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arcplan Excel Analytics 2.6.5

The latest version of *arcplan Excel Analytics* is available to customers, partners and prospects as an add-on to arcplan Enterprise deployments. *arcplan Excel Analytics 2.6.5* is an enhanced version of arcplan's current Microsoft Excel® add in, introducing new or improved functionality to deploy arcplan applications and application content in a Microsoft Office® environment.

This document accompanies the ***arcplan Excel Analytics 2.6.5 Product Bulletin*** and is intended on answering a variety of questions anticipated with the launch of *arcplan Excel Analytics 2.6.5*.

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General

1. What is arcplan Excel Analytics?

arcplan Excel Analytics is an Add-In to the existing Enterprise Suite that makes an arcplan application's functionality (in the form of arcplan objects) available within Microsoft Excel® and moreover to the user's desktop, rather than on the web. The targeted customer base consists of new customers to the arcplan Enterprise platform as well as existing customers that are migrating or have already migrated to at least arcplan Enterprise 5.5.

2. What is new in *arcplan Excel Analytics 2.6.5*?

The overall goal of arcplan Excel Analytics 2.6.5 is to improve performance and further expand the ad-hoc capabilities of the product. aEA 2.6.5 will include:

- One- click ad-hoc functionality supporting pivoting, stacking, dimension swapping for SAP BW, TM1, MS Analysis Services and all other ODBO compliant multidimensional data sources along with ad-hoc support for all ODBC and OLE DB compliant relational data sources.
- New compression/decompression functionality available to enhance performance for low bandwidth networks.
- Date format support from arcplan to aEA
- Improved performance for high volume transactions.



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3. What are the deployment requirements for arcplan Excel Analytics 2.6.5?

arcplan Excel Analytics 2.6.5 is an installed add in to Microsoft Excel 2003 and 2007. To successfully deploy arcplan Excel Analytics 2.6.5, users need the following:

- arcplan Enterprise 6.5
- arcplan Analytic Services
- a published arcplan application published on arcplan Enterprise 6.5
- the arcplan Excel Analytics add in (available at <http://www4.arcplan.com/en/services/locked/download6.html>)

Compatibility

4. Is arcplan Excel Analytics 2.6.5 compatible with arcplan applications developed using *dynaSight 4.1*?

No. arcplan Excel Analytics 2.6.5 only works on applications that have been built or migrated to arcplan Enterprise 5.5 Patch 6 and above

5. Can I open an arcplan Excel Analytics 1.5.2 spreadsheet using arcplan Excel Analytics 2.6.5?

Yes, spreadsheets are backwards compatible.

6. What version of Microsoft Excel do I need to use to install the arcplan Excel Analytics 2.6.5 add in?

arcplan Excel Analytics 2.6.5 can be installed as an add-in to Microsoft Excel 2003 and 2007. When running the executable, the installation script recognizes the version of Microsoft Excel running and installs the appropriate components.

However to take advantage of the new ad-hoc pivoting functions you must have Excel 2007. Excel 2003 doesn't support pivoting and true ad-hoc functionality.

7. Is arcplan Excel Analytics 2.6.5 compatible with arcplan Enterprise 5.x?

Yes, aEA 2.6.5 completely supports arcplan Enterprise 5.5 patch 6 and above and all applications upgraded to that version or any versions released after arcplan Enterprise 5.5 patch 6. aEA 2.6.5 is **not** compatible with any prior versions of arcplan Enterprise.

8. Does arcplan Excel Analytics 2.6.5 support new chart types in arcplan Enterprise 6.5

Yes aEA 2.6.5 fully supports the new chart types in arcplan Enterprise 6.5

Product Functionality

9. Will windows authentication work when I build spreadsheets manually?

Yes , Windows Integrated Authentication is fully supported. As long as your arcplan application is published in a Windows Integrated Authenticated environment and the machine with arcplan Excel Analytics installed is in a Windows Integrated Authenticated environment.



10. What arcplan objects can be exported to Excel via arcplan Excel Analytics?

Currently all arcplan objects are supported within arcplan Excel Analytics, including: Vertical Hierarchies (not supported by Excel alone), Horizontal Hierarchies (not supported by Excel alone), Menu Hierarchies (not supported by Excel alone), Tables, Columns, Rows, Charts, Images, Buttons, Radio Buttons, Checkboxes, Menus.

11. Are there any arcplan objects that should be avoided from being exported to excel?

Text objects are not supported in aEA and therefore shouldn't be exported to aEA. Also Empty objects(objects with no value) shouldn't be exported to aEA, as aEA cannot process such objects. It is also recommended to minimize the amount of checkboxes, radiobuttons and buttons to be exported to aEA as too many such OLE objects cause performance lag in Excel.

12. Are arcplan "events" transferred to arcplan Excel Analytics with the transferred objects?

Some events transfer with the objects, namely the "on update" events and those that don't require user behavior. Cursor and click events do NOT transfer with the object.

13. Can I write back data changes in Excel to the data source through arcplan Excel Analytics 2.6.5?

Yes. Write back can occur at the cell level (cell by cell) and the object level (update multiple cells simultaneously). Four settings exist for writing back data to the native data source.

- *Read only* – This mode prevents user from writing back into arcplan objects.
- *Online* – direct access to the arcplan data with updates automatically written back to the source as changes are made.
- *Submit* – This mode allows users to write back data into multiple cells without triggering a write back event at a cell level. The submit mode adds a submit button to the worksheet. By clicking on this submit button the changes can be written back to the source data as prompted by the end user and in accordance to the user privileges associated with the source data.
- *Offline* – user works outside of a connection to the arcplan data sources. Upon reconnecting (initializing the session), the user is prompted to refresh the data in the spreadsheet. NOTE: Data is lost IF the user refreshes the data prior to saving as a separate spreadsheet.

14. Is the Layout Manager turned on or off by default?

The Layout Manager is turned OFF by default when arcplan Excel Analytics is launched from Excel to optimize performance and turned ON by default when arcplan Excel Analytics is launched over the web to assure proper object alignment while exporting objects.

15. What behavior can I expect when the Layout Manager is turned 'OFF'?

Typically, external calculations won't expand with expanding objects. Expanding objects extend in front or behind other (nearby) objects. To control the layering of the objects, use the Z-order to specify what object should be on the top, if you prefer to keep the Layout Manager Off.



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16. Do I have to maintain a connection to work with my Excel / arcplan Excel Analytics spreadsheet?

NO. One of the primary features with arcplan Excel Analytics is that the data from an arcplan application is available as a snapshot for users that desire to work offline. Upon re-establishing the connection, the user is prompted to refresh the data in arcplan Excel Analytics or write back to the source data.

17. Can I modify an arcplan object within the Excel spreadsheet?

YES. Users can drag and drop cells to new locations and change font and color properties. Persisting these changes is dependent upon the “Format Type” property setting of the arcplan object and the Layout Manager setting. These changes do NOT affect the original arcplan object or application. Inserting rows /columns within an existing arcplan object is not allowed, however inserting rows/columns in between arcplan objects is allowed with full Excel functionality.

18. Can I change properties of arcplan objects within my arcplan application from arcplan Excel Analytics.

NO. Whereas data updates can be written back to the source data, changes to objects (like formatting modifications to change a cell color from yellow to red) only apply to arcplan Excel Analytics and not to the original arcplan application. If the arcplan server formats are turned on, these changes would revert to the arcplan formats with the next update/refresh.

19. Can I fully expand a hierarchy object within an arcplan Excel Analytics spreadsheet?

YES. Hierarchy expansion is fully supported. The limitation of expanding a hierarchy object is determined by the arcplan application. For example, if a hierarchy includes five levels and is set to enable expansion to the third level, arcplan Excel Analytics will expand to the 3-levels enabled by the arcplan application.

Value Proposition

20. How does arcplan Excel Analytics compare to other add ins?

arcplan’s core competitive advantage of heterogeneous data access extends to arcplan Excel Analytics. Whereas add-ins like Hyperion Excel Add-In, BEx Analyzer and IBM/Cognos/TM1 Add In limit connectivity and functionality to their own data sources, arcplan Excel Analytics offers full connectivity and functionality to multiple data sources. Additionally, customers with data sources that do not provide an available Add In can turn to arcplan Excel Analytics as their Excel interface.



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21. As a finance user, how does *arcplan Excel Analytics* help me?

Excel is a powerful desktop tool that allows finance managers and other end users to slice and dice data in multiple ways. This flexibility comes at a cost in which the data typically must be copied and loaded into the workbook. Data from multiple sources requires copying of various tables, complex consolidation of the data and, in many instances, manually entering data. arcplan Excel Analytics provides DIRECT access to the data used to populate Excel spreadsheets, greatly streamlining the process to build and populate Excel workbooks. Additionally, the ability to write-back to the source data, enables distributed Excel spreadsheets running arcplan Excel Analytics to automatically push updates to the user community. Not only is it easier to populate data into Excel with arcplan Excel Analytics, the decentralization of a spreadsheet once shared can be controlled, greatly increasing the collaboration across users (and disparate users).

22. Can the format of spreadsheets and the data populating spreadsheets be controlled centrally?

YES. Centralized control of the data is managed by write back and the user privileges that are established at the database level. Additionally and through arcplan's USERNAME() function, publishing specific arcplan objects can be limited at the user-level.

arcplan Excel Analytics 2.6.5 represents a significant step forward in arcplan's efforts to further simplify the integration of complex, compound analytics and access to multiple data sources into an environment best suited for financial managers, controllers and analysts. For questions related to this Product FAQ and the availability of arcplan Excel Analytics 2.6.5, please contact your primary account executive or the arcplan sales team at sales@arcplan.com or SalesUS@arcplan.com. Additional information on arcplan Excel Analytics and other arcplan offerings can be found online at www.arcplan.com.