Excel 2013 for Business Intelligence (Part 1)

Tom Jones - President, Iridium Technology LLC
Why Two Parts?

- Two factors
  - Huge interest from ILTA members
  - Huge number of cool new features

- Part 1
  - Overview of the new features
  - Demos of basic analysis features

- Part 2
  - *(If scheduled due to popular demand)*
  - Deep dive on advanced analysis features
Introduction - Iridium Technology

- “Business Intelligence for Law Firms. Period.”
- Founded in 2009
- 9-member team 100% focused on BI for Law Firms:
  - BI implementations
  - Profitability and GL cubes
  - Custom BI projects
  - SSRS Reports and Dashboards
- 27 Clients in all regions
- 25,000 hours of experience with BI for law firms
Background - Tom Jones

- 25 years experience with financial systems
- Co-founded Icon Technology in 1996 - developed the original versions of:
  - Expert Budgeting
  - Expert Profitability
  - Expert Report Center
- ADERANT employee for 11 years
  - Director - BI Development
  - Director - BI Product Management
  - Director - Product Marketing
- Microsoft Certified BI Developer
# References

**Excel 2013 In Depth** by Bill Jelen (Feb 4, 2013)

<table>
<thead>
<tr>
<th>Formats</th>
<th>Price</th>
<th>New</th>
<th>Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paperback</td>
<td>$49.99</td>
<td>$31.49</td>
<td>$28.28</td>
</tr>
<tr>
<td>Kindle Edition</td>
<td>$21.99</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Order in the next 5 hours to get it by Friday, Mar 15.

Sell this back for an Amazon.com Gift Card.

---

**Excel 2013 Pivot Table Data Crunching (MrExcel Library)** by Bill Jelen and Michael Alexander (Jan 26, 2013)

<table>
<thead>
<tr>
<th>Formats</th>
<th>Price</th>
<th>New</th>
<th>Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kindle Edition</td>
<td>$17.27</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Order in the next 5 hours to get it by Friday, Mar 15.

Sell this back for an Amazon.com Gift Card.
Cool New Features - Round 1

(No Demo - Just Slides)
SkyDrive Integration

- What the heck is SkyDrive?
- 7 GB of free cloud storage that's accessible from anywhere.

Save As

- Iridium Technology LLC
- SkyDrive
- Computer
- Add a Place

Use SkyDrive to access your files from anywhere and share with anyone.
How Does Excel Find My SkyDrive?

Account

User Information

Tom Jones
tom.jones@iridium-technology.com

Change photo
About me
Sign out
Switch Account

Office Background:
No Background

Office Theme:
White

Connected Services:

CAN'T DISPLAY ONLINE SERVICES
Sorry, we had a server issue and can't display your connected services. Please try again.
Try again

Iridium Technology LLC
tom.jones@iridium-technology.com
Add a service

Product Information

Office

Product Activated
Microsoft Office Professional Plus 2013
This product contains

About Excel
Learn more about Excel, Support, Product ID, and Copyright information.
Managing Add-ins

- This is where you enable PowerView, Solver, etc.
- You should disable anything you don’t need
One Workbook, One Window

- Each workbook has its own window, making it easier to work on two workbooks at once or with two monitors.
About 50 new functions...

... 45 of which you will probably never use!

<table>
<thead>
<tr>
<th>Function</th>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEILING.MATH function</td>
<td>Math and trigonometry:</td>
<td>Rounds a number up, to the nearest integer or to the nearest multiple of significance</td>
</tr>
<tr>
<td>SHEET function</td>
<td>Information:</td>
<td>Returns the sheet number of the referenced sheet</td>
</tr>
<tr>
<td>SHEETS function</td>
<td>Information:</td>
<td>Returns the number of sheets in a reference</td>
</tr>
<tr>
<td>UNICHAR function</td>
<td>Text:</td>
<td>Returns the Unicode character that is references by the given numeric value</td>
</tr>
<tr>
<td>UNICODE function</td>
<td>Text:</td>
<td>Returns the number (code point) that corresponds to the first character of the text</td>
</tr>
<tr>
<td>WEBSERVICE function</td>
<td>Web:</td>
<td>Returns data from a web service.</td>
</tr>
<tr>
<td>XOR function</td>
<td>Logical:</td>
<td>Returns a logical exclusive OR of all arguments</td>
</tr>
</tbody>
</table>
Licensing / Office 365

- Subscription based Microsoft Software
- $6/month/user for SharePoint, Exchange, Lync, etc.
- $15/month/user including Office

Office applications
- Word
- Excel
- PowerPoint
- Outlook
- OneNote
- Access
- Publisher

Related products
- Exchange
- SharePoint
- Lync
- Project
- Visio
- Office Web Apps
- Office for Mac
Got Kids? Office 365 Home

- The Jones home:
  - (2) Business laptops
  - (1) Personal Windows laptop
  - (2) MacBooks for the boys
Sharing (WebEx Style)

- Save to SkyDrive, then share with Lync

**Share**

Silver Demo - Performance
C: » Users » tom.jones » Google Drive » Tom - Scr...

**Invite People**

- Step 1: Save your document to a SkyDrive location
- Step 2: Share your document. We'll do this after you've finished saving.

**Email**

Silver Demo - Performance.xlsx - Excel
Sharing - Email

**Silver Demo - Profitability**
C: » Users » twnjones » Google Drive » Tom - Scr...

### Share
- **Invite People**
- **Email**

### Email
- Send as Attachment
  - Everyone gets a copy to review
- Send a Link
  - Everyone works on the same copy of this workbook
  - Everyone sees the latest changes
  - Keeps the email size small
  - Workbook must be saved in a shared location
- Send as PDF
  - Everyone gets a PDF attachment
  - Preserves layout, formatting, fonts, and images
  - Content can't be easily changed
- Send as XPS
  - Everyone gets an XPS attachment
  - Preserves layout, formatting, fonts, and images
  - Content can't be easily changed
- Send as Internet Fax
  - No fax machine needed
  - You'll need a fax service provider
Collaboration

- Co-authoring and versioning

- When you’re on a tight schedule and several people have to collaborate on a document, **co-authoring** is a good way to let everyone work on the document at the same time. (SkyDrive with Excel WebApp)

- Versioning is supported (with roll back)
Microsoft’s Response to Tom’s Pet Peeves in Excel 2010...
Iridium Query of the Day ("QOTD") Program

- QOTD is part of Iridium’s training curriculum
- 23 lessons to get our clients to “expert” level in analysis
- Focused on building pivot tables connected to a cube
- QOTD #14: Pet Peeves...
Pet Peeve #1: Poor Cube Navigation in Excel

Excel 2010

SQL Server Mgmt Studio

Excel 2013 (Partially Fixed)
Pet Peeve #2: ‘Not all items showing’ error when filtering over 10,000 rows of data

- Not fixed in Excel 2013
- Workaround exists (filtering)
Pet Peeve #3: Lack of Cascading Filters

- You filter on FY 2010...
- So why are 2005 FY periods offered?
- Not fixed in Excel 2013
- Workaround exists
Pet Peeve #4: Slow Filtering Large Dimensions

- With large dimensions, “Keep Only Selected Items” is very slow
- Fixed in Excel 2013!
- This one feature is worth upgrading for if you are a power user
Cool New Features - Round 2

(No Demo - Just Slides)
New Look and Feel

- Microsoft “Metro” Style
- Very minimalist
- No shadows, round button edges, etc.
- Most people either love it or hate it
- Applied to all Office 2013 products
Fewer Dialog Boxes

- Dialog boxes have been replaced with “task panes”
- Task panes remain open until closed or overwritten
Templates (Does anyone need Publisher?)

- Generic family budget
- Movie list app
- My financial portfolio
- Home loan comparison
- Employee training tracker
- Family tree with details
- Quarterly sales report
- Group weight tracker
From a Facebook Cynic...

- Post to Social Network option
- The best way to save the file first to SkyDrive.
- Seriously? How have I survived all these years without posting a spreadsheet to Facebook?
- I stand corrected:
  - Share a to-do list
  - Event planning worksheet
  - Group Weight Tracker
  - Family Tree
- Can post for edit or locked
- People can comment, etc.
And the winners are…

#1: In Outlook 2013, it will warn you if you try to send an email without an attachment

#2: In OneNote 2013 you can now cut and paste rows and columns in tables

#3: OneNote and SharePoint are now synched so I don’t have to log in every time

#4: Excel 2013 Flash Fill and Quick Analysis

#5: Plus that filtering bug in Excel
Tables (2010/2013)

- My favorite feature that not enough people use
- A Table is not a Pivot Table
- Improved features in 2013

Features
- Total Row
- Formulas applied to columns
- Styles
- Data Validation
- Conditional Formatting
- Tab to insert

(Table Tools, Convert to Range to remove table)
Quick Analysis tool lets you convert your data into a chart or table in two steps or less. You can preview the data and make your choice in one click.

You can instantly create different types of charts, including line and column charts, or add miniature graphs (called sparklines).

You can also apply a table style, create PivotTables, quickly insert totals, and apply conditional formatting.

*Everything performed by Quick Analysis can be done manually*
(Digression) Turning Off GETPIVOTDATA()

- GETPIVOTDATA() function is
  - Evil
  - Awkward
  - Misleading
Previously slicers were only available for PivotTable data.

Now slicers can also filter data in Excel tables, query tables, and other data tables.

Slicers show the current filter so you’ll know exactly what data you’re looking at.
A timeline makes it simpler to compare your PivotTable or PivotChart data over different time periods.

It's more visual and intuitive than the traditional filter.

There must be a DATE format column.
Charts Made Easier

- Formatting, picking and previewing changes to chart elements are quicker and easier

- With Chart Recommendations, Excel will recommend the most suitable charts with for data with previews
Trendlines

- Another cool feature that not enough people use (2010/2013)
- Improved toolset (tool pane) in 2013
Quick Explore: Drill into PivotTable Data

- **Quick Explore** feature lets you drill into your Online Analytical Processing (OLAP) cube or Data Model-based PivotTable hierarchy to analyze data details on different levels.

- I admit it...

- *This is the one new feature that I didn’t like*
Ad-hoc Querying with SSAS Cubes

- Excel is Iridium’s preferred query tool for working with SSAS Cubes
- Excel 2013 offers tighter integration with SQL Server
- We strongly encourage our clients to use Excel 2013
Topics for Part 2...

(and jumping in as time allows)
Multiple Tables in Data Analysis

- If you have relational data, you can immediately build a PivotTable based on related tables as soon as you import the data.

- When you import from a relational database, you can import multiple tables simultaneously.

- You can also import tables individually from the same or different data sources, add them to a Data Model in Excel, create relationships, and then use that Data Model to drive a PivotTable.
Calculated Members and Measures

- You can create and manage calculated members and measures right in Excel without having to reach for Excel Object Model.
- A new drag/drop GUI greatly simplifies creation and management of all of your calculated members and measures.
With PowerPivot add-in, you can build an MDX query using the MDX Query Designer when you import from a multidimensional database running on Analysis Services.

When you edit an MDX query, the graphical MDX query designer opens in Design mode. The query designer toolbar provides buttons to help you design MDX queries using the graphical interface.
Power View

- Simply click the Power View button on the ribbon to discover insights about your data with highly interactive, powerful data exploration, visualization, and presentation features that are easy to apply.

- Power View lets you create and interact with charts, slicers, and other data visualizations in a single sheet.
Standalone PivotChart

- A PivotChart no longer has to be associated with a PivotTable

- A standalone or de-coupled PivotChart lets you experience new ways to navigate to data details by using the new Drill Down, and Drill Up features
Closing

- Slide deck is available
- I hope you will join me for Part 2!
- Questions?
- tom.jones@iridium-technology.com
- www.iridium-technology.com
- LinkedIn
- “Iridium Update” Newsletter

- Thank you!