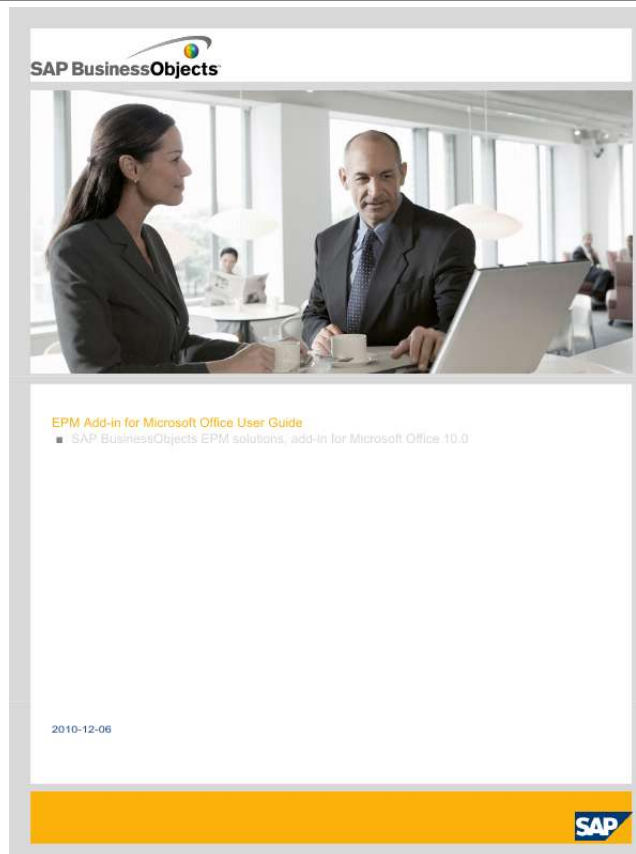




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User manual BUSINESS OBJECTS EPM ADD-IN FOR MICROSOFT OFFICE 10.0
User guide BUSINESS OBJECTS EPM ADD-IN FOR MICROSOFT OFFICE 10.0
Operating instructions BUSINESS OBJECTS EPM ADD-IN FOR MICROSOFT OFFICE 10.0
Instructions for use BUSINESS OBJECTS EPM ADD-IN FOR MICROSOFT OFFICE 10.0
Instruction manual BUSINESS OBJECTS EPM ADD-IN FOR MICROSOFT OFFICE 10.0



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Manual abstract:

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171 8 2010-12-06 Introduction to the EPM Add-in Introduction to the EPM Add-in The EPM add-in is an add-in to Microsoft Office Word, Microsoft Office Word and Microsoft Office PowerPoint. The EPM add-in enables you to analyze data. The EPM add-in is designed to give access to SAP Business Objects EPM Solutions' product data, transforming that data in real time into a form which supports reporting, and providing reporting and delivery tools. The add-in also permits analysis of data from several EPM solutions at the same time. The EPM add-in enables you to analyze the data of the OLAP data sources below, using ODBO/XMLA connections: · SSAS cubes created with SAP BusinessObjects Financial Consolidation, cube designer.
· SAP NetWeaver BW InfoCubes created with SAP BusinessObjects Financial Consolidation, cube designer. Note: Depending on the data source to which you connect, some EPM features are not supported and therefore the commands are automatically greyed out. You can use the EPM add-in on any other data sources as long as they support ODBO connections. 9 2010-12-06 Introduction to the EPM Add-in 10 2010-12-06 Installation Installation There are two ways of installing the EPM add-in for Microsoft Office.



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<http://yourpdfguides.com/dref/3600846>

· Launch the setup. · Download the EPM add-in from the SAP BusinessObjects Enterprise BI launch pad. Once you are logged to the BI launch pad, launch the installation in the Preferences area. Note: When the EPM add-in is not installed and you try to open an existing EPM workbook or to create a new one, a popup appears, indicating that the application is not installed. When you click OK, another dialog box opens, offering to install the application by clicking the Install EPM add-in button. The add-in is automatically loaded when you open Microsoft Office Excel, Microsoft Office Word or Microsoft Office PowerPoint.

To find out more about hardware and software prerequisites for installing EPM add-in, refer to the SAP BusinessObjects EPM Solutions, add-in for Microsoft Office Installation guide. 2.1 Re-activating the EPM Add-In If the EPM add-in has been deactivated, you can re-activate it. 1. 2. 3. 4. In Microsoft Office Excel 2007, click the Office button, then click the Excel Options button. In the Excel Options dialog box, select Add-Ins. Select Disabled Items from the Manage drop-down menu and click the Go button.

In the Disabled Items dialog box, select the SAP BusinessObjects EPM Solutions, add-in for Microsoft Office and click the Enable button. 5. Click the Close button. 11 2010-12-06 Installation 12 2010-12-06 Create and Open an EPM File from the BI Launch Pad Create and Open an EPM File from the BI Launch Pad · To create an EPM workbook, document or presentation from the BI launch pad, in the tree structure of the Document List, select one of the following: · New > EPM Workbook A new workbook opens in Microsoft Office Excel, displaying the EPM tab. · New > EPM Document A new document opens in Microsoft Office Word, displaying the EPM tab.

· New > EPM Presentation A new presentation opens in Microsoft Office PowerPoint, displaying the EPM tab. · To open an existing EPM file from the BI launch pad, in the tree structure of the Document List, select the appropriate folder, then double-click the file. Depending on the type of file, it opens in Microsoft Office Excel, Microsoft Office Word or Microsoft Office PowerPoint, displaying the EPM tab. 13 2010-12-06 Create and Open an EPM File from the BI Launch Pad 14 2010-12-06 Open a Report Created on Another Data Source Open a Report Created on Another Data Source When you open a report that has been created with a data source and you connect it on a different data source, provided that the two data sources have a similar structure, if some of the dimension names have changed, you will need to manually remap these dimensions. A dedicated dialog box automatically opens when needed.

Note: Dimension members are automatically retrieved, using internal identifiers. 15 2010-12-06 Open a Report Created on Another Data Source 16 2010-12-06 Main Interface Areas Main Interface Areas The EPM add-in for Microsoft Office adds the following areas to Microsoft Office Excel, Microsoft Office Word and Microsoft Office PowerPoint: · In the ribbon, the EPM tab is the main entry to perform reporting and data input actions. Note: · · · When positioning your cursor on a command in the EPM tab, a tooltip appears, explaining the command. Depending on the Microsoft Office application, the EPM tab does not contain all the same commands. The EPM Context bar is displayed by default horizontally and below the ribbon. The bar displays the dimensions that are included in the current cube/model and the members that are used in the current display of a report (or the saved members in an offline report). You can hide the bar by deselecting the Display EPM Context Bar option in EPM > Options > User Options. This bar can also be displayed inside the EPM pane by checking the Display Context inside EPM Pane option. You can also move the bar into and back from the pane, using the mouse move pointer. The EPM pane is displayed by default vertically on the right side of the window.

This pane include the following areas: the active connection, information about the selected report, including the connection used by the report, the name of the report, all the dimensions available, the page axis dimensions, the row axis dimensions and the column axis dimensions. You can hide the pane by deselecting the Display EPM Pane option in EPM > Options > User Options. Selecting the title bar of the pane and using drag and drop, you can move the pane to the left side of the window or anywhere else in the window. Note: The EPM Context bar and the EPM pane can be both hidden or displayed at one time by clicking the Show Pane & Context button in the EPM tab. · · Cell Context menu. Only in Microsoft Office Excel, a cell context menu appears when you right-click on any cell in the spreadsheet. The add-in adds one menu item to the top of it: EPM. This allows you to continue to use the existing Microsoft Office Excel features (such as the following features: cut, copy, paste, insert, etc.) and does not take up much space. Related Topics · Context · Report Creation using the EPM Pane · EPM Add-in for Microsoft Office Word and PowerPoint 17 2010-12-06 Main Interface Areas 5.

1 Hidden or Greyed out Commands When installing the EPM add-in, you specify the applications you use. When opening the add-in, the display of the EPM tab in the ribbon is initialized, depending on your selection in the installation setup. For example, if you have specified you would use Financial Consolidation, the Data Input group in the ribbon is not displayed since it is not relevant for this application. However, for some commands or group of commands accessible from the ribbon, you can specify if you want to display or hide them. To do so, select EPM > Options > Command Display Options. Besides, depending on the data source to which you connect, some EPM features are not supported and therefore commands are automatically hidden or greyed out in the ribbon or in other interface sections, such as dialog boxes. Note: if you create on the same sheet several reports using different connections, some commands may be greyed out or not, depending on the report you click on. Related Topics · Introduction to the EPM Add-in · Log On and Connections 18 2010-12-06 Log On and Connections Log On and Connections To access a specific cube or model with the EPM add-in, you need to use a connection. A connection establishes a connection between a specific data source and a report. The connections are managed in the Connection Manager dialog box. 6.1 Log On and Log Off Logging on enables you to establish a first connection between all the workbooks (for one Excel instance) and a cube or model. To log on, select EPM > Log On. Once you are connected to a data source, the Log On ribbon button is hidden and the Log Off button is displayed.



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When you log on, you select a first connection for the workbooks. The Logon dialog box proposes the default connection, if you have defined one, or is left blank and you need to click the ellipsis button and select a connection in the Connection Manager that opens. The connection selected is considered as the active connection. When you open a workbook containing reports and you perform a log on on a specific connection, all the other connections used by the other reports are automatically connected - unless the connection has been deleted for example, and you may have to enter the login and password to the connections. If you open another workbook containing reports, the connections will also be automatically connected. The log off disconnects all the connections used in the current workbook.

Related Topics · Active Connection for the Current Sheet 6.2 Connection Management The connections are managed in the Connection Manager dialog box. 19 2010-12-06 Log On and Connections The Connection Manager can be opened by selecting EPM > Report Actions > Manage Connections. This dialog box also opens: when you click Log On, then select the ellipsis button; and when you select Select Another Connection, from the Active Connection drop-down list of the EPM pane. When you open the Connection Manager, all the connections that you have once selected are displayed, including local connections, provided that the Display Local Connections option is selected. If you want local connections to be always displayed when you open the Connection Manager, select the Display Local Connections option in the User Options. You perform the following actions in the Connection Manager: · · Select a connection. Set a default connection. You can set a connection as the default one. The connection will be proposed by default when you log on.

To do so, in the Connection Manager, select a connection in the list and click Set as Default. Selectively connect or disconnect one or several sheet/connection couples. Edit or delete a connection. · · Related Topics · Hidden or Greyed out Commands · Report Creation · EPM Functions · Types of Connections · Selecting Connections · Selectively connecting or disconnecting one sheet/connection couples 6.3 Active Connection for the Current Sheet The active connection is the one that is used when you create a report or enter an EPM function.

When you perform a log on, you select a first connection. This connection is the active connection for all the workbooks. Then, at any time, you can select another connection that will become the active connection for the current sheet. The active connection is selected in the Active Connection drop-down list of the EPM pane. In this list, the connections that are available are the connections that you have connected since you have opened a Microsoft Office Excel instance.

The connection you select in the list is the active connection for the current sheet until you select another one. *Related Topics* · Several Reports in a Sheet · EPM Functions 20 2010-12-06 Log On and Connections 6.4 Types of Connections The EPM add-in enables you to analyze the data of the OLAP data sources below, using ODBO/XMLA connections: · SSAS cubes created with SAP BusinessObjects Financial Consolidation, cube designer. · SAP NetWeaver BW InfoCubes created with SAP BusinessObjects Financial Consolidation, cube designer. Note: Administrators create the cubes and models to which you connect your reports. They can modify the structure of the cubes and models at any time. Using the Connection Manager, there are three types of connection you can use and select: · SAP BusinessObjects Enterprise connections. These are connections that are stored on the SAP BusinessObjects Enterprise platform. If you have opened the EPM add-in from the BI launch pad, you can use these connections. Local connections.

Local connections are .oqy files. These connections can be stored on your machine or another machine on the network. You can select folders in which your administrator stores the local connections. To do so, click the Local Connection Folder button in the Connection Manager and select the folder in the dialog box that opens. Any connection that will be added afterwards to this folder will be automatically retrieved and you will only need to select the ones you need.

Note: · If the connection has not been created using the EPM add-in, the authentication method has not been defined and a message appears when trying to connect. Using the Connection Manager, you must edit the connection and specify its authentication method. When you choose to connect to an SAP NetWeaver BW InfoCube, you need to enter the user name and password to the SAP NetWeaver BW platform, and select your working language. To find out more about connections and their authentication method, please refer to the EPM add-in Installation documentation.

· · Note: Depending on the data source to which you connect, some features are not supported and therefore the commands are automatically greyed out. Note: When connecting to a cube/model, you can clear the cache if you want to load the whole structure and not just the data. Note that the cube/model will take some extra time to load. *Related Topics* · Hidden or Greyed out Commands · Metadata Cache 21 2010-12-06 Log On and Connections 6.5 Selecting Connections 1.

Select one of the following: a. EPM > Log On b. From the Active Connection drop-down list of the EPM pane, select Select Another Connection. c. EPM > Report Actions > Manage Connections The Connection Manager opens, displaying the list of all the connections that you have once selected, including local connections, provided that the Display Local Connections option is selected.

Note: · · If you want local connections to be always displayed when you open the Connection Manager, select the Display Local Connections option in the User Options. You can select folders in which your administrator stores the local connections. To do so, click the Local Connection Folder button in the Connection Manager and select the folder in the dialog box that opens. Any connection that will be added afterwards to this folder will be automatically retrieved. 2. To select a connection, simply select it from the list and click OK. 3. If the connection you want to use is not in the list, click Add and do as follows: · If you have opened the EPM add-in from the BI launch pad, you can select the SAP BusinessObjects Enterprise option. Enter the name you want for the connection, then select an EPM connection in the list, and select the cube or model. Note: If you have not opened the EPM add-in from the BI launch pad, when you select this type of connection, the list of EPM connections is empty.

· To create and select a local connection, refer to the installation guide.



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When you choose to connect to an SAP NetWeaver BW InfoCube, you need to enter the user name and password to the SAP NetWeaver BW platform, and select your working language. Note: To find out more about connections and their authentication method, please refer to the EPM add-in Installation documentation. 6.6 Selectively connecting or disconnecting one sheet/connection couples 1. Select one of the following: a. EPM > Log On b. From the Active Connection drop-down list of the EPM pane, select Select Another Connection. 22 2010-12-06 Log On and Connections c. EPM > Report Actions > Manage Connections The Connection Manager opens.

2. Click Report Connections. The Report Connections dialog box opens. All connected sheets in all open workbooks in the current session of Microsoft Office Excel appear in the tree view list displaying cubes/models, sheets and reports. Note: You can choose the way you want to display the sheet/connection couples by clicking the Display by Sheet or Display by Connection button.

3. You can perform the following actions: · To connect a specific sheet/connection couple, select the sheet check box and click OK. · To connect all the sheets linked to a cube/model, select all the sheet check boxes individually or select the cube/model check box and click OK. · To connect all the sheet/connection couples, click the Select All button and then click OK. · To change a connection, select the cube/model, the sheet or the report and click the Change Connection button.

Note: If you connect a report to a different cube or model, the previous cube/model will be disconnected. In other words, one report can only be connected to one cube/model at a time. 23 2010-12-06 Log On and Connections 24 2010-12-06 Context Context The context specifies the dimensions and associated members for a specific connection. The context represents the following: · The dimensions that are included in the current cube/model. · The members that are used in the current display of a report (or the saved members in an offline report). The context enables to define, for each dimension of a selected cube/model, a member corresponding to the default member to be applied for unspecified dimensions in any EPM function or in any report created. Note: The members that are selected in the axes of a report override the members selected in the context. The context applies to the user for a connection. If you open other workbooks and connect to the same cube or model, the context will be same even if you have modified it in one of the workbooks. The context is displayed the dedicated EPM Context bar.

Note: You can alternatively display the context settings inside the EPM pane by selecting the Display Context inside EPM Pane option in the User Options dialog box. However, you can set a specific member on a specific workbook or worksheet. When you set a member, you automatically lock its dimension and you cannot select another member from the EPM Context bar: the dimension drop-down list is greyed out. Note: If you set a member on a specific workbook, the member is also set on all the sheets of the workbook. To change the context in a report, you can select other members from the EPM Context bar. The data displayed changes to reflect the new context settings. To select another member for a dimension, select a dimension drop-down list, then select Select Other Members. The Member Selector opens and you can make your selection. Note: If the drop-down list is greyed out, you cannot select another member: this is because the dimension has been locked in the Context Options. To lock a dimension on a workbook or worksheet, select EPM > Options > Context Options. In the Context Lock tab, select the level from the drop-down menu, then click the member and select the one you want from the Member Selector that opens. The Lock checkbox is automatically checked for the dimension. 25 2010-12-06 Context Note: You can set a workbook to refresh automatically upon selecting a member from the context by selecting the Automatic Refresh on Context Changes option in the User Options dialog box. 7.1 Context Display Options You can specify display settings for the context by selecting EPM > Options > Context Options.

All these settings will be applied to the EPM Context bar. · Hiding dimensions. You can decide not to display a dimension in the EPM Context bar. To do so, select the Hide checkbox. The checkbox is available in both Context Display and Context Lock tabs.

For example, if you have locked a dimension on the worksheet, you may want to hide it from the EPM Context bar. Dimension and member name display. By default, in the EPM Context bar, the name of the dimension and the name of the member are displayed. If you want that only the member name and not the dimension name be displayed, you can uncheck the Show Dimension Name option. Dimension colors. In the EPM Context bar, colors are applied by default to all dimensions. You can define the colors you want for each dimension by clicking the colored area in the Color column. You can also choose not to display the colors at all by unchecking the Show Dimension Color option. Dimension order. You can modify the default order of the dimensions as they appear in the EPM Context bar, by selecting a dimension and clicking the Up or Down button.

Note: you can access the three features above in the Context Display tab. · · · 26 2010-12-06 Report Layout Rules Report Layout Rules There are some basic rules that you have to follow in laying out your report so that the EPM add-in can interpret it. These rules are simple and logical and also helps ensure that your report is readable for others. 8.1 Overall Layout Rules This layout structure needs to be followed for each sheet that you refresh but can appear anywhere on the worksheet. In addition, you can also request a refresh on ranges of selected cells and in those cases, only the selected range needs to contain a valid layout of recognizable members. The overall layout sections and terminology is as follows: Page axis members are members that act as a specification (filter) for the whole report. An axis is a set of one or more dimensions that define the row axis or column axis in a report - see the red and blue boxes in the layout picture above. The data grid is where the numbers from the database are read into. Here is a sample report with the same highlighted borders to indicate all four sections.

Notice that the three axes contain more than one dimension: 27 2010-12-06 Report Layout Rules Note: Formatting and spacing is completely up to you. 8.1.1 Basic Layout Rules The compulsory items are the column axis and the row axis. That is, you need to have at least one dimension member in the row axis and one in the column axis - forming the two axes.

For example, a report can be as small as this: Note that it does not matter where these two member cells appear on the worksheet, as long as the column header (in this example: Jan) is somewhere above and to the right of the row header (in this example: Revenue) - and they are both recognizable members of the connected data source.



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The data returned by a refresh request will appear in the intersecting cell that appears towards the bottom-right (in this example: B4). As another example, this is also a valid minimal report: 28 2010-12-06 Report Layout Rules 8.1.2 Dimension Layout Restrictions A dimension/hierarchy can only appear once in the whole layout.

For example, in a page axis, you cannot place two members of the same dimension/hierarchy in different cells. The following is an invalid report since you cannot tell if the whole report is supposed to contain data for Canada or for the USA: Note: However, you can perform a multi-selection of members for a dimension/hierarchy in the page axis. Similarly, a dimension/hierarchy in the row axis cannot have a member appear in the page axis or in the column axis or vice-versa. The following reports are also invalid since there is no data that represents both January and April at the same time: Period dimension appears both in the row and the column axis. Period dimension (Apr) appears in the page axis and in the column axis. 29 2010-12-06 Report Layout Rules Related Topics · Page Axis Dimension Members Modification using the Member Selector 8.2 Page Axis The page axis define filters for the whole report. · · · The page axis is optional. The page axis can appear anywhere as long as it is above the column axis. At least one row should be inserted between the page axis and the column axis, otherwise the page axis could be interpreted as the column axis.

You can see in this example that the page axis is above the column axis and that a row (in green) is inserted between the page axis and the column axis. You can select several dimension members for a page axis dimension. When you select several members for a dimension that is part of the page axis, the data on the members are automatically aggregated in the report. Related Topics · Overall Layout Rules 8.3 Row Axis The row axis defines the member row headers for a report, that is, the labels that indicate what data should appear in each row. Related Topics · Overall Layout Rules 30 2010-12-06 Report Layout Rules 8.3.1 Simple Row Axis The simplest row axis you can have is member(s) from one dimension in one column like this: In this case we have Revenue, COGS (Cost of Goods Sold) and GP (Gross Profit) which are all in the Accounts dimension. Note: If you type in the member names yourself, you do not have to get the case or the indentation correct. The EPM add-in will automatically correct the case and indent the members as specified in the sheet options. You do not need to have them all in adjacent cells. That is, you can spread them out like this: This is useful if you need to put your own Microsoft Office Excel formulas or annotations in between the report lines. 8.3.2 Multidimensional or Nested Row Axis To add an additional dimension to further qualify the row axis, you simple add its members to the column immediately on the left, for example: 31 2010-12-06 Report Layout Rules This is what is called a "nested" axis.

There are now two dimensions in the row axis. Chips, Popcorn and Pretzels are all in the Product dimension. The Accounts are nested inside of the Products.

You do not have to repeat the product row headers on each line. They implicitly apply to all members on the inside dimension (e.g. Accounts above) until another member from their dimension appears. For example, the following color coded blocks define the data in the corresponding rows: Note: What is called "block" is basically a grouping of members. In the example above, there are three blocks. The first block is the first three rows in green color. This is a very common and logical reporting standard. However, if you really want the outer dimension members repeated explicitly, it is allowed and maintained if the relevant option is selected in the sheet options. For example: There is virtually no limit to the number of dimensions that you can nest together in an axis. For example, the following report has four dimensions in the row axis and is valid: 32 2010-12-06 Report Layout Rules The four dimensions from outside to inside are Currency, Reporting Unit, Product and Accounts. The row spacing shown is completely optional.

Related Topics · Repeat Row Headers and Repeat Column Headers 8.3.3 Asymmetric Row Axis In the report below, all of the inner dimension member lists are repeated in all occurrences. Specifically Canada and USA, Chips and Pretzels, and Revenue and COGS. This is what is called a symmetric report. 33 2010-12-06 Report Layout Rules An important feature of the EPM add-in is that the inside members do not have to be identical repeated sets of members. The axis can be asymmetric like this: The products in each grouping above are not identical, but it is a valid report. This asymmetry is actually very common once you start using the following features: delete empty rows, delete Microsoft Office Excel rows, asymmetric expand or collapse. 8.3.

4 Row Axis Restrictions It is important to note that you must not leave members blank on the inside dimension like this: 34 2010-12-06 Report Layout Rules Note: The formal definition of the nested dimension member rule is: all inner dimension's members must be stated when an outer dimension contains a member on the same row. The correct row axis for what the above report likely means is this: Notice that the Accounts are now the outside dimension and the Products are now on the inside. This is called re-nesting the dimensions. This can be done by re-typing or moving the cells around, but it is usually much easier to use the Report Editor or the EPM pane and just re-order the dimensions in the row axis section. Although you are allowed to put blank rows anywhere throughout the axis, you must not put a blank column in between the nested dimensions like this: 8.

4 Column Axis The column axis defines the member column headers for a report, that is, the labels that indicate what data should appear in each column. Note: At least one row should be inserted between the page axis and the column axis, otherwise the page axis could be interpreted as the column axis. Related Topics · Overall Layout Rules · Page Axis 35 2010-12-06 Report Layout Rules 8.4.1 Simple Column Axis The simplest column axis you can have is member(s) from one dimension in one row like this: In this case, we have Act2001 (Actual 2001), Act2002, and Act2003 which are all in the Reporting ID dimension. You do not need to have them all in adjacent cells. That is, you can spread them out like this: This is useful if you need to put your own Microsoft Office Excel formulas or annotations in between the report columns. 8.4.2 Multidimensional or Nested Column Axis To add an additional dimension to further qualify the column axis, you simple add its members to the row immediately above it, for example: This is what is called a "nested" axis.



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There are now two dimensions in the column axis. Jan and Feb are all in the Period dimension. The Reporting ID are nested inside of the Months. Notice that you do not have to repeat the Period column headers in each column. They implicitly apply to all members on the inside dimension (e.

g. Reporting ID above) until another member from their dimension appears. For example, the following color coded blocks define the data in the corresponding columns: Note: What is called "block" is basically a grouping of members. In the example above, there are two blocks. The first block is the first three columns in green color. This is a very common and logical reporting standard. However, if you want the outer dimensions to be centered over their inner dimensions, then just use Microsoft Office Excel's Merge and Center feature or Center across Selection like this: 36 2010-12-06 Report Layout Rules Note: In merged cell column headers, the member name must actually be entered into the left-most merged cell. Alternatively, if you really want the outer dimension members repeated explicitly, it is allowed and maintained. For example: There is virtually no limit to the number of dimensions that you can nest together in an axis. For example, the following report has four dimensions in the column axis and is valid: The four dimensions from outside to inside (top to bottom) are Reporting Unit, Account, Reporting ID, and Period.

8.4.3 Asymmetric Column Axis In the report below, all of the inner dimension member lists are repeated in all occurrences. Specifically Revenue and COGS, Act2001 and Act2002, and Jan and Feb. This is what is called a symmetric report.

An important feature of the EPM add-in is that the inside members do not have to be identical repeated sets of members. The axis can be asymmetric like this: 37 2010-12-06 Report Layout Rules The months in each grouping above are not identical, but it is a valid report. This asymmetry is actually very common once you start using the following features: delete empty columns, delete Microsoft Office Excel columns, asymmetric expand or collapse. 8.4.

4 Column Axis Restrictions It is important to note that you must not leave members blank on the inside dimension like this: Note: The formal definition of the nested dimension member rule is: all inner dimension's members must be stated when an outer dimension contains a member in the same column. The correct column axis for what the above report likely means is this: Notice that now the Reporting IDs are now the outside dimension and the Periods are now on the inside. This is called "re-nesting" the dimensions. This can be done by re-typing or moving the cells around, but it is usually much easier to use the Report Editor or the EPM pane and just re-order the dimensions in the column axis section. Although you are allowed to put blank columns anywhere throughout the axis, you must not put a blank row in-between the nested dimensions like this: 8.5 Data Grid Considerations The EPM add-in data grid is loosely defined as all cells that form the intersection of recognized database dimension member axis. A data grid cell will have a valid column axis above it and a valid row axis to the left of it. The data grid is the collection of cells that the application fills in with data from the OLAP data source. For example, it is shown as the light-blue shaded area in the following simple sample: 38 2010-12-06 Report Layout Rules However, the application offers a lot more flexibility than the above tight grid layout. There are a lot of things that you can add in and around the data grid to form a custom formatted report with additional calculations.

The following picture contains exactly the same data grid as above, but demonstrates several things that you can do that will not prevent you from re-refreshing it with the application. Note that the unusual text and background formatting is only used here to help you differentiate the areas of the report. 39 2010-12-06 Report Layout Rules

8.5.1 Data Grid Important Tips Here are some important tips regarding the data grid: · Any number of blank rows and/or columns can be put anywhere throughout the grid. In other words, the grid can be split up. You can format the cells any way that you want using Microsoft Office Excel formatting including scaling the data. It will be retained by the application. However, if you expand on or pivot your report, the formatting will not move with the cells. Therefore, it is recommended that you do all formatting last or apply a dynamic formatting on the reports you want to analyze. Your own Microsoft Office Excel formulas can safely be put anywhere except in a grid cell and they will be retained in a subsequent Refresh. However, they will not be retained if you do a navigational action (Expand, Collapse, Keep, etc.) that will change the size of the report. It is recommended that you put in your custom formulas after you are finished doing ad-hoc manipulations to the layout and content. Note: If the Member Recognition is activated, any Microsoft Office Excel formula is automatically converted into local members.

· You can put anything outside of the report area. It will be completely ignored by the application unless you expand your report. · Related Topics · Blank Row and Column Insertion · Dynamic Formatting · Local Members 40 2010-12-06 Report Creation Report Creation You can create reports in three different ways. · · · Creating reports using the EPM pane. Creating reports using the Report Editor.

Creating reports directly in a sheet. A report is created by default on the active connection of the worksheet. The active connection is displayed in the Active Connection drop-down list of the EPM pane and in the Layout tab of the Report Editor. Related Topics · Log On and Connections 9.1 Report Creation using the EPM Pane You can create and modify a report by using the EPM pane. Note: If you work with several reports, you can only create the first report using the pane. To create additional reports, you must use the New Report button. Report creation by drag and drop in the pane In the Current Report area of the pane, you can drag and drop one or several dimensions to the following sections to create a report: · Page Axis. This is optional. · Row Axis.

· Column Axis. As soon as you drag and drop at least one dimension in the row axis and one dimension in the column axis - and provided that the Defer Layout Update option is not checked, the report with the selected dimensions is displayed in the worksheet. By default, each time that you make a change in the axes sections, the report layout is automatically updated. To improve performance when you are accessing a large amount of data, you can switch to manual update. When you switch to manual update, you cannot use the report until you switch back to automatic update.



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However, you can quickly add, move, and remove dimensions from the dimensions 41 2010-12-06 Report Creation section to the axes sections, and then switch back to automatic update to see your results. To enable manual update, select the Defer Layout Update option. The Update button is enabled. When you finish changing the report layout, click Update to see the layout in the worksheet. By default the member taken into account for a dimension is the one defined in the context.

Once a dimension has been added to an axis section, you can select another member for the dimension by clicking the dimension name that appears as a link. The Member Selector opens and you can select the member you want. When placing several dimensions in one axis, you can order the dimensions by selecting a dimension row (click on the right of the dimension link, not on the link itself) and performing a drag and drop. In the page axis section, you can click on the cell reference of the dimension (D7 for example). Using the Cell Selection dialog box that opens, select the cell you want in the sheet to move the page axis dimension.

An error message appears if you have selected a cell that is below the column axis. Alternatively to some of the above features, using the context menu (right-click) in the dimension list section and the three axes sections, and depending on the section you are in, you can perform the following actions: · In the dimension list section, you can add the selected dimension to: · The page axis by clicking the Move to Page Axis command. · The row axis by clicking the Move to Row Axis command. · The column axis by clicking the Move to Column Axis command. · In the page, row and column axes sections, you can: · Select members for the selected dimension by clicking the Select Dimension Members command.

The Member Selector opens and you can select the members you want. · Move the dimension to another axis, by clicking the Move to Page Axis, Move to Row Axis or Move to Column Axis command. · Remove the dimension from the axis by clicking the Remove command. In the row and column axes sections only, you can order the dimensions if you have selected more than one dimension in an axes. To do so, use the Move to the Top, Move Up, Move to the Bottom and Move Down commands. In the pages axis section only, you can click the Change Cell... command. Using the Cell Selection dialog box that opens, select the cell you want in the sheet to move the page axis dimension.

· · Report creation by drag and drop in the worksheet You can drag and drop dimensions or hierarchies from the Current Report list directly to the worksheet to create a report. The context member or the default member is displayed by default in the report, with the following relationship: Member Only. When several hierarchies exist for a dimension, a member node that belongs to one hierarchy may not belong to another hierarchy. For this reason, the context member is taken into account if the member belongs to the hierarchy you drag and drop. If the context member does not belong to the hierarchy you drag and drop, it is the default member of the hierarchy (this is defined in the cube or model) that is taken into account. Related Topics · Several Reports in a Sheet 42 2010-12-06 Report Creation 9.2 Report Creation using the Report Editor The Report Editor dialog box plays several roles: · · It can act as a graphic user-interface for defining an initial report on a blank worksheet. It can be used to define other reports on a sheet already containing a report. It can be used at any time on a valid report to re-arrange the layout or change the members in each section of the report: move (pivot) one or more dimensions between the page headers, row axis and column axis; reorder the nesting of dimensions within an axis; or change the selection or order of members of one or more dimensions in the report. It can be used to define report position: moving a report in a sheet, inserting separation between axis and data, moving each page axis dimension individually.

· You can perform all the above actions in the Layout tab of the Report Editor. Note: Using the other tabs of the Report Editor, you can also define specific options for the current report, enter customized names for the members, exclude members from the report, define sorting, filtering and ranking on the current report data. You can access the Report Editor dialog box by clicking Edit Report in the ribbon. The Report Editor does perform a refresh after it closes since the report must be valid to close it. Related Topics · Report Editor's Layout Tab Presentation · Several Reports in a Sheet 9.

2.1 Report Editor's Layout Tab Presentation To define or modify your report layout, click on Edit Report in the EPM tab of the ribbon. The Report Editor dialog box opens, displaying the Layout tab by default. · · You can perform drag and drop operations between the three axis and the Dimensions areas. On the left side is the Dimensions area which displays all the available dimensions, along with their hierarchies.

Note: If named sets are included in SSAS cubes created with Financial Consolidation Cube Designer, they will also appear along with the dimensions at the hierarchy level. The hierarchies appear in black, whereas the named sets appear in blue. When a named set is created in SAP BusinessObjects Financial Consolidation, cube designer, the default hierarchy (flat list) automatically comes along. As a consequence, both the named set and the default hierarchy appear below the dimension in 43 2010-12-06 Report Creation the Report Editor. Note that, once you have included the named set in the view, you cannot include the default hierarchy anymore. · On the right side is an intuitive view of the dimensional layout of the report. Note: Note that you can add an unused dimension in the Dimensions area to any section, and remove a dimension from any axis area by dragging it back into the Dimensions area. · On the right side, you can dynamically modify your report at any time with actions such as pivoting, re-nesting (reordering dimensions within an axis) or changing the member selections. On the right side, you can also: · Define a shift between the data grid of the report and its row and column headers. · Move the whole report by defining the position of the top left cell of the data grid.

· Define the position of each dimension of the page header. When you click OK in the Report Editor, the report is re-refreshed automatically. Note: Alternatively to some of the main features, using the context menu (right-click) in the dimension list section and the three axes sections, and depending on the section you are in, you can perform the following actions: · In the dimension list section, you can add the selected dimension to: · The page axis by clicking the Move to Page Axis command.



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· The row axis by clicking the Move to Row Axis command. · The column axis by clicking the Move to Column Axis command. · In the page, row and column axes sections, you can: · Select members for the selected dimension by clicking the Select Dimension Members command. The Member Selector opens and you can select the members you want. · Move the dimension to another axis, by clicking the Move to Page Axis, Move to Row Axis or Move to Column Axis command. · Remove the dimension from the axis by clicking the Remove command. In the row and column axes sections only, you can order the dimensions if you have selected more than one dimension in an axes.

To do to, use the Move to the Top, Move Up, Move to the Bottom and Move Down commands. In the pages axis section only, you can click the Change Cell... command.

Using the Cell Selection dialog box that opens, select the cell you want in the sheet to move the page axis dimension. · 9.2.2 Dimension Placement in the Report Editor You can use the Report Editor at any time on a valid report to re-arrange the layout or change the members in each section of the report: move (pivot) one or more dimensions between the page axis, row axis and column axis; reorder the nesting of dimensions within an axis; or change the selection or order of members of one or more dimensions in the report. 44 2010-12-06 Report Creation To define your layout, simply drag and drop your required dimensions to the correct sections of the report.

This includes moving the dimension name from one section to another or changing the order of them within a section. On the Dimensions area, the dimensions/hierarchies with a red cross are the ones that already appear in the report. Dimensions that are not in the report yet can be dragged into the layout from there. To remove a dimension from the layout, drag it to the Dimensions area. If you add a dimension to the page axis section, it will default to the cell on the right side of the page axis that you drop it under. To remove all dimensions from the layout, click Reset Report. Example: In the following example you can see the effect of the order of the dimensions in an axis. This applies to the column axis also. Account Before Product Row Axis Dimensions: Account Product.Family Product Before Account Row Axis Dimensions: Product.

Family Account 9.2.3 Member Selection in the Report Editor You can select the members to be displayed in the report directly from the Report Editor. · To modify the member selection for a dimension in the Row Axis Dimensions area or the Column Axis Dimensions area, click on the dimension name. The Member Selector opens and you can select the members you want. 45 2010-12-06 Report Creation · To modify the member selection for a dimension in the Page Axis Dimensions area, click on the dimension or on the member name. The Member Selector opens and you can select the members you want. Note: · You can also select the members directly on a spreadsheet in a valid report by double-clicking on a dimension of the page axis. When you click OK in the Member Selector, the report is refreshed automatically. This allows you to quickly change the page axis members.

When you select several members for a dimension that is part of the page axis, the data on the members are automatically aggregated in the report. If you often use a specific selection of members for a page axis dimension, you should convert the selection into a custom member. · Related Topics · Member Selection · Page Axis Dimension Members Modification using the Member Selector 9.2.4 Position of each Dimension in the Page Axis using the Report Editor Each dimension in the page axis can be positioned individually.

You can position a page axis dimension anywhere as long as it is above the column axis In the page axis area of the Report Editor, click on the cell reference of the dimension (D7 for example). Using the Cell Selection dialog box that opens, select the cell you want in the sheet to move the page axis dimension. An error message appears if you have selected a cell that is below the column axis. 9.2.

5 Report Move in the Sheet using the Report Editor You can move a report in the sheet simply by choosing one cell in the Report Editor. The cell displayed by default in the middle of the four blue arrow buttons in the Report Editor, corresponds to the top left cell of the data grid (B22 for example). You can change it by entering the cell reference or using the arrow buttons. The whole report is moved based on this cell, as soon as you click OK. 9.2.6 Shift Insertion Between the Data Grid of the Report and its Row and Column Axis 46 2010-12-06 Report Creation Using the Report Editor, you can insert a separation between the data grid and: · The row axis. The column axis. To do so, use the Shift area. Note: You can enter negative numbers for the row axis.

In this case, the row axis will be positioned on the right side of the data grid. Example: · If you enter 2 in the Shift area below the column axis area, you want one column to be inserted between the data grid and the column axis. If you leave 1 by default in the Shift area on the right of the row axis area, you want that no row separates the data grid and the row axis. 9.3 Report Creation Directly in a Sheet You can create a report manually. With the Member Recognition feature, you can enter dimension members and create local members directly in a cell of a report. You can also use the Auto Fill feature to automatically fill in cells with all the members of the same level in the hierarchy order. When you manually create a report, you can also get assistance to select members using the Member Selector. 9.3.

1 Member Recognition You can enter members directly in a cell of a report. You can also enter Microsoft Office Excel formulas. When the Member Recognition feature is activated, the members are automatically recognized and the Microsoft Office Excel formulas are automatically converted into local members. The Member Recognition feature can be activated or deactivated at the user level. Then, you can activate or deactivate it by sheet. 47 2010-12-06 Report Creation 9.3.1.1 Member Entry Directly in a Sheet Instead of using the Report Editor dialog box, you can enter text and figures directly in the cells of a sheet if you know the names of the members you want to retrieve. The Member Recognition feature must be activated.

You can enter a complete dimension member name or just a part of it. If you correctly enter the complete dimension member name, as soon as you press the Enter key, a green flash briefly appears in the cell, indicating that the member has been recognized. If you enter a part of a dimension member name: · If the member name fragment is unique in the cube, as soon as you press the Enter key, the name is automatically completed and a green flash briefly appears in the cell, indicating that the member has been recognized.



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· If the member name fragment is not sufficient to identify the member, the Ambiguous Name dialog box opens, displaying all the members contained in the cube that might match the entered member. Note: · · The recognized members are uniquely identified. When you select a member in the sheet, the Microsoft Office Excel Formula bar displays: =EPMOlapMember(xxx). You can define a member based on a formula. If the member is unique, it is converted into a member and the link will be kept inside the formula. For example, you can have "=Sheet2!D4" picking up the value "Ohio" from another worksheet. This allows you to create reporting templates where you can change "Ohio" to say "New York" in one place and then update (Refresh) all the related reports to get "New York" data.

9.3.1.2 Blank Row and Column Insertion In a report, you can insert a Microsoft Office Excel blank row or column to add a formula, a text or to be used as a separation row or column. When you perform a refresh or when you navigate in the report, the inserted row or column remains. However, if you want a blank row or column to be specifically attached to a member for example, you should create a local member. Related Topics · Local Members 48 2010-12-06 Report Creation 9.3.1.3 Excel Formula Entry Directly in a Sheet You can use Microsoft Office Excel formulas to perform calculations.

All Microsoft Office Excel formulas are automatically converted into local members. Related Topics · Blank Row and Column Insertion · Local Members 9.3.1.4 Auto Fill When the Member Recognition is activated, the standard Microsoft Office Excel Auto Fill feature enables you to automatically fill in cells with all the members of the same level in the hierarchy order.

Example: In your report, only France Eau is displayed. You want to display same level members for France Eau. You want to display the three members that come after France Eau in the hierarchy. By selecting France Eau cell and dragging the pointer (in the lower right corner of the cell) to cover the three following cells, here is an example of what you get: You want to display the five members that come before France Eau in the hierarchy. By selecting France Eau cell and dragging the pointer (in the lower right corner of the cell) to cover the five above cells, here is an example of what you get: 49 2010-12-06 Report Creation 9.

3.1.5 Auto Completion in Nested Axes When a row or a column axis contain several dimensions (nested dimensions), provided that the Member Recognition is activated, when entering a member for example in the outer dimension, members in the inner dimension are automatically entered, as shown in this example.

Example: Auto completion in a nested axis In the row axis, the outer dimension is Period and the inner dimension is Currency. You have already entered the following members: 2008 EUR USD Now, you enter the Period member 2009. The member is recognized as an EPM member and the Period members EUR and USD are automatically entered: 2008 EUR USD 2009 EUR USD 9.3.1.6 Activating or Deactivating the Member Recognition 1. Select EPM > Options > User Options.

50 2010-12-06 Report Creation 2. To activate the Member Recognition, select the Activate Member Recognition by Default option. The Member Recognition is activated by default for all the files used by the user. 3. Select EPM > Options > Sheet Options. By default, since the Member Recognition has been activated in the User Options, it is also activated here. 4. If you do not want the Member Recognition to be applied to the current sheet, you can deselect the Activate Member Recognition option. 9.3.

2 Member Entry Using the Member Selector When you manually create or modify a report, you can get assistance from the Member Selector dialog box which allows you to select any dimension members to help you construct your report layout. 9.3.2.1 Member Selector Presentation The Member Selector can be accessed through the Report Editor, the EPM pane or by double-clicking a member located in the report page axis.

The Member Selector is composed of the following areas: · · · In the title bar, the name of the dimension/hierarchy is displayed. Hierarchy or list display. Using the drop-down list, you can display the members in a simple list or in the hierarchy in the Dimension Members area. Member names to display. You can choose other members names to display as alternatives to the captions.

You can choose to show data either as it is formatted in the cube/model, such as code, short description, long description. Use the list icon. Member filtering by properties. To help you selecting members, you can filter the members by property value. Member search. You can search for a specific member. Using the binoculars icon, enter your search text into the Find What text box and then click on the Find button. To find a member, Note: · · · · The search is not case sensitive (e.g. "Shares" and "shares" will be treated the same).

You do not need the full member name (see "shares" example in the picture above"). It starts from the selected (highlighted) member and goes down. It searches through all members, not just the visible ones. It will expand and scroll the tree to display each member found. · · 51 2010-12-06 Report Creation · · · It will tell you when it reaches the bottom and ask you if you want to re-start at the top. It will tell you if there are no occurrences at all. Member Sorting & Grouping button. You can sort and group the selected members based on property values. Dimension Members list. This list contain all the members of the current dimension.

The member tree can be expanded by clicking the + icon, and contracted by using the - icon as necessary to view and select members. Note: · · If you have created custom members for a specific dimension, they will appear in the Dimension Members list. If you have entered a customized name for a member, it will appear in this list. · · · Buttons to select members. Selected Members area.

It is where you select and order the members of the currently selected dimension that you want to appear on the report. Selection Relationship drop-down list.

It allows you to select many members at once based on their relationship to selected (checked) members. Hierarchy Levels options. For some dynamic relationships, you can define the levels of the hierarchy you want to display.

Related Topics · Renaming Members 9.3.2.2 Member Selection · Even though you have not selected any member to display in the report, when you open the Member Selector, a member is selected by default with the following relationship: Member and Children. When several hierarchies exist for a dimension, a member node that belongs to one hierarchy may not belong to another hierarchy.



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