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1 What's New in the EPM Add-in for Microsoft Office Installation Guide

Links to information about the new features and documentation changes for the EPM Add-in for Microsoft Office.

What's New in Support Package 32 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Sign-On deactivation for Planning and Consolidation for the Microsoft Platform, connections</td>
<td>See <a href="#">Creating a Planning and Consolidation Connection for the Microsoft Platform</a> [page 53]</td>
</tr>
</tbody>
</table>

What's New in Support Package 31 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Chrome and Microsoft Edge are now supported</td>
<td>See <a href="#">Hardware and Software Recommendations</a> [page 12]</td>
</tr>
</tbody>
</table>

What's New in Support Package 30 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connecting to any server - even the ones that are defined in the untrusted zone, is now possible, by using the new configuration key TrustUntrustedServerCertificates</td>
<td>See <a href="#">Connecting to Untrusted Servers</a> [page 103]</td>
</tr>
</tbody>
</table>

What's New in Support Package 29 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web authentication protocol of type saml 2 now supported for connections to Planning and Consolidation SAP NetWeaver</td>
<td>See <a href="#">Creating a Planning and Consolidation Connection for SAP NetWeaver</a> [page 54]</td>
</tr>
</tbody>
</table>
What's New in Support Package 28 Patch 01 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amyuni PDF Converter 5.5 is provided in the setup of the EPM add-in as of Support Package 28 Patch 01.</td>
<td>See PDF Conversion [page 26]</td>
</tr>
</tbody>
</table>

What's New in Support Package 28 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secure Login solution for SAP Single Sign-On 3.0 is now supported.</td>
<td>See Creating a Planning and Consolidation Connection for the Microsoft Platform [page 53] and Creating a Planning and Consolidation Connection for SAP NetWeaver [page 54]</td>
</tr>
<tr>
<td>When creating a Planning and Consolidation connection, you can now choose to authenticate via a Secure Login profile, which generates a short-lived certificate.</td>
<td></td>
</tr>
<tr>
<td>TLS 1.1 and TLS 1.2 versions for HTTPS connections are now supported. By default, TLS 1.0 is used.</td>
<td>To use TLS 1.1 or TLS 1.2, see the procedure described in SAP note 2415155.</td>
</tr>
</tbody>
</table>

What's New in Support Package 27 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>New setups:</td>
<td>Installing EPM Add-in for Microsoft Office (standalone) [page 23]</td>
</tr>
<tr>
<td>● one for the 32-bit version of Microsoft Office</td>
<td></td>
</tr>
<tr>
<td>● one for the 64-bit version of Microsoft Office</td>
<td></td>
</tr>
<tr>
<td>Setups are full installers, no more .msp files to upgrade</td>
<td></td>
</tr>
<tr>
<td>Now embedded in the setups:</td>
<td>Installation Prerequisites for EPM Add-in [page 16]</td>
</tr>
<tr>
<td>● Microsoft .Net framework 4.5</td>
<td></td>
</tr>
<tr>
<td>● Microsoft XML parser 6.0 SP1</td>
<td></td>
</tr>
<tr>
<td>Microsoft Windows XP is no longer supported</td>
<td></td>
</tr>
</tbody>
</table>
## What's New in Support Package 25 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Windows 10 and Microsoft Office 2016 are now supported</td>
<td><a href="#">Hardware and Software Recommendations</a> [page 12]</td>
</tr>
</tbody>
</table>

## What's New in Support Package 22 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Windows Server 2012 R2 is supported</td>
<td><a href="#">Hardware and Software Recommendations</a> [page 12]</td>
</tr>
</tbody>
</table>

## What's New in Support Package 19 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Explorer 11 is supported</td>
<td><a href="#">Hardware and Software Recommendations</a> [page 12]</td>
</tr>
<tr>
<td>Microsoft Windows 8.1 is supported</td>
<td><a href="#">Hardware and Software Recommendations</a> [page 12]</td>
</tr>
</tbody>
</table>

## What's New in Support Package 18 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Office 365 is supported</td>
<td><a href="#">Hardware and Software Recommendations</a> [page 12]</td>
</tr>
</tbody>
</table>

## What's New in Support Package 16 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>New chapter regarding the new connection for SAP BW (INA Provider)</td>
<td><a href="#">Creating the SAP BW (INA Provider) Connection</a> [page 63]</td>
</tr>
</tbody>
</table>
What's New in Support Package 15 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>New chapter regarding the new local connection for the SAP HANA Platform</td>
<td>Creating a Local Connection for the SAP HANA Platform [page 49]</td>
</tr>
<tr>
<td>New option in the xml file: DeferLayoutUpdate</td>
<td>Deploying the Same Options for Several Users [page 85]</td>
</tr>
<tr>
<td>The already existing option MemberSelectorPagingSize: his equivalent option in the user interface is no more Members per page in Member Selector (that does not exist anymore) but Members Displayed on Node Expansion in Member Selector</td>
<td>Deploying the Same Options for Several Users [page 85]</td>
</tr>
</tbody>
</table>

What's New in Support Package 14 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Windows 8 and Microsoft Office 2013 are now supported</td>
<td>Hardware and Software Recommendations [page 12]</td>
</tr>
</tbody>
</table>

What's New in Support Package 13 Patch 02 Documentation

<table>
<thead>
<tr>
<th>What's new</th>
<th>Link to more information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added information about the new BAPI connection type</td>
<td>Creating a Local Connection for Financial Consolidation with NetWeaver BW Cubes [page 34]</td>
</tr>
</tbody>
</table>
2 Architecture

2.1 Architecture Overview

SAP BusinessObjects EPM Solutions, add-in for Microsoft Office provides business users the capability to analyze data from within supported SAP BusinessObjects EPM applications using Microsoft Office tools: Excel, Word or PowerPoint.
If you are using Dashboard Design, you can also convert EPM Add-in workbooks into Dashboard Design dashboards.
2.2 Software Units

Function

The EPM Add-in for Microsoft Office:

- creates the reports that will be published on the SAP BusinessObjects Enterprise BI launch pad portal.
- allows OLAP analysis of cubes (drill-down, pivot axis, etc.).
Supported data sources

EPM Add-in for Microsoft Office creates the reports on and analyzes the data from the following cubes:

- SAP BusinessObjects Financial Consolidation 10 and 10.1:
  - Financial Consolidation Microsoft SSAS cubes through the datapump component
  - Financial Consolidation NetWeaver BW cubes
- SAP NetWeaver Business Warehouse (SAP NetWeaver BW) (Integrated Planning supported, from SAP NetWeaver BW 7.4 SP6)
- SAP BusinessObjects Planning and Consolidation 10 and 10.1, version for the Microsoft platform
- SAP BusinessObjects Planning and Consolidation 10 and 10.1, version for SAP NetWeaver
- SAP BusinessObjects Profitability and Cost Management 10
- SAP BusinessObjects Strategy Management 10 and 10.1
- SAP HANA
- Oracle Essbase 11.1.2.3 (load-balancing configurations are not supported)

Note

In replacement of Extended Analytics Analyzer 7.5, you can use the EPM add-in 10.0 to retrieve and analyze data that comes from the following 7.5 data sources:

- SSAS cubes created with SAP BusinessObjects Financial Consolidation, cube designer
- SAP NetWeaver BW InfoCubes created with SAP BusinessObjects Financial Consolidation, cube designer
- SAP BusinessObjects Planning and Consolidation, version for SAP NetWeaver, models
- SAP BusinessObjects Planning and Consolidation, version for the Microsoft platform, models

You can connect to the EPM Add-in for Microsoft Office through:

- the SAP BusinessObjects Enterprise BI launch pad portal
- the SAP BusinessObjects Planning and Consolidation web portal
- the administration console of SAP BusinessObjects Planning and Consolidation, version for the Microsoft platform
- a local mode using Microsoft Office Excel, Word or PowerPoint

Required components

- Microsoft components:
  - Microsoft .NET Framework 4.5
  - XMLParser 6.0 SP1 (embedded in the EPM add-in setups)
  - Microsoft SQL Server 2005 or 2008 Analysis Services OLEDB Provider
Required components for the EPM Connector

- Dashboard Design 4.0
- Adobe Flash Player 10.1

Coexistence with other add-ins

The EPM add-in can coexist with all other Microsoft Office add-ins, even non-SAP ones.

2.3 Protocols Used in the EPM Add-in for Microsoft Office Software Architecture

XMLA

XML for Analysis Services is the Microsoft standard protocol for accessing SSAS.

ODBO

ODBO (OLE DB for OLAP) extends the ability of OLE DB to access multi-dimensional (OLAP) data stores.

2.4 Hardware and Software Recommendations

For hardware and software recommendations on BusinessObjects Enterprise XI 4.0 or 4.1 platform and SAP NetWeaver Business Warehouse platform, refer to their respective guides, which are available on the SAP Help Portal.

<table>
<thead>
<tr>
<th>Category</th>
<th>Supported configuration</th>
<th>Recommended configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processor</td>
<td>Intel Pentium processor 1.5 GHz or a Pentium compatible processor</td>
<td></td>
</tr>
<tr>
<td>RAM</td>
<td>At least 512 MB (depending on the operating system)</td>
<td>2 GB</td>
</tr>
<tr>
<td>Disk space</td>
<td>1 GB</td>
<td></td>
</tr>
<tr>
<td>Screen resolution</td>
<td>1024 X 768</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Supported configuration</td>
<td>Recommended configuration</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Operating system</td>
<td>All of the following Operating System service packs available on January 1, 2013:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Microsoft Windows Vista SP1 or higher, 32 or 64-bit editions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Microsoft Windows 7, 32 or 64-bit editions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Microsoft Windows 8 and 8.1, 32 or 64-bit editions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Microsoft Windows 10, 32 or 64-bit editions</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Windows 10 provides various maintenance options. As a rule, all of these maintenance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>options are supported by the EPM add-in as long as they are supported by Microsoft.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>However, the maintenance option &quot;Current Branch&quot; is supplied with corrections and</td>
<td></td>
</tr>
<tr>
<td></td>
<td>further developments by Microsoft at a high frequency. There is no option for checking</td>
<td></td>
</tr>
<tr>
<td></td>
<td>updates individually before they are applied. SAP does not check these corrections and</td>
<td></td>
</tr>
<tr>
<td></td>
<td>enhancements, either. For this reason, the use of &quot;Current Branch&quot; poses a certain</td>
<td></td>
</tr>
<tr>
<td></td>
<td>risk for the operation (in the case of errors or incompatibilities in a new version).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>We therefore explicitly recommend the use of one of the other two maintenance options.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>EPM add-in supports Citrix XenApp 6.5 and higher versions in both desktop and streaming</td>
<td></td>
</tr>
<tr>
<td></td>
<td>to server modes.</td>
<td></td>
</tr>
</tbody>
</table>

Microsoft Windows Server 2008, 2012 R2 and 2016 Terminal Services, 32 or 64-bit editions
<table>
<thead>
<tr>
<th>Category</th>
<th>Supported configuration</th>
<th>Recommended configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caution</td>
<td>IA 64-bit (Itanium) versions are not supported.</td>
<td></td>
</tr>
<tr>
<td>Software components</td>
<td>Internet Explorer 10 and 11</td>
<td>Internet Explorer 11</td>
</tr>
<tr>
<td></td>
<td>Mozilla Firefox version 57</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Google Chrome version 63</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Microsoft Edge version 38</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Supported versions of Microsoft Office</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Microsoft Office 2010 Professional</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Microsoft Office 2013 Professional</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Microsoft Office 2016 Professional</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Microsoft Office 365 Desktop Business 32-bit or 64-bit edition with the Microsoft .NET Framework 4.5</td>
<td></td>
</tr>
<tr>
<td>Restriction</td>
<td>Please note that Microsoft Office editions that contain the term Home, Personal, Student and University are</td>
<td></td>
</tr>
<tr>
<td></td>
<td>not supported.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Windows Installer 3.1 (installed with the EPM add-in setup)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Microsoft SQL Server OLEDB Provider 2005, 2008 or higher</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Adobe Flashplayer 10.1 or higher</td>
<td></td>
</tr>
<tr>
<td></td>
<td>EPM Add-in + EPM Connector up to version 10.0 SP13 Patch 03 supports Dashboard Designer 4.0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>EPM Add-in + EPM Connector from version 10.0 SP13 Patch 04 supports Dashboard Designer 4.0 SP05</td>
<td></td>
</tr>
<tr>
<td>Network connection</td>
<td>128 Kbps connection or higher dedicated to daily operations</td>
<td>An ADSL connection or equivalent can improve performance</td>
</tr>
<tr>
<td></td>
<td>By default, the HTTP flow is compressed</td>
<td></td>
</tr>
</tbody>
</table>
Caution

In the case of complex configurations, the client computer’s performance (available RAM and processor performance) can have a significant impact on the application’s performance.
3 Installing the EPM Add-in for Microsoft Office

3.1 For which EPM solution installing the EPM add-in

Installing the EPM add-in is mandatory for the following applications:

- Planning and Consolidation for the Microsoft Platform
- Planning and Consolidation for SAP NetWeaver

**Note**

When using SAP BusinessObjects Planning and Consolidation, version for SAP NetWeaver, models - version 10.1 with SAP BW (INA Provider) connections, it is recommended to use EPM add-in Support Package 26 with SAP BW 7.4 SP11. However, if you use a version lower than SAP BW 7.4 SP08 with EPM Add-in Support Package 20 and higher, then you must add the following key and set it to True, in the FPMXLClient.dll.config: UseOldMasterDataServiceForPAK key= True.

Installing the EPM add-in is optional for the following applications:

- SAP BusinessObjects Financial Consolidation
- SAP Profitability and Cost Management
- SAP Strategy Management

3.2 Installation Prerequisites for EPM Add-in

ODBO or OleDB providers from the following list may have to be installed to connect to foreign cubes, or to SAP NetWeaver BW cubes:

- XMLA provider
- Microsoft OLEDB Provider for Analysis Services 10.0
- Microsoft OLEDB Provider for Analysis Services 9
- SAP BusinessObjects Planning and Consolidation
- SAP BW OLEDB Provider
- Profitability and Cost Management Core Components and Connectivity Pack

If you are using the BOE platform (SAP BusinessObjects Enterprise XI 4), you must install the Microsoft Web Services Enhancement 3.0 (WSE 3.0) component, in the following cases:

- When opening Microsoft Excel from the BOE.
- When using local connections and when a value has been entered in the SAP BusinessObjects Enterprise Server field in the User Options dialog box of the EPM Add-in.
Tip
To improve performance when you launch the EPM Add-in, it is recommended that you run the installation in Administrator mode.

Embedded in the setups

The following are embedded in the EPM add-in setups, so you do not need to install them before running the EPM add-in setups:

- Microsoft .Net framework 4.5
- Microsoft Visual C++ 2010, 2012 and 2013 Redistributable Package (x64) for Microsoft Office 64-bit version
- Microsoft XML parser 6.0 SP1

3.3 Installing EPM Add-in for Microsoft Office in Silent Mode

You can install the EPM add-in in silent mode by entering the following command line:

```cmd
"[EPM add-in .exe file name]" /S/v"INSTALLDIR="[install path]\" SETUPPHASE=Install CT_PROFILE=[application name] CT_LANGUAGES="[language]\" /qn"
```

You must specify the following parameters (between [] above):

- **install path**: path to the folder in which you want to install the EPM add-in.
- **application name**: the EPM Solution you require. Enter one of the following applications:
  - FINANCE
  - BPCMS
  - BPCNW
- **language**: the default application language. Enter one of the following languages:
  - Danish
  - German
  - English
  - Spanish
  - French
  - Italian
  - Japanese
  - Korean
Example

```
"[EPM add-in .exe file name]" /S /v"INSTALLDIR="C:\Program files\SAPBOBJ\PC\"
SETUPPHASE=Install CT_PROFILE=FINANCE CT_LANGUAGES="Chinese (Simplified)" /qn"
```

To verify that the add-in has been installed, open your Microsoft Office application. The EPM tab should appear in the ribbon.

3.4 Prerequisites for Installing EPM Add-in for Microsoft Office from SAP BusinessObjects Planning and Consolidation, version for SAP NetWeaver

Prerequisites

**Note**

The following procedure applies only to SAP BusinessObjects Planning and Consolidation, version for SAP NetWeaver.

Before installing the EPM add-in for Microsoft Office from SAP BusinessObjects Planning and Consolidation, version for SAP NetWeaver, you must perform the following procedure to upload the setup files on the NetWeaver server.

**Caution**

If you do not perform this procedure, the EPM add-in for Microsoft Office setup files will not be available on the NetWeaver server and will therefore not be executable through the Planning and Consolidation Administration.

Procedure

1. Do one of the following:
If your version of SAP NetWeaver BW is prior to the SAP_BW Release 730 SP3, you must implement the following SAP Notes: 1558149, 1553052, 1578760 and 1547050.

If your version of SAP NetWeaver BW is 740, 750, 800, 801 or 810, you must implement the following SAP Note: 2369339.

If you need to install EPM add-in Support Package 27 or upper versions for the x64 edition, from the Planning and Consolidation web client, please upgrade Planning and Consolidation accordingly. See SAP note 2403723.

2. Log on to SAP NetWeaver and execute the RSBPCLD transaction.

3. In the Program field, enter UJ0_FILE_UPLOAD and click Execute (F8). The Upload window opens.

4. In the Option and version section, select the type of update you want to perform depending on whether or not the support package is mandatory.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Force update</td>
<td>When updates are defined as &quot;force update&quot;, a message pops up on your local machine, prompting you to install the update. If you do not install the update, you will not be able to use the EPM add-in. The version XXX of the EPM Add-in is now available. It must be installed before you can use the EPM Add-in.</td>
</tr>
<tr>
<td>Auto update</td>
<td>When updates are defined as &quot;auto update&quot;, a message pops up every time an update is available, prompting you whether you want to install it now or later. &quot;Version xxx of the EPM Add-in is now available. Do you want to install it?</td>
</tr>
<tr>
<td>User update</td>
<td>When updates are defined as &quot;user update&quot;, if you choose the Notify me when updates are available option, a message pops up every time an update is available, prompting you whether you want to install it now or later. &quot;Version xxx of the EPM Add-in is now available. Do you want to install it? You can choose to select the Do not show this message again option.</td>
</tr>
</tbody>
</table>

5. In the File version field, enter the EPM Add-in version number (for example: 10.0.0.5054).
6. Select the Full Installer type.
7. In the Upload section, click Browse to select the EPM Add-in.exe file and then click Upload. The Enter Transport Request dialog box opens.

8. Click the New icon. The Select Request Type dialog box opens.
9. Select **Customizing Request** and validate.

   The **Create Request** dialog box opens.

   ![Select Request Type Dialog](image)

10. Enter a short description text and click the Save icon.

11. In the **Enter Transport Request** dialog box, click the Validate icon.

12. Once the transport has been created, open the **Transport Management System**.

13. In the **Import Queue** of your system, select the transport you created and click **Import**.

### Next Steps

To perform an upgrade of the EPM add-in on the server, follow the same procedure.
3.5 Installing EPM Add-in for Microsoft Office from SAP BusinessObjects Planning and Consolidation

Prerequisites

The procedure to install EPM Add-in for Microsoft Office from Planning and Consolidation is the same for both versions of SAP BusinessObjects Planning and Consolidation: version for SAP NetWeaver or Microsoft.

Procedure

1. Log in to Planning and Consolidation.

2. In the Launch pane of the window, click Install EPM Add-in for Microsoft Office.

   Two links are available, one for each version of Microsoft Office: 32-bit version or 64-bit version.

   A download dialog box opens.

3. Click Run then Next.

   The License agreement dialog box opens.

4. Click I accept the terms in the license agreement and click Next.

   Once all of the requirements are installed, the Welcome dialog box opens.

5. Specify a User Name and your Organization and check the Anyone who uses this computer (all users) option.

   Caution

   If you install the EPM Add-in on Windows Vista or Windows 7 and you select the Only for me installation option, do not execute Microsoft Office Excel, Microsoft Office Word or Microsoft Office PowerPoint with the "Run as admin" option enabled; otherwise these applications will not function.
6. Click **Next**.
The following dialog box opens.

![EPM Solution and Application Language dialog box](image)

**EPM Solution and Application Language**

Choose the EPM solution you use and the EPM add-in application language to use when first started.

Select an EPM Solution:

- **SAP BusinessObjects Planning and Consolidation, version for SAP NetWeaver**
- **SAP BusinessObjects Planning and Consolidation, version for the Microsoft platform**
- **SAP BusinessObjects Financial Consolidation**
- **SAP BusinessObjects Profitability and Cost Management**
- **SAP BusinessObjects Strategy Management**

Select the application language:

- **English**

7. **Note**
The EPM Add-in installed is the same regardless of the solution you select. However, your selection determines the pre-configuration of the EPM Add-in.

8. **Note**
When opening the EPM add-in, the **EPM** tab in the ribbon displays only the commands that are relevant for the application(s) you have specified. You can change the display afterwards by selecting **EPM > Options > Command Display Options**.

7. Select the EPM Solution you require and click **Next**.
8. Select the application language and click **Next**.
9. Select the Destination folder of the application and click **OK**.
10. Click **Install** to begin installing the EPM add-in.
11. Once the installation is complete, click **Finish**.
Next Steps

To verify that the add-in has been installed, open Microsoft Office Excel, Microsoft Office Word or Microsoft Office PowerPoint. The EPM tab should appear in the ribbon.

3.6 Installing EPM Add-in for Microsoft Office (standalone)

Prerequisites

At least one of the following applications must be installed on your machine: Microsoft Office Excel, Microsoft Office Word or Microsoft Office PowerPoint.

Context

If you are using SAP BusinessObjects EPM solutions, add-in for Microsoft Office with the SAP BusinessObjects Information Platform Services, you can install the add-in directly from the installation folder.

Note

To improve performance when you launch the EPM Add-in, it is recommended that you run the installation in Administrator mode.

Note

If certain redistributables that need to be installed or updated are not, the installation of the EPM add-in may not be completed. A user with administrator privileges must perform the installation or update before launching the setup of the EPM add-in.

Procedure

1. Execute the appropriate setup located in the SAP BusinessObjects\EPM Add-In installation folder.
   a. If your computer is running a 32-bit version of the Microsoft Office, execute the EPM Add-in_x32.exe file.
   b. If your computer is running a 64-bit version of Microsoft Office, execute the EPM Add-in_x64.exe file.
2. Click Next.
3. Click I accept the terms in the license agreement and click Next.
4. Specify a User Name and your Organization and check the Anyone who uses this computer (all users) box.
Caution

If you install the EPM Add-in on Windows Vista or Windows 7 and you select the *Only for me* installation option, do not execute Microsoft Office Excel, Microsoft Office Word or Microsoft Office PowerPoint with the "Run as admin" option enabled; otherwise these applications will not function.

5. Click *Next*.

6. Specify the application(s) you use.

![EPM add-in for Microsoft Office - InstallShield Wizard](image)

Note

The EPM Add-in installed is the same regardless of the solution you select. However, your selection determines the pre-configuration of the EPM Add-in.

Note

When opening the EPM add-in, the *EPM* tab in the ribbon displays only the commands that are relevant for the application(s) you have specified. You can change the display afterwards by selecting *EPM > Options > Command Display Options*.

7. Select the application language you require. You can change the language afterwards by selecting *EPM > Options > User Options*.

8. Click *Next*.

9. Select the folder in which you want to install the application and click *Next*.

10. Click *Install* to begin installing the EPM add-in.
11. Once the installation is completed, click Finish.

Next Steps

To verify that the add-in has been installed, open Microsoft Office Excel, Microsoft Office Word or Microsoft Office PowerPoint. The EPM tab should appear in the ribbon.

3.7 Configuring the BOE for using the EPM Add-in from the BI launch pad

Context

If you want to publish EPM Add-in work books from the BI launch pad, you need to activate the following services from the BOE platform.

Procedure

1. Connect to the Central Management Console.
2. In the Organize section, click Servers.
3. Expand the Service Categories node. The following window opens.
4. Select Core Services.
5. In the right pane, select the following services:
5. Right-click on them and select Enable Server.

### 3.8 PDF Conversion

The book publication functionality requires conversion of workbooks to PDF.

- By default, Microsoft Office Excel handles the PDF conversion.
- Alternatively, you can install Amyuni PDF Converter 5.5.

#### Installing Amyuni PDF Converter 5.5

Amyuni PDF Converter 5.5 is provided in the setup of the EPM add-in as of Support Package 28 Patch 01.

When you execute the EPM add-in setup, the file "PDF Converter Printer Driver.zip" is copied in your installation folder.

If you want to install Amyuni PDF Converter 5.5, please do the following before launching the installation:

- Uninstall the version of Amyuni PDF Converter that is currently installed on your machine.
- In the FPMXLClient.dll.config file, set to “true” the key "UseAmyuni".

To install Amyuni PDF Converter 5.5, unzip "PDF Converter Printer Driver.zip" and double-click the file “install.exe”. Once installed, the virtual printer is called “SAP EPM Amyuni PDF Converter”.
4 Installing the EPM Connector

4.1 Components Prerequisites

If you want to use the EPM Connector, you need to install on your local machine the following components:

- Dashboard Design 4.0
- Adobe Flash Player 10.1

The SAP BusinessObjects EPM Connector add-on file is included in the SAP BusinessObjects EPM Add-in for Microsoft Office setup. The setup installs and copies the EPMConnector.xlx file in the EPMConnector sub-folder of the EPM Add-in installation folder (C:\Program Files\SAP BusinessObjects\EPM Add-In \EPMConnector).

If you want to connect to SAP BusinessObjects Financial Consolidation SSAS cubes, you do not need to install anything, as you connect through the XMLA provider.

If you want to connect to SAP BusinessObjects Financial Consolidation NetWeaver cubes, you need to install the SAP BW OLEDB Provider.

4.2 To install the EPM Connector add-on

Prerequisites

You can perform the following procedure once you have installed the appropriate components.

Procedure

1. Open Dashboard Design.
3. Click Install Add-On. The Open dialog box opens.
4. Select the EPMConnector.xlx file.

Note

The EPMConnector.xlx file is located in the EPM Connector sub-folder of the EPM Add-in installation folder. For example, in C:\Program Files\SAP BusinessObjects\EPM Add-In\EPMConnector.xlx.
Note

If you installed the EPM Add-in with the Only for me option, the installation path may be different. For example, C:\Users\<PROFILE>\AppData\Local\Programs\SAP BusinessObjects\EPM Add-In \EPMConnector.

5. Select Open.
6. In the Add-On Manager dialog box, select Close.
   The Dashboard Design Needs to Restart dialog box opens.
7. Click Exit.
Creating and Configuring Connections

This section explains how to create connections in the EPM Add-in for Microsoft Office. You can create three types of connections:

- Local connections
- Planning and Consolidation connections
- SAP BusinessObjects Enterprise connections

⚠️ Caution

You cannot create two connections with the same name.

5.1 Creating Local Connections

Creating a Local connection enables you to analyze the data of the following OLAP data sources:

- SSAS cubes created with SAP BusinessObjects Financial Consolidation, cube designer
- SAP NetWeaver BW InfoCubes created with SAP BusinessObjects Financial Consolidation, cube designer
- SAP BusinessObjects Profitability and Cost Management
- SAP BusinessObjects Planning and Consolidation, version for SAP NetWeaver
- SAP BusinessObjects Planning and Consolidation, version for the Microsoft platform
- SSAS cubes
- SAP NetWeaver Cubes
- SAP HANA MDX Provider

5.1.1 Configuration Prerequisites for Creating Local Connections

Prerequisites

The connections you create are OQY queries, stored in .oqy files on your local disc.

When creating these connections, you must indicate in which folder these files will be stored.
Procedure

1. Open Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint.
2. Select the EPM tab.
3. Click the Log On button.
   The EPM - Logon dialog box opens.
4. Click the browse button next to the Connection area.
   The Connection Manager opens.
5. Click the Display Local Connections option.
6. Click the Local Connection Folder button.
   The Local Connection Folder dialog box opens.

7. Make sure that:
   ○ the folders listed in this dialog box exist in your Windows Explorer,
   ○ you have Write permission on these folders.

   Note

   If you run Windows Terminal Services or Citrix and you want all users to see connections, you must put the .oqy files in a folder every user can read, for example C:\Program Files (x86)\Common Files \ODBC\data source. Alternatively, you can add another folder.
5.1.2 Creating a Local Connection for Financial Consolidation with SSAS Cubes using XMLA or OLEDB Providers

Procedure

1. Open Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint.
2. Select the EPM tab.
3. Select Options > User Options.
   The EPM - User Options dialog box opens.

4. Select the Server Configuration tab.
5. In the SAP BusinessObjects Enterprise Server, enter the address of the SAP BusinessObjects Enterprise platform and click Check Server.

   **Note**
   The correct syntax is the following: http://<server_name><port_number>. You must not enter /BOE/CMC at the end of the URL.

6. Click OK.
7. Then select the **EPM** tab and click the **Log On** button.

   **i Note**
   If a connection is already used on the file, select the **EPM** tab and then右手边的**Action** ➔ **Manage Connections**。The **Connection Manager** opens.

   The **EPM - Logon** dialog box opens.

8. Click the browse button next to the **Connection** area.

   The **EPM - Connection Manager** opens.

9. Click the **Create** button.

   The **Create Connection** dialog box opens.

10. In the **Connection Type** list, select the **Local** option.

11. In the **Local Connection** area, select one of the following providers and click the **Connect** button.

    ○ **Use XMLA to connect to a Microsoft Analysis Source**
    ○ **Microsoft OLEDB Provider for Analysis Services 10.0**
    ○ **Microsoft OLEDB Provider for Analysis Services 9**

   The **Create New OLEDB Data Source** dialog box opens.

12. In the **Application Server** area, enter the URL to the datapump.

    For example: `http://pmw2008r2.dhcp.pgdev.sap.corp/datapump/msmdpump.dll`

13. In the **XMLA SSAS Authentication Method** dropdown list, select the authentication method you require (for example, **Enterprise BOE Authentication for FC**).

14. Click **Next**.

   The **EPM - Logon** dialog box opens.
15. Enter the user name and password for the SAP BusinessObjects Enterprise platform and click Log on.
16. Back in the Create Connection dialog box, select an SSAS cube.

17. Enter a name for the connection.
The name appears in the Connection Manager list of connections.

**Note**

If the data source for which you are creating or editing the local connection is a large volume data source, select the **Do not Load Members at Connection** option.
5.1.3 Creating a Local Connection for Financial Consolidation with NetWeaver BW Cubes

Procedure

1. Open Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint.
2. Select the EPM tab.
3. Click Log On. The EPM - Logon dialog box opens.
4. Click the browse button next to the Connection area. The EPM - Connection Manager opens.
5. Click Create. The Create Connection dialog box opens.
6. In the Connection Type list, select the Local option.
7. In the Local Connection area, select one of the following provider:
   - the SAP BW OLEDB Provider.
   - or the BAPI provider for BW NW if you want to connect to a large volume data source. In that case, you can click the Use Navigation Attribute option if you want to retrieve navigation attributes from your SAP NetWeaver environment.

The Create New OLEDB Data Source dialog box opens.
8. Click **Connect**.

9. In the **Application Server** field, enter the name of the BW server.

10. Depending on the provider you selected at step 7, select the appropriate authentication method in the **MDrmSap.2 Authentication Method** or **BAPI_Generic Authentication Method** dropdown list.

11. If you selected a BAPI provider, select one of the following authentication method:
   - **SAP BW Authentication Basic**
   - **SAP Enterprise Authentication Basic**: use this option if you have access to a dedicated SAP Portal.

   **Note**
   
   You must enter the address of the SAP Portal in the SAP Portal area of the **EPM - User Options** dialog box.

12. In the **System Number** field, enter the system number of your SAP NetWeaver server.

13. In the **Client** field, enter your client number.

14. In the **Language** field, enter the language of your BW system.

15. Click **Next**.

   The **Logon** dialog box opens.

16. Enter the user name and password and click **Log on**.

17. In the **Create Connection** dialog box, select the model you want to use.

18. Enter a name for the connection.

   The name appears in the **Connection Manager** list of connections.

19. Click **OK**.
5.1.4 Creating a Local Connection for Profitability and Cost Management

Prerequisites

When installing the SAP Profitability and Cost Management application, you must install the following components:

- Core Components
- Connectivity Pack

Procedure

1. Open Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint.
2. Select the EPM tab.
3. Select Options > User Options.
   The User Options dialog box opens.
4. In the **SAP BusinessObjects Enterprise Server** field, enter the address of the SAP BusinessObjects Enterprise platform and click **Check Server**.

**Note**

You must enter the SAP BusinessObjects Enterprise platform server address only if you want to authenticate through the BOE platform.

**Note**

The correct syntax is the following: `http://<server_name><port_number>`. Do not enter `/BOE/CMC` at the end of the URL.

A message pops up, indicating if the server has responded.

5. Click **OK**.

6. Select the **EPM** tab and click the **Log On** button.

**Note**

If a connection is already used on the file, select the **EPM** tab and then [Report Actions ➤ Manage Connections ➤ Manage Connections](#) and the **Connection Manager** opens.

The **EPM - Logon** dialog box opens.

7. Click the browse button next to the **Connection** area.

The **Connection Manager** opens.

8. Click **Create**.

The **Create Connection** dialog box opens.

9. Select the **Local** option.

10. Select the **Profitability and Cost Management** provider from the drop-down menu and click **Connect**.

The **Create New OLEDB Data Source** dialog box opens.
11. In the **Application Server** field, enter the name of your Profitability and Cost Management server.

12. In the **EPMMDX.4 Authentication Method** dropdown list, select the appropriate authentication method.

13. Click **Next**.

   The **Log on** dialog box opens.

14. Enter the user name and password and click **Logon**.

15. Back in the **Create Connection** dialog box, select the model you want to use.

16. Specify a connection name and click **OK**.

---

**Note**

If the data source for which you are creating or editing the local connection is a large volume data source, select the **Do not Load Members at Connection** option.
5.1.5 Creating a Local Connection for Planning and Consolidation for Microsoft

Procedure

1. Open Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint.
2. Select the EPM tab.
3. Select Options ➤ User Options ➤. The User Options dialog box opens.
4. In the SAP BusinessObjects Enterprise Server, enter the address of the SAP BusinessObjects Enterprise platform and click Check Server.
i Note
You must enter the SAP BusinessObjects Enterprise platform server address only if you want to authenticate through the BOE platform.

i Note
The correct syntax is the following: http://<server_name><port_number>. Do not enter /BOE/CMC at the end of the URL.

A message pops up, indicating if the server has responded.

5. Click **OK**.

6. Then select the **EPM** tab and click **Log On**.

i Note
If a connection is already used on the file, select the **EPM** tab and then **Report Actions** ➔ **Manage Connections**. The **Connection Manager** opens.

The **EPM - Logon** dialog box opens.

7. Click the browse button next to the **Connection** area.
The EPM - Connection Manager opens.

8. Click Create.
   The Create Connection dialog box opens.

9. In the Connection Type area, select the Local option.

10. In the Local Connection area, select the SAP BusinessObjects Planning and Consolidation option and click Connect.
    The Create New OLEDB Data Source dialog box opens.

11. In the Application Server field, enter the name of the BW server.

12. In the BPCMDX.4 Authentication Method dropdown list, select the appropriate authentication method.

13. Click Next.
    The following dialog box opens.
14. Select the data source that you require.

15. Click **Finish**.

16. In the *Create Connection* dialog box, select the model you require.
17. Enter a name for the connection. The name appears in the Connection Manager list of connections.

18. Click OK.

5.1.6 Prerequisites for creating a local connection for Planning and Consolidation version for SAP NetWeaver

Prerequisites

Once the BW cube has been generated and before creating a local connection for Planning and Consolidation, version for SAP NetWeaver, from the EPM Add-in, the following procedure is required.

Procedure

1. Log in to Planning and Consolidation.
2. In the **Launch** pane of the window, click **Planning and Consolidation Administration**.
   The **Planning and Consolidation Administration** opens.
3. In the left pane, select **Dimensions and Models > Models**.
4. Select the model for which you want to create a connection.
   The following window opens.
5. In the Features Used with the Model section, select the Use as Source of Data for External Applications option.

   **Note**
   Selecting this option is creating a virtual provider in the SAP NetWeaver application.

6. Click Save and Close.

   **Note**
   The next steps are not mandatory. They are intended only if you want to verify the creation of the virtual provider in the SAP NetWeaver application.

7. Open the SAP NetWeaver application.

8. Execute the RSA1 transaction.
   The DataWarehousing Workbench opens.

9. In the left pane, expand the environment and click InfoProvider.

10. Under this section, you will find the virtual provider that was created during step 5.

   ![Data Warehousing Workbench: Modeling](image)

   **Note**
   The virtual provider name is suffixed by the letter B. In this example: Consolidation_B, as the provider itself has no suffix.

11. You can now exit the NetWeaver application.
5.1.7 Creating a Local Connection for Planning and Consolidation version for SAP NetWeaver

Procedure

1. Open Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint.
2. Select the EPM tab.
3. Click Log On.
   The EPM - Logon dialog box opens.
4. Click the browse button next to the Connection area.
   The EPM - Connection Manager opens.
5. Click Create.
   The Create Connection dialog box opens.
6. In the Connection Type area, select the Local option.
7. In the Local Connection area, select the SAP BW OLEDB Provider option and click Connect.
   The Create New OLEDB Data Source dialog box opens.

![Create New OLEDB Data Source dialog box](image)

8. In the Application Server field, enter the name of the BW server.
9. In the MDrmSAP.2 Authentication Method dropdown list, select the appropriate authentication method.
10. In the System Number field, enter the system number of your SAP NetWeaver server.
11. In the Client field, enter your client number.
12. In the Language field, enter the language of your BW system.
13. Click Next.
   The Logon dialog box opens.
14. Enter the user name and password and click **Log on**.

15. Click **Next**.

The following dialog box opens.

You can see the list of all the virtual providers that have been created on the SAP NetWeaver server.

16. Select the **$INFOCUBE** data source and click **Finish**.

17. In the **Create Connection** dialog box, select a cube that contains **TQ2**.

18. Enter a name for the connection.

   The name appears in the **Connection Manager** list of connections.
19. Click OK.

5.1.8 Creating a Local Connection for the SAP HANA Platform

Prerequisites

Before creating a local connection for the SAP HANA Platform, you must have installed the MDX Provider for SAP HANA.

Procedure

1. Open Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint.
2. Select the EPM tab.
3. Click Log On.
   The EPM - Logon dialog box opens.
4. Click the browse button next to the Connection area.
   The EPM - Connection Manager opens.
5. Click Create.
   The Create Connection dialog box opens.

6. In the Connection Type list, select the Local option.

7. In the Local connection area, select the SAP HANA MDX Provider and click Connect.
   The Create New OLEDB Data Source dialog box opens.
8. In the Application Server field, enter the name of the SAP HANA server.

9. In the SAPNewsDBMDXProvider Authentication Method, select the Other Basic method.

10. In the System Number field, enter the system number of your SAP HANA server.

11. Click Next.
   The Logon dialog box opens.

12. Enter the user name and password and click Log on.

13. In the Create Connection dialog box, select the model you want to use.

14. Enter a name for the connection.
   The name appears in the Connection Manager list of connections.
5.2 Creating Planning and Consolidation Connections

Creating a Planning and Consolidation connection enables you to enter data on the following models of:

- SAP BusinessObjects Planning and Consolidation, version for the Microsoft platform
- SAP BusinessObjects Planning and Consolidation, version for SAP NetWeaver
5.2.1 Creating a Planning and Consolidation Connection for the Microsoft Platform

Procedure

1. Open Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint.
2. Select the EPM tab.
3. Click Log On.
   The EPM - Logon dialog box opens.
4. Click the browse button next to the Connection area.
5. Click Create.
   The Create Connection dialog box opens.
6. In the Connection Type area, select Planning and Consolidation, version for the Microsoft platform.
7. In the Server URL area, enter the Planning and Consolidation server URL. For example: https://vmw3443:8443/sap/bpc/.
8. Choose one of the following options to connect to the Planning and Consolidation server:
   ○ Connect directly by clicking Connect. In the login dialog box that opens, enter your User Name and Password and click Logon.
   ○ Use a single sign-on client certificate. Select the option Client Certificate, then select a certificate that has been generated by your administrator. Note that this is not valid if you connect through a BusinessObjects Enterprise XI platform.

   **Note**

   If you encounter an issue with single sign-on, you can deactivate it by setting the key IgnoreWindowsAuthenticationInBPCMS to “true” in the file FPMXLClient.dll.config.

   ○ For enhanced security, use a single sign-on short-lived certificate by clicking SAP Secure Login Profile. When you select this option, the authentication is managed by SAP Secure Login Client (as part of the SAP Single Sign-On solution). Then, select a client profile. A client profile consists of a user authentication scheme with one or more authentication mechanisms: Kerberos, ADS, LDAP, RSA SecurID, 2-factor authentication (with a password and a one-time password). Then, click connect and enter the user name, password (and one-time password if you are using a 2-factor authentication profile) in the SAP Secure Login Client login dialog box. A short-lived certificate is created on your local machine and as long as the certificate is valid, you can log off and log in again as many times as you want and you will not have to authenticate each time. For more information on SAP Secure Login, see the Secure Login for SAP Single Sign-On Implementation Guide. Note that you need to buy a license to use SAP Single Sign-On.

9. Select an Environment and a Model.
10. Click Generate Connection Name or manually enter a connection name.
5.2.2 Creating a Planning and Consolidation Connection for SAP NetWeaver

Procedure

1. Open Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint.
2. Select the EPM tab.
3. Click Log On.
   The EPM - Logon dialog box opens.
4. Click the browse button next to the Connection area.
   The EPM - Connection Manager opens.
5. Click Create.
   The Create Connection dialog box opens.
6. In the Connection Type area, select Planning and Consolidation, version for SAP NetWeaver.
7. In the Server URL area, enter the Planning and Consolidation server URL. For example: http://serveur:port/sap/bpc/.
8. Choose one of the following options to connect to the Planning and Consolidation server:
   ○ Connect directly by clicking Connect. In the login dialog box that opens, enter your User Name and Password and click Logon.
   ○ Use a single sign-on client certificate. Select the option Client Certificate, then select a certificate that has been generated by your administrator. Note that this is not valid if you connect through a BusinessObjects Enterprise XI platform.
   ○ If the server does not use any of the protocols that are natively supported by the EPM add-in (that is: Basic, Client Certificate and Windows), but use a protocol of type saml 2 (that is a protocol that requires html and javascript technologies), select the Web Authentication Protocol option. Note that the option is taken into account only for versions 10 and 10.1 of Planning and Consolidation SAP NetWeaver.
   ○ For enhanced security, use a single sign-on short-lived certificate by clicking SAP Secure Login Profile. When you select this option, the authentication is managed by SAP Secure Login Client (as part of the SAP Single Sign-On solution). Then, select a client profile. A client profile consists of a user authentication scheme with one or more authentication mechanisms: Kerberos, ADS, LDAP, RSA SecurID, 2-factor authentication (with a password and a one-time password). Then, click connect and enter the user name, password (and one-time password if you are using a 2-factor authentication profile) in the SAP Secure Login Client login dialog box. A short-lived certificate is created on your local machine and as long as the certificate is valid, you can log off and log in again as many times as you want and you will not have to authenticate each time. For more information on SAP Secure Login, see the Secure Login for SAP Single Sign-On Implementation Guide. Note that you need to buy a license to use SAP Single Sign-On.
   
   **Note**
   If you use the SAP Portal credentials to create your Planning and Consolidation Connection for SAP NetWeaver connection, the authentication is performed directly at the SAP Portal level and not at the Planning and Consolidation server level. Beforehand, you must enter the SAP Portal parameters in the Server Configuration tab of the EPM - User Options dialog box.
9. Select an Environment and a Model.
10. Click Generate Connection Name or manually enter a connection name.

Creating an EPM Connection for Financial Consolidation with SSAS Cubes in the Central Management Console

Prerequisites

- You must install the EPM Connection Manager on the SAP BusinessObjects Enterprise platform before creating an EPM connection.
- Install the web services. To find out more about the installation procedure, see the SAP BusinessObjects Financial Consolidation Installation documentation.

Procedure

1. Log on to the Central Management Console.
2. In the Organize section, click EPM Connections.
3. Click New Connection.
   The following window opens.
4. Enter a name for the connection.

5. In the Source Application field, select the SAP BusinessObjects Financial Consolidation application.

6. In the Provider field, select Microsoft Analysis Services 2005 or Microsoft Analysis Services 2008.

7. In the Server address field, enter the URL of the datapump located on the SSAS Server.

8. In the Server Name field, enter the name of the SSAS server. If you installed it with a named instance, do not forget to indicate the name of the instance.

9. In the Catalog field, select the SSAS database you are going to use.

**Caution**

You must select a catalog (an SSAS database) that is only created and used by Cube Designer.

**Note**

When creating the EPM connection, a message appears "database not found". This is normal as the database is only created after the first solution is deployed.

10. In the Web services URL field, enter the URL of the SAP BusinessObjects Financial Consolidation Web Services.

11. Click **Save**.
Once the connection is created, you must define the appropriate security in the Central Management Console. The user must be granted the following rights:
- View right on connections.
- Publish right, if you want the user to publish workbooks in the BI launch pad.

### 5.3.2 Creating an EPM Connection for Financial Consolidation with NetWeaver BW Cubes in the Central Management Console

**Prerequisites**

- You must install the EPM Connection Manager on the SAP BusinessObjects Enterprise platform before creating an EPM connection.
- Install the web services. To find out more about the installation procedure, see the SAP BusinessObjects Financial Consolidation Installation documentation.

**Procedure**

1. Log on to the Central Management Console.
2. In the Organize section, click EPM Connections.
3. Click New Connection. The following window opens.
4. Enter a name for the connection.
5. In the Source Application field, select the SAP BusinessObjects Financial Consolidation application.
6. In the Provider field, select ODBO Provider for NetWeaver BW.
7. In the Application Server field, enter the URL of the SAP NetWeaver server.
8. In the System Number field, enter the system number of your SAP NetWeaver server.
9. In the Client field, enter your client number.
10. In the Web services URL field, enter the URL of the SAP BusinessObjects Financial Consolidation Web Services.
11. Click Save.

Once the connection is created, you must define the appropriate security in the Central Management Console. The user must be granted the following rights:
- View right on connections,
- Publish right, if you want the user to publish workbooks in the BI launch pad.
5.3.3 Creating an EPM Connection for Profitability and Cost Management in the Central Management Console

Context

You must install the EPM Connection Manager on the SAP BusinessObjects Enterprise platform before creating an EPM connection.

Procedure

1. Log on to the Central Management Console.
2. In the Organize section, click EPM Connections.
3. Click New Connection.
   The following window opens.

   ![Edit EPM Connection window]

4. Enter a name for the connection.
5. In the Source Application field, select the SAP BusinessObjects Profitability and Cost Management application.
6. In the Provider field, select ODBO Provider for PCM.
7. In the Server address field, enter the URL of the Profitability and Cost Management application server.
8. In the Catalog field, enter EPM.
9. Click Save.
   Once the connection is created, you must define the appropriate security in the Central Management Console.
   The user must be granted the following rights:
   ○ View right on connections,
5.3.4 Creating an EPM Connection for Planning and Consolidation version for SAP NetWeaver in the Central Management Console

Prerequisites

You must install the EPM Connection Manager on the SAP BusinessObjects Enterprise platform before creating an EPM connection.

Procedure

1. Log on to the Central Management Console.
2. In the Organize section, click EPM Connections.
3. Click New Connection.
   The following window opens.

   ![Edit EPM Connection](image)

   - **Name:** BPC_NW
   - **Description:** BPC_NW connection
   - **Source Application:** SAP BusinessObjects Planning and Consolidation for SAP NetWeaver
   - **Provider:** ODBO Provider for NetWeaver BW
   - **Server Information:**
     - Application Server: vmw3037.wdf.sap.corp
     - System Number: 26
     - Client: 600
   - **Web services URL:** https://es-ana-fin64-2:1443/ANA_PRO_MACIESK_1000_SQL2K8/Services
4. Enter a name for the connection.
5. In the Source Application field, select the SAP BusinessObjects Planning and Consolidation for SAP NetWeaver application.
6. In the Provider field, select ODBO Provider for NetWeaver BW.
7. In the Server address field, enter the URL of the SAP NetWeaver server.
8. In the System Number field, enter the system number of your SAP NetWeaver server.
9. In the Client field, enter your client number.
10. Click Save.

Once the connection is created, you must define the appropriate security in the Central Management Console. The user must be granted the following rights:
- View right on connections,
- Publish right, if you want the user to publish workbooks in the BI launch pad.

5.3.5 Creating an EPM Connection for Planning and Consolidation version for Microsoft in the Central Management Console

Context

You must install the EPM Connection Manager on the SAP BusinessObjects Enterprise platform before creating an EPM connection.

Procedure

1. Log on to the Central Management Console.
2. In the Organize section, click EPM Connections.
3. Click New Connection.
   The following window opens.
4. Enter a name for the connection.
5. In the **Source Application** field, select the **SAP BusinessObjects Planning and Consolidation for Microsoft** application.
6. In the **Provider** field, select **ODBO Provider for BPC MS**.
7. In the **Server address** field, enter the URL of the Planning and Consolidation application server.
8. In the **Catalog** field, enter the environment you are going to use.
9. Click **Save**.

Once the connection is created, you must define the appropriate security in the Central Management Console. The user must be granted the following rights:
- View right on connections,
- Publish right, if you want the user to publish workbooks in the BI launch pad.

### 5.3.6 Creating an SAP BusinessObjects Enterprise Connection

#### Procedure

1. Open the BI launch pad.
2. Click the **Documents** tab.
3. Click **New > EPM Workbook** (or EPM Document or EPM Presentation)
The corresponding Microsoft Office application opens.

4. In the **EPM - Logon** dialog box, click the browse button next to the **Connection** area. The **EPM - Connection Manager** opens.

5. Click **Create** and in the **Connection type** area, select **SAP BusinessObjects Enterprise**.

6. Select the EPM Connection you want to use. To find out more about the EPM Connection creation, see the **Creating an EPM Connection in the Central Management Console** sections of this documentation. The list of **Available Cubes/Models** opens.

7. Select the cube or model you want to use.

8. Enter a **Connection Name** and click **OK**.

### 5.4 Creating the SAP BW (INA Provider) Connection

**Procedure**

1. Open Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint.
2. Select the **EPM** tab.
3. Click **Log On**. The **EPM - Logon** dialog box opens.
4. Click the browse button next to the Connection area. The EPM - Connection Manager opens.

5. Click Create. The Create Connection dialog box opens.

6. In the Connection Type area, select the SAP BW (INA Provider) option.

7. In the Custom System area, enter a System Name and a Server Name.

8. Select the BASIC Authentication Method.

9. Select the protocol you want to use, enter a Port Number and a Client Number.

10. Click Generate Connection Name.

11. If you work with SAP Business Planning and Consolidation 10.1, version for SAP NetWeaver or higher, and you want to make the work status feature available, click Connect, then select an Environment and a Model.

12. Click OK.
5.5 User Preferences Configuration

Information about connections and user preferences is stored in different files, which are located in `\%userprofile%\AppData\Local\EPMOfficeClient\`.

**Note**

These files are not deleted when upgrading your version with a patch or support package, or installing a new version.

These files are:

- **Connections.xml**: contains the list of all the Planning and Consolidation and SAP BusinessObjects Enterprise connections.
- **EPMXLClientPreference.XML**: contains the user preferences (options and context values).

**Note**

By default, the EPMXLClientPreference.xml and Connections.xml files are stored in `C:\Users\<user>\AppData\Local\EPMOfficeClient`. However, you can now add the key as follows in the `FPMXLCIINT.dll.config` file and set the key to "true": "<add key="ConnectionDefinitionInRoamingUserProfiles" value="true"/>". The EPMXLClientPreference.XML and Connections.xml files will be stored in `C:\Users\<user>\AppData\Roaming\EPMOfficeClient`.

- **.oqy files**: contain all the local connections you have created in the EPM add-in and are stored in the Local Connections folder.

**Tip**

The content of the files can be exported to other machines if you want to deploy the same connections and user preferences for several users.
6 Configuring the EPM Connector

6.1 To configure the EPM Connector for Microsoft-based Solutions

Context

Dashboard Design is a Flash application and by default, Flash does not allow you to retrieve data from URLs that are not from the same DNS domain. To find out more, consult the following URL: http://www.senocular.com/pub/adobe/crossdomain/policyfiles.html.

To authorize access to URLs, you need to create crossdomain.xml files and add them to each XMLA provider.

Procedure

1. Create one file named crossdomain.xml in each XMLA provider folder, with the following content:
   - For HTTPS:
     ```xml
     <?xml version="1.0"?>
     <!DOCTYPE cross-domain-policy SYSTEM "http://www.adobe.com/xml/dtds/cross-domain-policy.dtd">  
     <cross-domain-policy>
     <allow-http-request-headers-from domain="*.mydomain.com" headers="*"/
     <allow-access-from domain="*.mydomain.com" to-ports="443"/>
     </cross-domain-policy>
     ```
   - For HTTP:
     ```xml
     <?xml version="1.0"?>
     <!DOCTYPE cross-domain-policy SYSTEM "http://www.adobe.com/xml/dtds/cross-domain-policy.dtd">  
     <cross-domain-policy>
     <allow-http-request-headers-from domain="*.mydomain.com" headers="*" secure="false"/>
     <allow-access-from domain="*.mydomain.com" to-ports="80" secure="false"/>
     </cross-domain-policy>
     ```

2. Modify the domain parameter depending on the initial domain of the Financial Consolidation or Planning and Consolidation server or the local machine where the EPM Add-in is installed. For example: *.sap.corp.

   For example, your environment is composed of the following:
   - one FC XMLA provider (http://FCserver-domain.com/datapump) or
   - one PC XMLA provider (http://PCserver-domain.com:[port]/sap/bpc/
   - all users are in the DNS domain named client-domain.com.

   For each XMLA provider, you must create a crossdomain.xml file like the following:
6.1.1 Defining HTTP headers of the crossdomain.xml file under Windows 2003

Procedure

1. Open the IIS server administration console.
2. Right-click on the crossdomain.xml file and select Properties.
3. In the HTTP Headers tab, click Add.
4. In the Custom Header Name area, enter X-Permitted-Cross-Domain-Policies.
5. In the Custom Header Value area, enter by-content-type.
6. Click **OK**.
7. Click **Add** again.
8. In the **Custom Header Name** area, enter **Content-Type**.
9. In the **Custom Header Value** area, enter **x-cross-domain-policy**.
10. Click **OK**.

### 6.1.2 Defining HTTP headers of the crossdomain.xml file under Windows 2008

**Procedure**

1. Open the IIS Manager.
2. Select the site of your XMLA provider and in the right pane, click **Content View**.
3. In the Content View list, select the crossdomain.xml file and in the Actions pane, click Switch to Features View.
In the Features View, double-click the HTTP Response Header icon.
The Add Custom HTTP Response Header dialog box opens.

5. In the Actions pane, click Add.
6. In the Name field, enter Content-Type.
7. In the Value field, enter x-cross-domain-policy.
8. Click OK.
9. Click Add again.
10. In the Name field, enter X-Permitted-Cross-Domain-Policies.
11. In the Value field, enter by-content-type.
12. Click OK.
6.1.3 Alternative configuration

**Note**

Alternatively, you can also configure the meta-policy in a different way if you create the crossdomain.xml file in the web server root folder (wwwroot in IIS). In this case, the file must contain the following:

```xml
<?xml version="1.0"?>
<!DOCTYPE cross-domain-policy SYSTEM "http://www.adobe.com/xml/dtds/cross-domain-policy.dtd">
<cross-domain-policy>
  <site-control permitted-cross-domain-policies="all"/>
</cross-domain-policy>
```

**Caution**

This configuration could be helpful if you put all the XMLA provider on the same machine. However, note that this configuration will apply to all applications deployed on this server. This method is recommended only for testing and development environments; as such, there are less restrictions.
6.2 To configure the EPM Connector for SAP NetWeaver-based Solutions

Context

Configuring the EPM Connector for SAP NetWeaver-based solutions consists of the following three steps:

- Creating a class
- Implementing the interface
- Creating the crossdomain service

6.2.1 Creating a Class on the SAP NetWeaver Server

Procedure

1. Log on to SAP NetWeaver and execute the SE80 transaction to open the ABAP editor.
2. Open the Repository Browser.
3. Select the Class / Interface repository and enter a class name (in this example: Z_EPM_CROSSDOMAIN).

A confirmation message opens (Create Object).
4. Click Yes.

5. In the **Object type** dialog box, select the **Class type** and validate. The **Create Class** dialog box opens.

6. Enter a description and click **Save**. The **Create Object Directory Entry** dialog box opens.

7. Select the options corresponding to your environment and click **Save**.

8. Open the new class you just created; in this example: Z_EPM_CROSSDOMAIN.
6.2.2 Implementing the Interface on the BW Server

Procedure

1. Open the new class you just created: in this example, Z_EPM_CROSSDOMAIN.
2. Select the Interface tab.
3. Click Display Change (Ctrl F1) to edit the interface.

4. In the Method field, enter IF_HTTP_EXTENSION and press [enter] to search for the method.
5. Select the Method tab.
6. Double-click the IF_HTTP_EXTENSION~HANDLE_REQUEST method to open it.
7. Paste into this method the following code lines:

```
<SIGNATURE>---------------------------------------------------------------------
 | Instance Public Method Z_EPM_XC_XD->IF_HTTP_EXTENSION~HANDLE_REQUEST
---------------------------------------------------------------------
 | [-->] SERVER TYPE REF TO IF_HTTP_SERVER
---------------------------------------------------------------------
<SIGNATURE>
```
method IF_HTTP_EXTENSION~HANDLE_REQUEST.
  DATA: l_crossdomain_xml TYPE string,
        l_crossdomain_xml_x TYPE xstring,
        l_string_length TYPE i,
        lo_conv TYPE REF TO CL_ABAP_CONV_OUT_CE.
  server->response->set_header_field(
    EXPORTING
      name  = 'X-Permitted-Cross-Domain-Policies'   " Name of the header field
      value = 'by-content-type'   " HTTP header field value
    ).
  server->response->set_header_field(
    EXPORTING
      name  = 'Content-Type'   " Name of the header field
      value = 'text/x-cross-domain-policy'   " HTTP header field value
    ).
  l_crossdomain_xml = '<?xml version="1.0"?>'.
  CONCATENATE l_crossdomain_xml '<cross-domain-policy>' INTO l_crossdomain_xml.
  CONCATENATE l_crossdomain_xml '<allow-http-request-headers-from
domain="*.mydomain.com" headers="*" secure="false" />' INTO l_crossdomain_xml.
  CONCATENATE l_crossdomain_xml '<allow-access-from domain="*.mydomain.com"
secure="false"/>' INTO l_crossdomain_xml.
  CONCATENATE l_crossdomain_xml '</cross-domain-policy>' INTO l_crossdomain_xml.
  lo_conv = CL_ABAP_CONV_OUT_CE=>create( ).
  call method lo_conv->convert
    exporting
      data   = l_crossdomain_xml
    importing
      buffer = l_crossdomain_xml_x
      len    = l_string_length.
  server->response->set_data(
    EXPORTING
      data   = l_crossdomain_xml_x     " Binary Data *      offset = 0    "
      length = l_string_length    " Length of binary data
    ).
endmethod.
ENDCLASS.

Note
Do not forget to enter the domain name in the "*.mydomain.com" parameter.
8. Save the method.  
   A message appears indicating that the IF_HTTP_EXTENSION-HANDLE_REQUEST method has been saved.  
9. Exit and return to the main screen.

6.2.3 Creating the crossdomain Service

Procedure

1. In the SAP NetWeaver main screen, execute the SICF transaction.  
The Maintain Services window opens.
2. In the **Hierarchy Type** field, enter **SERVICE** and click **Execute** (F8). The **Create Host/Service** window opens.

3. In the **Virtual hosts/Services** zone, expand the services list under **default_host**.

4. Right-click **sap** and select **New Sub-Element**.
The *Create a Service Element* opens.
5. In the *Name of service Element to Be Created*, enter `crossdomain` and leave the default other options.

**Caution**

You must enter `crossdomain` as the service name, otherwise it will not function.

6. Click **Validate**.
   
The *Create/Change Service* dialog box opens.

7. In the *Description* field, enter **EPM crossdomain**.
8. Select the **Handler List** tab.

9. In the **Handler List** zone, enter the class name you created in the first step of this procedure; in this example: `Z_EPM_CROSSDOMAIN`. (see *Creating a Class on the SAP NetWeaver Server* [page 74])
10. Click **Save** and exit.

The *Create Object Directory Entry* dialog box opens.
11. Click Local Object.
12. Back in the Create / Change a Service dialog box, click Save.
13. Click Back (F3) to go back to the Maintain Service window. You can see that the crossdomain service has been created but not yet activated.
15. Click Yes. The crossdomain service is now activated.
16. To restart the service, right-click Deactivate Virtual Host and then Activate Virtual Host.
17. If you want to test that the service has been correctly created, open a browser and enter the following URL: http://<your_netweaver_server.domain.corp:<port_number>/sap/crossdomain. The following XML file opens:

```xml
<?xml version="1.0"?>
<!DOCTYPE cross-domain-policy SYSTEM "http://www.macromedia.com/xml/dtds/cross-domain-policy.dtd">
<cross-domain-policy>
  <allow-http-request-headers-from domain="*.mydomain.com" headers="*" secure="false" />
  <allow-access-from domain="*.mydomain.com" secure="false"/>
</cross-domain-policy>
```
Deploying the Same Options for Several Users

If you want to deploy the same options for several users, you can export the content of the EPMXLClientPreference.xml to several machines.

The table below lists the options contained in the EPMXLClientPreference.xml file and the corresponding options in the user interface:

- The user options that are in Options ➤ User Options.
- The sheet options that are saved as default options when clicking Save as Default in Options ➤ Sheet Options.
- The command display options that are in Options ➤ Command Display Options.

Note

Some options are no longer used and are noted as "deprecated".

<table>
<thead>
<tr>
<th>in .xml</th>
<th>on the interface</th>
<th>where</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="https://example.com/icon.png" alt="Danger" /> Restriction</td>
<td>(no equivalent option in the EPM add-in interface)</td>
<td>(no equivalent option in the EPM add-in interface)</td>
</tr>
<tr>
<td>ActivateMemberSetMode</td>
<td>This option applies to BPC NetWeaver connections only</td>
<td>This option applies to BPC NetWeaver connections only</td>
</tr>
<tr>
<td></td>
<td>Values: True or False (False is the default value)</td>
<td>Values: True or False (False is the default value)</td>
</tr>
<tr>
<td></td>
<td>When set to True, and provided that the server recognizes the relationship, the server performs the member expansion, not the client. If the server does not recognize the relationship (for example, the Offset relationship), the client performs the expansion.</td>
<td>When set to True, and provided that the server recognizes the relationship, the server performs the member expansion, not the client. If the server does not recognize the relationship (for example, the Offset relationship), the client performs the expansion.</td>
</tr>
<tr>
<td></td>
<td>Setting this option to True improves performance.</td>
<td>Setting this option to True improves performance.</td>
</tr>
</tbody>
</table>

Caution

We recommend not to set this option to True before you install Planning and Consolidation for NetWeaver 10.0 Support Package 10.
<table>
<thead>
<tr>
<th>in .xml</th>
<th>on the interface</th>
<th>where</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>⚠️ Restriction</strong></td>
<td>This option applies to BPC NetWeaver connections only</td>
<td>(no equivalent option in the EPM add-in interface)</td>
</tr>
<tr>
<td>ActivateMemberSetModeForBaseLevel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong> (False is the default value)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When set to <strong>True</strong>, and when the <strong>Base Level</strong> relationship is used, the server performs the expansion of the base level members, not the client. Setting this option to <strong>True</strong> improves performance.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>⚠️ Caution</strong></td>
<td>We recommend not to set this option to <strong>True</strong> before you install Planning and Consolidation for NetWeaver 10.0 Support Package 10.</td>
<td></td>
</tr>
<tr>
<td>AlwaysAutoUpdateCharts</td>
<td><strong>Refresh Charts Automatically</strong></td>
<td><strong>User Options</strong> &gt; <strong>Navigation</strong></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AutoFitColumns</td>
<td><strong>Auto Fit Column Width</strong></td>
<td><strong>Sheet Options</strong> &gt; <strong>Formatting</strong></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AutoFitRefresh (deprecated)</td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AutomaticRefresh</td>
<td><strong>Automatic Refresh on Context Changes</strong></td>
<td><strong>User Options</strong> &gt; <strong>Navigation</strong></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AutoUpdateWarning</td>
<td><strong>Notify me when updates are available</strong></td>
<td><strong>User Options</strong> &gt; <strong>Others</strong></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BOEServer</td>
<td><strong>SAP BusinessObjects Enterprise Server</strong></td>
<td><strong>User Options</strong> &gt; <strong>Server Configuration</strong></td>
</tr>
<tr>
<td>Values: server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CacheValidityDuration</td>
<td><strong>Clear Metadata Cache Frequency</strong> data entry field</td>
<td><strong>User Options</strong> &gt; <strong>Navigation</strong></td>
</tr>
<tr>
<td>Values: integer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default value: 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter a number to specify the number of days</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CalculateParentsInHierarchy</td>
<td><strong>Calculate Parents in Hierarchies</strong></td>
<td><strong>Sheet Options</strong> &gt; <strong>Refresh</strong></td>
</tr>
<tr>
<td>in .xml</td>
<td>on the interface</td>
<td>where</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-------------------------------------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ClearDataOnSave</td>
<td><strong>Clear Data in the Whole File when Saving it</strong></td>
<td><strong>Sheet Options &gt; Refresh</strong></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ClearFormattingBeforeApplyDynFormatting</td>
<td><strong>Clear Report Format before Applying Dynamic Formatting</strong></td>
<td><strong>Sheet Options &gt; Formatting</strong></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ColumnAxisTotalsRefresh (deprecated)</td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>CustomExpand/Apply</td>
<td><strong>Custom Expand</strong></td>
<td><strong>Sheet Options &gt; General</strong></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CustomExpand/ExpansionType</td>
<td><strong>Button Define Custom Expand</strong></td>
<td><strong>Sheet Options &gt; General</strong></td>
</tr>
<tr>
<td>Values:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● UntilLevel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● LevelsRange</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● OneLevel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● BaseLevel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CustomExpand/IncludeMember</td>
<td><strong>Include Member</strong></td>
<td><strong>Sheet Options &gt; General</strong></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DataLinkColor</td>
<td><strong>Data Link Symbol Color button</strong></td>
<td><strong>User Options &gt; Others</strong></td>
</tr>
<tr>
<td>Values: integer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default value: 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use ARGB color values</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DeactivateSubmitAndRefresh (deprecated)</td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DefaultForEmptyComment</td>
<td><strong>Empty Comment</strong></td>
<td><strong>User Options &gt; Others</strong></td>
</tr>
<tr>
<td>Values: string</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default Value: ...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter the characters that you want to be saved for empty comments.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DefaultLocalMemberRecognitionOn (deprecated)</td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>DefaultMemberRecognitionOn (deprecated)</td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>DefaultNotAnEPMSheet (deprecated)</td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>DeferLayoutUpdate</td>
<td><strong>Defer Layout Update</strong></td>
<td><strong>EPM tab</strong></td>
</tr>
<tr>
<td>in .xml</td>
<td>on the interface</td>
<td>where</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-------------------------------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td><strong>DisplayCommentsUsingExcel</strong></td>
<td>Show as Microsoft Excel Comments</td>
<td>![Sheet Options]</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td>![General]</td>
</tr>
<tr>
<td><strong>DisplayDeprecatedFunctions</strong></td>
<td>Load EV Functions</td>
<td>![User Options]</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td>![Others]</td>
</tr>
<tr>
<td><strong>DisplayName</strong></td>
<td>Display Name options</td>
<td>![User Options]</td>
</tr>
<tr>
<td>Values:</td>
<td></td>
<td>![Formatting]</td>
</tr>
<tr>
<td>• to display the member captions,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>enter <strong>SoDnCaption</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• to display the member captions,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>enter <strong>SoDnFullUniqueName</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>DisplayUnrecognizedMembers</strong></td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>DoNotStoreModelWarning</strong></td>
<td>Warn if Connection or Environment in the Connection is not Stored</td>
<td>![User Options]</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td>![Navigation]</td>
</tr>
<tr>
<td><strong>DoubleClick</strong></td>
<td>Enable Double-Click</td>
<td>![User Options]</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td>![Navigation]</td>
</tr>
<tr>
<td><strong>EliminateEmptyAndZeroColumns</strong></td>
<td>Remove Empty and Zero Values</td>
<td>![Sheet Options]</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td>![General] Columns</td>
</tr>
<tr>
<td><strong>EliminateEmptyAndZeroRows</strong></td>
<td>Remove Empty and Zero Values</td>
<td>![Sheet Options]</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td>![General] Rows</td>
</tr>
<tr>
<td><strong>EliminateEmptyColumns</strong></td>
<td>Remove Empty</td>
<td>![Sheet Options]</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td>![General] Columns</td>
</tr>
<tr>
<td><strong>EliminateEmptyRows</strong></td>
<td>Remove EmptyRemove Empty</td>
<td>![Sheet Options]</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td>![General] Rows</td>
</tr>
<tr>
<td><strong>EmptyValueReplacement</strong></td>
<td>Empty Cell Default Value</td>
<td>![Sheet Options]</td>
</tr>
<tr>
<td>Values: integer or string</td>
<td></td>
<td>![Formatting]</td>
</tr>
<tr>
<td>You can also leave a blank. The cells that have no data will be left blank.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ExpandCollapse</strong></td>
<td>Expand/Collapse on Single Member</td>
<td>![User Options]</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td>![Navigation]</td>
</tr>
<tr>
<td><strong>ExpandToLowerLevel</strong></td>
<td>Expand Options</td>
<td>![Sheet Options]</td>
</tr>
<tr>
<td>Values:</td>
<td></td>
<td>![General]</td>
</tr>
<tr>
<td>in .xml</td>
<td>on the interface</td>
<td>where</td>
</tr>
<tr>
<td>---------</td>
<td>------------------</td>
<td>-------</td>
</tr>
<tr>
<td>● To expand Member and Children, enter <strong>SoZiMemberChildren</strong>.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● To expand Children, enter <strong>SoZiChildren</strong>.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● To expand Member and Descendants, enter <strong>SoZiMemberDescendants</strong>.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● To expand Descendants, enter <strong>SoZiDescendants</strong>.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ForceBasicWrite</td>
<td>Apply only Report Editor Definition for Faster Refresh</td>
<td>Sheet Options  &gt;  Refresh</td>
</tr>
<tr>
<td>Values: <strong>True or False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ForceSymmetricQueryWhenNecessary</td>
<td>Force Symmetric Refresh for Large Asymmetric Axis</td>
<td>User Options  &gt;  Others</td>
</tr>
<tr>
<td>Values: <strong>True or False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HideEmptyAndZeroColumns</td>
<td>Hide Empty and Zero Values</td>
<td>Sheet Options  &gt;  General  &gt;  Columns</td>
</tr>
<tr>
<td>Values: <strong>True or False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HideEmptyAndZeroRows</td>
<td>Hide Empty and Zero Values</td>
<td>Sheet Options  &gt;  General  &gt;  Rows</td>
</tr>
<tr>
<td>Values: <strong>True or False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HideEmptyColumns</td>
<td>Hide Empty</td>
<td>Sheet Options  &gt;  General  &gt;  Columns</td>
</tr>
<tr>
<td>Values: <strong>True or False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HideEmptyRows</td>
<td>Hide Empty</td>
<td>Sheet Options  &gt;  General  &gt;  Columns</td>
</tr>
<tr>
<td>Values: <strong>True or False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HideGhostConnect</td>
<td>(no equivalent option in the EPM add-in interface)</td>
<td></td>
</tr>
<tr>
<td>HideLinks</td>
<td>(no equivalent option in the EPM add-in interface)</td>
<td></td>
</tr>
<tr>
<td>HideMatrixSecurityWarning</td>
<td>Display Matrix Security Warning</td>
<td>User Options  &gt;  Others</td>
</tr>
<tr>
<td>Values: <strong>True or False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Caution</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>● When set to <strong>True</strong>, the option is unchecked.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● When set to <strong>False</strong>, the option is checked.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HideRefreshWarning</td>
<td>Display Warning when Process Takes Time</td>
<td>User Options  &gt;  Others</td>
</tr>
<tr>
<td>Values: <strong>True or False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notation</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>in .xml</td>
<td></td>
<td></td>
</tr>
<tr>
<td>on the interface</td>
<td></td>
<td></td>
</tr>
<tr>
<td>where</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### HideSubmitWarning
Values: **True** or **False**

**Caution**
- When set to **True**, the option is unchecked.
- When set to **False**, the option is checked.

**Display Warning when Saving Data or Comment**

> **User Options** > **Others**

### IntelligentFormatting
Values: **True** or **False**

**Apply Dynamic Formatting**

> **Sheet Options** > **Formatting**

### IntelligentFormattingSheet
Values: name of the worksheet
Default value: EPMFormattingSheet

**Default Formatting Sheet**

> **Sheet Options** > **Formatting**

### IsNotAnEPMSheet
Values: **True** or **False**

**EPM Worksheet**

> **Sheet Options** > **General**

### KeepEliminate
Values: **True** or **False**

**Keep/Exclude on Single Member**

> **User Options** > **Navigation**

### KeepFormulaAfterRefresh
Values: **True** or **False**

**Keep Formula on Data**

> **Sheet Options** > **General**

### LanguageEdition
Values: ISO 639-1 language codes
For example, **en** stands for English

**Application Language**

> **User Options** > **Others**

### LanguageIsoCode
Values: ISO 639-1 language codes
For example, **en** stands for English

**Data Language**

> **User Options** > **Navigation**
<table>
<thead>
<tr>
<th>in .xml</th>
<th>on the interface</th>
<th>where</th>
</tr>
</thead>
<tbody>
<tr>
<td>LinkIsLocal</td>
<td>Workbook Location options</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LocalAndCustomMemberRecognition</td>
<td>Activate Local Member Recognition</td>
<td>Sheet Options &gt; General</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LocalMemberAsCellPosition</td>
<td>Use Position in Axis</td>
<td>Sheet Options &gt; General</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MeasureDisplayFormat (deprecated)</td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>MemberLinkColor</td>
<td>Member Link Symbol Color button</td>
<td>User Options &gt; Navigation</td>
</tr>
<tr>
<td>Values: integer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default value: 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use ARGB color values</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MemberSelectorPagingSize</td>
<td>Members Displayed on Node Expansion in Member Selector</td>
<td>User Options &gt; Navigation</td>
</tr>
<tr>
<td>Values: integer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default value: 1000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter the maximum number of members to display when expanding a node in the member selector</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NoMatchInMasterAxisValueReplacement</td>
<td>Member not Found Default Value</td>
<td>Sheet Options &gt; Formatting</td>
</tr>
<tr>
<td>Values: text</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default value: #NOMEMBERFOUND</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter the text to be displayed in the cells when a member is not found for the following reason.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NumberFormat</td>
<td>Number Format</td>
<td>only in Microsoft PowerPoint and Word:</td>
</tr>
<tr>
<td>Values: number</td>
<td></td>
<td>Presentation Options &gt; Formatting</td>
</tr>
<tr>
<td>Default value: 0.##</td>
<td></td>
<td>and Document Options &gt; Formatting</td>
</tr>
<tr>
<td>OnTheFlyMemberRecognition</td>
<td>Activate Member Recognition</td>
<td>Sheet Options &gt; General</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OverrideEmptyValue</td>
<td>Set Default Value in Empty Cell</td>
<td>Sheet Options &gt; Formatting</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OverrideNoMatchInMasterAxisValue</td>
<td>Set Default Value when Member not Found in Shared Axis</td>
<td>Sheet Options &gt; Formatting</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>in .xml</td>
<td>on the interface</td>
<td>where</td>
</tr>
<tr>
<td>---------</td>
<td>------------------</td>
<td>-------</td>
</tr>
<tr>
<td>OversizeQueryLimit</td>
<td>cells entry area</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>Values: integer</td>
<td>Default value: 0</td>
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</tr>
<tr>
<td>PauseRefresh</td>
<td>Freeze Data Refresh</td>
<td>User Options &gt; Navigation</td>
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<td>Values: True or False</td>
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</tr>
<tr>
<td>RefreshOnOpen</td>
<td>Refresh Data in the Whole File when Opening it</td>
<td>Sheet Options &gt; Refresh</td>
</tr>
<tr>
<td>Values: True or False</td>
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</tr>
<tr>
<td>RefreshOnlyDataAfterSubmit</td>
<td>Refresh only Data on &quot;Save &amp; Refresh Data&quot;</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>Values: True or False</td>
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<td></td>
</tr>
<tr>
<td>RefreshOnlyExpandedMembers</td>
<td>Refresh only Expanded and Inserted Members</td>
<td>User Options &gt; Navigation</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RemoveWorksheetBeforeGeneration</td>
<td>Remove EPM Worksheets Before Generation</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ReportLinkColor (deprecated)</td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>RestoreDynamicOnRefresh (in the &lt;DefaultSheetOptions&gt; section)</td>
<td>Restore Dynamic Selection on Refresh after Navigation</td>
<td>Sheet Options &gt; Refresh</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RepeatColumnHeaders</td>
<td>Repeat Columns Headers</td>
<td>Sheet Options &gt; Formatting</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RepeatRowHeaders</td>
<td>Repeat Row Headers</td>
<td>Sheet Options &gt; Formatting</td>
</tr>
<tr>
<td>Values: True or False</td>
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<td></td>
</tr>
<tr>
<td>RestoreDynamicOnRefresh (not in the &lt;DefaultSheetOptions&gt; section: deprecated)</td>
<td></td>
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</tr>
<tr>
<td>RowAxisTotalRefresh</td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>RowHeaderIndentation</td>
<td>Row Header Indentation options</td>
<td>Sheet Options &gt; Formatting</td>
</tr>
<tr>
<td>Values: • To indent children, enter SoRhiChildren • To indent parents, enter SoRhiParents • To specify no indentation, enter SoRhiNone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SheetLocked (do not use)</td>
<td>(do not use)</td>
<td></td>
</tr>
<tr>
<td>SheetPwd (do not use)</td>
<td>(do not use)</td>
<td></td>
</tr>
<tr>
<td>in .xml</td>
<td>on the interface</td>
<td>where</td>
</tr>
<tr>
<td>---------</td>
<td>------------------</td>
<td>-------</td>
</tr>
<tr>
<td>SheetProtectionOptions (do not use)</td>
<td>(do not use)</td>
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</tr>
<tr>
<td>ShowDataComments</td>
<td>Show Source Data in Comments</td>
<td>Sheet Options &gt; Refresh</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ShowCurrentViewPane</td>
<td>Display EPM Context Bar</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ShowCurrentViewVertical</td>
<td>Display Context inside EPM Pane</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ShowLocalConnections</td>
<td>Display Local Connections</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ShowReportEditionPane</td>
<td>Display EPM Pane</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ShowUnrecognizedMemberWarning</td>
<td>Warn if Rows and Columns of Unrecognized Members Will be Kept</td>
<td>User Options &gt; Navigation</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SmtpConfiguration/Address</td>
<td>Server Address</td>
<td>User Options &gt; Server Configuration</td>
</tr>
<tr>
<td>SmtpConfiguration/AuthenticationType</td>
<td>Authentication Type</td>
<td>User Options &gt; Server Configuration</td>
</tr>
<tr>
<td>Values: enter 0 for Anonymous</td>
<td></td>
<td></td>
</tr>
<tr>
<td>enter 1 for Basic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>enter 2 for NTLM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SmtpConfiguration/EnableSsl</td>
<td>Enable SSL</td>
<td>User Options &gt; Server Configuration</td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SmtpConfiguration/Port</td>
<td>Server Port</td>
<td>User Options &gt; Server Configuration</td>
</tr>
<tr>
<td>SmtpConfiguration/User</td>
<td>User Name</td>
<td>User Options &gt; Server Configuration</td>
</tr>
<tr>
<td>TopMostDialog</td>
<td>(no equivalent option in the EPM add-in interface)</td>
<td></td>
</tr>
<tr>
<td>Values: True or False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If you enter True, any EPM add-in dialog box will be displayed on top of any other application window.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TotalsAtTheLeft</td>
<td>Left and Right</td>
<td>Sheet Options &gt; General &gt; Totals Placement</td>
</tr>
<tr>
<td>in .xml</td>
<td>on the interface</td>
<td>where</td>
</tr>
<tr>
<td>---------</td>
<td>-----------------</td>
<td>-------</td>
</tr>
<tr>
<td>TotalsAtTheTop</td>
<td>Top and Bottom</td>
<td>Sheet Options &gt; General &gt; Totals Placement</td>
</tr>
<tr>
<td>UnauthorizedCellsText</td>
<td>Unauthorized Cell Text</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>UnauthorizedCellManagement</td>
<td>Keep Rows and Columns of Unrecognized Members</td>
<td>User Options &gt; Navigation</td>
</tr>
<tr>
<td>UseAsInputForm</td>
<td>Use as Input Form</td>
<td>Sheet Options &gt; General</td>
</tr>
<tr>
<td>UseCacheValidityDuration</td>
<td>Clear Metadata Cache Frequency</td>
<td>User Options &gt; Navigation</td>
</tr>
<tr>
<td>UseCustomDataLinkColor</td>
<td>Data Link Symbol Color</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>UseCustomMemberLinkColor</td>
<td>Member Link Symbol Color</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>UseCustomReportLinkColor</td>
<td>(deprecated)</td>
<td></td>
</tr>
<tr>
<td>UseEPMMemberIDInEVPFormulas</td>
<td>Use EPMMemberID in EPM Formulas</td>
<td>User Options &gt; Others</td>
</tr>
<tr>
<td>UseMetaDataCache</td>
<td>Activate Metadata Cache</td>
<td>User Options &gt; Navigation</td>
</tr>
<tr>
<td>VisibilityCollaborationAll</td>
<td>All Buttons</td>
<td>Command Display Options &gt; Collaboration Group</td>
</tr>
<tr>
<td>VisibilityDataAnalysisAll</td>
<td>All Buttons</td>
<td>Command Display Options &gt; Data Analysis Group</td>
</tr>
<tr>
<td>VisibilityDataManager</td>
<td>All Buttons</td>
<td>Command Display Options &gt; Data Manager Group</td>
</tr>
<tr>
<td>VisibilityReportAndAnalysisOpenSave</td>
<td>Open/Save</td>
<td>Command Display Options &gt; Reports Group</td>
</tr>
<tr>
<td>in .xml</td>
<td>on the interface</td>
<td>where</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------</td>
<td>----------------------------------------------------------------------</td>
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<tr>
<td>VisibilitySubmitDataAll</td>
<td>All Buttons</td>
<td>Command Display Options Data Input Group</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
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<td>VisibilityToolsCustomMembers</td>
<td>Custom Members</td>
<td>Command Display Options Tools Group</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VisibilityToolsOffLineMode</td>
<td>Offline Mode</td>
<td>Command Display Options Tools Group</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VisibilityToolsQuickLinks</td>
<td>Quick Links</td>
<td>Command Display Options Tools Group</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VisibilityUndo</td>
<td>All Buttons</td>
<td>Command Display Options Undo Group</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VisualizeUnauthorizedCells</td>
<td>Show Unauthorized Cell Text</td>
<td>Sheet Options Refresh</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WarmDynamicRefresh</td>
<td>Warn if Navigation Will Break Dynamic Selection</td>
<td>User Options Navigation</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WarnIfQueryIsTooBig</td>
<td>Warn if Report Exceeds</td>
<td>User Options Others</td>
</tr>
<tr>
<td>Values: <strong>True</strong> or <strong>False</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
8 EPM Add-in for Microsoft Office Technical Log Configuration

You configure the EPM Add-in technical log in the following files:

- **FPMXLClient.dll-ExcelLogConfig.xml** for Microsoft Excel
- **FPMXLClient.dll-PowerPointLogConfig.xml** for Microsoft PowerPoint
- **FPMXLClient.dll-WordLogConfig.xml** for Microsoft Word

The log categories are listed below:

<table>
<thead>
<tr>
<th>Log Category</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>FPMXLClient.AnalyzerOne</td>
<td>Default for the entry point of the product</td>
</tr>
<tr>
<td>FPMXLClient.AnalyzerOne.Automation</td>
<td>&quot;Regular&quot; EPMAddIn automation operations</td>
</tr>
<tr>
<td>FPMXLClient.AnalyzerOne.EPMExcelClientDMAutomation</td>
<td>DataManager EPMAddIn automation operations</td>
</tr>
<tr>
<td>FPMXLClient.AnalyzerOne.EPMExcelClientUIMacro</td>
<td>EPMAddIn automation operations displaying a UI</td>
</tr>
<tr>
<td>FPMXLClient.AnalyzerOne.EVFuntions</td>
<td>EPMAddIn Excel function operations</td>
</tr>
<tr>
<td>FPMXLClient.AnalyzerOne.ExcelEvents</td>
<td>Excel event handling operations</td>
</tr>
<tr>
<td>FPMXLClient.AutoUpdate</td>
<td>EPMAddIn AutoUpdate operations</td>
</tr>
<tr>
<td>FPMXLClient.BOEIntegration</td>
<td>BOE communication operations</td>
</tr>
<tr>
<td>FPMXLClient.Books</td>
<td>BPC Publication operations</td>
</tr>
<tr>
<td>FPMXLClient.BPCProxy</td>
<td>Communication with BPC MS/NW default category</td>
</tr>
<tr>
<td>FPMXLClient.BPCProxy.Datamanager</td>
<td>Communication with BPC MS/NW Datamanager operations</td>
</tr>
<tr>
<td>FPMXLClient.BPCProxy.Dataservice</td>
<td>Communication with BPC MS/NW Dataservice operations</td>
</tr>
<tr>
<td>FPMXLClient.BPCProxy.Drillthrough</td>
<td>Communication with BPC MS/NW Drillthrough operations</td>
</tr>
<tr>
<td>FPMXLClient.BPCProxy.DynamicHierarchy</td>
<td>Communication with BPC MS/NW Dynamic hierarchy operations</td>
</tr>
<tr>
<td>FPMXLClient.BPCProxy.Filters</td>
<td>Communication with BPC MS/NW Filter operations</td>
</tr>
<tr>
<td>FPMXLClient.BPCProxy.Metadata</td>
<td>Communication with BPC MS/NW Metadata operations</td>
</tr>
<tr>
<td>FPMXLClient.BPCProxy.Session</td>
<td>Communication with BPC MS/NW Session operations</td>
</tr>
<tr>
<td>FPMXLClient.BPCProxy.User</td>
<td>Communication with BPC MS/NW User operations</td>
</tr>
<tr>
<td>Log Category</td>
<td>Explanation</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------</td>
</tr>
<tr>
<td>FPMXLClient.BPCProxy.Workstatus</td>
<td>Communication with BPC MS/NW Workstatus operations</td>
</tr>
<tr>
<td>FPMXLClient.BPF</td>
<td>BPF related operations</td>
</tr>
<tr>
<td>FPMXLClient.Connection</td>
<td>Connection mechanism common operations</td>
</tr>
<tr>
<td>FPMXLClient.Connection.ADONET_ODBOConnection</td>
<td>Connection mechanism ADO.NET specific operations</td>
</tr>
<tr>
<td>FPMXLClient.Connection.BPC10Connection</td>
<td>Connection mechanism BPC10 operations</td>
</tr>
<tr>
<td>FPMXLClient.Connection.ODBOConnection</td>
<td>Connection mechanism ODBO operations</td>
</tr>
<tr>
<td>FPMXLClient.Connection.XMLAConnection</td>
<td>Connection mechanism XMLA operations</td>
</tr>
<tr>
<td>FPMXLClient.Datamanagement</td>
<td>Document data handling operations</td>
</tr>
<tr>
<td>FPMXLClient.DataManager</td>
<td>BPC DataManager operations</td>
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<tr>
<td>FPMXLClient.DataManager.TransformationFile</td>
<td>BPC DataManager Transformation/Conversion files operations</td>
</tr>
<tr>
<td>FPMXLClient.DynamicCharts.ChartObject</td>
<td>Charts related operations</td>
</tr>
<tr>
<td>FPMXLClient.EVDRE</td>
<td>EVDRE default category</td>
</tr>
<tr>
<td>FPMXLClient.EVDRE.Formatting</td>
<td>EVDRE formatting related operations</td>
</tr>
<tr>
<td>FPMXLClient.EVDRE.Suppress</td>
<td>EVDRE suppress related operations</td>
</tr>
<tr>
<td>FPMXLClient.FilesManagement</td>
<td>Document / File management operations</td>
</tr>
<tr>
<td>FPMXLClient.Flash</td>
<td>Flash related operations</td>
</tr>
<tr>
<td>FPMXLClient.Logon</td>
<td>Logon related operations</td>
</tr>
<tr>
<td>FPMXLClient.Migration</td>
<td>Migration default category</td>
</tr>
<tr>
<td>FPMXLClient.Persistence</td>
<td>Preference default category</td>
</tr>
<tr>
<td>FPMXLClient.Persistence.MetaDataPersistenceManager</td>
<td>Cache related operation</td>
</tr>
<tr>
<td>FPMXLClient.ReportManagement</td>
<td>Report management related operation default category</td>
</tr>
<tr>
<td>FPMXLClient.REST</td>
<td>REST connection related operations</td>
</tr>
<tr>
<td>FPMXLClient.Ribbon</td>
<td>Uses EPM Add-In Office Ribbon related operation</td>
</tr>
<tr>
<td>FPMXLClient.UILayer</td>
<td>UI default category</td>
</tr>
<tr>
<td>FPMXLClient.UILayer.DataManager</td>
<td>UI DM related operations</td>
</tr>
<tr>
<td>Log Category</td>
<td>Explanation</td>
</tr>
<tr>
<td>--------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Performance</td>
<td>Performance default category</td>
</tr>
</tbody>
</table>
9  EPM Add-in Report Size Limitations

The following Report Size Limitations apply to the EPM Add-in:

- The maximum memory that can be allocated to the Microsoft Excel 32-bit application is 1.2 GB. This means that:
  - The EPM Add-in report size is limited to 200,000 rows and two million cells.
  - Each data source is limited to 2 million members: this amount of 2 million = \( \text{sum (for each dimension, number of dimension members} \times \text{number of hierarchies)} \).

  **Note**
  Both limits above do not apply for Microsoft Excel 64-bit application.

- The maximum memory that can be allocated to the Microsoft Excel application is 1.2 GB. This means that the EPM Add-in report size is limited to:
  - 200,000 rows and two million cells.
  - For 32-bit operating systems, 2 million members for each data source: this amount of 2 million = \( \text{sum (for each dimension, number of dimension members} \times \text{number of hierarchies)} \).

- When importing data with the Data Manager, you cannot import more than 30,000 members at the same time.

- The maximum size of a file you can upload or download for the Data Manager is 800 MB. Beyond this size limit, we suggest that you upload or download files directly on the Planning and Consolidation server, that is without using the EPM add-in.

- An amount coming from BPC NetWeaver can have a maximum of 13 digits before the comma and seven digits after.

- You cannot have more than 20 EPM Add-in reports in a single Excel sheet.

- Cell-based formula parameters cannot exceed 255 characters (this is a Microsoft Excel limitation).

- In the Insert Member dialog box, the option at Selected Cell is not supported in a report axis containing more than 150,000 rows.

- Performing a multi-selection when the Page-axis option is enabled increases the refresh time of the EPM Add-in, especially for large reports (since this calculation is performed on the client side and not on the server side.)

- Regarding asymmetric reports:
  - The number of dimension members in an axis before applying a remove empty or zero values option cannot exceed 150,000 rows or columns.
  - When the Force Symmetric Refresh for Large Asymmetric Axis option is enabled, the number of members in each nested dimension in a report axis, when multiplied by themselves and before applying the remove empty or zero values option, cannot exceed 9,223,722,368,854,775,807.
  - If the excluded members feature is used in this report axis, the Force Symmetric Refresh for Large Asymmetric Axis option cannot be used and the limit of 150,000 rows or columns is applied.
10 General Limitations

Cell Functions

The following cell functions have to be used for ad hoc data. They must not be used instead of, or as, an EPM report. If a performance issue occurs when using the cell functions, please design an EPM report instead:

- EPMRetrieveData
- EPMScaleData
- EPMSaveData
- EPMSaveDataOnly
- EVGET
- EVGTS
- EVSND

Calculation

To ensure calculation accuracy in the EPM add-in, please do not use the Microsoft Excel “manual calculation” feature.

If you use manual calculation, we cannot guarantee the data integrity.
11 Disabling EPM Add-in for Faster Microsoft Office Applications Load Time

Context

You can disable the EPM Add-in for Microsoft Office so that the Microsoft Office applications Excel, Word or PowerPoint open faster.

This procedure contains two main steps:

- Create a .bat file to remove two registry keys that are created by default by the setup.
- Use the `UnloadEPMAddin.reg` or the `LoadEPMAddin.reg` files, depending on whether you want to disable or enable the EPM Add-in.

Below is the detailed procedure:

Procedure

1. Close all Microsoft Office applications that might be open: Microsoft Excel, Word, PowerPoint and Outlook.
2. Create and execute the following .bat file:

   ```bash
   echo off
   REM All Users
   set var=
   for /F "tokens=3" %%i in ('REG QUERY "HKLM\SOFTWARE\Microsoft\Office\Excel\AddIns\FPMXLClient.Connect" /v Description') do set var=%%i
   if not "%var%"=="" REG DELETE HKLM\SOFTWARE\Microsoft\Office\Excel\AddIns\FPMXLClient.Connect /f
   set var=
   for /F "tokens=3" %%i in ('REG QUERY "HKLM\SOFTWARE\Microsoft\Office\Word\AddIns\FPMXLClient.Connect" /v Description') do set var=%%i
   if not "%var%"=="" REG DELETE HKLM\SOFTWARE\Microsoft\Office\Word\AddIns\FPMXLClient.Connect /f
   set var=
   for /F "tokens=3" %%i in ('REG QUERY "HKLM\SOFTWARE\Wow6432Node\Microsoft\Office\Excel\AddIns\FPMXLClient.Connect" /v Description') do set var=%%i
   if not "%var%"=="" REG DELETE HKLM\SOFTWARE\Wow6432Node\Microsoft\Office\Excel\AddIns\FPMXLClient.Connect /f
   set var=
   for /F "tokens=3" %%i in ('REG QUERY "HKLM\SOFTWARE\Wow6432Node\Microsoft\Office\Word\AddIns\FPMXLClient.Connect" /v Description') do set var=%%i
   if not "%var%"=="" REG DELETE HKLM\SOFTWARE\Wow6432Node\Microsoft\Office\Word\AddIns\FPMXLClient.Connect /f
   set var=
   for /F "tokens=3" %%i in ('REG QUERY "HKLM\SOFTWARE\Wow6432Node\Microsoft\Office\PowerPoint\AddIns\FPMXLClient.Connect" /v Description') do set var=%%i
   if not "%var%"=="" REG DELETE HKLM\SOFTWARE\Wow6432Node\Microsoft\Office\PowerPoint\AddIns\FPMXLClient.Connect /f
   ```
Note

These keys allow you to execute the EPM Add-in for Microsoft Office for all users on this machine. Once the keys are deleted, the EPM Add-in can no longer be executed on this machine.

3. To enable the EPM Add-in, execute the \LoadEPMAddin.reg\ file.
   The EPM tab in the Excel, Word or PowerPoint application becomes available for the current user only.

4. To disable the EPM Add-in, execute the \UnLoadEPMAddin.reg\ file.
   This file is located in the EPM Add-in installation directory. For example, in C:\Program Files (x86)\SAP BusinessObjects\EPM Add-In.
   The EPM tab is no longer available for the current user only in the Microsoft Excel, Word or PowerPoint ribbon.
12 Connecting to Untrusted Servers

For test or debug purposes, the administrator can specify that a client machine can access any server, even the ones that are defined in the untrusted zone.

To enable a client machine to access any server, use the key "TrustUntrustedServerCertificates" located in the file FPMXLClient.dll.config and set it to "true". By default, the key is set to "false", meaning that the client machine can only access the servers that are defined in the trusted zone.

This applies to all types of connection that include "https" in the server address.
13 Troubleshooting

EPM Add-in fails to uninstall

If your computer software security policy does not allow you to remove programs from the Microsoft Windows Control Panel, you cannot uninstall the EPM add-in using the Control Panel. The following message is displayed when trying to uninstall the EPM add-in: "The system administrator has set policies to prevent this installation".

In order to uninstall the EPM add-in, the system administrator must set the computer software security policy accordingly.

Otherwise, you must do the following:

1. Run a windows command using "Run as administrator".
2. Enter the following command line: msiexec.exe /x {2C342070-8569-41F7-9DB4-6FF7D63AACAA2}
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