



**BROCHURE**

# EPAM SharePoint Connector for TIBCO Spotfire

# Streamline Reporting Workflows with Secure Data Access to Microsoft SharePoint

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## CHALLENGE

Leveraging enterprise data stored on Microsoft SharePoint inside analytics is time consuming and can be very costly to automate. Data validation, temporary data storage and exports require the constant participation of the IT department. Enforcing strict enterprise governance when connecting Microsoft SharePoint and TIBCO Spotfire is a must for every organization.

## SOLUTION

The EPAM SharePoint Connector for TIBCO Spotfire enables SharePoint data to be embedded within analytics, automates data import, ensures regular data refresh and solves all integration challenges, such as enforcing strict enterprise security and protecting sensitive business data.

## KEY FEATURES

- Native integration with TIBCO Spotfire as a custom data source
- Automated refresh when opening reports while being online
- Support for multiple SharePoint data types (e.g. Microsoft Excel files, CSV files, custom lists, calendars, text files, etc.), metadata field types (CanBeDeleted, ReadOnly, Hidden) and all list types
- Support for recursive query to download list hierarchies (e.g. lists inside lists or folders inside folders or folders inside lists) for unlimited depth
- Spotfire Automation job support
- Compatible with SharePoint 2007, 2010, 2013 and SharePoint Online
- Support for SharePoint Server Authentications: Basic, Forms, Windows and SharePoint Online Authentications: Forms and Azure Active Directory SSO
- Query unlimited data rows
- Dynamic, configurable authentication method
- Customizable HTML sanitization and increased performance
- Support for Service Accounts in SharePoint through existing credentials on file

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## **BENEFITS & VALUE**

### *Unlock Enterprise Data*

- Turn SharePoint data into insights through TIBCO Spotfire Analytics
- Enable users to deep dive into data from SharePoint by analyzing it via TIBCO Spotfire
- Retrieve deeply held data with powerful search and retrieval of lists and sub-list items

### *Automated Data Access*

- Access the most recent, automatically refreshed data stored on Microsoft SharePoint at anytime

### *Enterprise Security*

- Ensure strict enterprise security standards with built-in support for various authentication methods (basic, forms, integrated Windows and SSO)

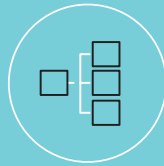


# Use Cases

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PROJECT  
MANAGEMENT  
& REPORTING



PROJECT  
PORTFOLIO  
MANAGEMENT



EXPANDED  
MASTER DATA  
MANAGEMENT



EMPLOYEE  
LIFECYCLE  
MONITORING

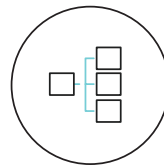


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## *Project Management & Reporting*

Enable holistic status reporting throughout the full lifecycle of projects managed on Microsoft SharePoint

- Track the status of projects managed on SharePoint through SharePoint lists or Excel files embedded directly in Spotfire dashboards
- Handle dependencies and relations within SharePoint inside Spotfire reports through SharePoint List IDs
- Integrate live data from SharePoint without data transfer
- Refresh project statuses automatically



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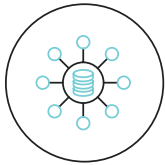
## *Project Portfolio Management*

Manage project portfolios, optimize resources and process elements with the EPAM SharePoint Connector

- Build reports from project portfolios using SharePoint data
- Track metrics of individual projects within centralized Spotfire dashboards from multiple project sources
- Collaborate on project decisions on SharePoint and visualize outcomes on centralized Spotfire dashboards
- Optimize budget allocation and set project goals based across multiple SharePoint data sources stored in various formats (e.g. Excel, CSV or SharePoint objects)

## Use Cases

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### *Expanded Master Data Management*

Allow the easy and seamless usage of continuously growing project data with the EPAM SharePoint Connector

- Easily embed the master data maintained on SharePoint into Spotfire analytics
- Seamlessly connect global or localized master data with analytics
- Ensure strict enterprise security while accessing SharePoint data
- Automatically refresh master data maintained on SharePoint when opening dashboards



### *Employee Lifecycle Monitoring*

Support Human Resources (HR) decisions and monitor employee lifecycle based on SharePoint data

- Embed HR data from SharePoint into Spotfire dashboards
- Unify diverse HR data from several SharePoint sources
- Analyze various KPIs from different SharePoint sources to find correlations between employee satisfaction, commitment and retention
- Automatically refresh KPIs on HR dashboards from SharePoint



# Frequently Asked Questions

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## *Which TIBCO Spotfire version is the EPAM SharePoint Connector compatible with?*

- TIBCO Spotfire 7.5 and above

## *Where can I access SharePoint data with the EPAM SharePoint Connector?*

- TIBCO Spotfire® Analyst Client, TIBCO Spotfire® Business Author, TIBCO Spotfire® Consumer

## *Where can I set up a new SharePoint data connection for my Spotfire analysis?*

- It is available on the TIBCO Spotfire® Analyst Client. Click 'File', 'Open from', 'SharePoint file', 'Option'.

## *What will happen with a connection when a report is migrated to another server?*

- All saved SharePoint connections will be available and fully functional in the new server.

## *What will happen when a report is moved to another server?*

- Moving a report to a different server will not affect the created SharePoint connections as these are stored in the report.

## *What kind of file types are supported by the EPAM SharePoint Connector?*

- Microsoft Excel files (xls,xlsx,xlsm), text files (csv,txt), SharePoint lists

## *What kind of authentication types are supported by the EPAM SharePoint Connector?*

- Windows (classic without credentials, classic with credentials), form based authentication, and SharePoint Online with Cloud credentials

## *Can I modify my SharePoint connection without saving the report?*

- The modifications made in the SharePoint connection will only be committed when the report is saved.

## *Can I use the EPAM SharePoint Connector for Spotfire Automation Services?*

- It is possible if the credentials are stored in the DXP. (Use Service Accounts for Automation Services execution.)

## *Can I refresh a SharePoint-based data table?*

- There are three options available – 1) Click on 'Replace datatable' from 'File' menu and open SharePoint file, 2) Close and reopen the specified template, and 3) Click on 'Reload Data'.

## **STREAMLINE ANALYTICS TO ANSWER ANY QUESTION AT ANY SCALE**

Contact [EnterpriseAnalytics@EPAM.COM](mailto:EnterpriseAnalytics@EPAM.COM) for more information or to get a free demo of the EPAM SharePoint Connector today.

[www.epam.com](http://www.epam.com)

