

Content

Acknowledgments	xi
Introduction	xxiii
Part I: Introducing Excel Services	1
Chapter 1: Introduction to Excel Services	3
Why Use Excel Services	3
The Excel Client Farms	4
Rewriting the Models	4
How Excel Services Comes to the Rescue	5
Excel Services Goals	5
First Goal — 100% Fidelity with Excel	6
Second Goal — Security	6
Third Goal — Robustness and Reliability	6
Chapter 2: User and Administrator Cheat Sheet	7
Excel 2007 and Excel Services	7
Object Model Support	7
Addin Model Support	8
Excel Services Out of the Box	8
Excel Web Access	8
Topologies	9
Departmental Deployment	10
Large Scale Deployment	10
Unsupported Features	10
Old File Format	10
VBA	10
Query Tables	11
External Workbooks	11
Real-Time Data	11
Images and Shapes	11
Protection/Encryption	12
Other Unsupported Features	12
Roundtrip-Only Features	12



Contents

How to Administer Excel Services	12
Excel Services Settings	13
Trusted File Locations	14
User Defined Function Assemblies	15
Summary	15
Chapter 3: Inside Excel Services	17
Session, State, and Workbooks	17
Caches	18
Workbook Caches	18
Data Caches	19
Caching Calculations	19
Summary	20
Chapter 4: Programmability Options	21
Excel Web Services	21
Opening and Closing the Workbook	21
Getting Values from the Workbook	22
Writing Values to the Workbook	22
Workbook-level Interaction	22
Getting a Whole Workbook	23
Miscellaneous Methods	23
User Defined Function Assemblies	23
EWA Web Part	23
Summary	23
Part II: Excel Web Services	25
Chapter 5: Hello World Sample	27
Hello World Overview	27
Preparing the Project and Opening a Workbook	28
Making Sure the File Can Be Accessed by Excel Services	28
Preparing the Project for Use with Excel Services	30
Opening a Workbook on the Server	32
Getting a Cell from the Workbook	34
Writing Values into Cells in the Workbook	35
Using the Model Part of the Workbook	36



Contents

Finishing the Sample Project	36
Updating the Model	37
Extras	38
Final Program	38
C# Hello World Program	38
VB.NET Sample Code	40
Summary	41
Chapter 6: Excel Web Services Reference	43
Direct Linking	43
Notations Used in the API Reference	43
Session Management Methods	44
OpenWorkbook	44
CloseWorkbook	46
CancelRequest	46
GetSessionInfo	48
Cell Retrieval Methods	49
Common Characteristics for GetXXX Methods	49
GetCell	52
GetCellA1	53
GetRange	54
GetRangeA1	55
Workbook Retrieval	56
GetWorkbook	57
Writing Values into Cells	57
Type and Content Restrictions with Set Methods	57
SetCell	58
SetCellA1	59
SetRange	59
SetRangeA1	60
Workbook Updating Methods	61
Calculate	62
CalculateA1	63
CalculateWorkbook	64
Refresh	64
Support Classes and Enumerations	66
RangeCoordinates	66
Status	66



Contents

Exceptions and Errors	66
SoapException	67
SubCode List	68
Summary	70
Chapter 7: Building the Excel Services Library (ESL)	71
Project Design	72
Abstraction Classes	72
Namespace	73
Support Classes	74
Method Call Abstraction	76
IExcelServiceWrapper	77
IWrapperCredentials	78
Modifying ExcelServiceSoap	78
Exception Classes	80
ExcelServices Class	80
ExcelServicesType	80
Implementing ExcelServices	80
ExcelServices.Open()	82
ExcelServices.FromSessionId()	83
The Session Class	83
Dispose Code	85
Refresh Functionality	87
GetRangeA1 Functionality	88
Session Class Summary	89
The RangeResult Class	89
Example	90
How RangeResult Works	91
WorkbookData Class	96
Summary	97
Part III: User Defined Functions	99
Chapter 8: UDF Sample	101
What This Sample Contains	101
Creating a UDF Assembly	101
Required References	102
Adding the UDF Class	103
Adding the First UDF	103
Optional Parameters	108



Contents

Getting External Data	109
Using Ranges with UDFs	111
Caching Information	115
Summary	118
Chapter 9: UDF Reference	119
History	119
Excel Services UDFs	120
Execution of UDFs	120
UDF Requirements	120
The Assembly Loading Process under the Hood	121
UDF Classes' Lifetime	122
UDF Methods	122
Cell Ranges	127
UDFs and Interop	128
Thread Safety	128
Volatility of UDFs	129
Personal Data UDFs	130
Caching Information in UDF Classes	132
Loading UDFs on the Server	134
Updating Assemblies	134
Troubleshooting UDFs	136
Debugging UDFs	138
Summary	140
Chapter 10: Client Support for Server UDFs	141
Modifying UDFs to Run on the Client	141
Add COM Support to a UDF Assembly	142
Registering the Assembly	144
Using the UDF inside Excel Client	144
Adding Client Support for GetMultiStockQuote	145
Conclusion	147
Generic Client UDF Support	147
Configuration Application	148
UdfProxy	149
CUdfAutomation	159
Final Steps	169
Improvements	170
Other Generic Solutions	170
Summary	171



Contents

Part IV: Excel Web Access	173
Chapter 11: Using Excel Web Access	175
EWA Usage	175
Web Part Properties	177
Part to Part Communication	179
Inside EWA	181
Frame Communication	182
Session Cookie	182
Summary	182
Part V: Reusable Excel Web Services Projects	183
Chapter 12: Utilizing Web Services in UDFs	185
Library Component	185
How It Works	186
About Code Generation	186
WebServiceMethodCollection and WebServiceMethod Classes	187
WebServiceParameter and WebServiceParameterCollection Classes	189
UdfDefinition Class	189
GeneratedResult Class	195
Helper Class	200
ExcelServicesHelper Class	203
ExcelHelper Class	206
UI Component	209
Summary	211
Chapter 13: Custom Web Services	213
Overview	213
Usage Example	214
Using the Custom Web Service	218
Updating the Model	219
More Type Safety	219
Generating UDFs	219
Topology	219
Coding the Solution	221
Solution Structure	221
Library	222



Contents

Excel Addin	223
Web Application	230
Enumerating Web Services	233
Summary	234
Chapter 14: RSS over Excel Services	235
<hr/>	
Overview	235
What Is RSS	236
Usage Example	236
Coding the Solution	245
Solution Structure	245
Library	245
Excel Addin	247
RSS Server	250
Summary	257
Chapter 15: Excel Services as an RTD Server	259
<hr/>	
Overview	260
Use	260
Coding the Solution	262
How RTD Works on the Client	262
ClientSideRtd	263
Summary	271
Chapter 16: Real Time Data UDF	273
<hr/>	
Overview	273
Use	274
Dangers of Using RTD in Excel Services	275
Coding the Solution	276
RtdUdf Project	277
Summary	285
Chapter 17: Directly Parameterized Workbooks	287
<hr/>	
Overview	287
Use	287
CustomWorkbooks Project	291
Summary	295



Contents

Chapter 18: SQL Tables and SharePoint Lists	297
Overview	297
Use	298
Coding the Solution	306
Pes.DataUdfs Project	306
OleDbUdfs Class	311
SharePointUdfs Class	311
Summary	316
Chapter 19: External Workbook References	319
Overview	319
Use	321
Coding the Solution	328
Pes.DataUdfs Project	328
Utils Class	337
Summary	337
Chapter 20: Excel Services Workflows	339
Overview	339
Use	340
Coding the Solution	347
Pes.ExcelWorkflows Project	347
Deploying the Solution	365
Summary	368
Chapter 21: EWA Projects	369
Parameterized EWA Links	369
How It Works	369
How to Build	370
Custom XLViewer	376
How It Works	376
Coding the Solution	379
Manipulating the EWA Session	382
How It Works	382
Coding the Solution	384
Summary	392



Contents

Chapter 22: Excel Data Filter	393
Overview	393
Use	394
Coding the Solution	401
The Excel Services AJAX library	401
How Part to Part Works	406
Pes.Filter Project	407
Summary	418
Chapter 23: Excel Services Mashup	419
Overview	419
Use	419
Coding the Solution	423
Workbook Model	423
EWA Page	424
UDF Assembly	425
HTML	425
Summary	430
Index	431

