

Work with business data in SharePoint lists

Microsoft Office SharePoint Server 2007 provides a list column type called Business Data, which is available to SharePoint lists in Office SharePoint Server 2007. The business data column type enables users to add data from business applications that are registered in the Business Data Catalog to lists. You can integrate information from business applications such as SAP, Siebel, and Microsoft SQL Server into the collaborative environment of Microsoft Office SharePoint Server 2007 by adding the business data column type to a list. This way, you have a list of items that use a combination of columns from a SharePoint site and from an external business application.

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Ways to use business data in lists

There are several advantages to using business data in lists. For example, Contoso, Ltd., a consulting company that uses a customer relationship management (CRM) system, uses business data in lists in the following ways:

- **To associate documents with customer records** Documents such as proposals, contracts, and presentations can be stored in SharePoint lists and associated with the appropriate customer in the CRM database. This helps keep all of the customer documentation in one place and lets page viewers easily navigate to the customer's record in the business application.

- **To easily augment information from external data sources** Adding custom fields to a large database, such as a CRM system, can be costly and complex. By using a SharePoint list, Contoso employees can create custom columns for any type of data, such as an annotation, and then associate that column with the customer record in the CRM system. Not only is this type of column easy to add, it also helps prevent changes to the original data.
- **To select data from a list of consistent values** To create a new column in a SharePoint list that displays a list of values, such as postal codes, authors can use the preapproved master list of values from the CRM database. This saves time and reduces inconsistency and errors during data entry.

Important Your administrator must first register your external business application with Office SharePoint Server 2007 before the business data column type is available. The type of information that you can add from your business application depends on the fields that your administrator registers with Office SharePoint Server 2007.

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Shortcuts to business data actions

Business data actions are links that appear beside business objects. These links can, for example, open Web pages, display the user interfaces of business applications, or open Microsoft Office InfoPath forms. Business data actions menus also appear in SharePoint lists and search results. By using these links, you can easily update an item or see related data.

The types of business data actions that are available from a SharePoint list depend on the permissions that your administrator sets on the item and the type of list item itself. For example, if the item is an entity in an SAP database, you can access and edit items in the database directly from the SharePoint list.

To view the actions list, point to the item that you want to view, click the arrow that appears, and then click one of the actions on the menu.

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Add a column of business data to a SharePoint list

Depending on the type of business data that you are working with and the values associated with the data, you need to first designate one primary column for which you can then select optional related columns for each value. Examples of business data values are class, color, name, price, and so on.


Note To complete this task, you must have permission to the data source and the Contribute permission level on the site.

1. If the list is not already open, click its name on the Quick Launch.

If the name of your list does not appear, click **View All Site Content**, and then click the name of your list.

2. On the **Settings** menu , click **Create Column**.
3. In the **Name and Type** section, type the name that you want in the **Column name** box.
4. Under **The type of information in this column is**, select **Business data**.

The **Additional Column Settings** section is updated with the settings that apply to business data columns.


5. In the **Additional Column Settings** section, in the **Type** box, type the name of the business data type from which you want to add columns. To browse for a business data type, click **Browse** .
6. In the **Display this field of the selected type** list, select the field that you want to display in the primary business data column.
7. Under **Add a column to show each of these additional fields**, select as many additional fields as you want. These columns are automatically populated when you select a value in the primary business data column.
8. Click **OK** to save your changes and return to the list.

Note You can sort and filter the additional columns, but you cannot change their order in the list.

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Add business data items to a SharePoint list

Before you can add business data items to a list, you must add a column of business data, as described earlier in this article.

1. On the **New** menu  click the arrow, and then click **New *item type***, such as **New Item**.

If additional content types have been added to the list, other choices appear, such as **New Support Issue** or **New Vendor**.

2. In the **Title** box, type a name for this item in your list.
3. To search for data in a business data column, do one of the following.



If you

Do this

Know the name of the item

1. Type as much of the value as you can, and then press **CTRL+K**.
2. If there is more than one result, select one from the list, and then click **OK**.

Want to search for an item


1. Click **Browse** .
2. Click the arrow, and then select the name of the filter that you want to search for.
3. Type the value in the box to the right, and then click **Search** .
4. Select the data from the search results box, and then click **OK**.

4. To add the item to the list, click **OK**.

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Update the data in the business data column with business application data

To ensure that business data columns in your SharePoint list stay current with the dynamic data in your business application, you need to update your SharePoint list columns frequently. You update only the primary business data column. Any additional related business data columns are updated when the primary column is updated.

1. Locate the primary business data column in the list by finding the column with the **Update** symbol  next to it .
2. Click the **Update** symbol.
3. The **Update Confirmation** page appears. To continue with the update, click **OK**.
4. The **Update Status** page shows how many records were updated and whether any errors occurred. To return to the list, click **OK**.

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View the profile of a list item


Each business data item in a SharePoint list has a profile that contains additional details from the business application. For example, the column may contain only the product name, but the profile can show details such as product description, color, list price, or cost.

To view the profile of an item, click the arrow next to the item, and then click **View Profile**.

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Delete a business data column from a SharePoint list

When you add more than one business data column from the same external database to a list, you designate one primary column and then select additional related columns. When you delete the primary column, all of its related columns are deleted. Related columns cannot be deleted independently of the primary column.

1. On the **Settings** menu , click **List Settings**.
2. Under **Columns**, select the name of the column that you want to delete.

Note Only primary column names are displayed in the list.

3. On the **Change Column** page, click **Delete**.

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