repeat the above process to Unfreeze Panes.