
TM1 Technical Bulletin

Using TM1 9.1 SP3 with Excel 2007

Date: December 11, 2007

Relevant TM1 Versions: TM1 9.1 SP3



Cognos has performed basic acceptance tests of TM1 Perspectives running on Excel 2007 and provides limited support for this configuration.

The following topics are included in this technical bulletin:

- Using Excel 2007 with TM1 Perspectives
- Running Excel 2007 on the TM1 Web Server
- Publishing and Viewing Excel 2007 Worksheets in TM1 Web
- Exporting Worksheets to Excel 2007 from TM1 Web
- Using Print Preview with the TM1 Print Report Feature in Excel 2007
- Accessing the TM1 Add-in Menu in Excel 2003 and 2007
- Keyboard Shortcut Differences Between Excel 2003 and 2007
- Manually Adding the TM1 Add-in to Excel 2007
- Adding the TM1 Toolbars to the Excel 2007 Quick Access Toolbar
- Modifying an Existing TM1 Action Button in Excel 2007

Using Excel 2007 with TM1 Perspectives

Cognos supports the TM1 Perspectives add-in with Excel 2007. You can add Excel 2007 worksheets in the .xlsx format to TM1 Application folders and re-open them in Excel. The following exceptions apply:

- Publishing and viewing Websheet versions of Excel 2007 worksheets in the .xlsx format is not supported in TM1 Web.
- Print Preview is disabled for the TM1 Print Report feature in Excel 2007.

For more details, see the related sections later in this technical bulletin.

Running Excel 2007 on the TM1 Web Server

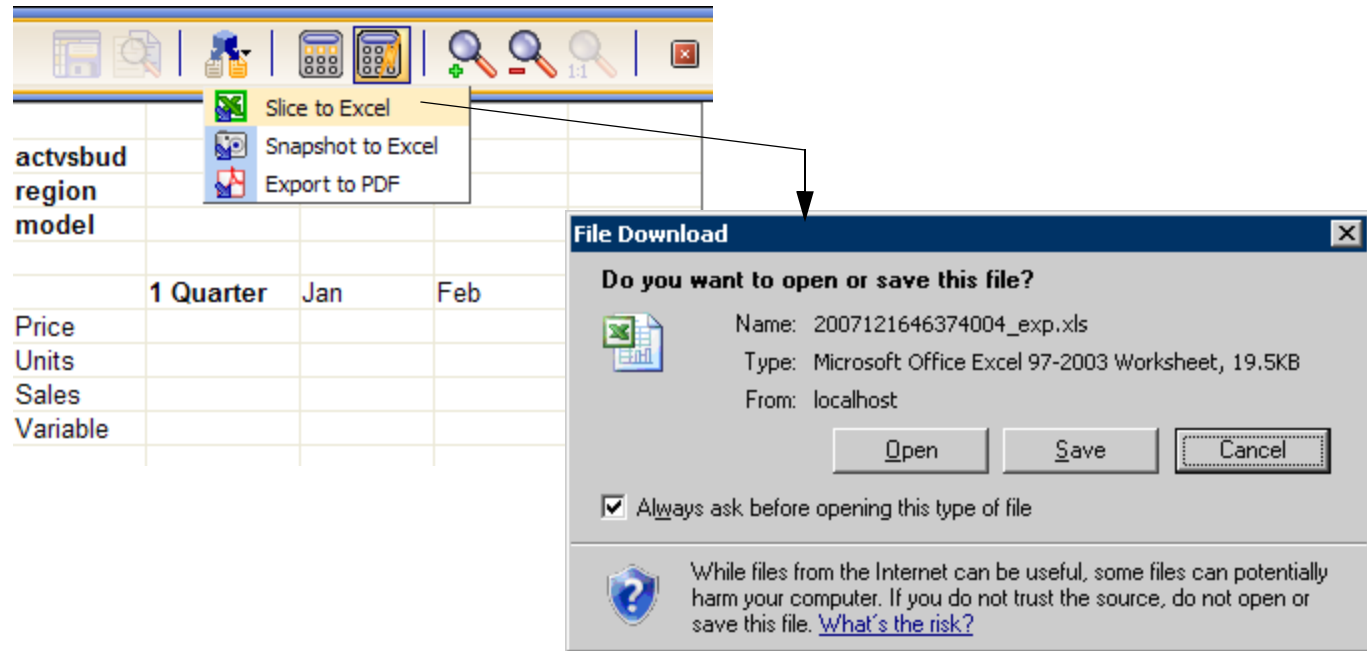
Cognos TM1 Web supports Excel 2007 running on the web server that is hosting TM1 Web.

Publishing and Viewing Excel 2007 Worksheets in TM1 Web

Publishing Excel 2007 worksheets in the .xlsx format and viewing them as TM1 Websheets is not supported in Cognos TM1 Web. If you want to view an Excel 2007 worksheet as a Websheet in TM1 Web, you must first save the file as an Excel 2003 .xls file.

Exporting Websheets to Excel 2007 from TM1 Web

When you select the Slice to Excel export option in TM1 Web, a File Download dialog appears.



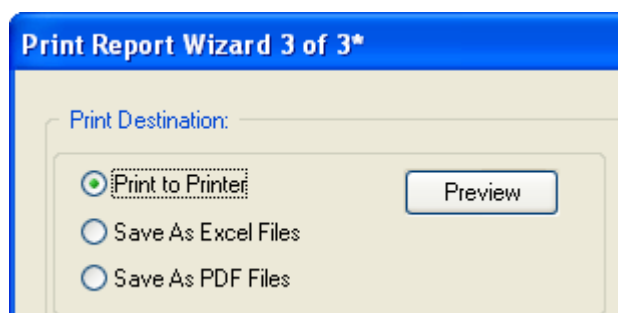
If Excel 2007 is installed on your computer and you click **Open**, the slice displays in the *full* application version of Excel 2007. An empty web browser window also opens in the background and can be closed after the slice opens.

If Excel 2003 is installed and you click **Open**, the exported slice displays within in a web browser version of Excel and not in the full application version of Excel.

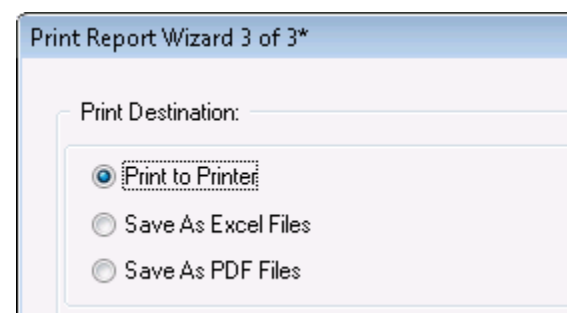
Using Print Preview with the TM1 Print Report Feature in Excel 2007

The option to preview your report is not available when you use the TM1 Print Report feature in Excel 2007. The Preview button, on the Print Report Wizard 3 of 3 screen, is available in Excel 2003, but is absent in Excel 2007.

Excel 2003



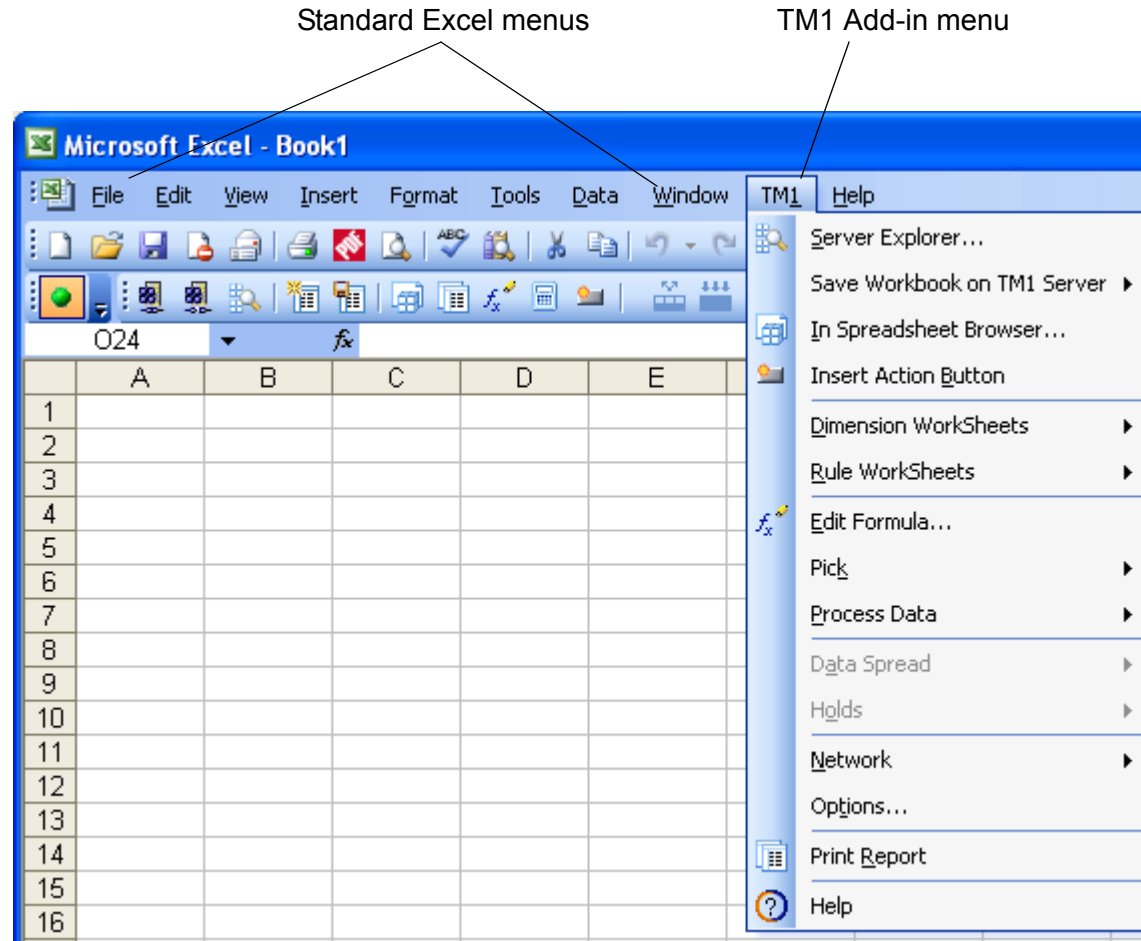
Excel 2007



Accessing the TM1 Add-in Menu in Excel 2003 and 2007

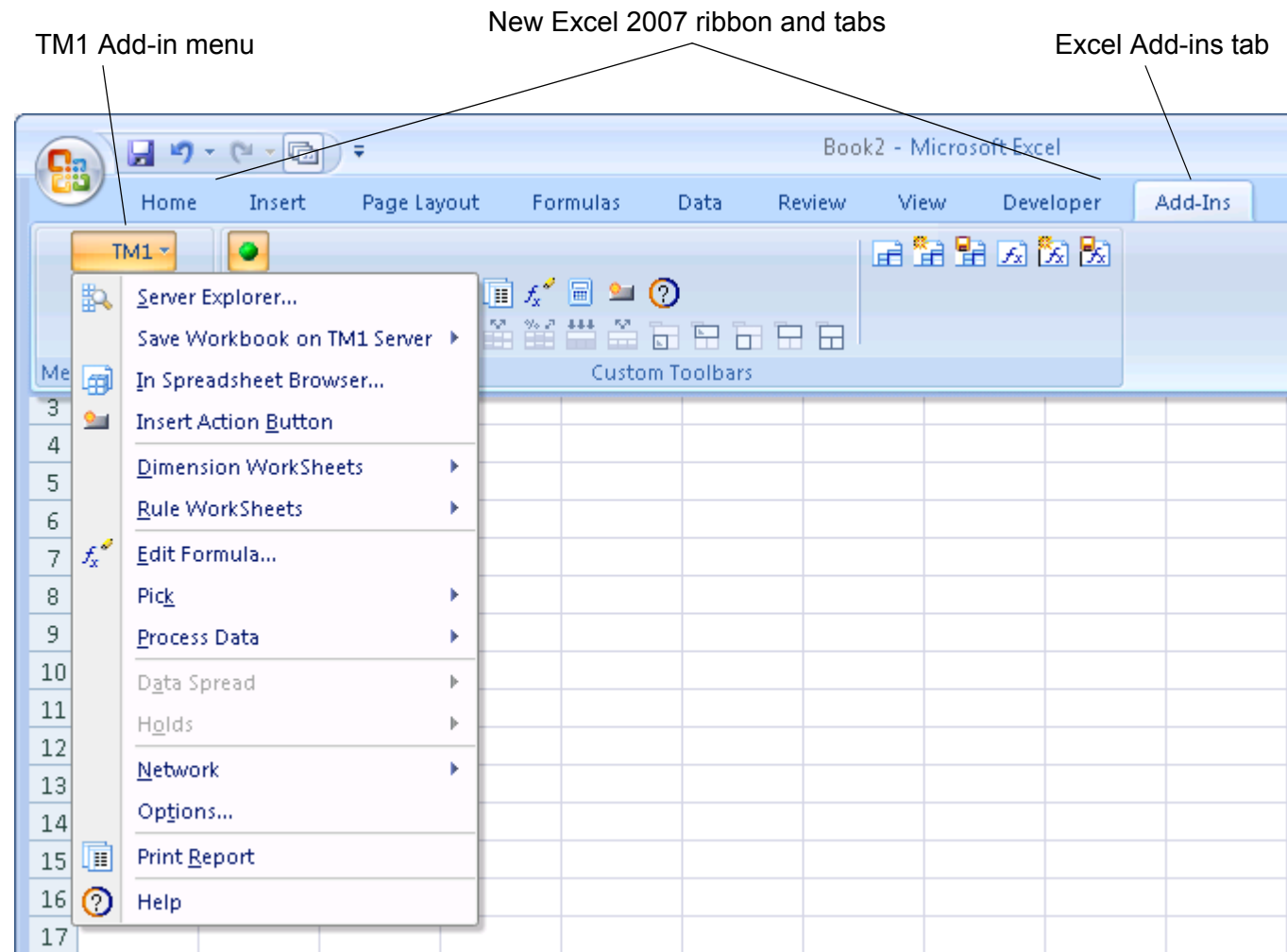
In Excel 2003, the TM1 Add-in menu is available at the same level as the standard Excel menus.

Excel 2003



In Excel 2007, the TM1 Add-in menu is available under the Excel Add-Ins tab. To display the TM1 menu, you must first click on the Add-Ins tab.

Excel 2007



Keyboard Shortcut Differences Between Excel 2003 and 2007

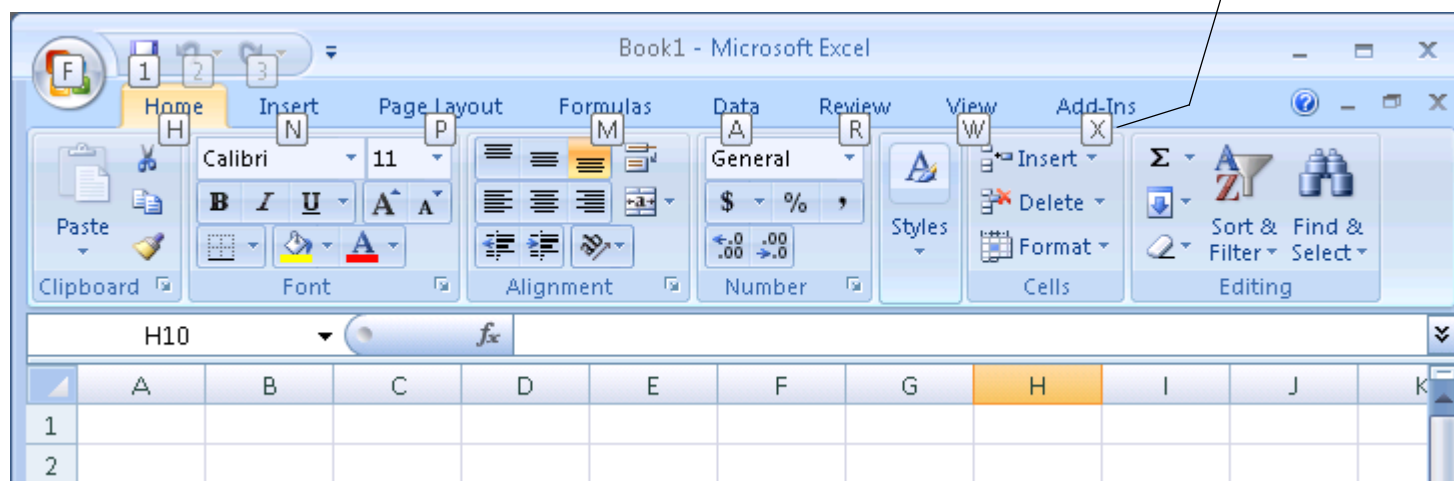
The keyboard shortcuts to access TM1 options are different between Excel 2003 and 2007.

For example, pressing Alt-1-S opens TM1 Server Explorer in Excel 2003, but you must press Alt-X-1-S to open Server Explorer in Excel 2007.

When you press the Alt key in Excel 2007, a shortcut key appears next to each menu, as shown in the following figure.

Excel 2007

Press and hold the Alt key to display the available shortcut keys



To access TM1 shortcuts in Excel 2007, press Alt-X, preceded by the shortcut for any of the TM1 menu options.

The following table lists Excel 2003 and 2007 shortcut keys for some common TM1 commands.



In the English version of Excel 2007, press Alt-X-1 to access the TM1 add-in menu, as shown in the following examples.


Shortcut Action	Excel 2003 Shortcut	Excel 2007 Shortcut
Server Explorer	Alt-1-S	Alt-X-1-S
Spreadsheet Browse	Alt-1-I	Alt-X-1-I
Dimension Worksheets/New	Alt-1-D-N	Alt-X-1-D-N
Dimension Worksheets/Save	Alt-1-D-S	Alt-X-1-D-S

In the French version of Excel 2007, press Alt-M 2-1 to access the TM1 add-in menu, as shown in the following examples.

Shortcut Action	Excel 2003 Shortcut	Excel 2007 Shortcut
Server Explorer	Alt-1-S	Alt-M 2-1-S
Spreadsheet Browse	Alt-1-I	Alt-M 2-1-I
Dimension Worksheets/New	Alt-1-D-N	Alt-M 2-1-D-N
Dimension Worksheets/Save	Alt-1-D-S	Alt-M 2-1-D-S

In the German version of Excel 2007, press Alt-Q 2-1 to access the TM1 add-in menu, as shown in the following examples.

Shortcut Action	Excel 2003 Shortcut	Excel 2007 Shortcut
Server Explorer	Alt-1-S	Alt-Q 2-1-S
Spreadsheet Browse	Alt-1-I	Alt-Q 2-1-I

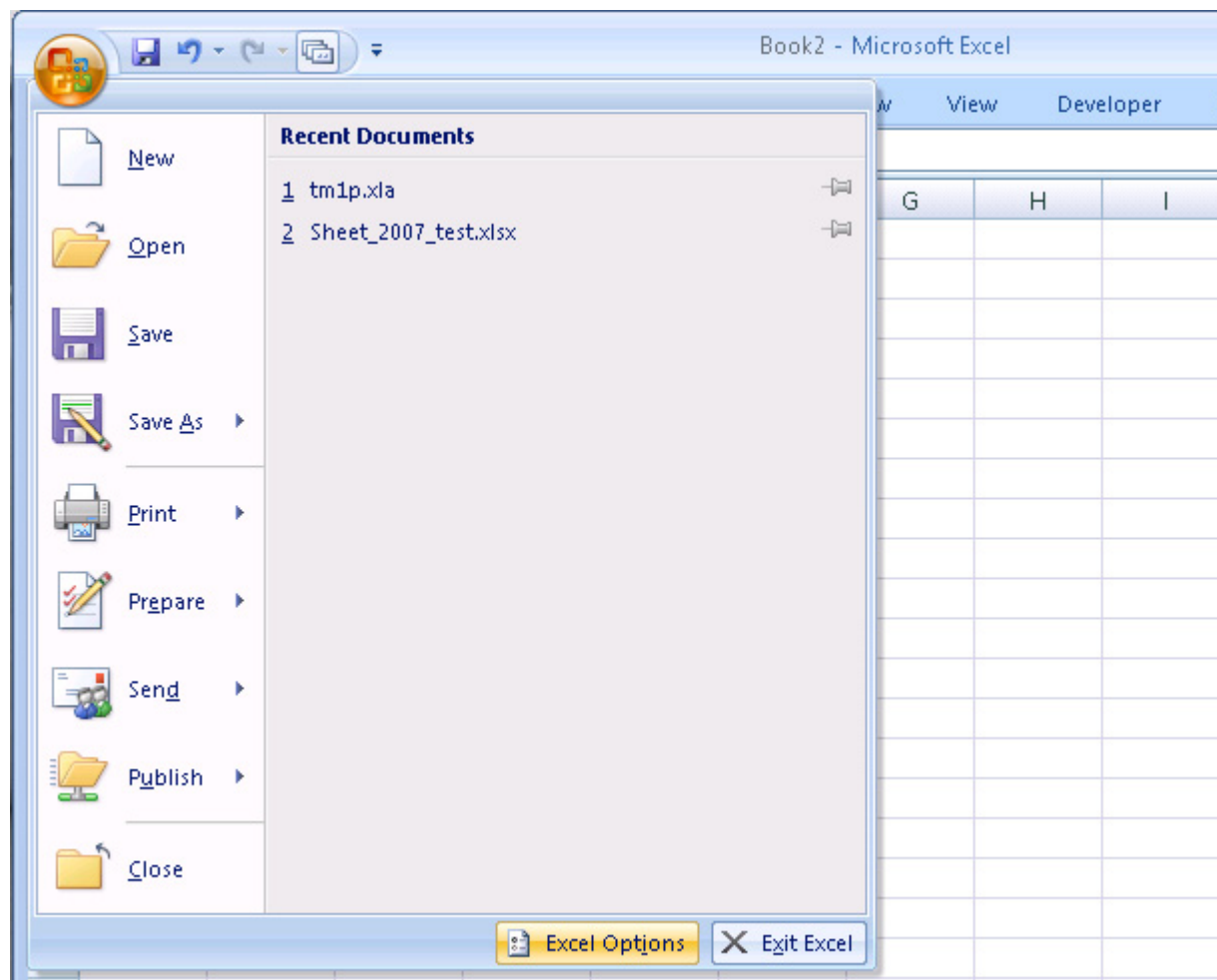


Shortcut Action	Excel 2003 Shortcut	Excel 2007 Shortcut
Dimension Worksheets/New	Alt-1-D-N	Alt-Q 2-1-D-N
Dimension Worksheets/Save	Alt-1-D-S	Alt-Q 2-1-D-S

Manually Adding the TM1 Add-in to Excel 2007

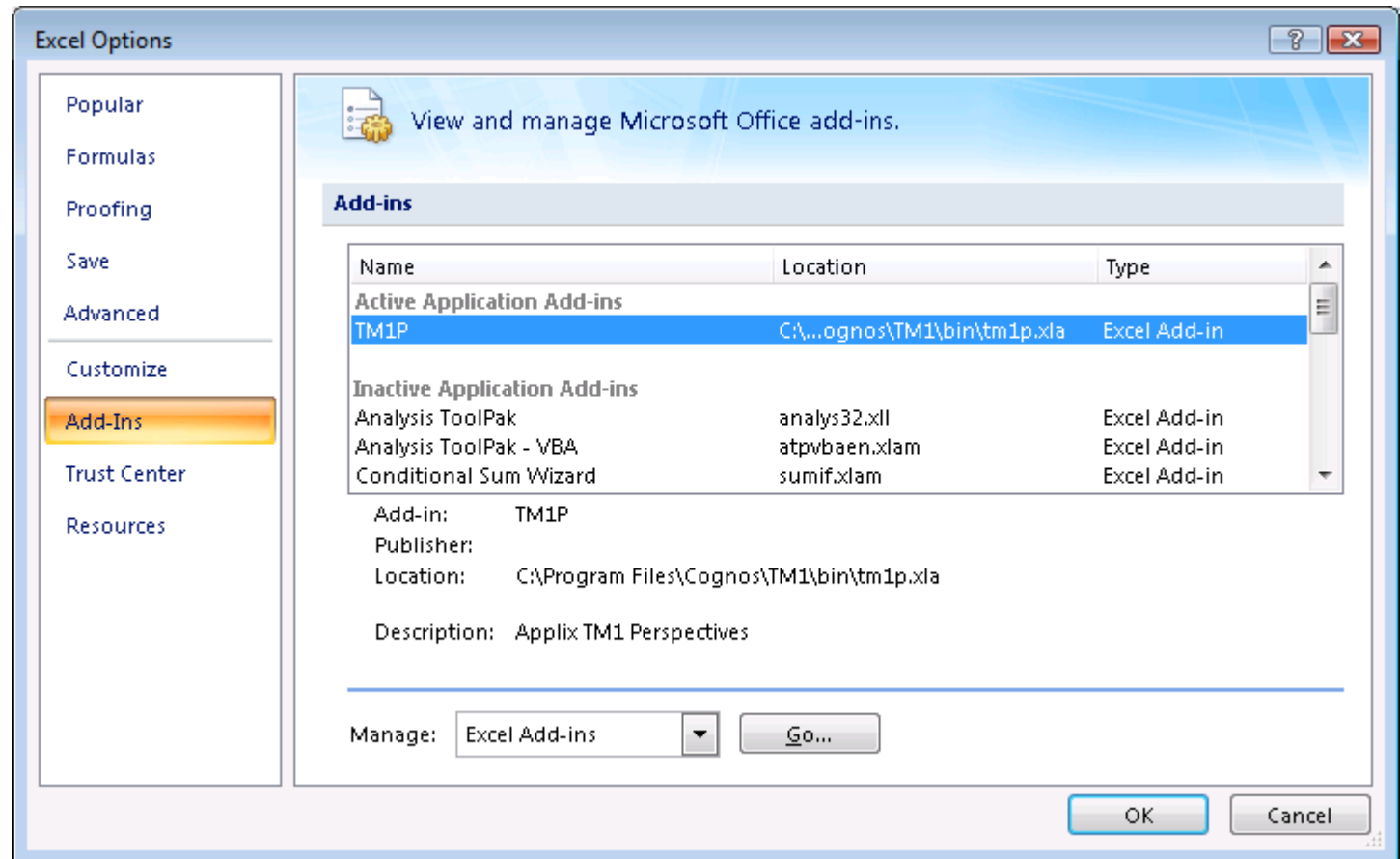
If you need to manually add the TM1 add-in to Excel 2007, perform the following steps:

1. Click the Excel **Office** button to display Excel's main menu.



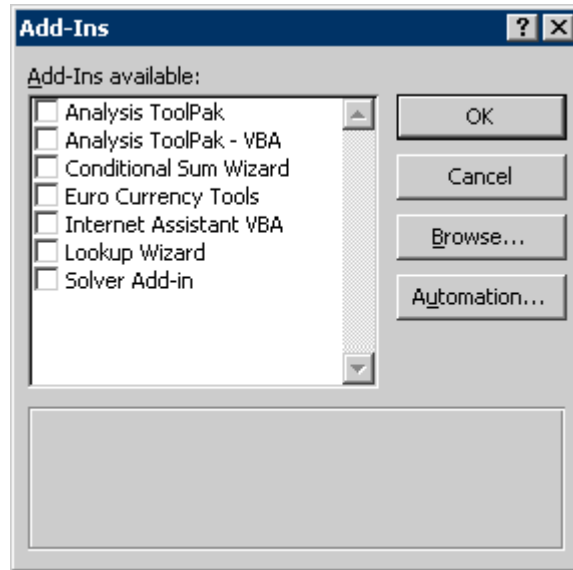
2. Click the **Excel Options** button.

The Excel Options window appears.



3. Select **Excel-Add-Ins** in the Manage list and then click **Go**.

The Add-Ins dialog appears.



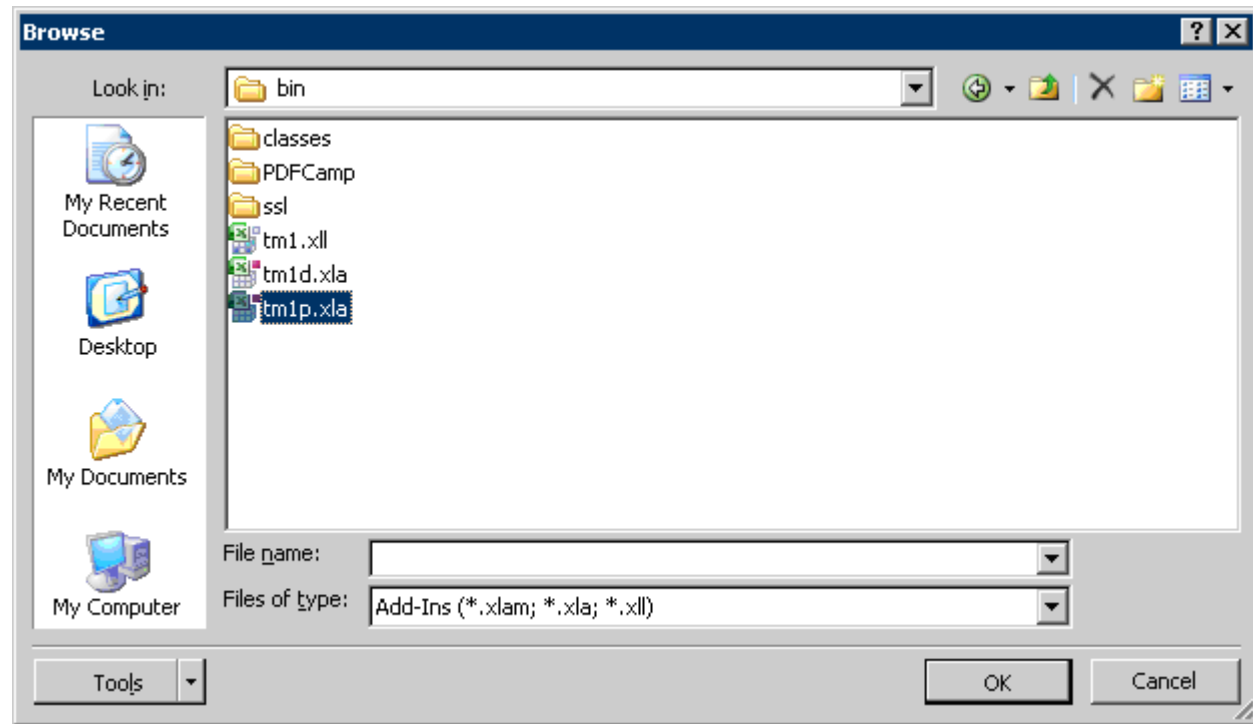
4. Click **Browse**.

The Browse dialog appears.

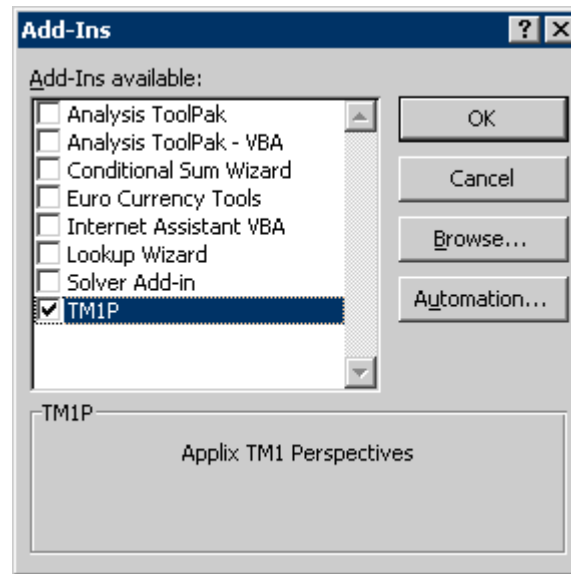
5. Browse to the TM1 <install directory>\bin directory and locate the tm1p.xla file.

The default installation location of the TM1 <install directory>\bin is:

C:\Program Files\Cognos\TM1\bin



6. Select the **tm1p.xla** file and click **OK**.
7. The **TM1P** add-in appears in the Add-Ins available list.

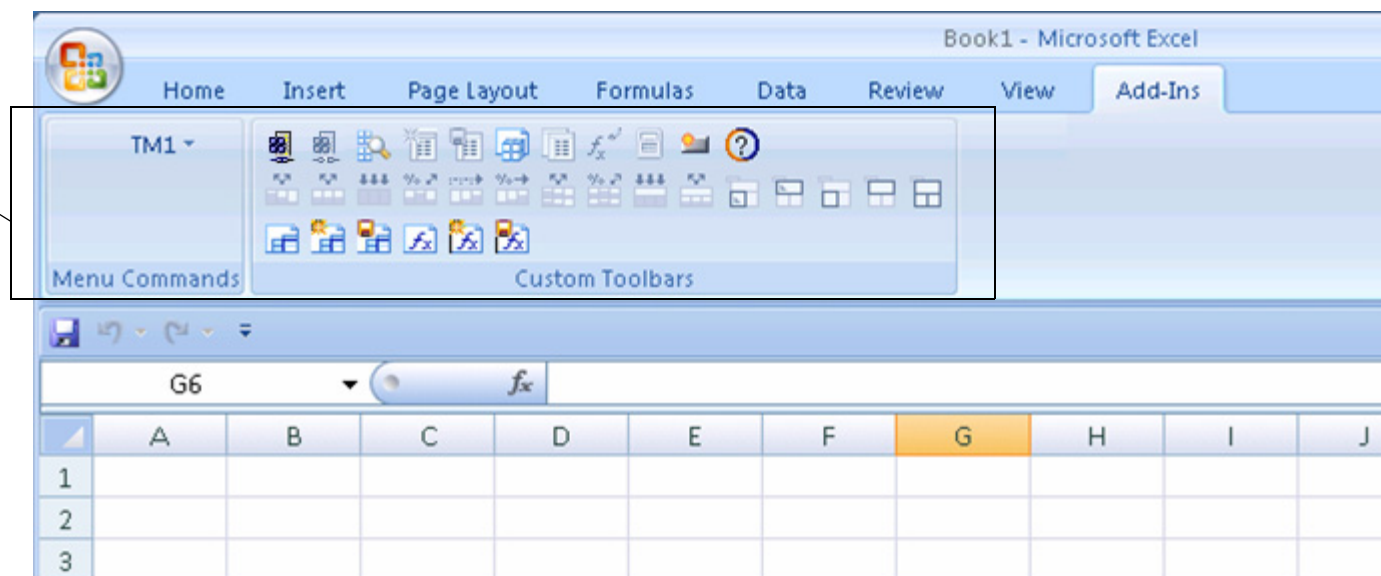


8. Make sure the TM1P check box is selected.
9. Click **OK** to close the Add-Ins dialog and return to Excel.

The TM1 toolbar now appears on the Add-Ins tab of the Excel 2007 ribbon.



TM1 add-in toolbar in Excel 2007



Adding the TM1 Toolbars to the Excel 2007 Quick Access Toolbar

This section describes the differences in the appearance and configuration of the TM1 toolbars in Excel 2003 and 2007.

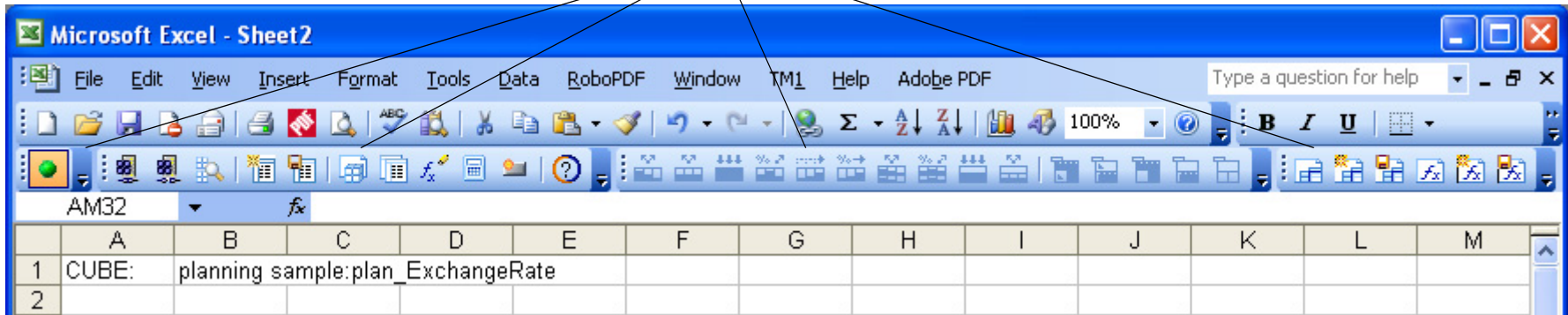
The TM1 toolbars include the following:

- TM1 Developer toolbar
- TM1 Servers toolbar
- TM1 Spreading toolbar
- TM1 Standard toolbar

In Excel 2003, the TM1 toolbars appear with the standard Excel toolbars as shown in the following figure.

Excel 2003

TM1 toolbars in Excel 2003



You can turn the display of each TM1 toolbar on or off separately in Excel 2003.

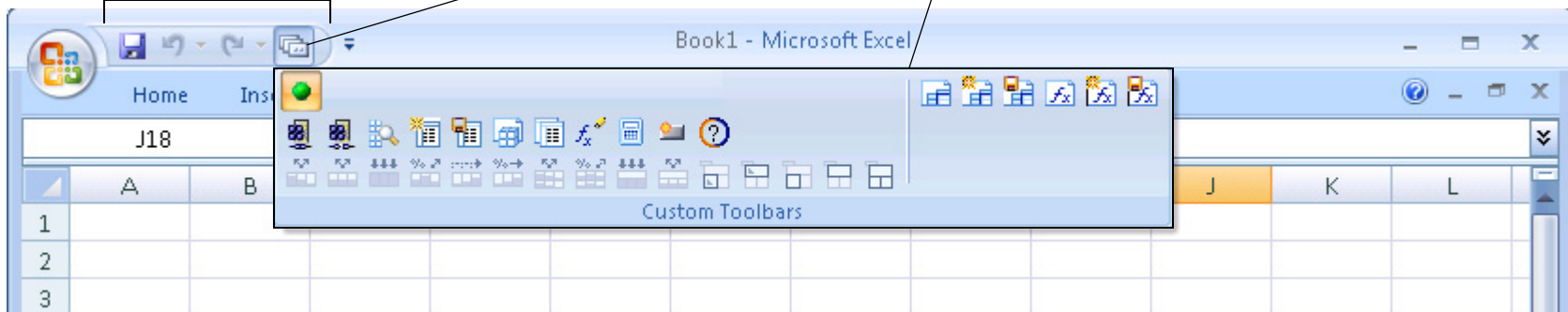
In Excel 2007, the TM1 toolbars appear under the Excel Add-Ins tab, but you can also choose to display them on Excel's new Quick Access toolbar, as shown in the following figure.

Excel 2007

Quick Access Toolbar

Custom Toolbars button

TM1 toolbars



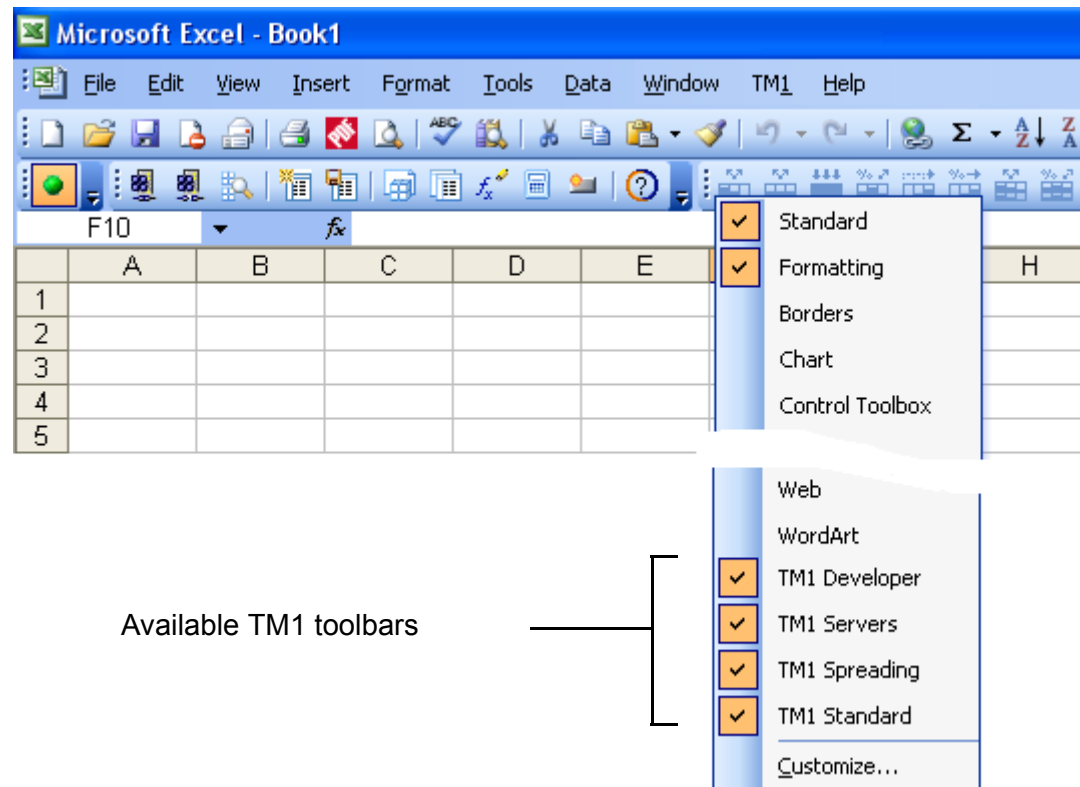
In this configuration, the TM1 toolbars only appear when you click on the Custom Toolbar button in the Quick Access toolbar. Another difference is that the four TM1 toolbars are grouped together in Excel 2007 and can not be turned on or off separately.

How to Display TM1 Toolbars in Excel 2003

To display the TM1 toolbars in Excel 2003:

1. Right-click on the Excel toolbar.

The list of available Excel and add-in toolbars appears.

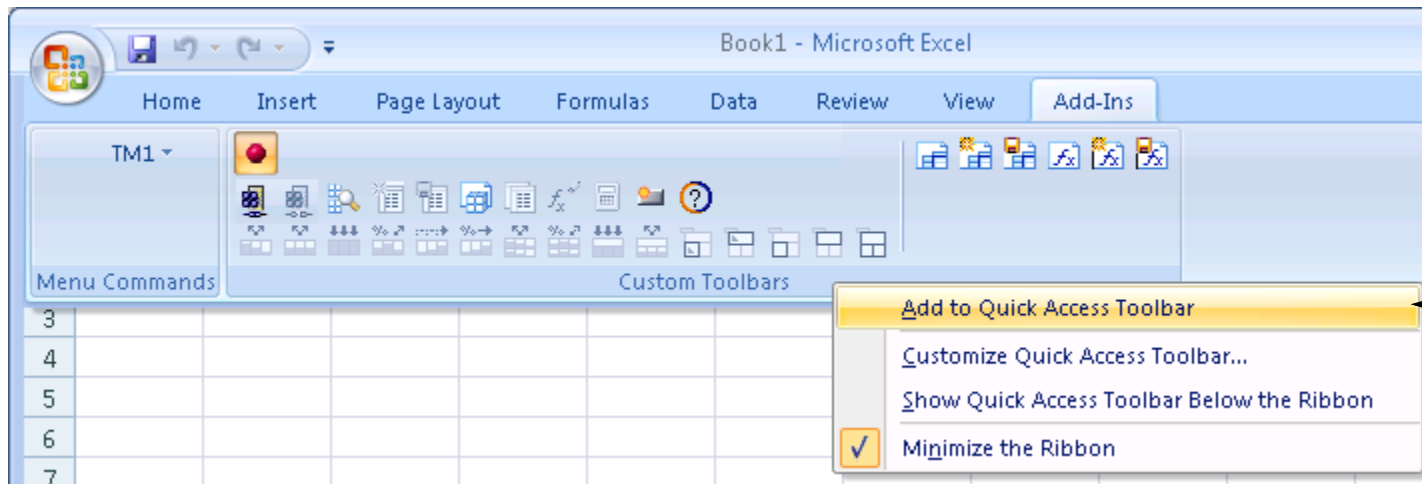


2. Click on a TM1 entry in the list to enable/disable any of the TM1 toolbars.

How to Add TM1 Toolbars to the Quick Access Toolbar in Excel 2007

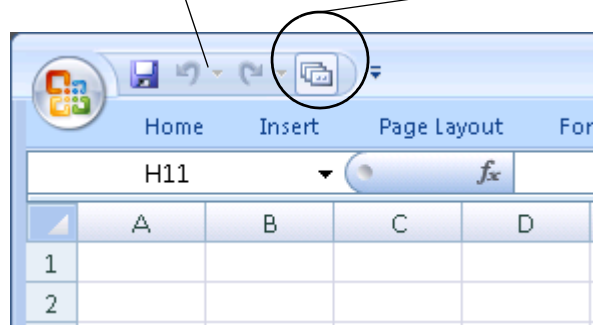
To add the TM1 toolbars to the Quick Access toolbar in Excel 2007:

1. Click the **Add-Ins** tab.
2. The Add-in ribbon tab appears.
3. Right-click on the Custom Toolbars label and select **Add to Quick Access Toolbar**.



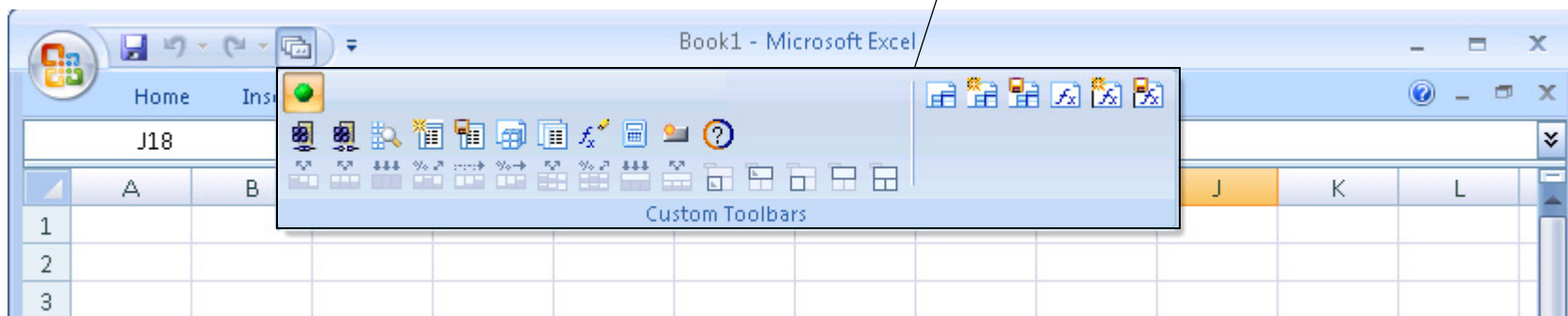
The Custom Toolbar button  appears in the Quick Access toolbar.

Quick Access Toolbar Custom Toolbars button



4. Click the Custom Toolbar button to display the TM1 toolbars.

TM1 toolbars



Modifying an Existing TM1 Action Button in Excel 2007

If you are working in Excel 2007 and want to move or resize an existing TM1 Action button in a worksheet, you need to make sure the Developer tab is enabled so you can access the Design Mode button.

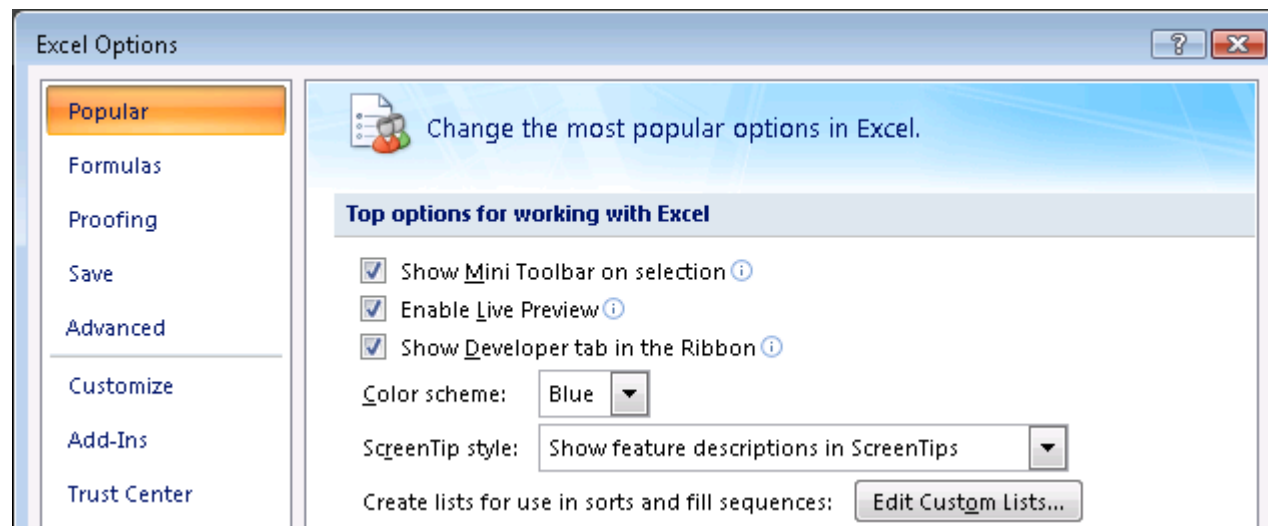
To enable the Developer tab in Excel 2007:

1. Click the **Office** button .

Excel's main menu appears.

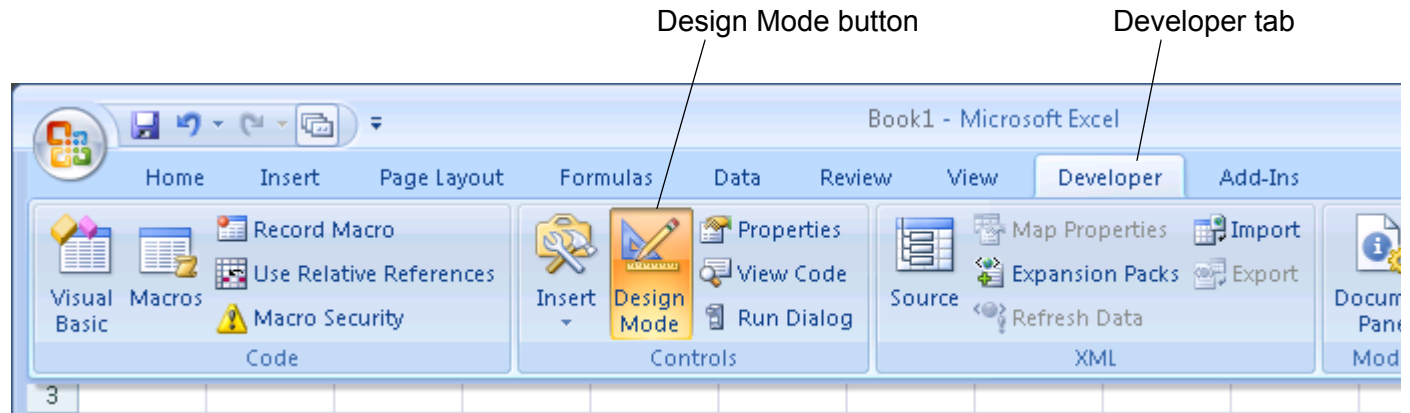
2. Click the **Excel Options** button.

The Excel Options dialog appears



3. Select **Show Developer tab in the Ribbon**.

4. Click **OK** to close the Excel Options dialog.
The **Developer** tab now appears in the ribbon.
5. Click the **Developer** tab to access the **Design Mode** button.



6. Click to enable the **Design Mode** button.
Excel changes to Design Mode and you can now move and resize an existing TM1 Action button.
7. Click to disable the **Design Mode** button and exit Design Mode.