

# IBM Cognos Analysis for Microsoft Excel

*Explore and analyze data in a familiar spreadsheet format*



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## Highlights

- Explore and analyze data drawn from IBM Cognos TM1 models and IBM Cognos Business Intelligence in a familiar spreadsheet format
  - Retain Microsoft Excel functionality and formatting when moving data between Cognos TM1 and Microsoft Excel
  - Easily share results by publishing IBM Cognos Business Intelligence-sourced reports, including new column and row calculations, in standard Cognos reports and dashboards
  - Enjoy self-service capabilities that let you analyze data from different sources without assistance from IT
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## Overview

IBM® Cognos® Analysis for Microsoft Excel brings the benefits of modern enterprise performance management to your Microsoft Excel spreadsheets. It provides a way for business analysts, financial analysts, line-of-business managers, and users on the front line to pull data from a variety of sources, including IBM Cognos TM1® and IBM Cognos Business Intelligence, and perform analysis in a familiar Microsoft Excel spreadsheet environment.

Cognos Analysis for Microsoft Excel can apply the complete spectrum of Excel capabilities to your source data to help you avoid multiple versions of the truth, data entry errors and security problems. Users can work in their spreadsheets with trusted information from IBM Cognos TM1, along with data from other sources. Excel functionality and formatting is retained when data is moved between Cognos TM1 and an Excel spreadsheet, so changed or reoriented data stays as it was. And with formula-based data access, users can answer key questions, solve business problems and present results in ways that help drive actionable insight—without depending on IT support to get the job done.



## Flexible exploration and analysis

Cognos Analysis for Microsoft Excel extends access to Cognos TM1 data to more users in your enterprise so they can help make the decisions that drive superior performance. Built for use with existing versions of Microsoft Excel, it does not require a platform upgrade. Its single, intuitive interface for all exploration and analysis functions integrates with the existing Microsoft Excel workspace.

Cognos Analysis for Microsoft Excel also offers a complete range of business intelligence capabilities on a single platform, with common metadata and security to ensure that you are working with consistent, accurate information. And because you can reuse Cognos Business Intelligence reports and dashboards, sharing information and analysis results with the rest of your organization is easy. You can select, filter data and define layouts or use all of the capabilities of Microsoft Excel to enrich business scenarios. And you can enjoy the freedom of analyzing data from different sources without asking for IT intervention.

## Exploration user interface

An easy-to-use Exploration user interface in Cognos Analysis for Microsoft Excel can be used directly with Cognos TM1 data sources. This interface allows users to drag and drop members, dimensions, views and subsets from the metadata tree of your Cognos TM1 model into the spreadsheet column or row you choose.

You can organize Cognos TM1 dimensions on your Excel spreadsheet to perform analysis, discover trends and identify business opportunities far more effectively than in a static reporting environment. In addition, all the hierarchies that you've built in the Cognos TM1 model are available in Excel, so they do not need to be recreated. Users can also write back to the Cognos TM1 model with Excel formatting intact.

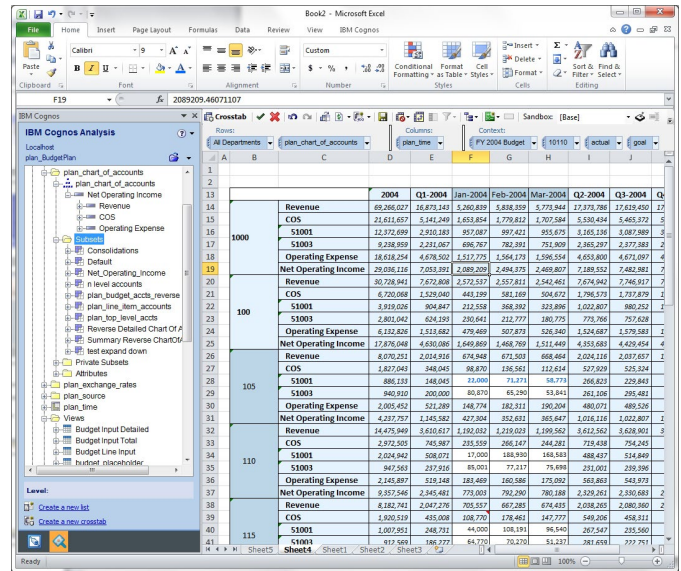


Figure 1: Users can drag and drop members from the metadata tree of a Cognos TM1 model (shown on the left) into a spreadsheet column or row.

## Flex view for Cognos TMI

The Flex view adds even more flexibility to your Excel presentations. You can build large, crosstab reports, or you can place just one or more values anywhere you want. Flex view also enables you to build control panels, which makes it easy to change the information in a report with just one click.

The Flex view for Cognos TMI enables users to convert an Exploration or drag a view directly to an individual cell. You can use Set Editor and drag and drop gestures to change members or simply type names in the cells. You can also add formats and calculations and add content from multiple cubes. In addition, the Flex view allows you to link Cognos TMI data with Excel functions and cell references.

## Analysis for everyone

For the best business outcomes, companies must utilize the full potential of people in all areas of their organizations—from the executive suite all the way to the front lines of the business. They need to break down the barriers and expand traditional analysis capabilities to make them available to all users. Cognos Analysis for Microsoft Excel opens up your organization's information to more users by making it available to those who prefer to work in the spreadsheet environment that they already know.

Cognos Analysis for Microsoft Excel makes it possible to:

- Provide visibility and access to the performance management information that users need, along with the different perspectives and contexts that help drive informed decisions.
- Assess the immediate business situation with more advanced, predictive or what-if analysis.
- Engage the right teams and individuals from across the organization for more inclusive and broadly representative decision-making and analysis.
- Deliver analysis results to the processes and people at the front line of the business.

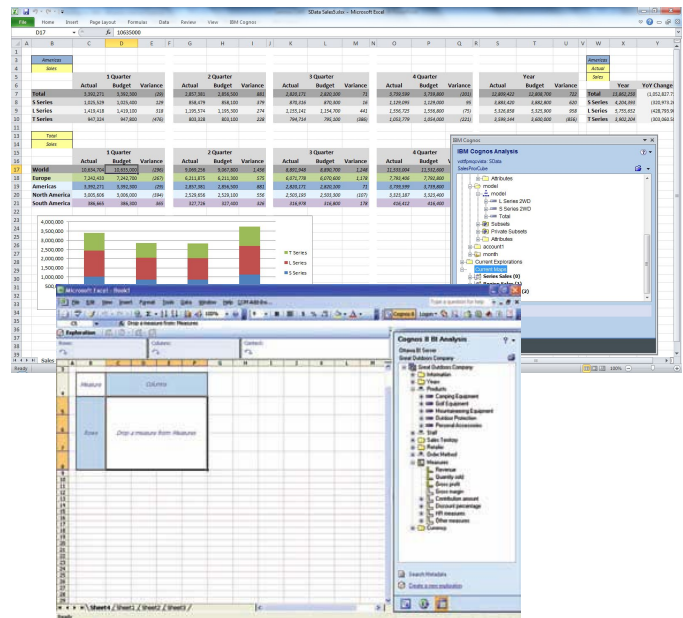


Figure 2: Users can explore and analyze multidimensional data in a familiar Microsoft Excel workspace, taking advantage of Microsoft Excel features and functionality.

## **IBM Cognos Analysis for Microsoft Excel Features**

Cognos Analysis for Microsoft Excel makes it possible to analyze business data in a working environment that most users already know, offering benefits for both business users and the IT teams that support them.

### **Little to no training required**

With Cognos Analysis for Microsoft Excel, users do not have to interrupt their work to learn a new interface or platform. They can explore data, perform flexible analysis and solve business problems using familiar spreadsheet tools and techniques.

### **Efficient reuse of Cognos TM1 objects**

Create objects and subsets in Cognos TM1 models and reuse them in the spreadsheet environment of Cognos Analysis for Microsoft Excel without having to recreate them.

### **Not limited to proprietary data**

Exploration and analysis is not limited to proprietary data sources. In addition to Cognos TM1 and Cognos Business Intelligence, users can pull data from personal spreadsheets and a variety of performance management and business intelligence sources.

### **A single, intuitive interface**

Navigate, personalize and manipulate data to gain a managed view of information from multiple, heterogeneous data sources, including planning and consolidation and dimensionally modeled relational data sources—all in one place.

### **Self-service capabilities**

Review data and build reports and dashboards on your own without the need for IT to prepare performance management or business intelligence data with data from other sources.

### **Live connection to information**

Connect directly to IBM Cognos TM1 and IBM Cognos Business Intelligence data sources, along with continual data refresh to ensure accuracy and reliability. Modify analysis or queries, including formatting revisions such as inserting, deleting or switching rows and columns—and refresh occurs automatically. Refresh can also be performed on demand at any time.

### **Easy distribution of results**

Publish Cognos Analysis for Microsoft Excel reports in standard Cognos reports and dashboards, and distribute the results of your data exploration and analysis to a wider business community. You can also reuse these exploration results as queries for other worksheets or in other Cognos performance management solutions.

### **Security**

Cognos Analysis for Microsoft Excel uses the same IT security framework used by the entire IBM Cognos performance management suite.

## Conclusion

Microsoft Excel is one of the most powerful and popular software applications in use today. But different analysis tools, information silos, and multiple platforms can hinder effective decision-making at a time when you need to make better decisions faster. In addition, your business users want to be able to analyze data without waiting for IT to modify and deliver requested information for use in their preferred formats. Cognos Analysis for Microsoft Excel addresses this need by providing analysis capabilities in an intuitive, single interface that is familiar to most users, expanding information and analysis to everyone who needs it.

## About IBM Business Analytics

IBM Business Analytics software delivers data-driven insights that help organizations work smarter and outperform their peers. This comprehensive portfolio includes solutions for business intelligence, predictive analytics and decision management, performance management, and risk management.

Business Analytics solutions enable companies to identify and visualize trends and patterns in areas, such as customer analytics, that can have a profound effect on business performance. They can compare scenarios, anticipate potential threats and opportunities, better plan, budget and forecast resources, balance risks against expected returns and work to meet regulatory requirements. By making analytics widely available, organizations can align tactical and strategic decision-making to achieve business goals. For further information please visit [ibm.com/business-analytics](http://ibm.com/business-analytics)

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