

<<enable
your
business>>

Perficient, Inc.

Office XML & SharePoint

by
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Enabled Enterprise™ Solutions and Services



Perficient®

Introduction



- Perficient, Inc.
 - > Formerly Genisys Consulting, Inc.
 - > www.perficient.inc

- Malcolm Eaton - Consulting Manager
 - > Worked with Microsoft Office since 1992
 - > Heading up our Information Worker division within Perficient

Three Questions

1. How many people know more about XML than what it stands for?
2. How many people here have seen Windows SharePoint Services (WSS) or SharePoint Portal Server (SPS)?
3. How many people here have seen the movie Minority Report?

- Why Minority Report?
 - > Tom Cruise's character splits information easily just using his fingers.
 - > We will use XML to easily separate and display data using Microsoft Office 2003.



1. What is XML and Why You Should Care
2. The Case for XML in Office
 - > Business Case Scenarios
3. XML in Word
 - > Demonstration (XML)
 - > Demonstration (Placeholders/Protection)
4. XML in Excel
 - > Demonstration
5. Using XML in SharePoint
 - > Demonstration
6. Summary



XML Terminology Primer/Review

- XML :
 - > e**X**tensible **M**arkup **L**anguage
 - > Markup language for documents containing structured information
- XSD :
 - > **X**ML **S**chema **D**efinition Language
 - > XML language for describing and constraining the content of XML documents
 - > Think of this like the database design
- XSLT :
 - > e**X**tensible **S**tylesheet **L**anguage **T**ransformations
 - > Language for transforming XML documents into other XML documents
- XPath :
 - > **X**ML **P**ath Language
 - > Language for addressing parts of an XML document



The Promise of XML / What and Why

- Sharing data is hard
 - > Numerous implementations, binary and text
 - > Many storage mechanisms
 - > Differing structures and definitions
- XML makes it easy
 - > A standardized approach to describing and structuring data



Scenarios

- Key Issues
 - > You want users to be able to use Microsoft Office to modify documents
 - > You want users to be able to work offline
 - > You want to be able to compile the information

- Scenarios
 - > You receive Status Reports from many different groups
 - > HR Review Forms
 - How did the person do last year?
 - Need to only see ratings
 - > Proposal Generation/Archival
 - Quote generation

“Allows data to be freely introduced to, and provided from Office applications without regards to structure, format, or proprietary requirements.”

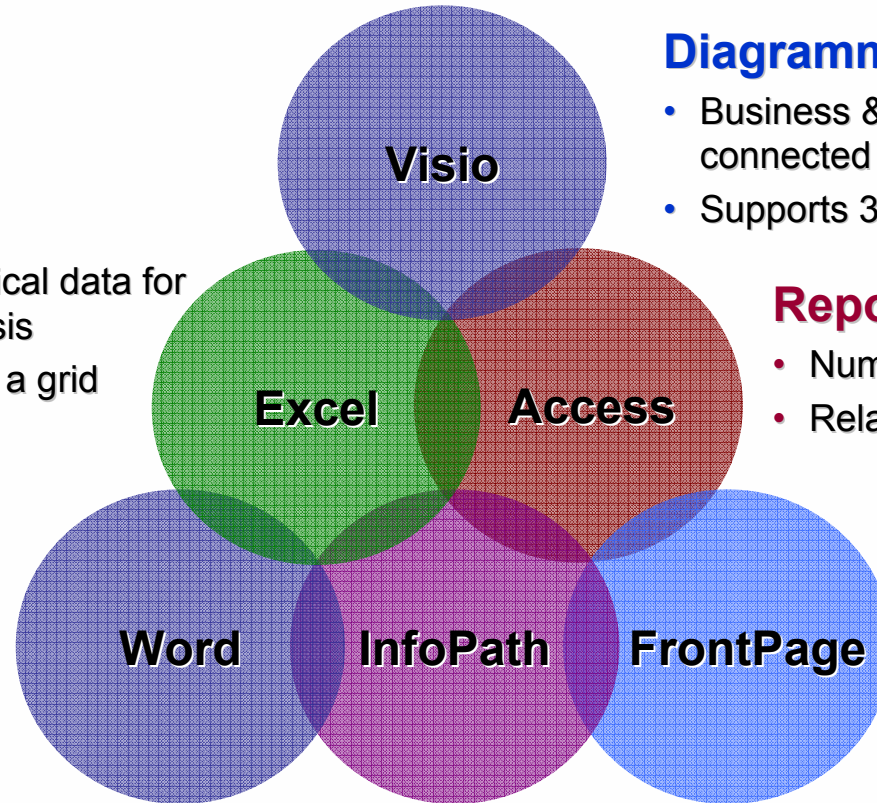
Simply stated:

“XML simplifies common data exchange”

- Office Documents are Information Assets
- Sharing data with/from Microsoft Office
 - > Numerous file formats and versions
 - .doc, .xls, .mdb, .vsd, .txt, .csv, .rtf, .htm, etc...
 - > Commonly require coded solutions
 - > Resulted in usable data being locked in documents or unavailable for use within Office
- XML within Office separates the data content from the style information

Data Analysis

- Tabular, largely numerical data for calculations and analysis
- Data best presented in a grid



Diagramming

- Business & technical drawings connected to Data, SVG support
- Supports 3rd party XML Data

Reporting & Storing

- Numerical or textual fields
- Relational tables in databases

Data Driven Web Sites

- Flexible presentation of tabular or hierarchical data
- Expanded data reach
- Integrate across data sources

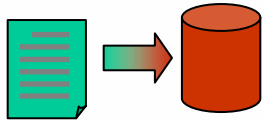
Content Authoring

- Large areas of text or mixed content
- Flexible layout and formatting with XML markup

Information Gathering

- Highly structured, grouped information
- Form-like with few paragraphs of formatted text

XML in Word enables...



- Extraction of specific business data from documents for automated processing

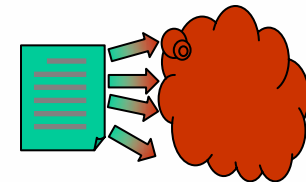
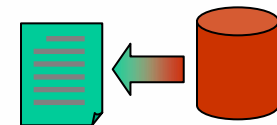
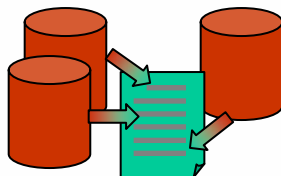
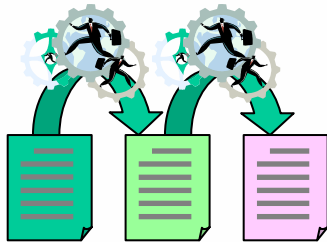
- Easy access to relevant business data in the document context

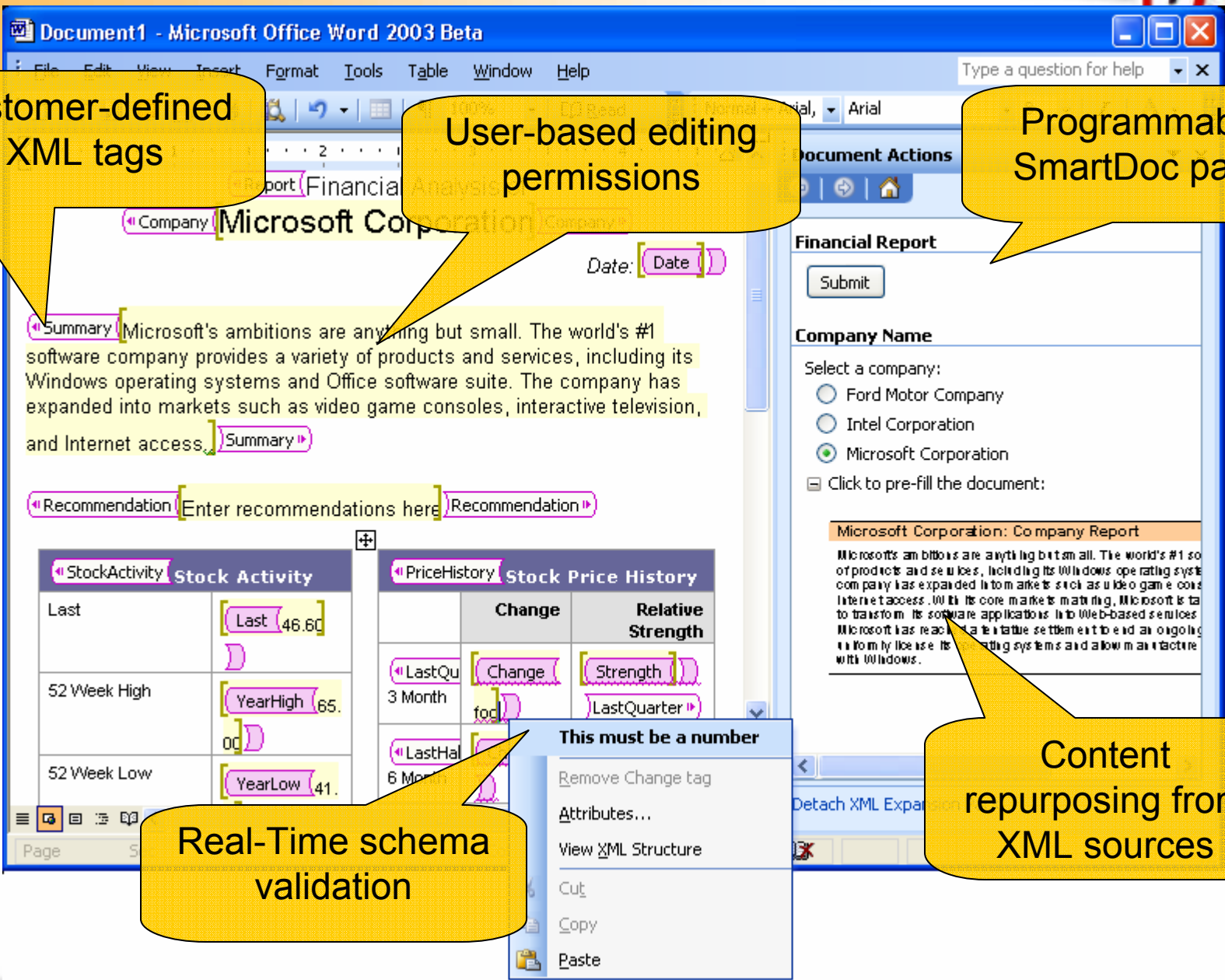
- Increased efficiency of business processes with structured data

- Liberation of document content for repurposing and data-mining

- Automated report generation and document assembly from data or content repositories

...all within familiar, easy to use, powerful Word!





Customer-defined XML tags

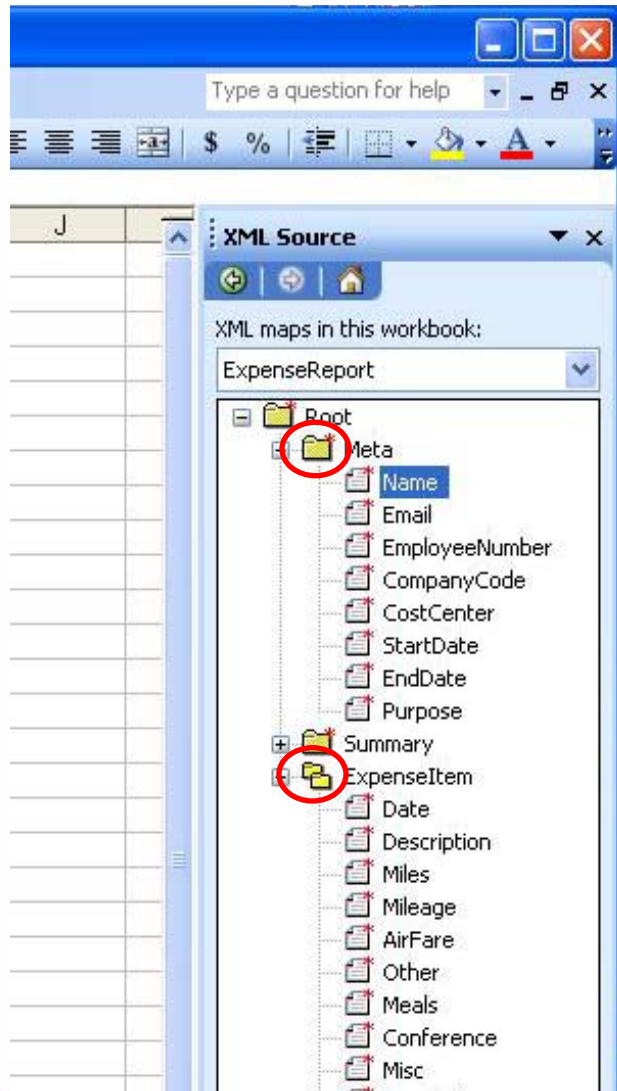
User-based editing permissions

Programmable SmartDoc pane

Real-Time schema validation

Content repurposing from XML sources

XML in Excel – Visual Mapping



- Hierarchical view of schema
- Repeating vs. Non-repeating elements
- Drag / Drop
 - > Associate XML elements with ranges in the workbook



Combining XML with Lists

- New Excel 2003 feature
- Simplifies managing lists in Excel
- Enhanced usability
- Insert Row
- Auto-Filter

Date ▼	Description ▼	AirFare ▼	Meals ▼
1/1/2003	Flight	\$ 550.00	
1/1/2003	Lunch		\$ 35.99
1/1/2003	Dinner		\$ 51.45
*			



SharePoint and XML

- How SharePoint uses XML
 - > Web Services and the XML Web Part
 - > DataView Web Part
 - > SharePoint Lists
 - > InfoPath

Demonstration

- **Who is Perficient?**

- > Perficient is a leading provider of e-business IT services and solutions.

- **Microsoft Technologies Focus**

- > Perficient is a Microsoft Gold Certified Partner in Information Worker Solutions.
- > We specialize in developing custom solutions utilizing the following Microsoft technologies:
 - **SharePoint Portal Server * Office 2003 * Windows SharePoint Services * OneNote * Content Management Server * Exchange * InfoPath**
- > Our solutions typically utilize SQL Server, .NET development and XML. We leverage our expertise in Commerce Server and BizTalk as needed but are anticipating a growing need for them.

- XML in Microsoft Office 2003:
 - > Unlocks data from Office documents
 - > Captures data in new/better ways
 - > Enables new types of solutions
 - > Reduces the amount of XML programming
 - > Makes sharing data less of a challenge

- What we missed today:
 - > XML Existing in Other Office Applications
 - InfoPath
 - Visio
 - FrontPage
 - Access

Information

- Resources

- > <http://www.xmlinoffice.com/> - Great Book
- > <http://www.w3.org/> - XML Standards and Definitions
- > <http://www.microsoft.com/office> - MS Office Site

- Contacts

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- Thank You

- Questions?

