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NEWS

Gartner BI Summit: Wave the white flag on using Excel for business intelligence

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LAS VEGAS -- It's a staple of business intelligence (BI) and data warehousing conferences: speakers and attendees lamenting the continued existence of spreadsheets and "the kingdom of Excel" as

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they talk about [business users who won't give up their spreadsheets](#) in favor of the more functional and manageable BI applications installed by their organizations.

But that kind of talk wasn't heard at Gartner Inc.'s annual Business Intelligence Summit here this week. Instead, Gartner analysts and BI managers said that [efforts to stop Excel BI use](#) in its tracks were bound to fail. Their advice: Stop trying and make your peace with Excel as a BI tool.

“
**We decided
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'em, join 'em.**

Sam Owens,
director of systems
integration at
Sentara Healthcare,
on the use of Excel
for BI purposes

”

“No matter what we try to do, I don't think we can get away from Excel,” said Sri Vemparala, manager of reporting and BI at Stanford University in Palo Alto, Calif. Stanford uses applications from several BI platforms, including SAP BusinessObjects, Oracle BI and Oracle Hyperion. But Vemparala said the vast majority of end users – perhaps 90% – take data from the BI tools and [export the information to Excel](#) so they can work on it there. Attempting to stamp that out “would be a waste of time,” he added.

Sentara Healthcare, a regional healthcare system based in Norfolk, Va., has also installed SAP BusinessObjects, as well as IBM's Cognos BI software and analytic applications from SAS Institute Inc. But the number of Excel BI users “easily” outstrips the combined total of people who are using the regular BI applications, said Sam Owens, Sentara's director

of systems integration.

Over the last two years, Sentara has embraced Excel as an approved application for storing and working on BI data, Owens said. Last July, for example, the company deployed a prototype BI system with Excel sitting on top of Microsoft Corp.'s SQL Server Analysis Services software for use by the operating room managers at its hospitals, he said. “We decided that if you can't beat 'em, join 'em.”

Excel business intelligence uses create threat alert in IT departments

Gartner analyst John Hagerty acknowledged during a session at the BI Summit that the continuing proliferation of [Excel for BI](#) uses can be “threatening” to IT departments because they see it as a recipe for internal chaos -- even anarchy.

“But I think that what we have to do now is face the facts,” Hagerty said. “You can’t put on your blinders and say this isn’t happening.”

Hagerty recommended that BI development teams adopt a rapid-iteration model for creating and updating reports, queries and analysis applications for business users. Then, he said, they should let the data be deployed where user needs can best be met – and if that’s a spreadsheet, so be it.

IT also may have to [give up some control over BI data](#) and accept that not all information used for reporting and analysis needs to be normalized, cleansed and put into a data warehouse, Hagerty said.

Chaos is not a good thing, of course, and Hagerty added that data governance still has a role to play in controlling spreadmart excesses. His view is that data meant to be used in a “repeatable” way needs to be governed according to corporate rules. But he admitted that there’s a “permeable line” between repeatable and non-repeatable data, making the [Excel BI governance and data integrity](#) issue a challenge for organizations to resolve.

No silver bullet on Excel BI and data governance

Figuring out how to govern and manage data that’s in the hands of end users is still an open issue at Sentara, Owens said. He noted that during a conference call back to Sentara’s offices earlier in the day on Tuesday, “the joke is that I was coming here looking for a silver bullet. But walking around [the trade show floor], there aren’t any.”

At Stanford, Vemparala said, users who export healthcare data and other protected information to Excel are required to keep it in the same format as in the BI tool that they used to get the data. For regulatory compliance purposes, they also have to sign reports produced with the data and certify that the information in the reports is accurate. But, Vemparala said, “they can do their own thing” in Excel if data isn’t protected.

Naturally, Microsoft is only too happy to see Excel BI users sticking with their spreadsheets. “I think it’s going to be hard to rip Excel away from users,” said Michael Tejedor, a senior product manager in Microsoft’s Office Business Division.

But he acknowledged that IT needs to be able to keep some level of control over the data being pulled down into spreadsheets. Toward that end, Microsoft is developing a SharePoint version of its upcoming PowerPivot software that Tejedor said will enable IT managers to track and monitor the use of BI data in Excel. Both the [PowerPivot for Excel](#) add-in and the SharePoint release are due by midyear.

Just about every other BI vendor is in the Excel camp as well, via export capabilities built into their tools. “I don’t think Excel is such a bad thing if it’s used in the right way,” said Matthew Mikell, product marketing manager for BI software at SAS. The analytics vendor treats Excel as a presentation layer for data, and Mikell said SAS is now working on a similar integration feature that will let users display dashboard metrics and [key performance indicators](#) in Outlook messages.

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