IBM Cognos Business Viewpoint for Microsoft Excel
Version 10.1.1

User Guide

IBM
Note
Before using this information and the product it supports, read the information in "Notices" on page 5.

Product Information
This document applies to IBM Cognos Business Viewpoint Version 10.1.1 and may also apply to subsequent releases. To check for newer versions of this document, visit the IBM Cognos Information Centers [http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp].

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Chapter 1. Introduction

IBM® Cognos® Business Viewpoint for Microsoft Excel lets you download data from Business Viewpoint Studio to Microsoft Excel, manipulate the data, and then return it to Business Viewpoint Studio.

This document includes the procedures, notes, tips, and other background information to help you use Business Viewpoint for Microsoft Excel.

**Audience**

This document is intended to help business users such as analysts and managers use Business Viewpoint for Microsoft Excel.

**Finding information**

To find IBM Cognos product documentation on the web, including all translated documentation, access one of the IBM Cognos Information Centers at [http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp](http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp). Updates to Release Notes are published directly to Information Centers.

You can also read PDF versions of the product release notes and installation guides directly from IBM Cognos product disks.

**Accessibility features**

This product does not currently support accessibility features that help users with a physical disability, such as restricted mobility or limited vision, to use this product.

**Forward-looking statements**

This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

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Chapter 2. Using Business Viewpoint for Microsoft Excel

IBM Cognos Business Viewpoint for Microsoft Excel is an add-in program for Microsoft Excel that you use to extract and work on data from Business Viewpoint Studio.

Use Business Viewpoint for Microsoft Excel to copy data from Business Viewpoint Studio and work on it offline. After you use Business Viewpoint for Microsoft Excel to modify the data, you can upload it to Business Viewpoint Studio when you are reconnected to the server. You can also save the modified data as a Microsoft Excel file.

You can use Business Viewpoint for Microsoft Excel to download different types of data from Business Viewpoint Studio to be worked on in Microsoft Excel. For example, you can connect to Business Viewpoint Studio and download data from IBM Cognos Transformer.

Starting Business Viewpoint for Microsoft Excel

To use this product, you must start IBM Cognos Business Viewpoint for Microsoft Excel and connect to Business Viewpoint Studio.

Procedure
1. In Microsoft Excel, open a new worksheet.
2. Do one of the following:
   - If you have Microsoft Excel 2003, click IBM Cognos Business Viewpoint > Show Business Viewpoint Studio.
   - If you have Microsoft Excel 2007, click the Add-Ins tab and then click Show Business Viewpoint Studio.
3. Click any cell in the worksheet.
4. In the Business Viewpoint Studio pane, enter your user name and password for Business Viewpoint Studio.
   Tip: If the cursor does not activate the Business Viewpoint Studio pane, press the escape key (Esc).

Importing data from Business Viewpoint Studio

You can import data from IBM Cognos Business Viewpoint Studio to Microsoft Excel.

Microsoft Excel accepts only static hierarchies, dynamic hierarchies, lists, levels, and sets from Business Viewpoint Studio. You cannot import dimensions into Microsoft Excel.

Procedure
1. In the Business Viewpoint Studio pane, expand the dimension tree and find the item that you want to import to Microsoft Excel.
2. Double-click the item.
   The data is loaded into Microsoft Excel. You can now manipulate the data using the features of Microsoft Excel.
Changing the starting record in Microsoft Excel

You can change which record the Microsoft Excel pane begins with, and how many records to display.

**Procedure**
1. In the **Start record** box, type the row number of the record you want at the top of the Microsoft Excel pane.
2. Click **Refresh**.
   The record moves to the top of the pane and the data is refreshed.

Changing the number of records to display in Microsoft Excel

You can change the number of records Microsoft Excel displays.

**Procedure**
1. In the **# of records** box, type the number of records you want Microsoft Excel to display.
2. Click **Refresh**.
   The number of records changes to the number you want Microsoft Excel to display and the data is refreshed. The status box is updated to display the number of records displayed.

Uploading data to Business Viewpoint Studio

You can upload data from Microsoft Excel to IBM Cognos Business Viewpoint Studio.

The data you upload must be data that you previously downloaded from Business Viewpoint Studio. The structure must be the same as for the data that you originally downloaded.

**Procedure**

Do one of the following:
- If you have Microsoft Excel 2003, click **IBM Cognos Business Viewpoint > Update repository**.
- If you have Microsoft Excel 2007, click the **Add-Ins** tab and then click **Update repository**.

The Microsoft Excel data is uploaded and overwrites the data in Business Viewpoint Studio.

**Tips:**
- The **Update repository** menu item is disabled until you make changes to the Microsoft Excel data.
- Any changed cells in Microsoft Excel are highlighted with yellow.
- Deleted cells are not highlighted, but you can tell if anything has changed by noting whether the **Update repository** menu item is available.
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