Introduction

This Quick guide will give you an overview of how to connect to Cube through your EXCEL files. This guide is only for the BMS Cloud users.

Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software. The guide ends with a Q&A.

The guide *may* contain important general notices. These will be marked with an exclamation icon.

Tips and tricks are marked with an Info-icon.

Questions & Answers note relevant to the topic at hand.

Connecting to BMS Cube

BMS Cube is a reporting system, which is used to show data in Pivot Tables in your EXCEL files. With Cube you can create AdHoc reports or build advanced reports.

In order to retrieve data from your BMS account you have to connect to Cube using your personal BMS username and password on a specific Server address.
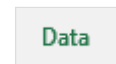
Connect to BMS Cube

1 **Open an EXCEL file**

Open a new EXCEL file or the one that you want to create the Pivot Table. *(The following steps have been performed with MS Office 2016. If you use a different MS Office version the process may be a bit different.)*

2 **Open Data**

In the EXCEL file, on the ribbon, click on the **"Data"** tab to open the corresponding options under.
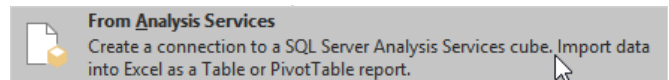
3 **Open From other sources**

On the Data ribbon, click on the **"From other sources"** button to open the dropdown list.
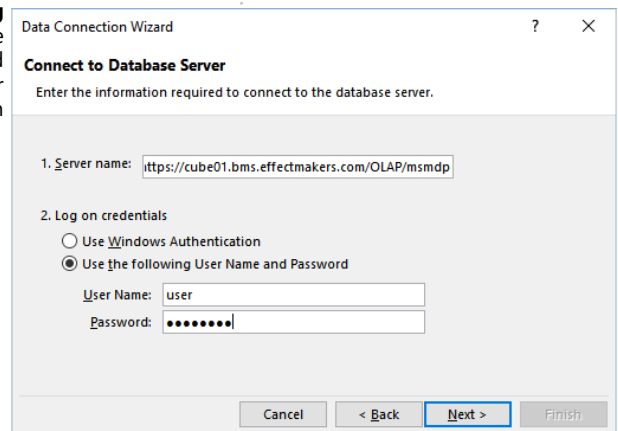
4 **Select from Analysis services**

From the dropdown list click on the **"From Analysis Services"** in order to open the SQL Server Analysis Services window.

From Analysis Services
Create a connection to a SQL Server Analysis Services cube. Import data into Excel as a Table or PivotTable report.

5 **Connect to cube**

In the new window fill in the BMS Cloud Server name **https://cube01.bms.effectmakers.com/OLAP/msmdpump.dll**. Then select the option **"Use the following User Name and Password"** to activate the fields of **"User Name"** and **"Password"**. Use your personal BMS User Name and Password and then click on **"Next"**.

Data Connection Wizard

Connect to Database Server
Enter the information required to connect to the database server.

1. _S_erver name: https://cube01.bms.effectmakers.com/OLAP/msmdp

2. Log on credentials
   ○ Use _W_indows Authentication
   ● Use the following User Name and Password

   _U_ser Name: user
   _P_assword: ●●●●●●●
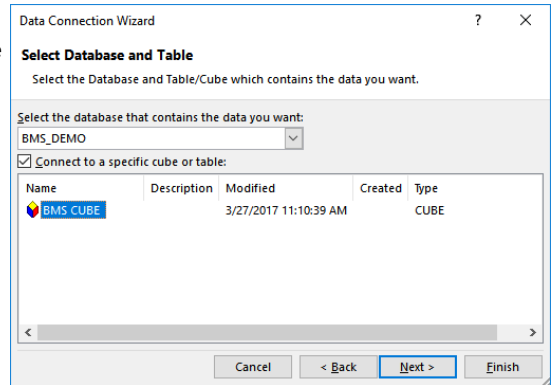
Cancel   < _B_ack   _N_ext >   Finish

Important: The Server Name provided in Step 5, is **only** for the users of **BMS Cloud**. If you are a user of **BMS on-premise**, the Server Name will be different and it will be provided to you from an admin/super-user of your organization.

6 **Select database and table**

Select the **"Database"** of the data you want to use from the drop-down list. There can be multiple Databases to access, but your organization will only give access to your username in the specific databases you are qualified to use.

Select the Cube you want to connect. In BMS we provide you with one BMS CUBE database.
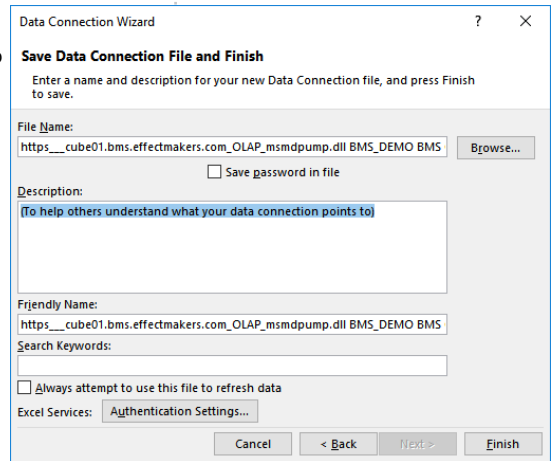
Click **"Next"**.

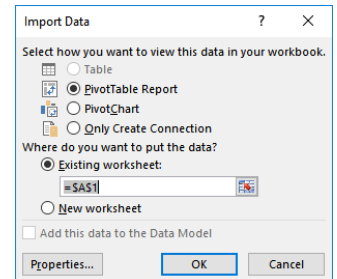**7** **Save data connection file and finish**

You can leave these settings as default, as this is a standard EXCEL set up. Except if an admin/super-user of your organization provides you specific information for this.

Click on **"Finish"** to complete the connection to BMS Cube and open the "**Import Data**" window.

8 **Set Pivot table**

Select on the **"PivotTable Report"** and then select the coordinates to put the data. Click on **"OK"** to apply everything.
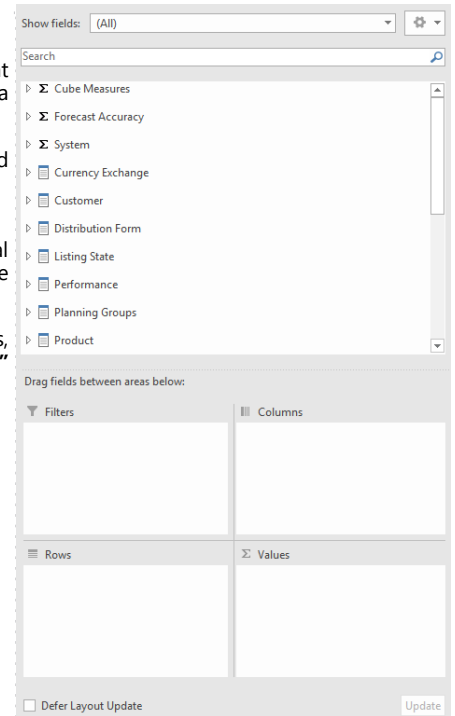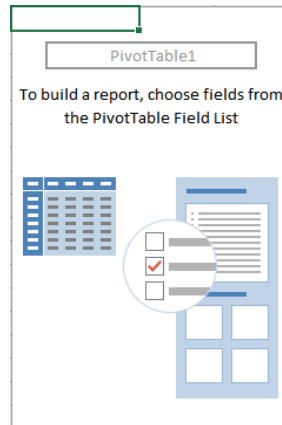
9 **The Cube layout**

Now you have opened a **"Pivot Table"** to the left and to the right of your spreadsheet is the **"PivotTable Fields"** with all of the data you can import and use.

The **"PivotTable Fields"** are organized in **"Measures"** and **"Dimensions"**. The Measures are symbolized with the symbol Σ and Dimensions with ▤.

Meassures are the data you want to report and contain your official reporting P&L. The Measures group can be used only in the **"Values"** field.

Dimensions are unmeasurable variables like Customers, Products, Dates, etc. The Dimensions group can be used in **"Rows"**, **"Filters"** and **"Columns"** fields.

Why can I not connect to BMS Cube?

Check if the server address is correct and if you use the correct user name and password. If it still does not connect, close your file and open it again and repeat the steps. If still it is not possible to connect, then contact our support team.

I cannot see "BMS CUBE", when I select database and table to connect. Why?

Probably, you do not have access to BMS Cube or you do not have the permission to use it. Contact our support team to assist you..