

**XL<sup>3</sup>**

**XL**Cubed.com

# EMBRACING EXCEL IN AN ENTERPRISE BI STRATEGY



By: Jen Underwood, Founder  
Impact Analytix, LLC

## Table of Contents

Introduction .....	2
Don't Replace Excel, Embrace Excel .....	2
Solving Excel Reporting Pains .....	2
XLCubed for Enterprise Excel and Web Reporting .....	3
Solution Overview .....	4
Solution Architecture .....	4
Why Excel Users Love XLCubed .....	5
XLCubed for Solution Implementers .....	7
XLCubed in Action .....	8
Summary .....	9

## Introduction

Excel is the #1, most loved analytics tool in the world with over one billion users worldwide. It is figuratively the Swiss Army knife of analytics. Why? Excel is easy to learn, comfortable, powerful, fast and infinitely flexible. Even when modern data discovery tools are bought, Excel is still desired.

In a recent self-service analytics market survey<sup>1</sup>, Excel export was cited by over 94% of both business and technical personas surveyed as highly important. Despite outlandish advertisements that claim Excel should not be used for reporting, nothing else in the market can replace the truly unique value of Excel.

## Don't Replace Excel, Embrace Excel

Instead of wasting time, energy and resources trying to remove Excel from reporting processes, you should consider finding ways to responsibly embrace Excel. Attempts to eliminate Excel are usually futile. You are far more likely to be successful by considering human emotional attachment and genuine technical need for Excel-centric reporting.

Concerns around ensuring Excel reporting accuracy, minimizing errors, easing report sharing pains and complying with regulatory requirements are legitimate and do need to be addressed. The real problem that you should be solving is how to best deliver and effectively govern Excel reporting across the enterprise.

---

The real problem that you should be solving is how to best deliver and effectively govern Excel reporting across the enterprise.

## Solving Excel Reporting Pains

Implementing responsible, governed enterprise reporting with Excel across the complete analytics life-cycle from desktop Excel design, to web sharing and even mobile viewing is possible with XLCubed, a Microsoft partner solution. Base Microsoft Office 365, SharePoint and even the latest Power BI offer some capabilities for enterprise reporting with Excel. The downsides of using those solutions include:

- Poor web and mobile user experience with Excel
- Limited authoring, PivotTable rendering, interactivity, and interlinking
- Limited ability to write-back without custom application development
- Missing governance features for reporting use cases
- Expensive to roll out to everyone
- Complex to set up and configure - even in the cloud

XLCubed is a unique enterprise Excel reporting solution that fills Microsoft gaps in Excel-centric reporting. There is nothing else in the market today even close to it. In this white paper, we will introduce XLCubed, discuss what makes it a compelling solution for Excel-centric reporting and how to incorporate it into your overall enterprise BI strategy.

---

<sup>1</sup> Logi Analytics 2017 Self-Service BI Adoption Survey

## XL Cubed for Enterprise Excel and Web Reporting

XL Cubed is a mission-critical environment for managed Excel-centric reporting. It marries the delightful aspects of Excel with world class performance, scale, security and governance. Reports and dashboards built in Excel can be easily published and shared to XL Cubed's web portal for best-in-class, fully interactive user experiences.

XL Cubed connects directly to server-based data avoiding classic Excel reporting pains where data could be easily overtyped or become out of sync with the central repository. XL Cubed addresses this fundamental issue and the ensuing problems which have made Excel so unpopular in many IT departments.

XL Cubed's background and expertise in performance management has influenced product design. Today it delivers unrivalled flexibility in Excel reporting, analytics, dashboards, planning and budgeting applications for over 700 Customers including well-known organizations.



Figure 1 XL Cubed Customers

As a respected Microsoft Gold Partner solution, XL Cubed aims to help companies maximize return on existing investments. XL Cubed is optimized for popular SQL Server Analysis Services, and can now also be used with relational and other OLAP databases. The latest version of XL Cubed is compatible with SAP HANA, Oracle, Power BI, Amazon Redshift and Google BigQuery.

## Solution Overview



Figure 2 XLCubed Applications

XLCubed is a suite of products for enhanced Excel-centric reporting that includes XLCubed Excel Add-In, XLCubed Web, an API for embedding and native mobile apps.

Report authoring and one-click publishing is supported from numerous versions of Excel 32-bit and 64-bit desktop applications ranging from Excel 2007 to Excel 2016 via the XLCubed Excel Add-In. XLCubed Web is an HTML5, 64-bit Microsoft Windows IIS web server-based platform.

Reports published to XLCubed Web can be rendered in all common web browsers, via web parts in SharePoint, inline frames in web or BI portals, embedded in applications, or in touch-optimized mode via XLCubed native mobile apps for Apple iOS, Android and Windows devices. Embedded XLCubed supports two-way parameter passing for first-class, contextual, hybrid reporting experiences. Options for scheduled mass distribution of Excel and Adobe PDF reports are also available.

XLCubed Web provides role-based security with single-sign-on from LDAP authentication sources such as Active Directory. Fine grained, dynamic security can be applied at report level or at data level all the way down to a specific cell with OLAP data sources.

By combining people, process and XLCubed auditing, annotation and versioning, you can apply enterprise BI governance standards to self-service activities for managing Excel-centric reporting assets.

## Solution Architecture

XLCubed delivers the best user experience when combined with SQL Server Analysis Services data sources. However, it can also be used with other databases and OLAP sources.

When adding XLCubed into an enterprise BI strategy, the solution can be used stand-alone or combined with other web-based reporting portals including but not limited to Microsoft SharePoint BI, Power BI, Tableau, Qlik, SAP Business Objects, IBM Cognos and MicroStrategy.

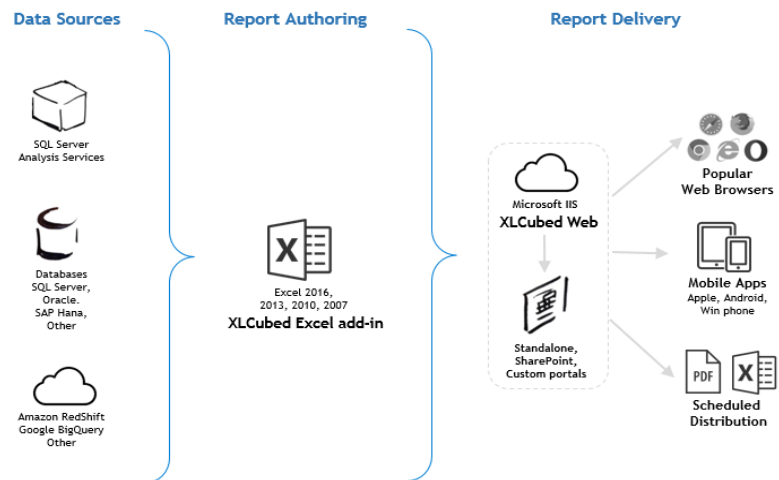


Figure 3 XLCubed Technical Architecture

# TOP 10

## WHY EXCEL USERS LOVE XLCUBED

Apart from the speed, flexibility and familiarity of reporting in Excel, XLCubed further improves the entire Excel-centric reporting experience. XLCubed combines everything that is great about Excel as a dashboard tool, addresses annoying limitations and enhances authoring, data visualization, grouping, publishing and sharing.

The following is a list of XLCubed users' favorite features that are simply not available with other Excel reporting solutions in the market.

1. Flexibility to freely navigate and report outside of pivot tables without breaking links to the underlying data model to ensure one version of the truth.
2. Enhanced, scoped and dynamic table calculations for any valid Excel formula is supported without having to use complex MDX or DAX code. Please refer to Figure 4 or watch a [video demonstration](#) of this capability.

Geography	+CY 2012	+CY 2013	+CY 2014	Calc	+CY 2015
Australia			£847,430.96	=(E8-D8)/D8	
Canada	£1,513,359.46	£4,849,120.98	£5,927,583.55	£0.22	£2,506,518.37
France		£857,123.18	£2,439,683.75	£1.85	£1,429,890.66
Germany			£1,098,866.68	#DIV/0!	£926,381.90
United Kingdom		£841,757.76	£2,216,226.38	£1.63	£1,325,925.36
United States	£6,552,075.85	£17,705,651.14	£20,829,523.10	£0.18	£9,664,332.06

Figure 4 Scoped and dynamic table calculations

3. First-class user experience to define custom reporting Groups or Named Sets, again without having to use any MDX or DAX code. Please refer to Figure 5 or watch a [video demonstration](#) of this capability.

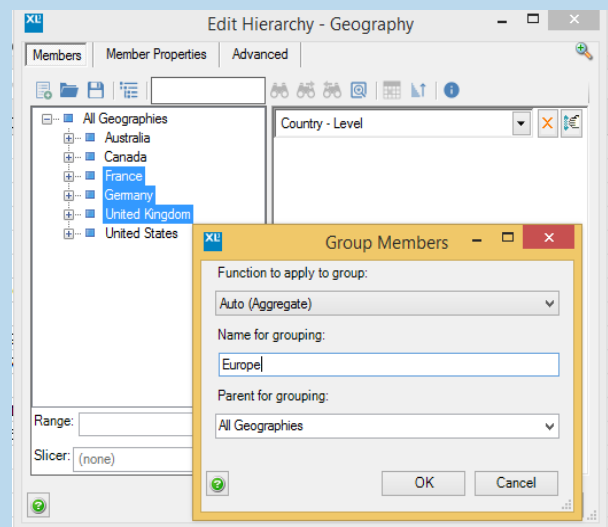


Figure 5 Custom Reporting Groups and Sets

4. An ability to define, use or combine any Excel cell range dynamically within XLCubed calculations and report selections, fully leveraging the flexibility of Excel itself
5. Web and mobile publication of Excel developed, data-connected reports and dashboards within a straightforward, scalable, and governed infrastructure. Please refer to the [video demonstration](#) of this capability.

6. XLCubed XL3Links are used like Excel formulas to enable contextual links within multi-sheet reports, or between separate reports both in Excel and on web published reports and dashboards. Please refer to Figure 6.

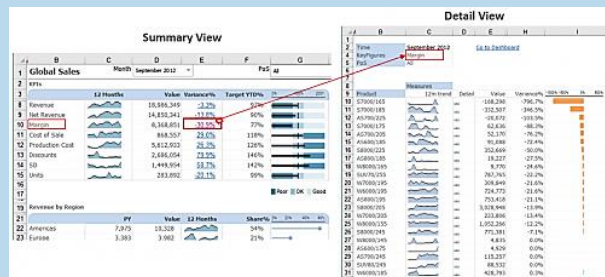


Figure 6 XLCubed XL3Link

7. Version control is invaluable for self-service Excel-centric reporting. Please refer to Figure 7.

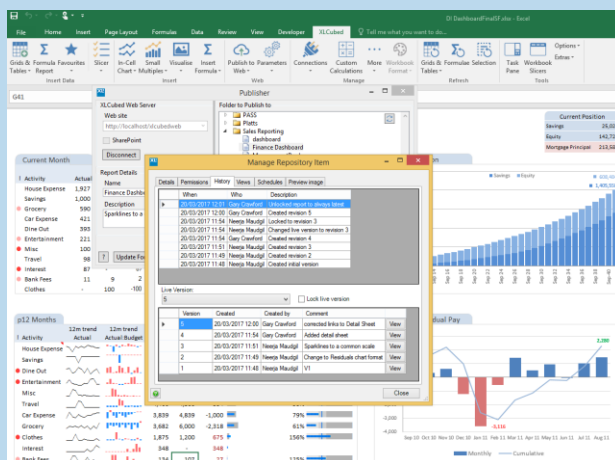


Figure 7 Version Control

8. More data visualization types for Excel including interactive tree maps, small multiples, trellis charts, sophisticated interactive geospatial mapping and a rich library of in-cell charts including sparklines, KPIs and bullet graphs. Please refer to Figure 8.

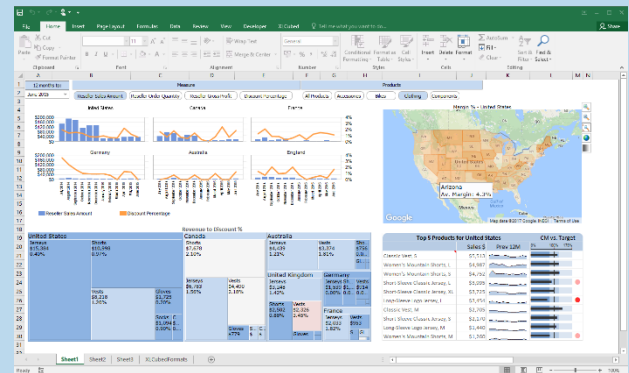


Figure 8 Additional Visualizations

9. Report level data mashups - different data sources can be brought together at report level, without the need for a full semantic model and the associated complications of data refresh. Please refer to the [video demonstration](#) of a mashup between SQL Server Analysis Services and SQL Server. There is also a [video demonstration](#) of SQL Server Analysis Services and Excel.
10. Governed collaboration allows users to annotate or initiate discussion on any level of data. Please refer to Figure 9.

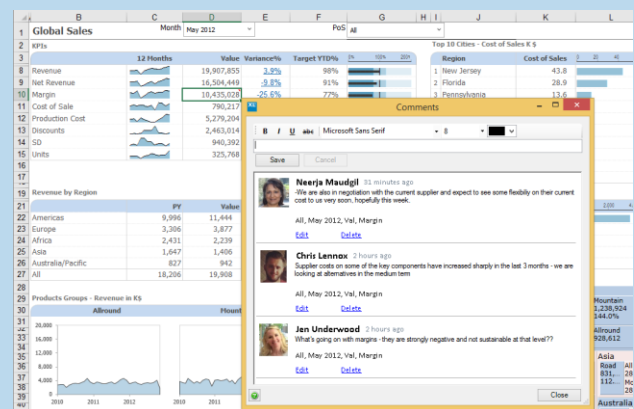


Figure 9 Collaboration



## XLCubed for Solution Implementers

For professional BI consultants and systems integrators, XLCubed provides a fantastic new revenue stream to help your clients govern Excel reporting. Every customer has Excel and likely needs your help to solve traditional Excel reporting pains. With XLCubed, you can expand your total addressable market potential.

Consultants and systems integrators benefit with lead referrals by joining XLCubed's Partner Program at <https://www.xlcubed.com/partner-program>. XLCubed partners are provided with services engagement accelerator resources, marketing collateral and demo material to easily add Governed Enterprise Excel Reporting into your offerings.

### Highlighted Partner Success with XLCubed

CPM4Care is a healthcare partner that works with over 40 healthcare organizations including the largest in the Netherlands. They sell a 'total solution' proposition delivering customer-friendly business intelligence tools along with data management solutions.

---

**"We looked at most of the Magic Quadrant vendors and most products proved significantly more complex to install and configure than XLCubed. XLCubed also requires less user training. Customers and prospects quickly see the benefits of XLCubed."**

**Marcel Brockhoff,  
CPM4Care Co-Owner**

Prior to finding XLCubed, CPM4Care's legacy business intelligence tool was reaching the end of life. This group diligently researched numerous business intelligence vendors for a replacement.

Gerrit de Glee, CPM4Care Technical Director, says that in their market research they tested other solutions that had very demo-friendly visualizations but lacked flexibility in real-world scenarios using more complex data. Flexibility in analysis, presentation and formatting were key requirements. XLCubed delivered on those criteria exceptionally well.

After careful evaluation, CPM4Care selected XLCubed as their preferred BI tool for the following reasons:

- XLCubed product flexibility and speed
- Relatively shallow learning curve
- Familiar, extended Excel environment
- Fast reporting and interactive dashboards
- Responsive, multi-device functionality
- Straightforward integration with CPM4Care solutions
- Write-back capability
- Competitive licensing
- XLCubed expertise and partner collaboration

The pace of migration of CPM4Care's customers to XLCubed has been extremely rapid. Marcel Brockhoff reports that 60% of customers moved to XLCubed within 18 months and expects that 90% will have switched by the end of 2017, and 100% by 2018.

---

**"We grow our business by helping partners to grow theirs"**

**Gary Crawford,  
XLCubed COO**



Customer adoption is fast and end users are quickly productive. A bonus for CPM4Care is that they do not have to commit to intensive and continuous product training programs. XLCubed is relatively simple to use compared with other systems as users can leverage many of their existing Excel skills rather than start from scratch in a standalone environment with proprietary functions and rules.

Marcel says that during 2016 and 2017 XLCubed has played a significant part in helping CPM4Care to win new business. XLCubed integrates with CPM4Care's Microsoft-centric solution and generates early confidence in prospective customers that they will be able to access, interpret and report on data at many stakeholder levels, from power user to team level, and from management to remote field operatives.

He continued to say working with XLCubed is "really good. XLCubed are always very responsive and flexible in the way they accommodate us and our customers. I have worked with many vendors and XLCubed, quite simply, takes support to a new level." Gerrit de Glee says "any problems are solved quickly and XLCubed always listen to our suggestions."

On behalf of XLCubed, COO Gary Crawford said, "Working closely with partners is vital to us. We grow our business by helping partners to grow theirs. We actively encourage partner feedback on their customers' needs, and it is incorporated into product development to ensure XLCubed continues to deliver what customers value in BI."

---

"I have worked with many vendors and XLCubed quite simply takes support to a new level."

Gerrit de Glee,  
CPM4Care  
Technical Director

---

"It is ever more important for the executive team to have access to the information we need to run the business wherever we are and whenever we need it. XLCubed has helped us deliver that capability."

Chris Harrop,  
Marshalls Group  
Marketing Director,

## XLCubed in Action

Marshalls, a leading Construction and Landscape company that operates in Europe and China, needed better reporting tools to help fully realize their investment in base Microsoft BI platform offerings. Core staff is comprised of 450 people with a wide range of reporting skills from expert to novice. Marshalls needed an easy, flexible, self-service reporting solution that all users could quickly leverage and was capable of automating report delivery to the masses.

After a detailed evaluation process of several competing solutions, XLCubed was chosen to replace a legacy ProClarity implementation. Power users at Marshalls now enjoy authoring in Excel with one-click publishing to XLCubed Web for governed report distribution without the need for IT involvement.

All report users can access beautiful, interactive reports with rich, slice and dice analysis on any desktop or mobile device. The ability to rapidly author and access governed Excel developed reports is key to successfully operating the business today.

## Summary

XLCubed is the only robust Excel-centric BI platform in the market. There is nothing else quite like it. Today XLCubed is used by more than 700 customers with thousands of users worldwide. The solution delivers much needed secure, centralized Excel report publishing, management and governance for enterprise BI environments.

XLCubed can be used stand-alone or as a complementary solution to other enterprise BI platforms, including but not limited to, Microsoft SharePoint BI, Power BI, Tableau, Qlik, SAP Business Objects, IBM Cognos and MicroStrategy. The latest version of XLCubed has excited customers and partners alike since it supports a wide variety of data sources such as Oracle, SAP HANA, Power BI, Amazon Redshift and Google BigQuery.

Business users thrive when reporting in their #1 favorite analytics tool, Excel. With XLCubed, the historical pains and risks with Excel-centric reporting can finally be effectively addressed while keeping the both the business and IT happy.

For more information about XLCubed offerings and Partner Programs, please review these additional resources.

- XLCubed Web Site <https://www.xlcubed.com>
- XLCubed Partner Program <https://www.xlcubed.com/partner-program>
- XLCubed Training <https://www.xlcubed.com/resources/training>
- XLCubed Video Library <https://www.youtube.com/user/XLCubed>



XLCubed Limited  
Maidenhead Court Boathouse,  
Court Road,  
Maidenhead,  
SL6 8LQ, UK

email: [info@XLCubed.com](mailto:info@XLCubed.com)  
tel: +44 1628 763222  
fax: +44 1628 634403