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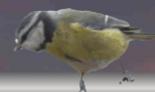
Excel hell - Exit Strategy

EXIT 101

EXCEL HELL



WAY OUT



In Excel Hell – Take The Next Exit

I am thinking of starting a society – “I’m Jaz and I’m stuck in Excel Hell.”

Are you there?

More most report writers there is a period set aside every month for crunching the latest sales and marketing number in preparation for the monthly management reports. We start with a data extract from which ever database the company is using, import into excel and off we go, maybe.

Excel hell 1 – Is the data extract that has gone over a million rows and won’t load fully into Excel anymore. There are two common strategies when this happens. Strategy one is to ignore the pop-up and press on with the data that was loaded. Just imagine that your data extract is created in oldest to newest order. At some point your new sales fall off the bottom of the loadable data and you get reports that show no sales for the last days or months.

Strategy two is two import the data into a text editor and save it as two halves. Some then analyse the two halves separately; others have ways of getting everything back together in Excel. The latter group spend a lot of time at the coffee machine waiting for the last action they took to catch up.

Excel loads files into memory, so when you are getting towards that million row limit your computer has to do a lot of work. Look at it this way – 1 million rows with a single column is 1 million cells. Add a column and you are now working with 2 million cells. 10 columns is 10 million cells. Most of my spreadsheets have more than 10 columns!

Excel hell 2 – caffeine overdose. Seriously, the waiting while a large sheet recalculates is insane. Even on a fast computer with a large amount of free RAM, you still have to wait. The worst is when you are on a roll and you decide it would be good to sort the data by product then date. Oops, another trip to the coffee machine, yes they have decaff’ but who drinks that stuff.

Excel hell 3 – Mixed columns, you know, the ones with several data items junked into a single column, sometimes with a common delimiter and sometimes not. You have done this before and know it isn’t that hard. Eventually you hit the data menu and find ‘text-to-columns’, here you can set a range of delimiters or choose fixed space delimitation. Remember that warning about overwriting data, yes it really did just overwrite ‘n’ columns to the right of the data you just split.

Excel hell 4 – Pivot tables. Personally, I kind of like pivot tables. In the days before data visualisation they made my life a lot easier, but that was then. I start with a pivot of the whole data set. It lets me look at everything I have data on, a first step in data discovery. Well, I used to. Now I load my data directly into either Tableau Public (it’s free but you can’t save, except by publishing your data for the world to see) or Microsoft PowerBI (it’s free and you can save.) Back to those pivot tables – Where was I? Oh yes. You start with a pivot of the full data set. You drag in date, sales, products; suddenly you have a list that scrolls down 8 screens and you barely got started. Now if those items listed in the pivot table fields were marked as whether they were strings or numbers, I might just wet myself. My pants stay safely dry.

Excel hell 5 – Values. What I mean is, when you drag a number into the values area it defaults to a count. If you have ever been caught out by this then you will be nodding along with me know. Why a count? Who knows. Sum or average would be way more useful. If you are wondering – Click the

arrow at the end of the 'Count of xxxxxx' drop down to Value field settings and you can choose the aggregation you want.

[Excel hell 6](#) – Pie charts. How many times have you shown a pie chart with three similarly sized segments, then struggled to show a legend outside the pie chart so people can see that you have 32% 34% & 35%, you know there is some rounding up of the number going on somewhere. You also know it is more important that you find that rounding otherwise the finance guy WILL point out that 101% isn't rocking his boat, and WHERE did this data come from anyway?

Deep breaths Jaz, remember that all this is in the past. Think calming thoughts and move on. Actually it isn't all in the past. Regardless of which data visualisation tool you choose, you still end up in Excel doing some data prep.

I know I said tableau Public, but I actually have Tableau Personal, Professional would let me connect directly to a lot more data sources but I can't do much of the other clever stuff Professional gives me unless my pockets extend to thousands of dollars for Tableau Server or Online, mine are not nearly that deep and I have some cool ways of making my dashboards safe enough to distribute with Tableau Reader, which is free.

I also mentioned Microsoft PowerBI. If you have a Microsoft licence there is a good chance you can use PowerBI for free but I never looked too closely at the licencing so best do that for yourself.

If you go for Tableau, they will tell you that it saves you vast amounts of time. I find that it costs me as much time as it saves. Really! If I didn't get drawn into playing with random data sets then the time wasting wouldn't happen, but I don't know many people who are strict in sticking to work related use of Tableau.

If you are rolling out a self-service BI solution to replace Excel with, then PowerBI is a good option. I don't know anyone, outside of Microsoft, who plays with data in PowerBI. Those users I do know will go into PowerBI, do what needs doing and get out again. Your average Tableau user is still choosing a colour pallet and flicking through Show Me when the PowerBi user has moved on to the next item on their to do list. Having said that, I am stuck on tableau and will waste my time any way I like. "I am Jaz and I am a Tableaugholic."

I wrote a "[Beginners Guide to Tableau Desktop Visualisation](#)" and published it on Amazon. I made it as cheap as they would let me. It isn't a full length book, don't expect hundreds of pages. Just enough to get you going.

Warning – If you get hooked on Tableau it will cost you hours of your life.

I am currently working on a beginners guide to Microsoft PowerBI, it will be just as cheap and you are far less likely to get lost in your analytics.