

PROBLEM SOLVING · RESEARCH ARTICLE

Excel still multiplies what your planning platform *can do*.

A modern planning platform does not make Excel obsolete. It makes Excel better — if the two work on the same numbers. EAConnect Planning gives finance teams a full web experience: driver-based models, input forms, workflows, dashboards and an AI assistant. Yet on any given Monday most of the same people still have a spreadsheet open. That is not a failure of adoption; it is a sign that Excel does a different job, and does it well. This article explains why Excel keeps its place next to a comprehensive planning UI, and how the EAConnect Excel add-in lets a team use both without copying numbers between them.

AUDIENCE

Leaders of mid-size enterprises

THE PRINCIPLE

Govern on the web · think in Excel · one model

ROUTES INTO A
WORKBOOK

Add-in ·
automation ·
broadcasts

READING TIME

7 min read

Series Hours, Not Months Evidence EAConnect Excel add-in screens, Sept 2026

Standard product behaviour as shown; opinion labelled as such

01 Why Excel still multiplies productivity

The web platform is where the plan is governed. Excel is where people think, check and package it. Each is best at different work, and the mistake is to make one do the other's job.

THE WEB PLATFORM IS BEST AT	EXCEL IS BEST AT
One governed model with security, locks and audit	Fast, personal analysis on top of those numbers
Structured data entry through forms and workflows	Side calculations the model was never built to hold
Consolidation, currency translation, allocations	Combining plan data with a bank file, a quote or a list
Dashboards that everyone reads the same way	Exact layouts for board packs and management packs
Approvals, versions and a single source of truth	A scratch model in minutes, before it earns a place in the platform
The left column is about the number of record. The right column is about what people do with it. A platform that tries to absorb the right column ends up with a worse spreadsheet inside a browser.	

Four reasons Excel keeps its place

Everyone already knows it

Finance teams think in formulas and shortcuts. Asking them to leave that behind slows them down, and the slowdown is paid every day.

The last mile is ad hoc

A CFO's question on Tuesday afternoon rarely matches a dashboard built last quarter. The answer usually needs a pivot, a side column and a chart, in the next twenty minutes.

Presentation matters

Board packs need exact fonts, footnotes, page breaks and the same layout as last quarter. That is document work, and Excel is a better document tool than any grid.

Iteration is cheap

An analyst can test an idea in ten minutes before asking anyone to change the model. Most ideas do not survive the ten minutes, and that is the point.

The risk was never Excel

It is the *exported copy*: numbers that go stale the moment they leave the system, versions emailed around, and no trail back to the source. The 96% of FP&A teams who use spreadsheets weekly are not the problem. The export is. The answer is to connect Excel to the platform, not to ban it.

02 One model, many ways in

In EACConnect, Excel is a first-class way into the plan, not an export target. The web platform, the Excel add-in, server-side Excel automation and scheduled broadcasts all read the same governed model.

EVERY PATH FROM THE MODEL TO A WORKBOOK IS READ FROM THE SAME GOVERNED SOURCE



Automation and broadcasts produce finished workbooks from the same source, so every copy can be traced back and refreshed. Nothing is a snapshot nobody can reconcile.

Figure 1. One model, three routes into a workbook. The add-in is interactive; automation and broadcasts are produced; all three read the governed model rather than an export of it.

03 The EAConnect Excel add-in

Governed EAConnect reports inside Excel — live, refreshable, in a single sidebar. There is no new ribbon to learn: open the add-in and everything happens in one pane beside the sheet.

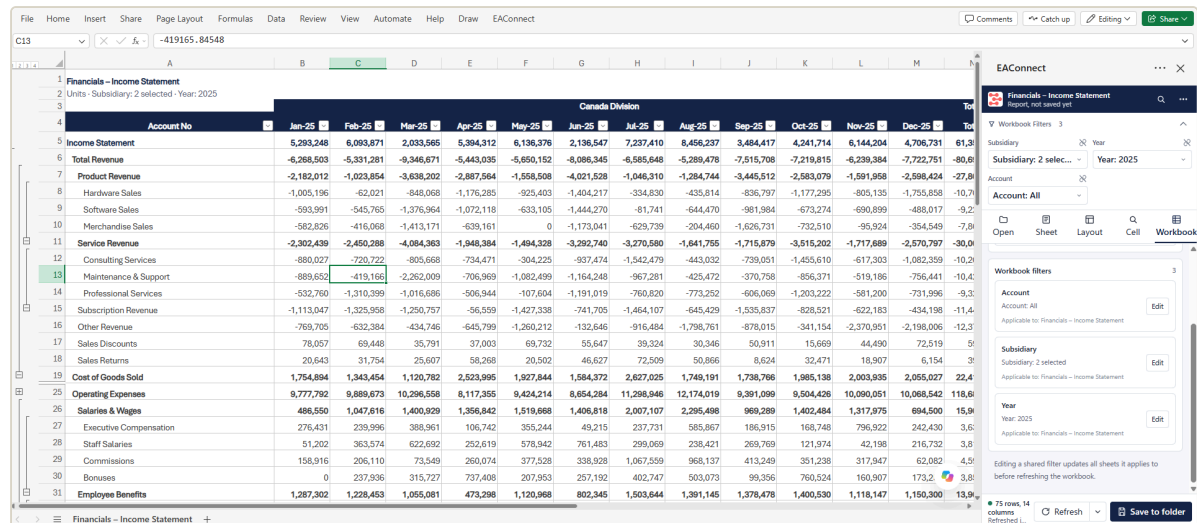


Figure 2. A governed report on an Excel sheet as real cells with outline groups, and the add-in sidebar to its right. Formulas, charts and notes added around the report stay put on refresh.

How it works

1

Sign in once

A small window asks for your EAConnect account. You see exactly the data you can see on the web — the same access rules, nothing more.

2

Open a report

Pick a saved report or start from any EAConnect report. It lands on its own sheet as real Excel cells, not an image or a locked object.

3

Work in Excel

Add formulas, charts and notes around the report. They stay where you put them when the numbers refresh.

4

Refresh or save

One click pulls the latest numbers. Save the layout to a shared folder so colleagues open the same view, from the same source.

04 A tour of the add-in

Five features do most of the work: hierarchies, the layout editor, the report library, shared filters and saving to folders.

Hierarchies that behave like Excel

Account hierarchies arrive as Excel outline groups. Use the +/- buttons in the margin, or the 1, 2, 3 level buttons, exactly as in any workbook. Choose which level the report opens at, and nest another field — Department, say — under each account. The hierarchy is the platform's versioned hierarchy; the outline is Excel's.

Change the layout without leaving the sheet

The layout editor sits in the sidebar. Add fields to Rows, Columns or Values with one click or by dragging, and pick Sum, Average, Min, Max or Count for each value. Changes wait until you press *Apply and refresh*, so the report reloads once, not after every click.

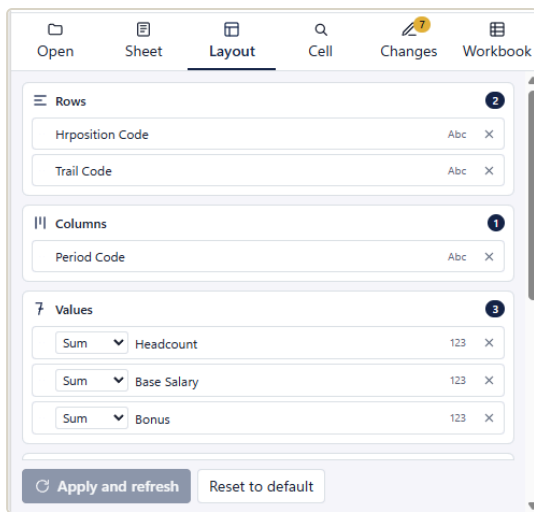


Figure 3. The layout editor: rows, columns and values, with an aggregation per value and a single apply.

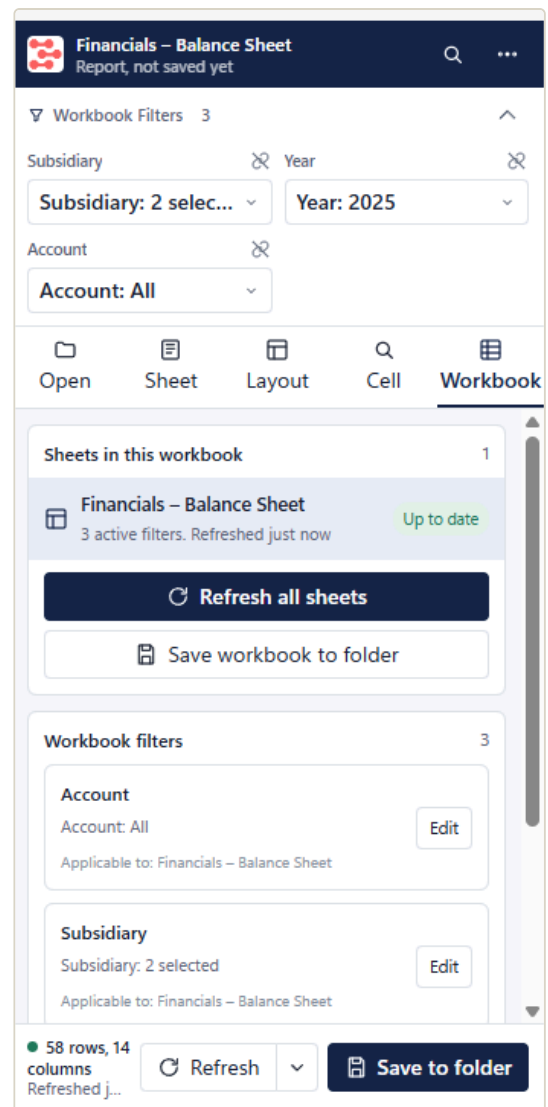


Figure 4. Filters as chips at the top of the sidebar, and the Workbook tab: every EACConnect sheet, its refresh status, one refresh for all of them.

Every report in one place

The Open tab lists reports saved to shared folders, the EACConnect reports you can start from, and a search box across all of them. Each report opens on its own sheet, so one workbook can hold a whole management pack.

Filter once, refresh everything

Filters sit at the top of the sidebar as chips. When two sheets use the same field, tick *Apply to* and they share one filter: change Subsidiary once and both reports update. *Refresh all sheets* brings every EACConnect sheet in the workbook up to date in one go.

< Filter by account

Search values

Select all Clear

☐ **IS Income Statement**

☐ **4000 Total Revenue**

☐ **4100 Product Revenue**

☐ 4110 Hardware Sales

☐ 4120 Software Sales

☐ 4130 Merchandise Sales

☐ **4200 Service Revenue**

☐ 4210 Consulting Services

☐ 4220 Maintenance & Support

☐ 4230 Professional Services

☐ 4300 Subscription Revenue

☐ 4400 Other Revenue

☐ 4500 Sales Discounts

☐ 4600 Sales Returns

☐ **5000 Cost of Goods Sold**

☐ 5100 Direct Materials

☐ 5200 Direct Labor

☐ 5300 Manufacturing Overhead

☐ 5400 Shipping & Handling

☐ 5500 Cost of Services

☐ **6000 Operating Expenses**

Cancel Apply and refresh

Figure 5. Filtering by account over the platform's hierarchy, with a single apply.

< Save to folder

Update "Income statement by month FY25" **Save as new**

Priya Nair owns this report and you can only view it, so save a copy.

Name

Income statement by month FY25 (copy)

Folder

My reports

Description

Optional

Saved reports appear under Open for everyone who can see the folder. This workbook also remembers the link.

Cancel Save

Figure 6. Saving a layout to a shared folder — as a copy when the user only has view access to the original.

Save to shared folders

Save to folder stores the layout, filters and hierarchy settings in EAConnect, where the team can open them. If you only have view access to a report, the add-in saves a copy to your own folder rather than overwriting the original. Saved reports appear under Open for everyone who can see the folder, and the workbook remembers the link.

05 More Excel in EAConnect

The add-in is for people working in Excel. Two more features deliver Excel

files to people who are not.

FEATURE	WHAT IT DOES	USE IT FOR
Excel automation	Generates finished XLSX or XLSM workbooks from EAConnect reports on the server: your own templates filled with live data, several reports in one workbook with a cover sheet, and hierarchies that expand and collapse inside the file. Handles up to 100,000 rows per grid.	Board packs and regulatory templates in a fixed format
Report broadcasting	Emails a report as an Excel attachment on a schedule. Filters and titles resolve when it is sent, so "current month" always means the current month. Each run is logged with sent and failed counts.	Monthly packs to executives, weekly flash reports to regional managers
Together with the add-in, these cover the three ways a workbook leaves the platform: pulled live by an analyst, generated to a template, or delivered on a schedule — and in each case the file can be traced to the model and the version it came from.		

06 A practitioner's view for leaders

Opinions from people who have watched planning platforms succeed and fail on their relationship with Excel. Not product claims.

Do not ban the spreadsheet; ban the export

Every planning implementation that tried to eliminate Excel produced shadow workbooks within a quarter. The governed number belongs in the platform; the thinking belongs wherever the analyst is fastest. Connect the two and the shadow copies stop, because they are no longer necessary.

Live cells, not images

An add-in that pastes a picture of a report is an export with extra steps. Real cells with outline groups, refreshed from the model under the user's own access rules, are the difference between a workbook that stays right and one that was right on Tuesday.

Let layouts be shared objects

When a saved layout lives in the platform rather than on someone's drive, the management pack survives the analyst who built it. Save-to-folder with view-only copies is the small feature that makes this safe.

Put fixed formats on the server

Board packs and regulatory templates should be generated, not hand-assembled. Automation from a template with live data, and broadcasts that resolve filters at send time, remove the last-mile hours without removing the last-mile format.

Measure the scratch models

A scratch model that survives three cycles has earned a place in the platform. Ask analysts quarterly which side calculations they keep re-doing; those are the next driver models.

Getting started

If your team plans in EAConnect and still lives in Excel, you no longer have to choose. Ask your EAConnect administrator to enable the Excel add-in for your workspace, or contact the EAConnect team for a walkthrough.

EAConnect Planning · Research library · Hours, Not Months

Evidence: EAConnect Excel add-in screens (report sheet, layout editor, workbook filters, workbook tab, account filter and save dialog), Sept 2026; Excel automation and broadcasting as described by EAConnect. The 96% figure is from the AFP FP&A Benchmarking Survey 2025.

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