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 *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 OLAP Cube using your personal BMS username and password on a specific server address.
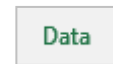
Connect to BMS Cube

1 **Open an Excel file**

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

2 **Select Data tab**

In the Excel file in the ribbon, click on the Data tab to open the corresponding options in the ribbon.
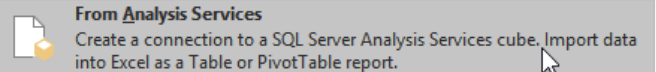
3 **Select From other sources**

On the Data ribbon, click on the From other sources button to open the drop-down list.

4 **Select from Analysis services**

From the drop-down 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.
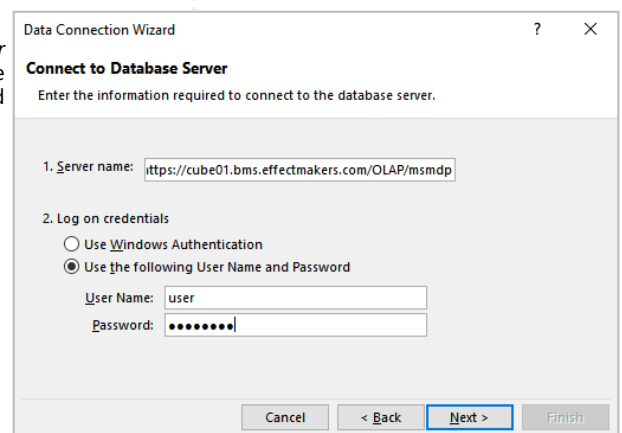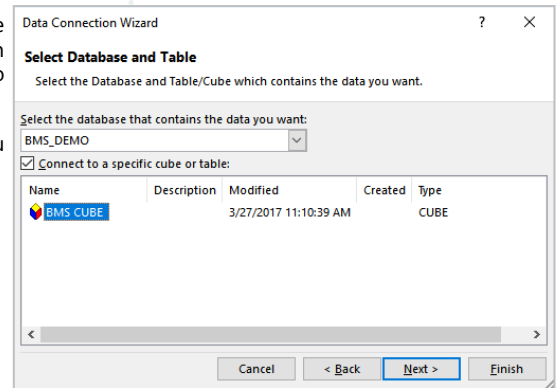
5 **Connect to cube**

In the new window fill in the BMS Cloud Server name:

https://cube01.bms.effectmakers.com/OLAP/msmdpump.dll

Then select the option to *Use the following User Name and Password* to activate the input fields. Use your personal BMS user name and password and then click *Next*.

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

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

2. Log on credentials
   ○ Use Windows Authentication
   ● Use the following User Name and Password
   User Name: user
   Password: ••••••••

Cancel   < Back   Next >   Finish

Server name

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 administrator of your organization.

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6   Select database and table

Select the Database of the data you want to use from the drop-down list. Multiple databases will be displayed on the list, but your organization will only allow you access to the specific databases you are qualified to use.

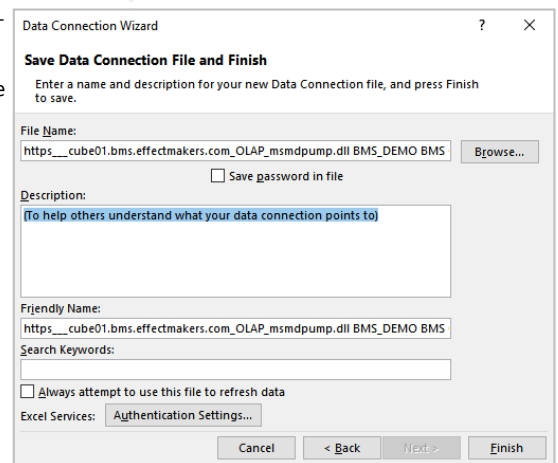Select the cube you want to connect to. We provide you with one BMS Cube database.

Click Next.
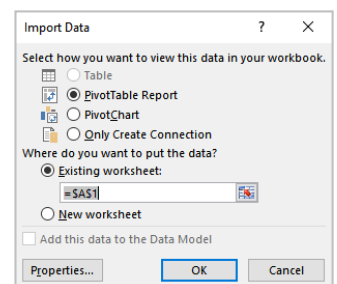

7   Save data connection file and finish

You can leave these settings as default, as this is a standard Excel set up.

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

8   Set Pivot table

Click on the PivotTable report and then select the coordinates to place the data. Click on OK to generate the table.

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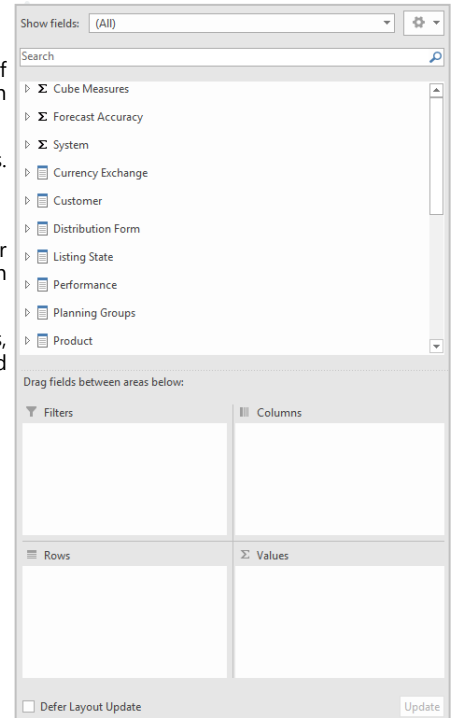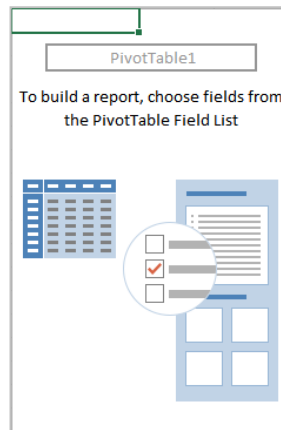The screenshots are taken from Microsoft Excel 2016.

(9) **The Cube layout**

Now you have opened a Pivot table to the left and to the right of your spreadsheet are the PivotTable fields with all of the data you can import and use.

The PivotTable fields are organized in Measurements and Dimensions. The measurements are symbolized with the symbol Σ and dimensions with $\boxed{=}$.

Measurements are the data you want to report and they contain your official reporting P&L. The measurements 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.

Show fields: (All)

Search

- ▷ Σ Cube Measures
- ▷ Σ Forecast Accuracy
- ▷ Σ System
- ▷ 📋 Currency Exchange
- ▷ 📋 Customer
- ▷ 📋 Distribution Form
- ▷ 📋 Listing State
- ▷ 📋 Performance
- ▷ 📋 Planning Groups
- ▷ 📋 Product

Drag fields between areas below:

▼ Filters	III Columns

≡ Rows	Σ Values

☐ Defer Layout Update   Update

PivotTable1

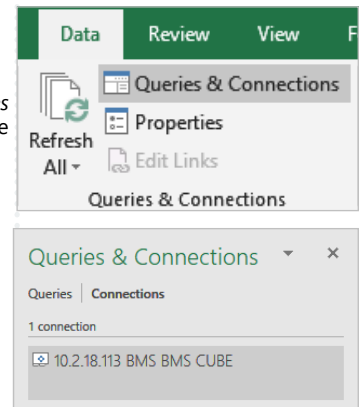To build a report, choose fields from the PivotTable Field List

Save the password to Pivot Table Data Connection

When creating a reporting tool using BMS Cube, Excel will require you to insert the username and password every time you open the file. You are required to insert the password and username per each Pivot Table in the file (for each data connection)

This can become a very time-consuming procedure if you are using more then one Pivot tables in the report. Therefore, a solution is to save the password for the existing data connections in the file.
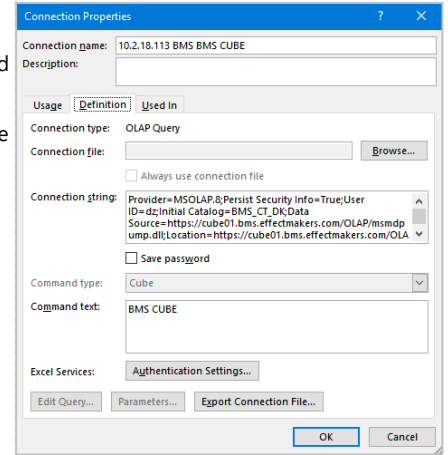
(1) **Open an Excel file**

Go to the *Data* section of the Excel sheet on the top and click *Queries & Connections*. A table with existing connections will appear on the right. Double click the suggested connection—BMS.

| Data | Review | View | F |

Queries & Connections

Refresh All ▾

Properties

Edit Links

Queries & Connections

Queries & Connections   ▾   ✕

Queries | Connections

1 connection

◻ 10.2.18.113 BMS BMS CUBE

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2 **Open an Excel file**

The Connection Properties table will appear. Go to *Definition* and check the *Save Password* box.

Password is saved and will not require log again when you open the file.

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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.