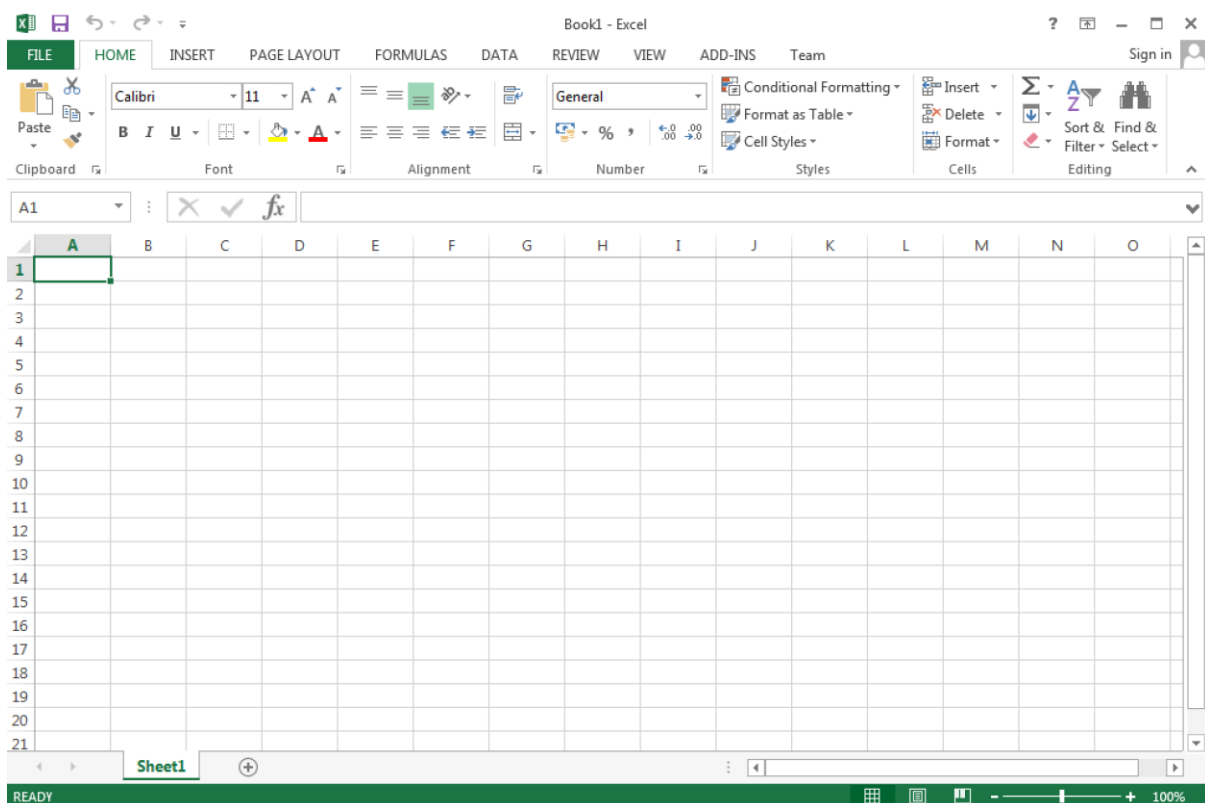


Creating a link to SDS Sequel from Microsoft Excel

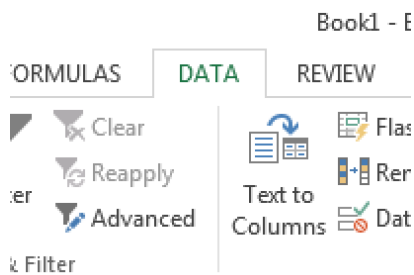
These instructions are for linking an Excel workbook to the SDS Sequel database. This is useful when you wish to manipulate the data directly, for example, creating your own bespoke reports. The link between the two systems is automatic, meaning the data can be refreshed in the Excel workbook at the click of a button, without needing to open Sequel.

Part One – Creating the data connection

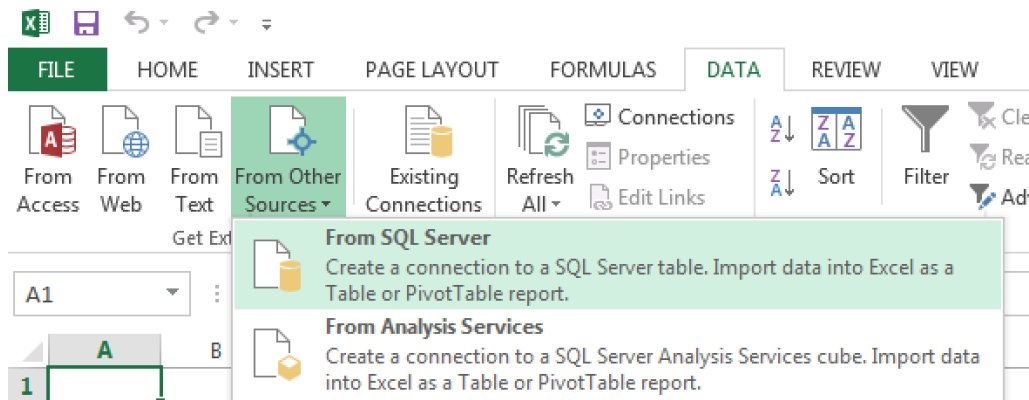
1. Open Excel and create a new workbook. The screenshots below are taken from Microsoft Excel 2013, but the same process is applicable to older versions of Excel as well.



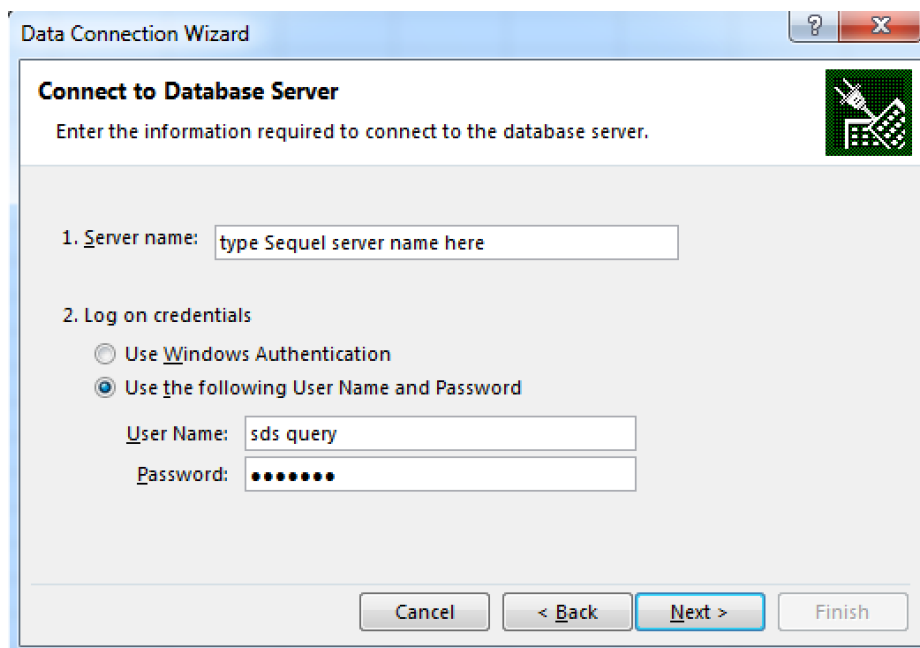
2. Click on the “Data” tab on the ribbon bar.



3. In the “Get External Data” group on the ‘Data’ ribbon bar, click the “From Other Sources” drop down button, and choose the “From SQL Server” menu option.



4. In the “Data Connection Wizard” that will appear, there are two pieces of information to enter.
 - a. The first of these is the name of the server where the Sequel database is located. If you don’t know what this is, please start SDS Sequel, as the server name you need will be displayed on the login screen.
 - b. The second piece of information is the username and password to connect to the database. These are:
 - i. User Name: sds query
 - ii. Password: sds!234



5. On the next page of the wizard, the database and data source must be selected. Generally speaking, the name of the database will be “SDSSequelWorking”, as this is the live database.

Data Connection Wizard

Select Database and Table

Select the Database and Table/Cube which contains the data you want.

Select the database that contains the data you want:

SDSSequelWorking

☒ Connect to a specific table:

☐ Enable selection of multiple tables

Name	Owner	Description	Modifi
vwCoreTransactionsPivot36Months	sds sequel		

- Beneath the database selection is a list of all available tables and views in the database that you can use in your Excel file. If you know the name of the view that you wish to use, simply select it in the list. If you're not sure what to select, please note that each report supplied as standard with Sequel will have a corresponding view by the same name, prefixed with a "vw", which is short for 'view'. So, for example, in the screenshot below "vwCostToCompletion" is selected, which corresponds to the report called "Cost to Completion".

Data Connection Wizard

Select Database and Table

Select the Database and Table/Cube which contains the data you want.

Select the database that contains the data you want:

SDSSequelWorking

☒ Connect to a specific table:

☐ Enable selection of multiple tables

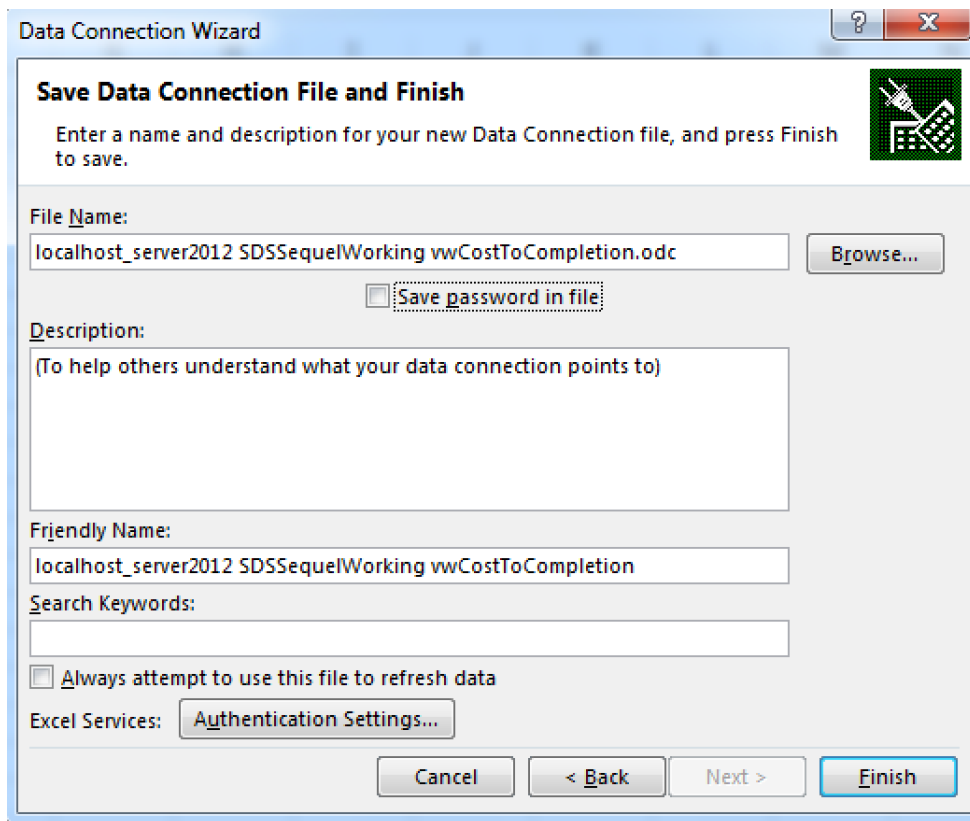
Name	Owner	Description	Modified	Created
vwCoreTransactionsPivot36Months	sds sequel			8/9/2011 4:25
vwCostTimeOverrun	sds sequel			2/14/2011 11
vwCostToCompletion	sds sequel			2/14/2011 11
vwCPCAgendaCashflowManager	sds sequel			11/13/2013 1
vwCPCAgendaReport	sds sequel			12/10/2013 1
vwCPCAgendaReportProjectDefects	sds sequel			11/13/2013 1
vwDates	sds sequel			1/15/2014 2:4

☐ Import relationships between selected tables

Select Related Tables

Cancel < Back Next > Finish

- Having selected the database and source, click 'Next'. You will then be able to save this connection in the Excel file, so it can be used to get the data from the Sequel. You will be able to edit the filename and other descriptive data. You can leave these as the default if you like, or edit them to make them more descriptive.



Data Connection Wizard

Save Data Connection File and Finish

Enter a name and description for your new Data Connection file, and press Finish to save.

File Name:
localhost_server2012 SDSSequelWorking vwCostToCompletion.odc Browse...

☐ Save password in file

Description:
(To help others understand what your data connection points to)

Friendly Name:
localhost_server2012 SDSSequelWorking vwCostToCompletion

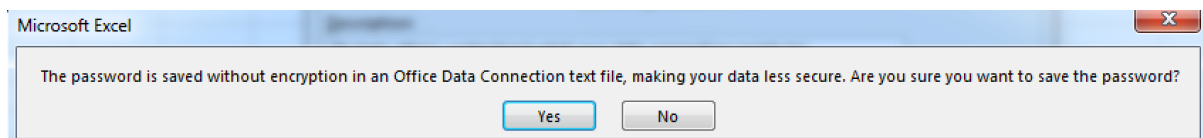
Search Keywords:

☐ Always attempt to use this file to refresh data

Excel Services: Authentication Settings...

Cancel < Back Next > Finish

8. Before finishing the wizard, tick the option under the filename to “Save password in file”. You will be warned that this could be potentially unsafe; however, the username and password is for a read-only login, so just click “Yes” to continue.

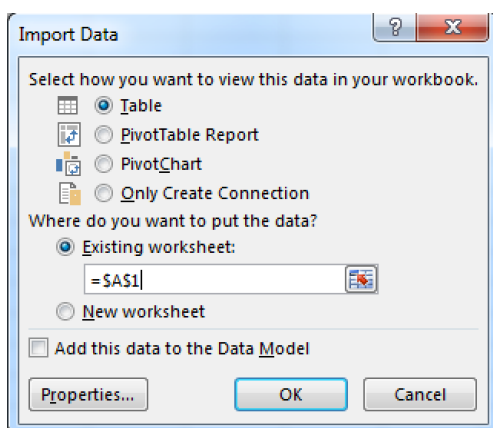


Microsoft Excel

The password is saved without encryption in an Office Data Connection text file, making your data less secure. Are you sure you want to save the password?

Yes No

9. After clicking ‘Finish’, you will be asked how the data should be incorporated into Excel, and where. For the simplest and quickest way to complete the process, leave the default options selected, and click “OK”.



Import Data

Select how you want to view this data in your workbook.

☒ Table
☐ PivotTable Report
☐ PivotChart
☐ Only Create Connection

Where do you want to put the data?

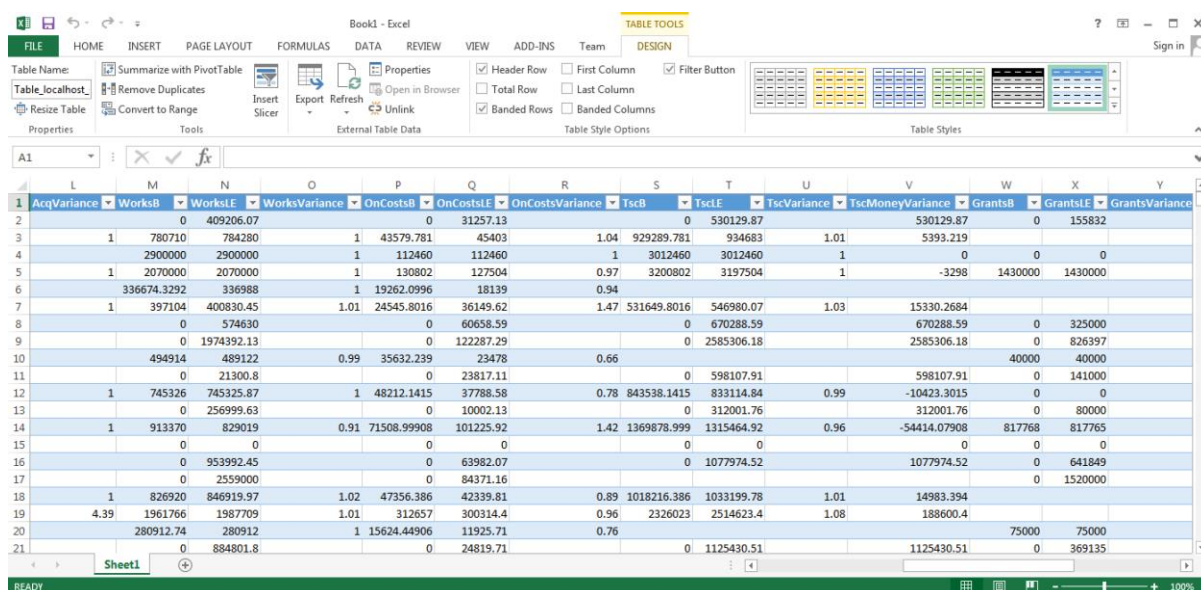
☒ Existing worksheet:
 = \$A\$1

☐ New worksheet

☐ Add this data to the Data Model

Properties... OK Cancel

10. This will insert the data directly into a table in the current worksheet, starting at cell A1.



11. Once the data is in the workbook, you can now reference and link to it from any other worksheet in the usual way.

Part Two: Refreshing the data

Once the data connection has been made, there is no need to repeat the first part of these instructions to refresh the data. Instead, to reload the latest figures from the database, click the “Refresh” button on the ‘Data’ ribbon:

