

Creating a connection using Microsoft Excel

The steps for creating a connection in different versions of Excel are the same. In the following example Excel 2010 will be used.

To create a connection, you need to start the “Data connection wizard”. You can do this in two ways:

- I)
 1. Select the cell where you want the top left cell of the PivotTable to be.
 2. Go to “Insert” tab from the menu

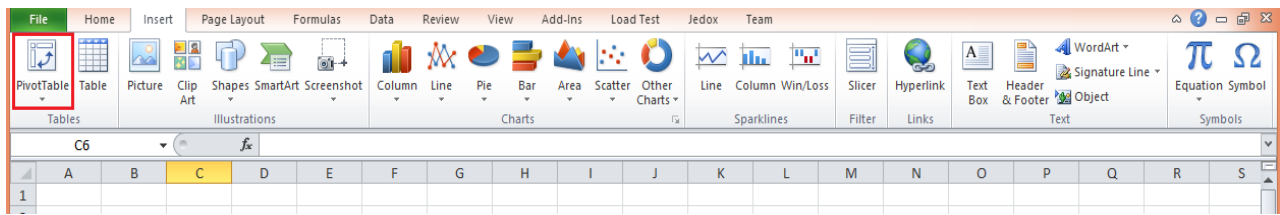


Fig.1

3. Click the “PivotTable” button and select “Use an external data source” option from the “Create PivotTable” window. After you select this option, push the button “Choose connection”.

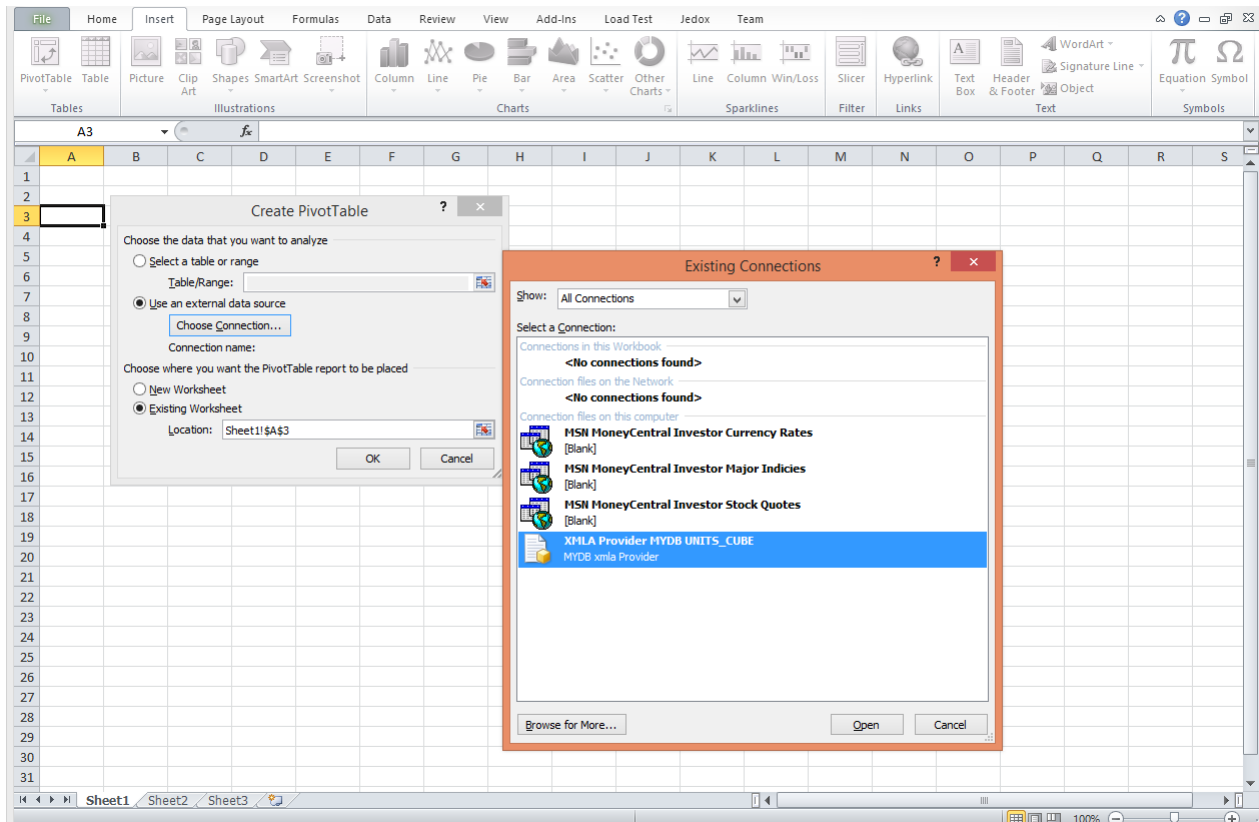


Fig. 2

4. You can see now the window for “Existing Connections”. You can choose an existing connection from the list or choose to create a new connection. To create a new connection push “Browse for More...” button.

5. The “Select Data Source” window is now on your screen. Push the “New Source” button, from the bottom left.

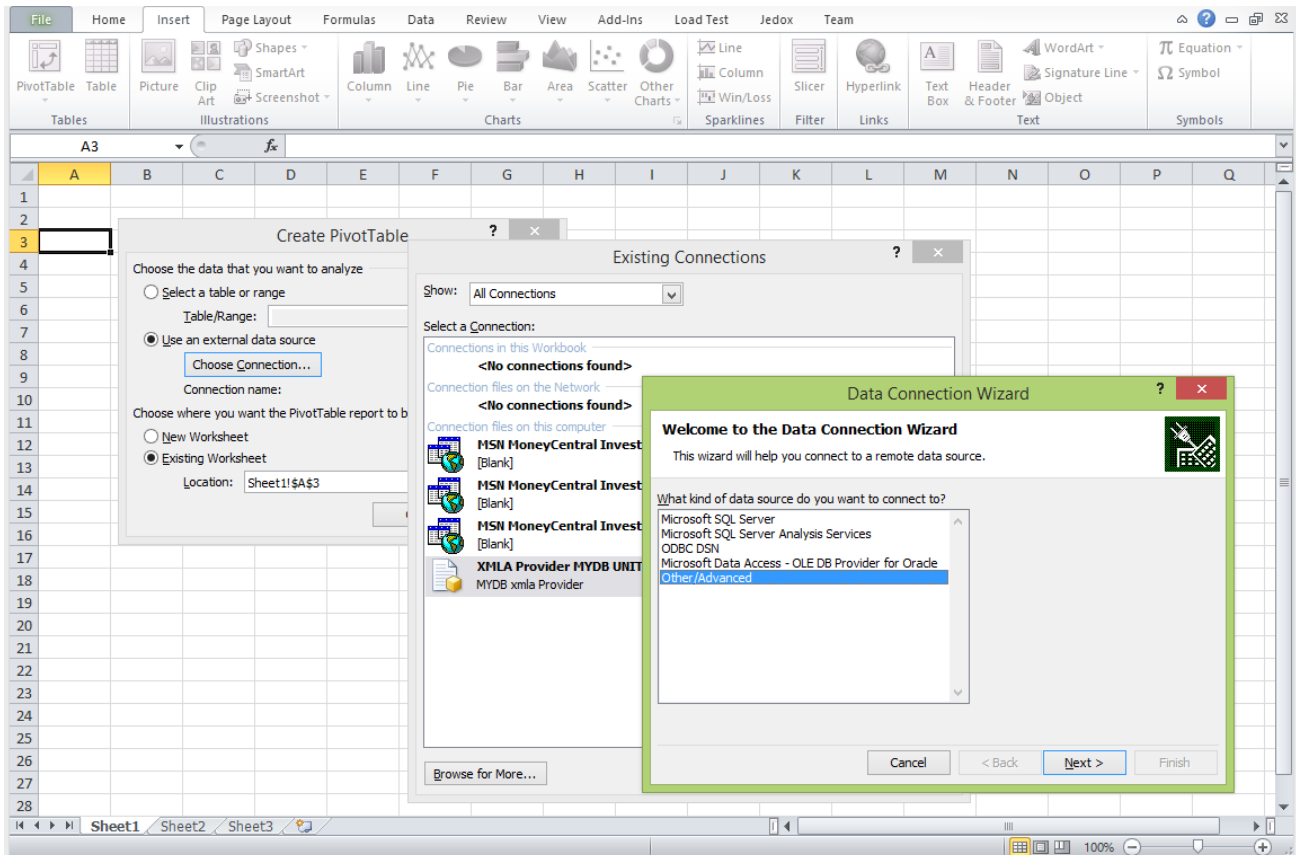


Fig. 3

And you have the “Data Connection wizard”.

Follow the next steps to create a new connection using “Data Connection wizard”:

1. In the “Data Connection Wizard”, select “Other/Advanced” and press the button “Next” or double-click on “Other/Advanced”.

- In the window “Data Link Properties”, select from the list of “OLE DB Providers” **XMLA Data Source**. Click “Next”, double-click on the item or select the “Connection” tab from the upper menu.

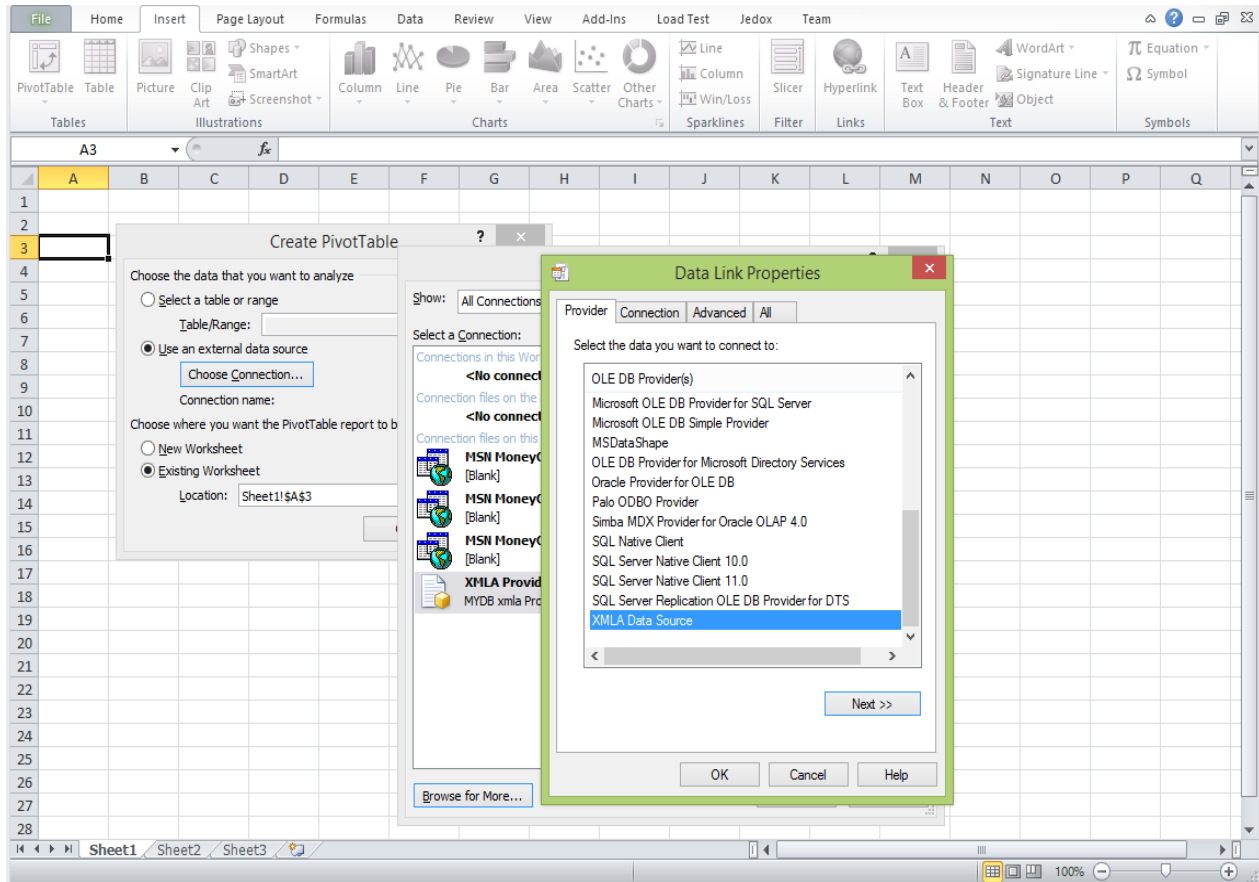


Fig. 4

- In the “Connection” tab you need to fill the following information:

- **Location** – if the default settings were used during installation this should be “127.0.0.1:8081”. If the default settings were changed location is filled with the “host:port” information set when the product was installed (IT department can give you this information).
- **Credentials** for the server (User name and Password) – this information is used only for the current session. In the next step you can choose if the credentials should be saved with the connection file.

- **Catalog** – select from the dropdown list the catalog you want to use for your connection.

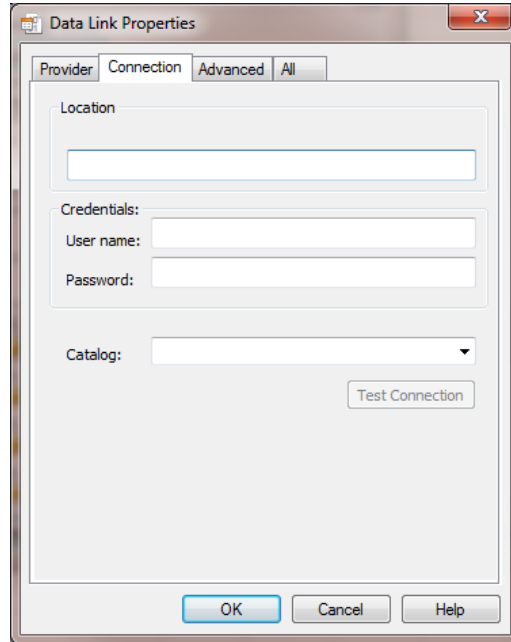


Fig. 5

You can click on “Test Connection” button to verify that the information you entered is correct and a connection can be established.

After you entered all the information, push the “OK” button.

4. The “Data Connection Wizard” redirects you to the “Select Database and Table” menu. Select the cube that you want to use in this connection for Pivot Table and then click “Next”.

5. You are now in “Save Data Connection File and Finish” window (fig. 6).

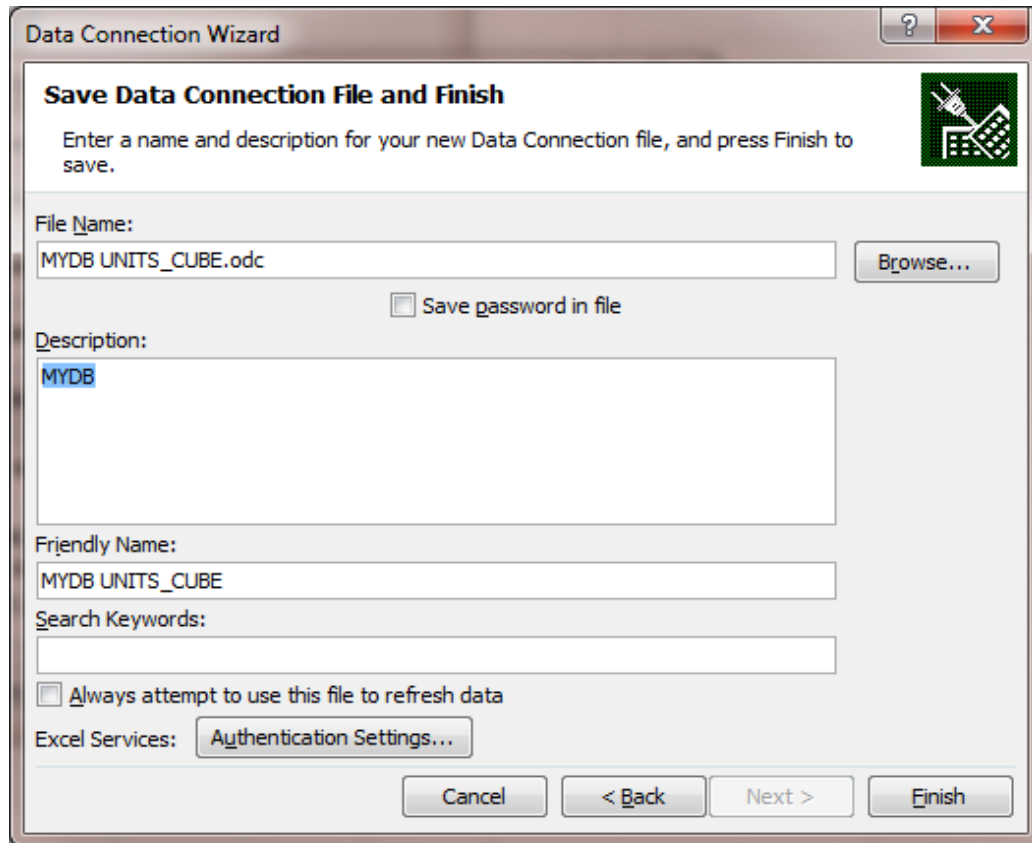


Fig. 6

- In this window, you can modify the “File Name ” of the odc file that records the information for this connection. It is recommended that you give each connection a specific name, so you can manage them more easily. The connection files are usually stored in “My Documents/My Data Sources”.
- If you want to save the password in the connection file, you must check “Save password in file”. The default does not save the password to the connection file. Before saving the password to the file consider that the password is saved without being encrypted.
- You can add a “Description” to this connection, visible in the “Existing Connection” window under the File Name.
- If you want your connection data to be stored in the odc file, check “Always attempt to use this file to refresh data”. If this checkbox is not selected the connection is embedded in the workbook. One advantage of using .odc files is that the updates are done only once for the file, and any workbook that uses the file for its data connection will use the updated connection.
- Click the “Finish” button to save your new connection file. From now on you can find this connection under “Existing Connections” window.

Now you have a new Pivot Table connection. Enjoy your new workbook.

II) This is the second way to make a connection.

1. Select the cell where you want the top left cell of the PivotTable to be.
2. Go to “Data” tab from the upper menu

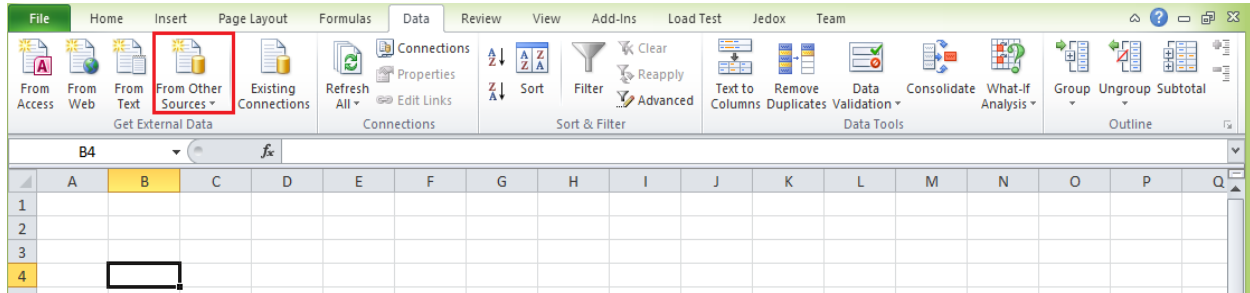


Fig. 7

3. Click the “From Other Sources” button and select “From Data Connection Wizard”

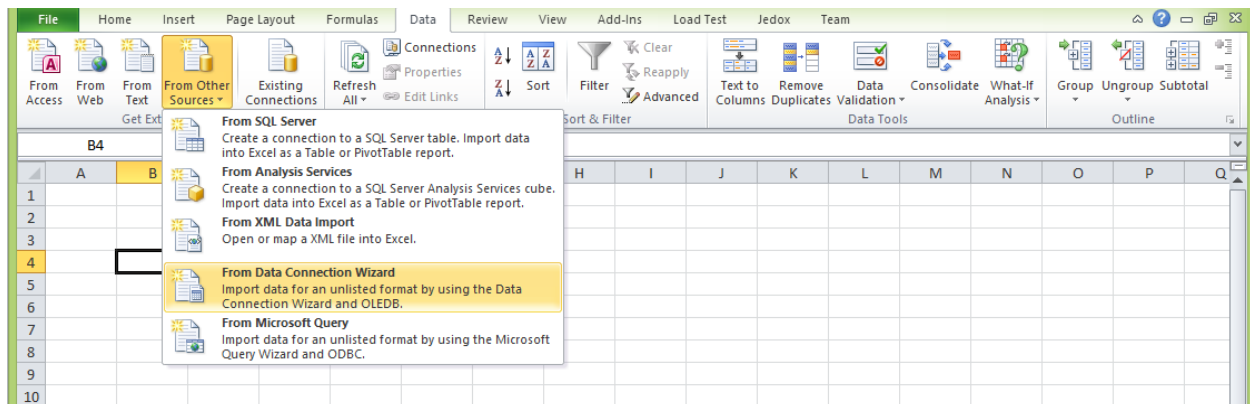


Fig. 8

And the window for “Data Connection wizard” appears. The next steps for creating a connection are described above.

4. If the connection is started from “Data” tab, you will see the following window:

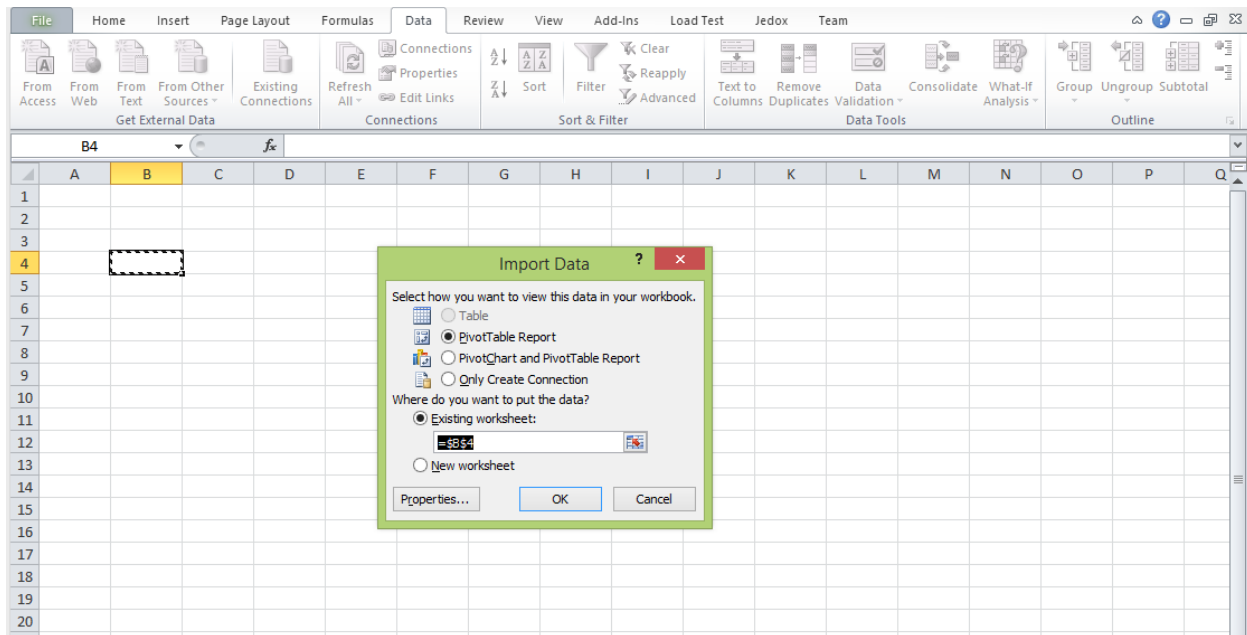


Fig. 9

- You can change the position for you PivotTable (the position for the left corner of the PivotTable)
- You can select to nave a Pivot Chart attached to your PivotTable
- You can choose to make a simple connection and give up on importing a PivotTable. You can find this connection in “Existing Connections” window.

After choosing one of the options above your connection is created, and now you can enjoy the benefits of Microsoft Pivot Table (for more information read Analytics with Excel).