INCREASE YOUR AUDIENCE - EXCEL INTEGRATION IN POWER BI

Mihaly Kavasi – Southampton Data Platform and Cloud Meetup – 13 March 2024

Introduction

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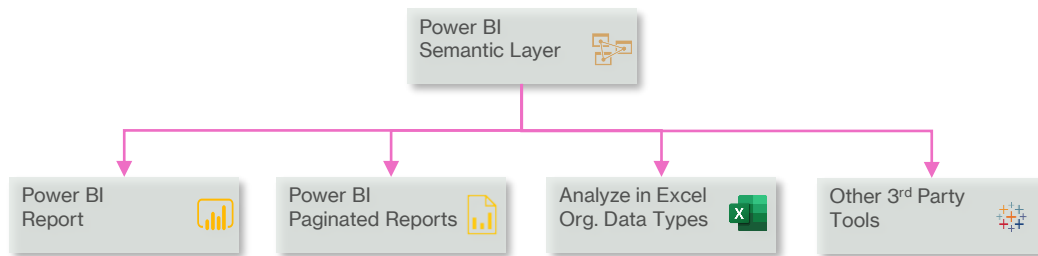
Delivery Lead and Trainer

Avanade

- ✓ 8+ Years of Power BI Experience
- ✓ 7+ Year of Training Experience
- ✓ Microsoft Certified Solution Expert – Data Management and Analytics
- ✓ Microsoft Certified Trainer
- ✓ Azure Enterprise Data Analyst
- ✓ Fasttrack Recognized Solution Architect

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Excel vs Power BI

- "Let's move away from Excel and embrace Power BI for Data Analytics!"

- For sure we need to move away from Excel as a database

- Power BI is not just a reporting tool, but a whole ecosystem.

- Need to separate the semantic layer from the reporting layer.

Excel & Power BI: Better together

To make organizations data driven we should make working with data as easy as possible.
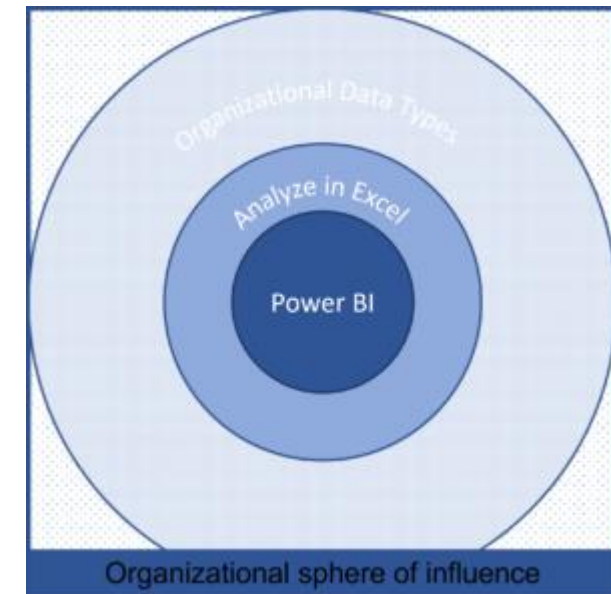In an organization people whose core task is to analyse data and need the capabilities of a tool like Power BI is relatively small.
But almost everyone uses Excel for ad hoc tasks.

In this session we are going to talk about how to utilize the different ways Power BI and Excel can work together.

Features covered:
- Export to Excel
- Analyse in Excel
- OLAP Tools
- Organizational Data Types
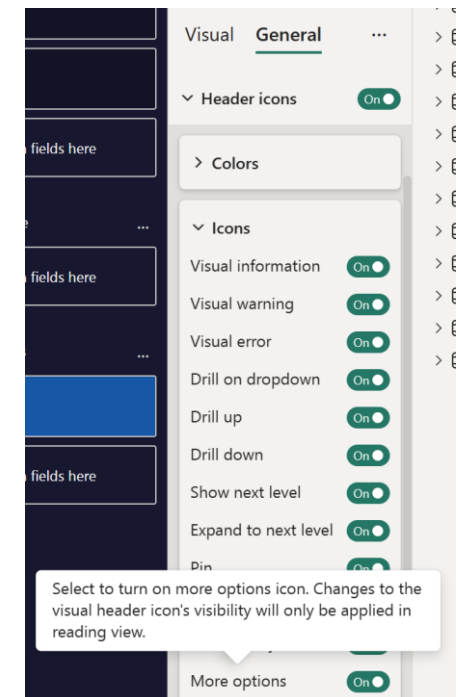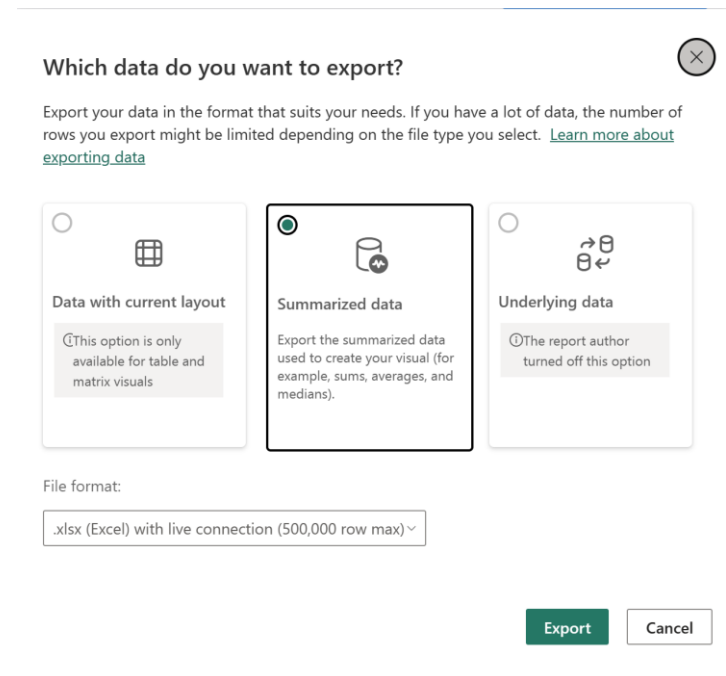
Export to Excel

Most frequently used way to export data into Excel from Power BI.

Can be managed in the tenant settings, report level or even at the visual level.

Showcase:
- Tenant settings
- Report level settings
- Visual level settings

Export to Excel
Enabled for the entire organization

Export to .csv
Enabled for the entire organization

Which data do you want to export?

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. Learn more about exporting data

Data with current layout
ⓘThis option is only available for table and matrix visuals

Summarized data
Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data
ⓘThe report author turned off this option

File format:
.xlsx (Excel) with live connection (500,000 row max)

Export   Cancel

Visual **General** ...
Header icons On
> Colors
Icons
Visual information On
Visual warning On
Visual error On
Drill on dropdown On
Drill up On
Drill down On
Show next level On
Expand to next level On
Pin

Select to turn on more options icon. Changes to the visual header icon's visibility will only be applied in reading view.

More options On

Analyse in Excel

https://selfservicebi.co.uk/hidden-features-of-analyze-in-excel-part-1-show-me-the-details/

https://selfservicebi.co.uk/hidden-features-of-analyze-in-excel-part-2-give-me-all-the-data/

https://selfservicebi.co.uk/hidden-features-of-analyze-in-excel-part-3-focus/
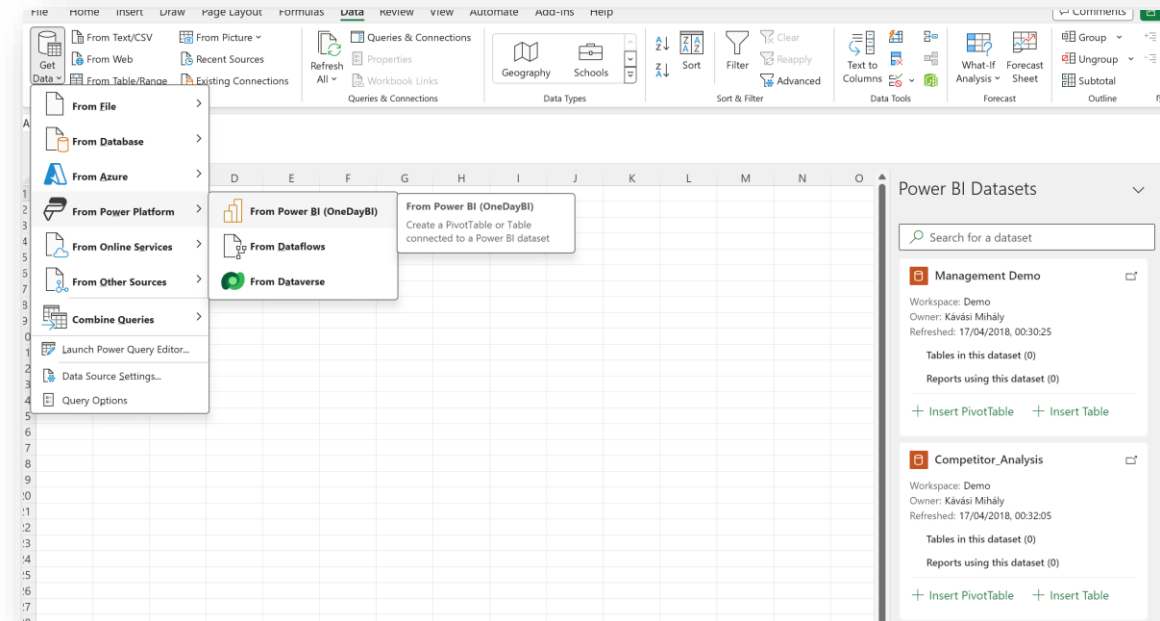
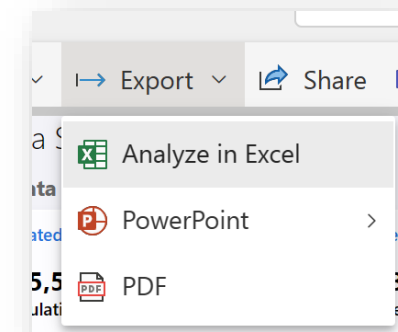Connect to a Power BI semantic layer with Excel.
Enables live, refreshable connection.

Caution:
- Keeps last refreshed data (security issue)
- Only proper access enables refresh

Showcase:
- Available in MDX
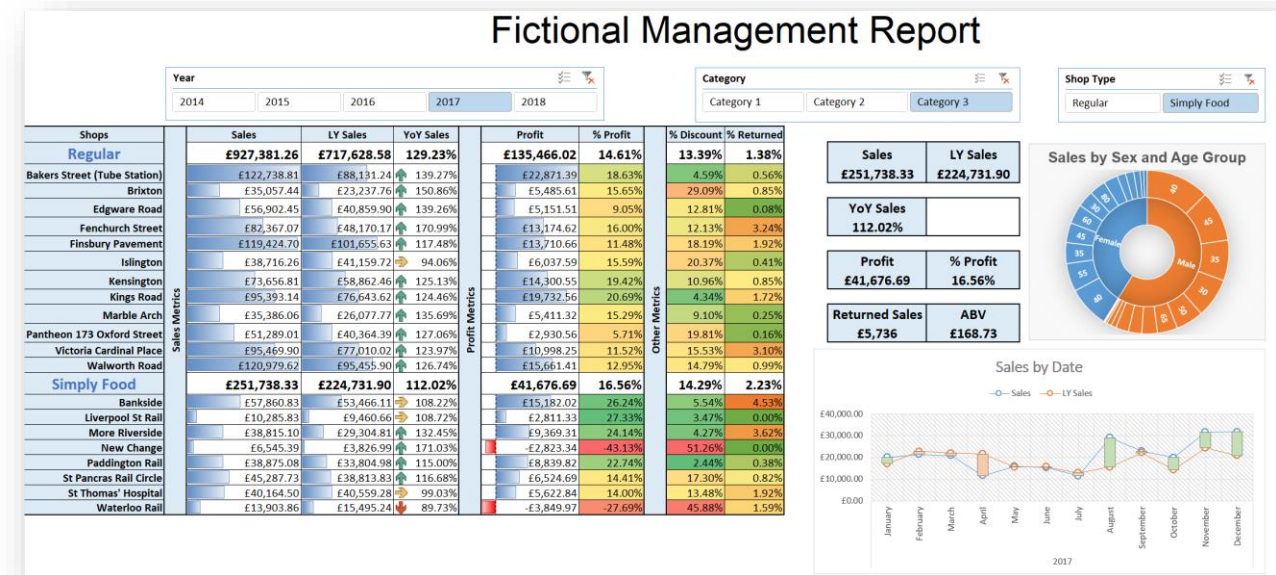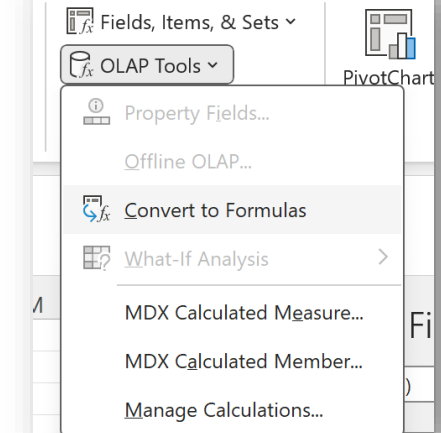- Perspectives
- Detail Rows
- OLAP Drill through

OLAP Tools – MDX Formulas

Pivot tables in Excel are a standard way to analyse data from a model. Sometimes you would like to have more freedom in presenting the data without the need to export.

This is where Formulas come in handy. They give you the freedom to query specify part of the model and enable you to create dynamic filters.
You can use this technique to build interactive and refreshable dashboard in Excel.

Showcase:
• MDX Formulas
• Slicers
• Dynamic Dashboard

Organizational Data Types

https://selfservicebi.co.uk/organizational-data-types-supercharge-your-excel-users-productivity/

Fairly unknown feature in Excel.

Primary goal is to provide a reliable source of master data.

Enables utilization of data stored in Power BI to be used by Excel users without even knowing about Power BI.

Optimal for operational tasks.

Showcase:
- Using Data Types