MICROSOFT EXCEL CONNECTOR

Organizations across industries have come to rely on Microsoft® Excel™ to collect, organize, manipulate and visualize large sets of data. As a result, many business professionals have experience and expertise using the familiar spreadsheet software for data management, analysis, and reporting. That's why ProcessUnity offers a desktop integration tool that enables seamless data sharing between Excel and the ProcessUnity platform.
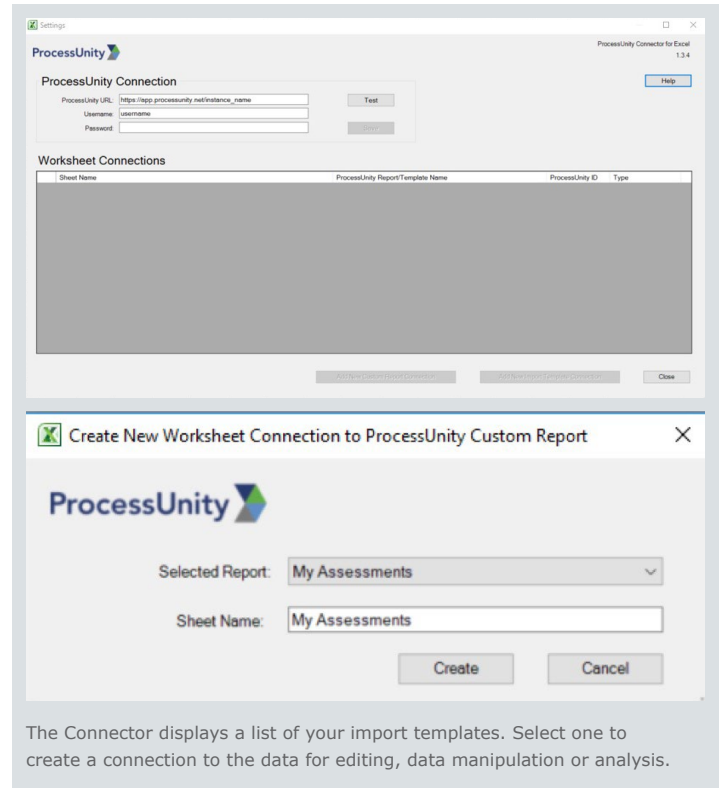
The Excel Connector allows users to quickly load data into the ProcessUnity platform using import templates. The add-on solution also makes it easy to access data stored in your ProcessUnity instance to support external workflows and data manipulation — all via an additional tab in your Excel toolbar.

With the Excel Connector, you have the freedom to maintain existing Excel-based data sets and seamlessly integrate them into your processes and workflows. At the same time, you gain the flexibility to query data from ProcessUnity and work offline in Excel for efficient data manipulation and reporting. The Excel Connector also provides an effective way to report out to managers and executives who may not have access to the ProcessUnity platform.

Once installed and activated, the Excel Connector appears as a ProcessUnity tab on the Excel ribbon, providing fast, easy access to data stored within the ProcessUnity platform.
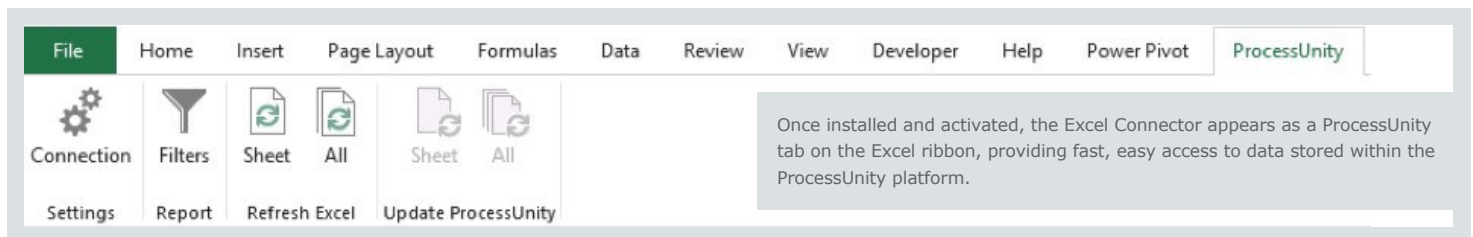
Quick, easy data import

The Excel Connector lets you automatically import data stored in Excel worksheets into your ProcessUnity instance using simple import templates. To create a new import template, you simply navigate within

The Connector displays a list of your import templates. Select one to create a connection to the data for editing, data manipulation or analysis.

ProcessUnity to the settings area, import templates, select the appropriate headers, and save the template. The Connector will display your list of import templates, and you select the one to be added to your workbook for easy data manipulation and import into ProcessUnity.

The tool also facilitates bulk updates from Excel to records stored in ProcessUnity to ensure current, consistent information is available within the platform for storage, action or reporting.

Once installed and activated, the Excel Connector appears as a ProcessUnity tab on the Excel ribbon, providing fast, easy access to data stored within the ProcessUnity platform.

ProcessUnity

Flexible data export and manipulation

Through simple navigation within ProcessUnity, you can easily create custom reports to extract data from specific ProcessUnity subject areas and properties and pull directly into Excel. The Excel Connector will use the custom report to extract the specified data into the Excel spreadsheet where you can then perform a variety of functions such as:

- Create pivot tables
- Explore weighting scenarios
- Run additional calculations
- Execute mail merges
- Compare/combine with data from other systems
- Generate ad-hoc reports and analysis in Excel using data from ProcessUnity
- Normalize and cleanse data to re-import into the system
- Explore updates to your inherent risk methodology using raw data

ProcessUnity's cloud-based solutions help organizations of all sizes automate their risk and compliance programs. Our highly configurable, easy-to-use tools significantly reduce manual administrative tasks, allowing customers to spend more time on strategic risk mitigation. As a software-as-a-service technology, ProcessUnity deploys quickly with minimal effort from customers and their IT resources. Our technology delivers faster, better results, and the ability to scale governance, risk, and compliance programs over time. Learn more at www.processunity.com.

Availability and requirements

The Excel Connector is included with select ProcessUnity packages and is available as a separately priced add-on subscription for other editions. It requires a current license for Microsoft Excel version 2013 or higher.

Interested?

For more information,
visit www.processunity.com/integration
or contact us at info@processunity.com.

ProcessUnity

190618