Excel Services
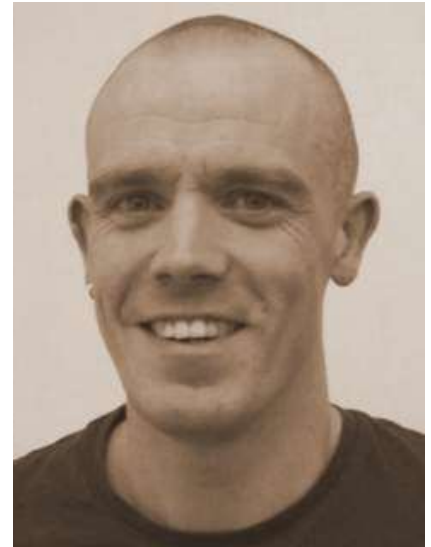
The BI frontend of the future

Just Thorning Blindbæk

▸ Consultant at justB
▸ Trainer at Orange Man
▸ Founder of MsBIP.dk
▸ Worked with Microsoft BI in 8 years
▸ Strong focus on the front-end
  ◦ Analysis Services
  ◦ Reporting Services
  ◦ PerformancePoint Services
  ◦ Excel and PowerPivot
▸ just@blindbaek.dk / blog.justB.dk

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SSAS MAESTRO by Microsoft

Microsoft CERTIFIED IT Professional

Microsoft CERTIFIED Trainer

Agenda

- Excel Services overview
  - Business Intelligence in Excel
  - What's new in SharePoint 2013
- Publish Options
- Integration in SharePoint
- Tips'n'Tricks
  - Remove Excel look
  - Control the layout

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Excel Services overview

▸ Sharing workbooks through the browser
▸ Render Business Intelligence:
  ◦ Dashboards
  ◦ Scorecards
  ◦ Reports
▸ Interactive analytics
▸ Analysis Services or PowerPivot as a source
▸ Also works in SharePoint Online / 365

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Business Intelligence in Excel

▸ The main Desktop Client in Microsoft BI offerings
▸ PivotTables and Charts
  ◦ Slice'n'Dice
  ◦ Re-Ordering and Grouping
  ◦ Sorting and filtering
  ◦ Show value as
  ◦ Named Sets
▸ KPI's and conditional formatting
▸ Cube Functions – Free Format Reports
▸ Power View

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Create dashboards and reports

Sales Dashboard

Sales Amount	Sparkline	Value	Taget		% Target
Europe		19.800.577,06	33.691.300,00	●	58,77%
North America		79.353.361,18	112.048.250,00	●	70,82%
Pacific		10.655.335,96	3.964.450,00		268,77%

#	Top 10 Products	Sales Amount
1	Mountain-200 Black, 38	2.589.364
2	Mountain-200 Black, 42	2.265.485
3	Mountain-200 Silver, 38	2.160.982
4	Mountain-200 Black, 46	1.957.528
5	Mountain-200 Silver, 42	1.914.548
6	Mountain-200 Silver, 46	1.906.249
7	Road-150 Red, 56	1.847.819
8	Mountain-200 Black, 38	1.811.229
9	Road-350-W Yellow, 48	1.774.884
10	Road-150 Red, 62	1.769.097

Bike Size % of Total Gross Profit

Avg Sales Amount per Month

| #	Bottom 10 Products	Sales Amount
1	LL Road Seat/Saddle	163
2	LL Road Frame - Black, 60	179
3	Mountain Bike Socks, L	513
4	LL Touring Frame - Blue, 58	800
5	LL Mountain Frame - Black, 40	1.199
6	LL Road Frame - Red, 52	1.288
7	LL Touring Seat/Saddle	1.481
8	ML Mountain Frame-W - Silver, 38	1.529
9	LL Touring Handlebars	1.549
10	LL Headset	1.949

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Demo: Building a dashboard in Excel

- ▸ Slicer
- ▸ PivotTables
- ▸ Sparklines
- ▸ KPIs

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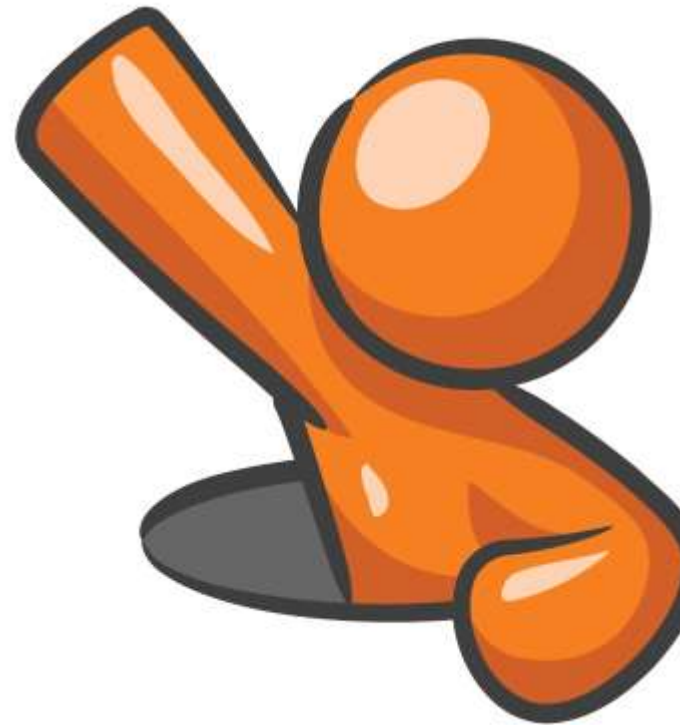
Free Format Reports

- Are usefull when…

- Rearrange and delete cells
- Insert rows and columns
- Use multiple data sources
- Create a nonuniform row or column layout

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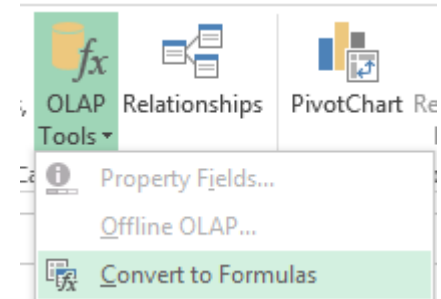
Cube Functions

- CUBEMEMBER
  - Returns a member or tuple from the cube.
- CUBEVALUE
  - Returns an aggregated value from the cube for a member or tuple from the cube.
- CUBEKPIMEMBER
  - Returns a key performance indicator (KPI) property and displays the KPI name in the cell.
- CUBEMEMBERPROPERTY
  - Returns the value of a member property from the cube.
- CUBERANKEDMEMBER
  - Returns the n'th, or ranked, member in a set.
- CUBESET
  - Defines a calculated set of members or tuples.
- CUBESETCOUNT
  - Returns the number of items in a set.

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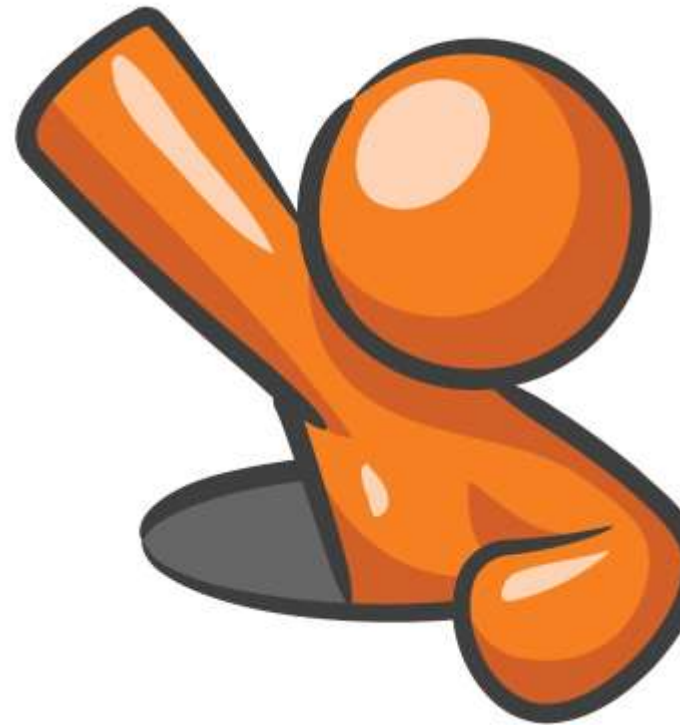# Cube Functions Examples

- =CUBEMEMBER("ThisWorkbookDataModel";
  "[Ship Date].[Calendar].[Calendar Year].&[2005]")

- =CUBEVALUE("ThisWorkbookDataModel";
  "[Measures].[Sales Amount]")

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Demo: Building a scorecard in Excel
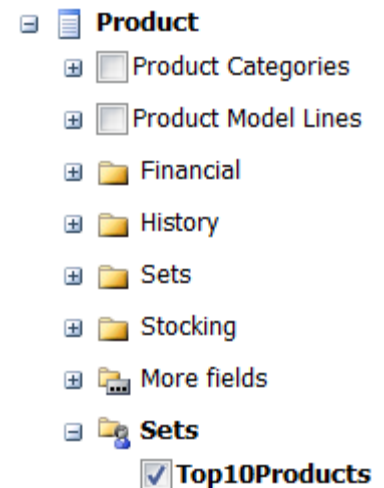
- ▸ Cube Functions

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Named Sets

- Named, reusable sets of members
- Can combine members from different hierarchies (asymmetric reporting)
- Set up time intelligence
- Defined by:
  - **Explicit member selection**
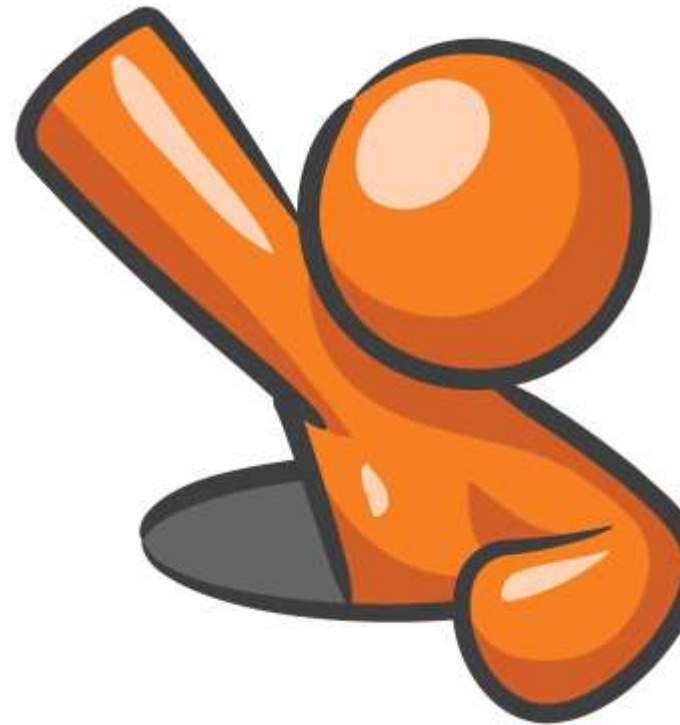 - **Custom MDX**
- Saved in connection file

CY 2005	CY 2006	CY 2007	CY 2008		
Actual	Actual	Actual	Budget	Actual	Budget

□ 🗎 **Product**
- ⊞ ☐ Product Categories
- ⊞ ☐ Product Model Lines
- ⊞ 📁 Financial
- ⊞ 📁 History
- ⊞ 📁 Sets
- ⊞ 📁 Stocking
- ⊞ 📑 More fields
- □ 📑 **Sets**
  - ☑ **Top10Products**

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Demo: Named Sets

- Assymetric reporting
- Time Intelligence
  - CurrentDay
  - CurrentMonth
  - Current Year
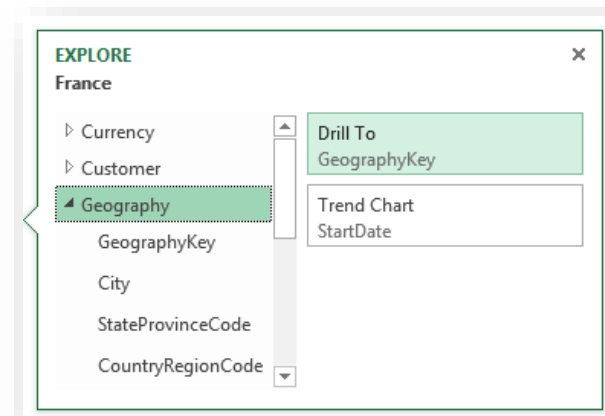 - Last12Months

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What's New in Excel Services 2013

▸ Features
  ◦ Power View
  ◦ PivotTable Field List/Field Well
  ◦ Timeline Slicers
  ◦ Quick Explore
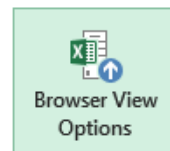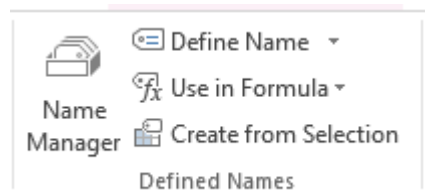 ◦ 3D charts
  ◦ Apps for Office
  ◦ Named Object View v2
▸ Tech stuff
  ◦ EffectiveUsername
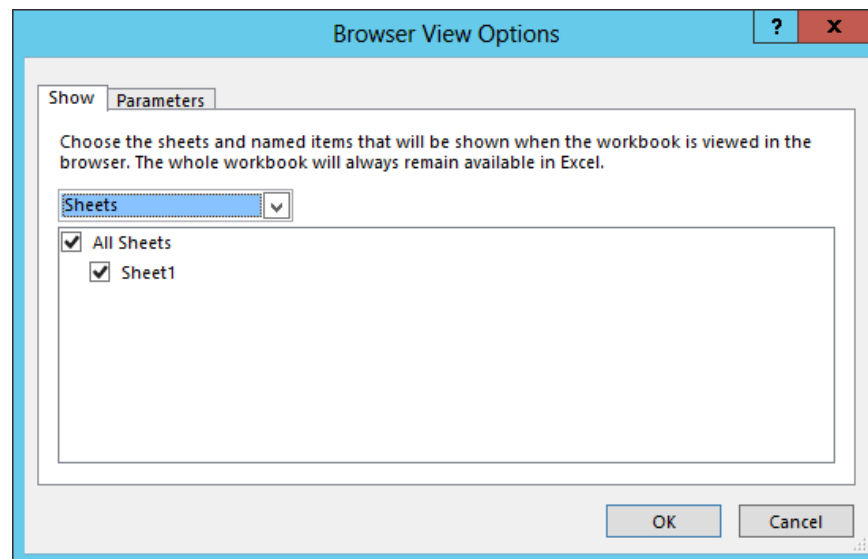 ◦ Automatic Target App Creation
  ◦ BI Server

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Publish Options

▸ Entire Workbook

▸ Sheets

▸ Items in the Workbook
  ◦ Charts
  ◦ PivotTable
  ◦ Named Ranges

▸ Parameters

Browser View Options

Pick what users can see when this workbook is viewed on the Web.

Browser View Options

Show | Parameters

Choose the sheets and named items that will be shown when the workbook is viewed in the browser. The whole workbook will always remain available in Excel.

Sheets

☑ All Sheets
  ☑ Sheet1

OK | Cancel

Name Manager | Define Name | Use in Formula | Create from Selection | Defined Names

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Connection properties

▸ Authentication Settings
- Integrated Security
- Secure Store Services (Specify)
- None (uses Excel Services SSS)

▸ Export Connection File
- Data Connection library

▸ Refresh data when opening the file

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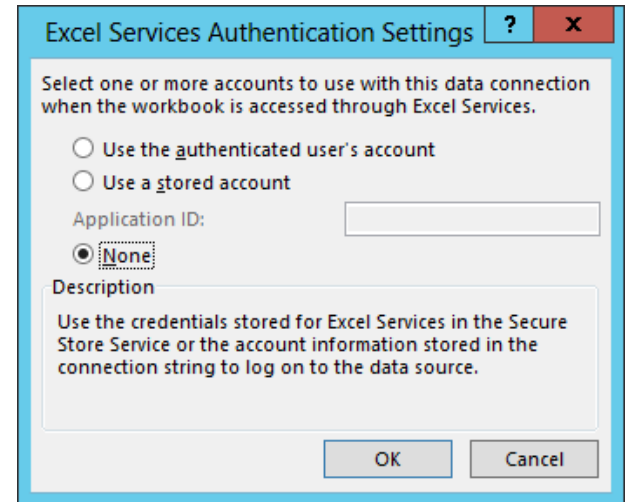
Manage Excel Services Application

▸ SharePoint Central Administration
▸ Trusted File Locations
  ◦ Warn on Refresh = No
  ◦ Allow External Data = Trusted data connection libraries only
▸ Global Settings
  ◦ Unattended Service Account

Manage Excel Services Application ⓘ

Central Administration

Application Management

System Settings

Monitoring

Backup and Restore

Security

Upgrade and Migration

General Application Settings

Apps

Office 365

Configuration Wizards

Global Settings
Define load balancing, memory, and throttling thresholds. Set the unattended service account and data connection timeouts.

Trusted File Locations
Define places where spreadsheets can be loaded from.

Trusted Data Providers
Add or remove data providers that can be used when refreshing data connections.

Trusted Data Connection Libraries
Define a SharePoint Document Library where data connections can be loaded from.

User Defined Function Assemblies
Register managed code assemblies that can be used by spreadsheets.

Data Model Settings
Register instances of SQL Server Analysis Services servers that Excel Services Application can use for advanced data analysis functionality.

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Demo: Publish options

▸ Connection properties
▸ Entire Workbook / Sheets
▸ Items in the Workbook
 ◦ Charts
  ◦ PivotTable
  ◦ Named Ranges

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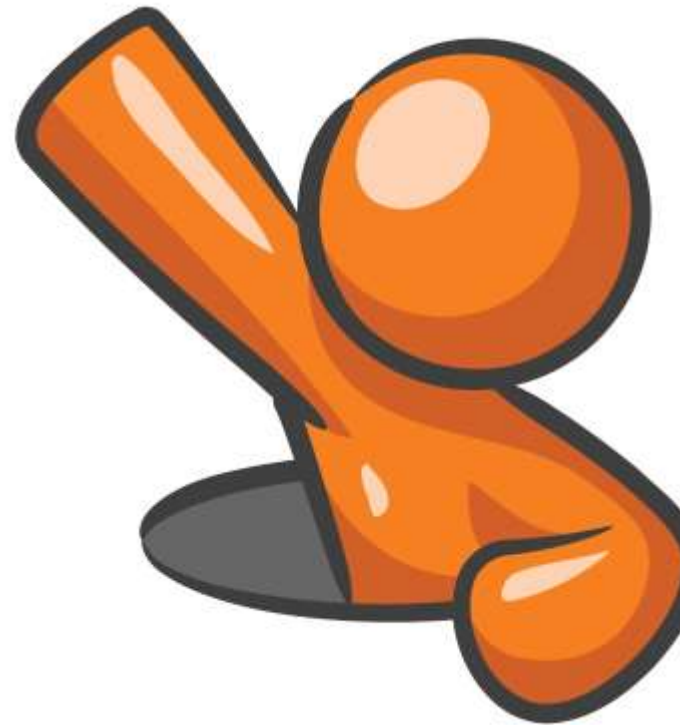
Integration in SharePoint

▸ Full page / Named Object Viewer
  ◦ The lazy solution

▸ PerformancePoint Services Dashboard
  ◦ The smart, easy and quick solution
  ◦ Use the filters from PPS

▸ Web Part Page
  ◦ The customizable solution

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Demo: Integration in SharePoint

- ▸ Full page
- ▸ Named Object Viewer
- ▸ PerformancePoint Services Dashboard
- ▸ Blank Web Part page

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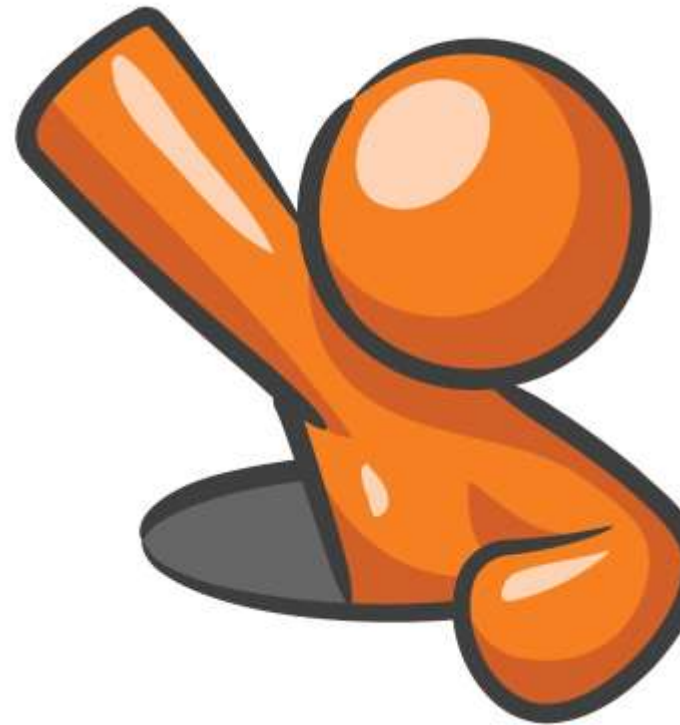
Tips'n' Tricks

▸ Remove the Excel look
  ◦ Remove Gridlines
▸ Control the layout
  ◦ Named Ranges
  ◦ Cube functions
▸ Named sets
  ◦ Reusable logic
  ◦ Time intelligence

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Related Information

- Microsoft Excel Blog: http://blogs.office.com/excel/
- Channel 9: http://channel9.msdn.com/search?term=Excel+Services
- Microsoft Online Demo Solutions: http://mssalesdemos.com/
- Cube functions: http://blogs.office.com/b/microsoft-excel/archive/2006/02/06/cube-functions-2-a-few-examples.aspx
- Danish ExcelBI community: http://ExcelBI.dk
- Excel 2013 - Whats new: https://sqlbits.com/Sessions/Event11/Excel_2013-Whats_new_beside_PowerPivot_and_Power_View
- Business Intelligence with Excel 2010: https://sqlbits.com/Sessions/Event10/Business_Intelligence_with_Excel_2010

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Thank you!