# Creating a Toolbar button to access an Excel Cube

This document is intended to walk a user through adding a button onto their Microsoft Excel toolbar. The button will contain code to automatically connect the user to an Excel data warehouse OLAP cube.

The steps involved in this process are as follows:
1. Verify /Create a data source to connect to the OLAP cube.
2. Create a macro to automate the connection.
3. Add the macro to your Excel Toolbar.

Verify /Create a data source to connect to the OLAP cube

1. Open a blank MS Excel worksheet
2. From the Data menu select Pivot Table and Pivot Chart Reports…
3. Place a check mark in both "External Data Source" and "Pivot Table" in step 1 of the Pivot Table and Pivot Chart wizard.
4. Select the "Get Data" button from step 2 of the Pivot Table and Pivot Chart wizard.
5. Select the OLAP Cubes tab at the top of the Choose Data Source Window.
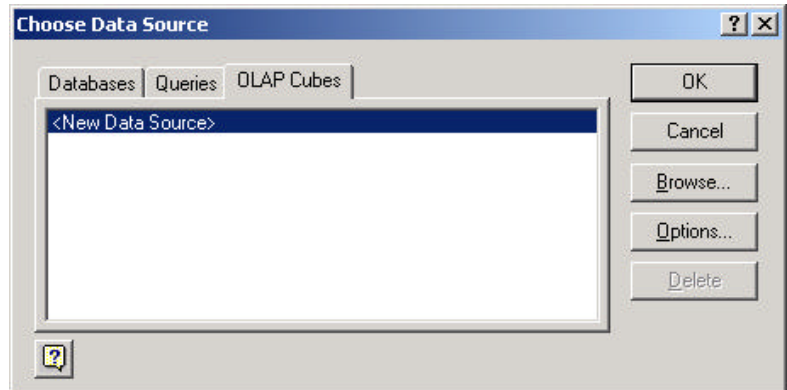
NOTE: If you have already created a working data source to connect to the cube, select the Cancel button (you have just verified a connection) and continue on to section 2 "Create a macro to automate the connection".

6. If no data sources are listed then select <New Data Source> and single-click the OK button
7. Enter a name for your data source that is unique and indicative of your connection (like DW_EXEL_CUBE) in **step 1**.
8. In **step 2**, the Select an OLAP provider for the database you want to access drop down option, select the Microsoft OLE DB Provider for Olap Services 8.0.
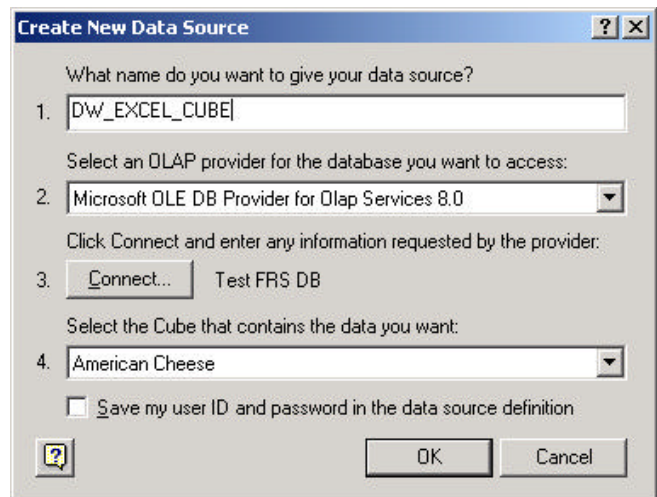
NOTE: If you do not have this option then please refer to installing PTS&ODBC.bat earlier in this document.

9. Click the Connect… button.
10. In the Multidimensional connection window, verify that Analysis server is selected and type in the name of the server that houses the data warehouse.
11. Click the Next > button
12. In the Select the Database you want to work with dialog box select the data warehouse database and select Finish. **Step 3** should now list the database name immediately to the right of the Connect… button (in this example it is Test FRS DB).
13. Select the cube that contains the data you want to access and single-click OK. (This is **step 4**)
14. In the Choose Data Source window, select the data source you just created and select OK.
15. Click the Next button.
16. Select either a New Worksheet or an Existing Worksheet; click Finish.
17. Drag the fields from the PivotTable Toolbar onto your pivot area.

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Create a macro to automate the connection

1. Open a new blank Excel worksheet.
2. Under the Tools Menu select Macro and Record New Macro.
3. Type In a name for the Macro that is indicative of the cube you are going to connect to (such as mcrPoolBalance)
4. Under the Store Macro In: drop down box, select Personal Macro workbook
5. Select OK to begin recording the macro. (You will see an additional toolbar appear to indicate that your macro is recording)
6. Complete steps 1-5 and 14 –16 in the above section "Verify /Create a data source to connect to the OLAP cube".
7. Once you have the pivot table appear in your Excel worksheet and can see the pivot table toolbar with the cube fields, select the Stop Recording (blue square) button on the Macro Toolbar.
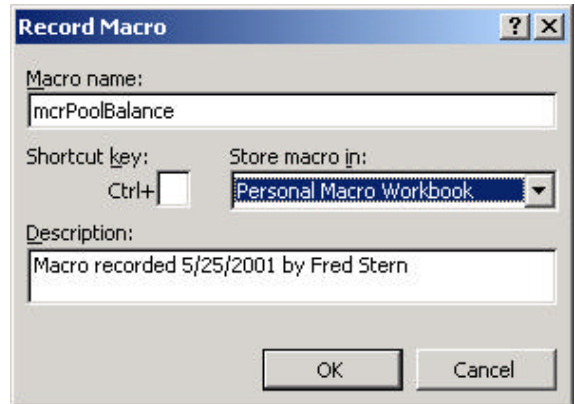
Add the macro to your Excel Toolbar

1. On the View menu select Toolbars and then Customize.
2. Select the Commands tab in the Customize window.
3. Scroll down in the left windowpane until you see Macros and select it.
4. Drag the custom button command from the right windowpane to your Microsoft Excel Toolbar.
5. Right-click on the button once it has been dragged onto the toolbar and select Assign Macro from the drop down list.
6. Select the macro that you have created and select OK.

Optional Customizations:

- Right-click on the button, and under Name type in a new name for the Macro (Ex. Pool Balance)
- Right click on the button and select Text Only(Always) to have the macro show its name rather than a picture.