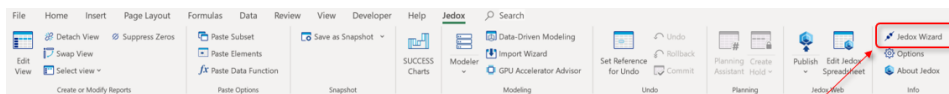


# Connection Wizard in Excel Add-in

Connection parameters for Excel Add-in are established in the Jedox Connection Wizard in the Jedox ribbon.



In the Connection Wizard, you can perform the following tasks:

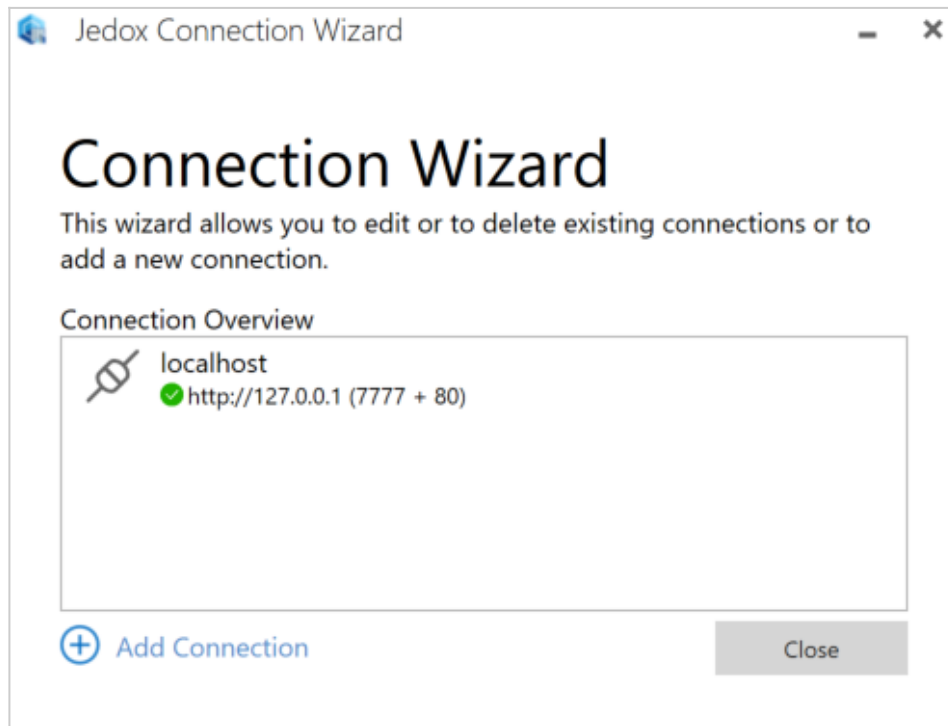
1. [Create, edit, and delete connections](#)
2. [Set the active connection](#)
3. [Connect to or disconnect from a server](#)
4. [Set an authentication method](#)

With a client/server installation, only the user who is logged in during the installation will be registered with the Jedox In-Memory DB (OLAP) server. Other users must register once they connect to the server. Connections remain in the list until they are deleted.

## 1. Creating, editing, and deleting connections

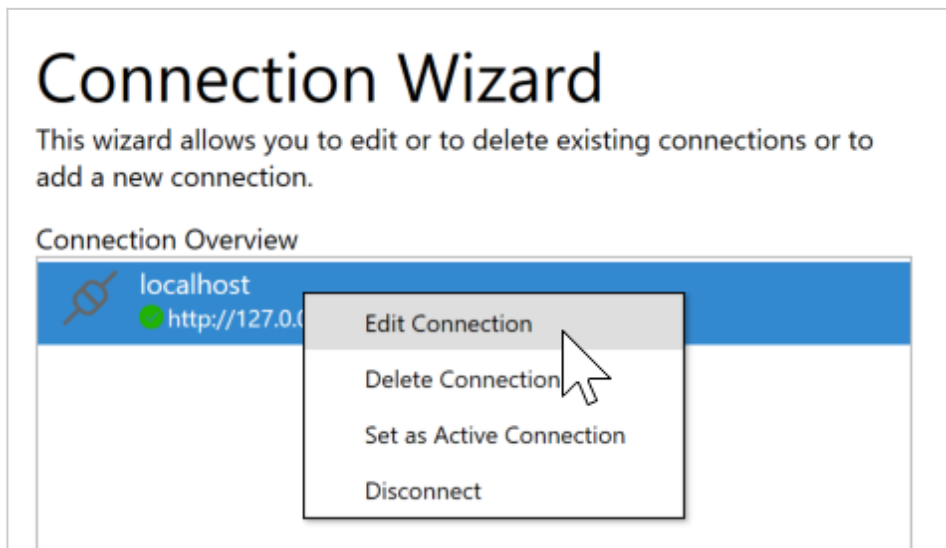
To create a new connection or to modify an existing connection, click **Jedox Wizard** in the Jedox Ribbon. The Jedox Connection Wizard

appears:



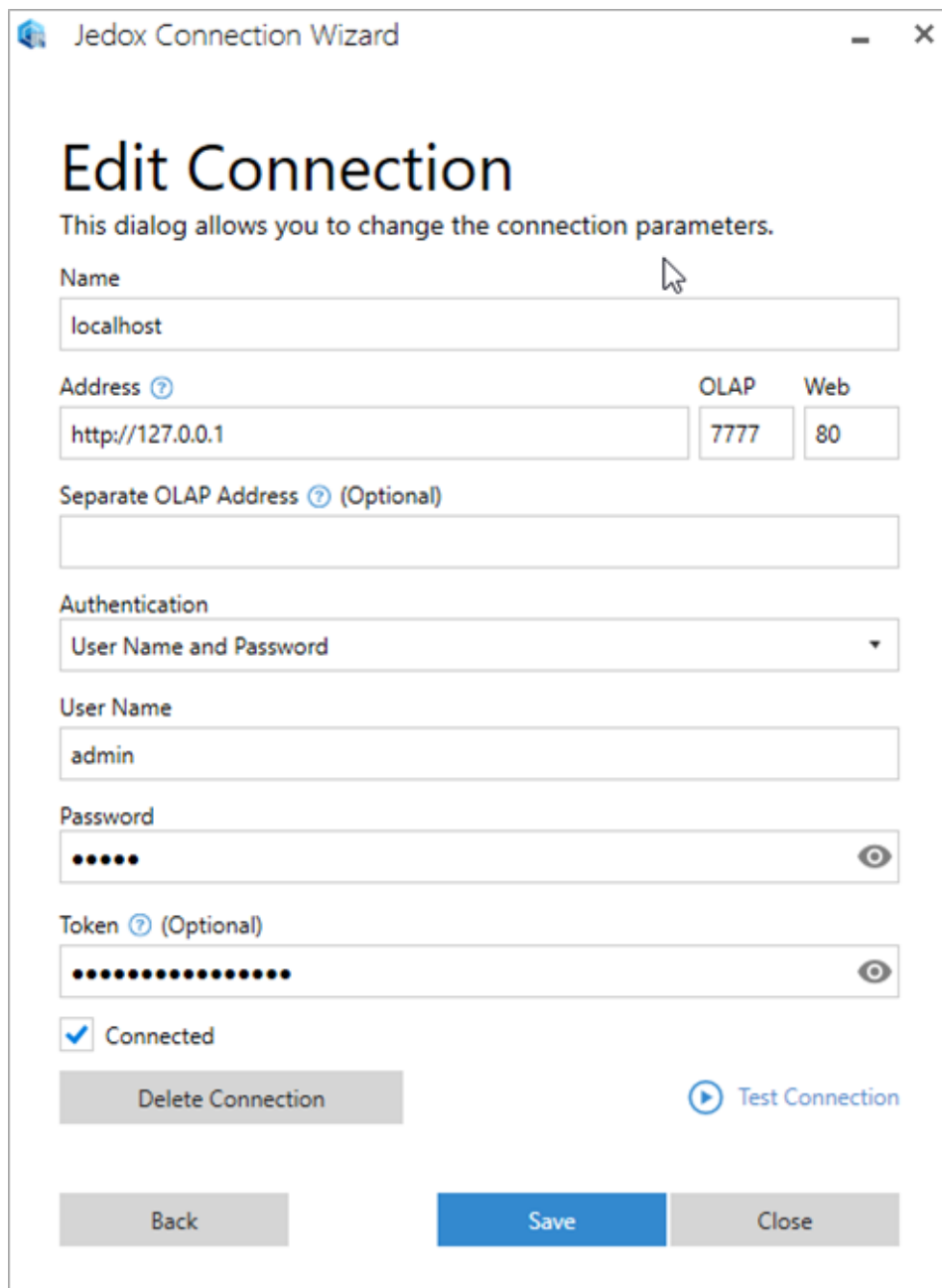
An overview of existing connections is displayed, as well as the **Add Connection** button.

To edit or delete an existing connection, right-click on it in the Connection Overview and select an option.



The Edit Connection dialog shows the connection parameters and the buttons **Delete Connection** and **Test Connection**. Always test the connection after making changes. Note that a valid token must be in place for the test to work.

The screenshot below shows the default settings for a local connection, which is created when you install Jedox.



The screenshot shows a window titled "Jedox Connection Wizard" with a close button. The main heading is "Edit Connection". Below it, a subtitle reads: "This dialog allows you to change the connection parameters." The form contains the following fields and controls:

- Name:** A text input field containing "localhost".
- Address:** A text input field containing "http://127.0.0.1".
- OLAP:** A numeric input field containing "7777".
- Web:** A numeric input field containing "80".
- Separate OLAP Address (Optional):** An empty text input field.
- Authentication:** A dropdown menu currently set to "User Name and Password".
- User Name:** A text input field containing "admin".
- Password:** A password input field with six dots and a visibility icon.
- Token (Optional):** A text input field with ten dots and a visibility icon.
- Connected:** A checked checkbox.
- Buttons:** "Delete Connection" (grey), "Test Connection" (blue with play icon), "Back" (grey), "Save" (blue), and "Close" (grey).

In most Jedox installations, the OLAP and Web servers are installed on the same machine. Since the address will be the same for the OLAP connection, you can leave the **Separate OLAP Address** field blank.

If the Jedox OLAP and Web servers are *not* installed on the same machine, you have to enter the address of the Jedox Web Server in the **Address** field and the OLAP server address in the **Separate OLAP Address** field. See [Accessing the Jedox In-Memory DB from Client Machines](#) for more information.

If you are accessing the OLAP server via a proxy, you can indicate the proxy server in the **Separate OLAP Address** field in this manner:

`@<Proxyname|Proxyip>:<ProxyPort>`

For example: @192.168.2.110:8080

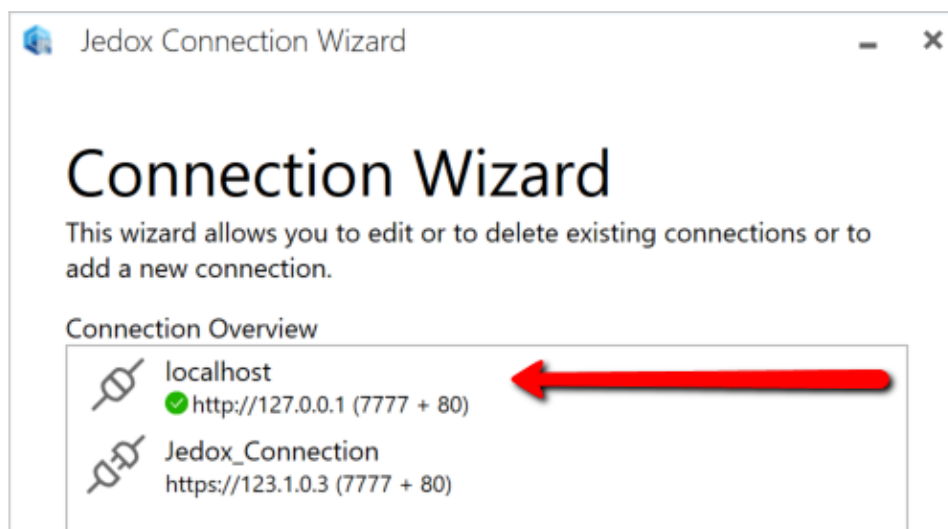
### Notes on Jedox connections:

- The active connection is used for the Modeler in Jedox Excel Add-in.
- When updating from a Jedox version older than 2018.2, Excel attempts to convert existing connections. If the OLAP and Web connection have the same name (e.g. when they point to a Jedox Cloud), the Jedox Connection Wizard will merge these into a single connection. If the OLAP and Web connections have different names, the new connection will only work for the OLAP dialogs, such as Paste View, but not for the complete functionality of a Web connection, because there cannot be set an active connection to Jedox Web (see next section).
- In all cases where the user interface is provided by Jedox

Web, the Jedox Web language setting of the active connection will be used.

## 2. Setting the active connection

The **Active Connection** is indicated with a green checkmark in front of the address:



To set a connection as active, right-click on it and select the context-menu option **Set as Active Connection**.

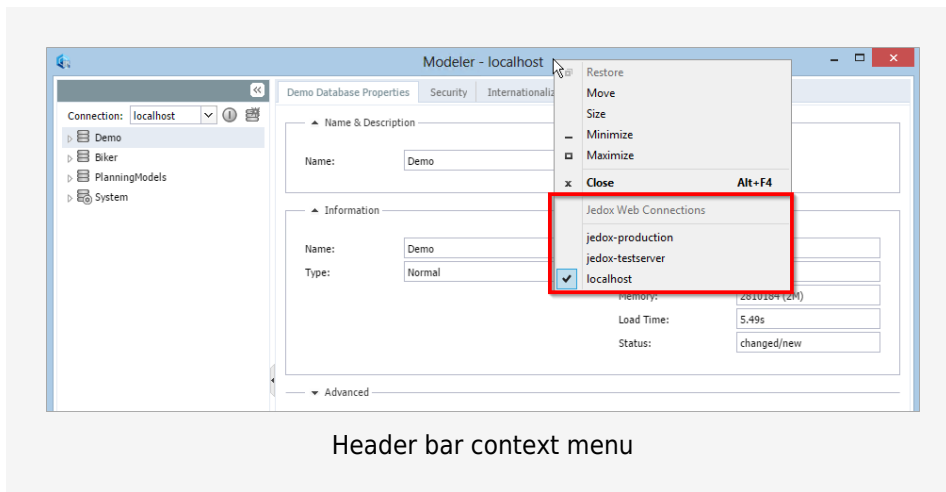
For Jedox Web connections, you can define multiple connections in parallel, but for complete functionality, one of these connections must be designated as the active connection.

To publish Excel files in Jedox Web or to load Jedox spreadsheets from Jedox Web in Excel, the active connection must have the following entries:

- A valid URL connection in the displayed format with a port specification
- Valid authentication credentials
- The security token must match the entry “CFG\_SECRET” in the config.php file (...\\jedox Suite\\httpd\\app\\etc\\config.php).

## Changing the active Jedox Web connection

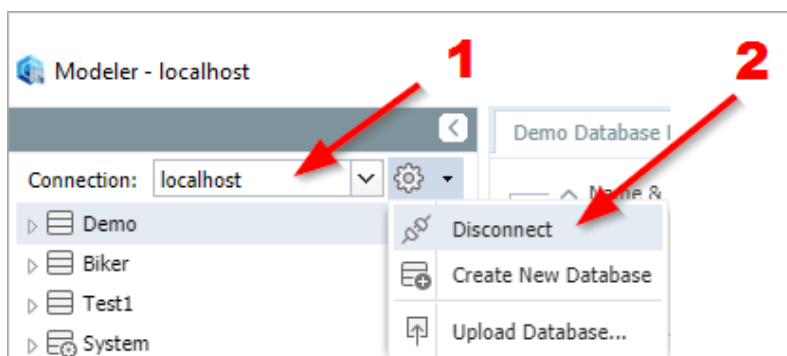
The active connection, used by the Excel Add-in dialogs that access Jedox Web, can be changed from each Web dialog directly. To change the connection, right-click the header bar of any Web dialog (such as Modeler), and select the connection from the context menu. The selected connection will then be used in the opened dialog and other dialogs that access Jedox Web.



### 3. Connecting to or disconnecting from a server

There are different ways to connect or disconnect a server:

- Right-click on connection in the Connection Wizard.
- In Web dialogs (such as Modeler or Paste View), select the connection from the Connection drop-down list (1) and then choose an option with the cog wheel (2):





## 4. Setting an authentication method

Authentication options in Jedox include username and password, [Windows Authentication \(SSO\)](#), and [SAML](#). All are natively supported in Jedox. The desired option can be selected from the Authentication drop-down menu in the Edit Connection dialog, as shown below.

### Edit Connection

This dialog allows you to change the connection parameters.

Name

Address ?  OLAP  Web

Separate OLAP Address ? (Optional)

Authentication

SAML Authentication ▼

User Name and Password

Windows Authentication

SAML Authentication

Connected

Delete Connection ▶ Test Connection