Planner User Guide

This section describes how to use the Excel Add-In.

The Excel Add-In that gives Business people the most powerful reporting and data input for Analysis Services. All the power of Excel, the most powerful reporting and analysis tool you know and love, linked directly to your Analysis Services applications with no compromises in your use of Excel.

Features

- Powerful financial reports easily created by business users:
    1. Trend reports
    2. Comparative reports
    3. Consolidating reports, etc.
- Maximize the Excel experience for the user. No compromises in your native Excel.
- Current View navigation for easy access to everything you have access to.
- Dynamic row and column expansions as you navigate through the data while automatically preserving all your Excel defined formatting, formulas, etc.
- All reports can be saved and used offline.
- Data input schedules. All input schedules can be taken offline and then data submitted later.
- Drill down within the same dimension, or across any other dimension.
- Zero suppression is as simple as a checkbox.
- Time offsets for easy comparative reporting against last year, last period, etc.
- Wizard to create mix and match reports from column and row templates.
- Full write security with the control required for things like gathering Forecast at a summary level, while at the same time gathering Actuals at a detail level.
- Workflow with multi-level approvals.
- Level down expansions.
- Control Panel driven.
- Shared Report library.
- Live interaction with Analysis Services data and structures.
- Easy user logon with just a URL. No complicated, technical connections to setup or find.
- Access to all your member properties in ways you can do powerful and creative things in Excel.
- Sharepoint integration .
- No complex MDX formulas, cryptic identifiers, etc.
- Distribute to users without any need for administrator rights on the client computers.
- Only requires Excel XP or later. No other components to install or update on the clients.
- Book publishing for bulk creation of reports.
- Data Manager to load data, extract data, and clear data in bulk with only Excel knowledge required.

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Last update: **2018/02/21 13:53**