#### **Mastering the Query Features of Power BI Desktop**



#### **Agenda**

- Deciding What To Measure
- Managing Queries, Datasources and Credentials
- Working with the Query Editor Window
- Designing Queries to Generate a Star Schema
- Merging Columns from Multiple Datasources
- Appending Rows from Multiple Datasources



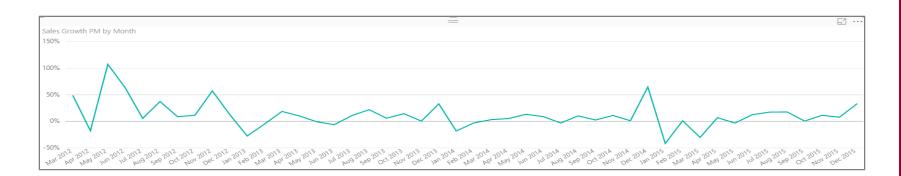
#### **Data Discovery**

- Data can live in a variety of sources
  - Files (e.g. CSV file, Excel workbook)
  - OLTP Databases
  - OLAP Databases
  - SharePoint Lists and Document Libraries
  - Azure-based services
  - Online services & SaaS applications



#### **Deciding What To Measure**

- You Must Determine Measurable Objectives
  - Financial (revenue, expenses, profit margin, etc.)
  - Business processes efficiency
  - Customer Satisfaction Levels





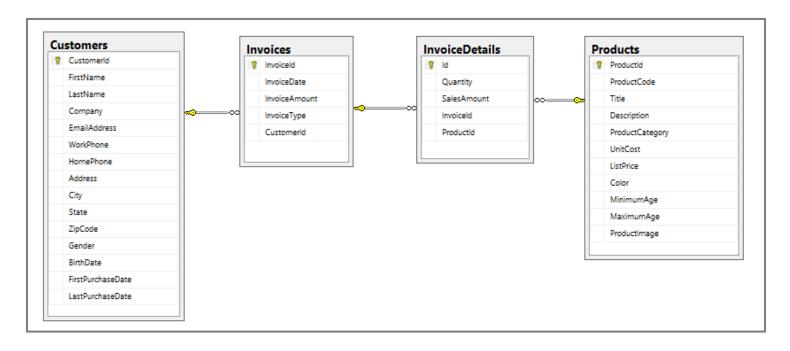
#### **Defining Grain Statements**

- Grain statements should be defined in initial design phase
  - Grain statements helps determine requirements for BI queries
  - Grain statements can be created & understood by business users
- Example grain statements for BI project at Wingtip Toys
  - What was the total sales revenue over the last 4 years?
  - What was the sales revenue by year, quarter and month?
  - What was the sales revenue by region, state, city and zip code?
  - What was the sales revenue by category, subcategory and product?
  - What was the growth in sales revenue from month to month in 2013?
  - What was profit margin for each product by year, quarter and month?
  - Have their been any products with significantly decreasing profit margin?



### Sample OLTP Database: WingtipSalesDB

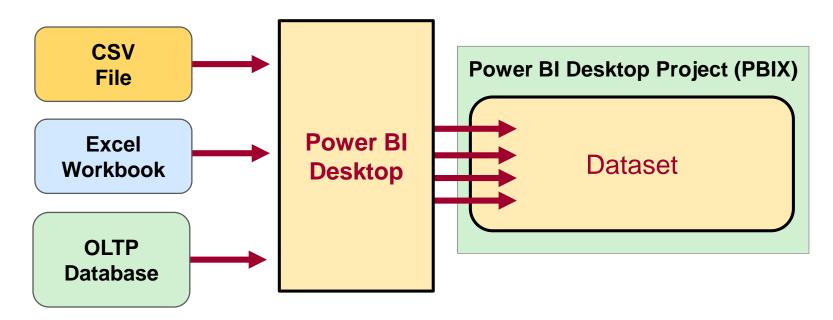
- Online Transaction Processing (OLTP) System
  - Used for real-time data access and transaction-based data entry
  - Optimized for faster transactions (e.g. inserts, updates & deletes)
  - Tables normalized to reduce/eliminate redundancies
  - Table schemas can be hard for business users to understand





### Power BI Desktop is an ETL Tool

- ETL process is essential part of any BI Project
  - Extract the data from wherever it lives
  - Transform the shape of the data for better analysis
  - Load the data into dataset for analysis and reporting





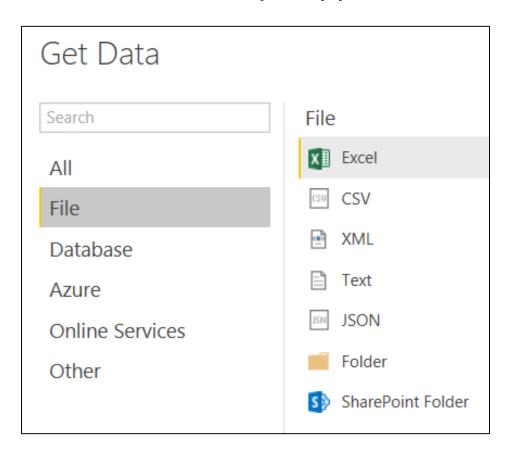
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#### **File-based Data Sources**

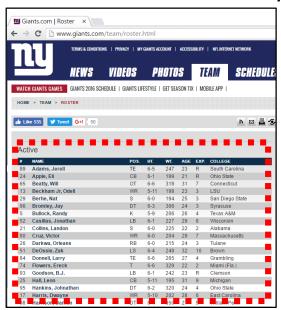
Power BI Desktop supports common file types

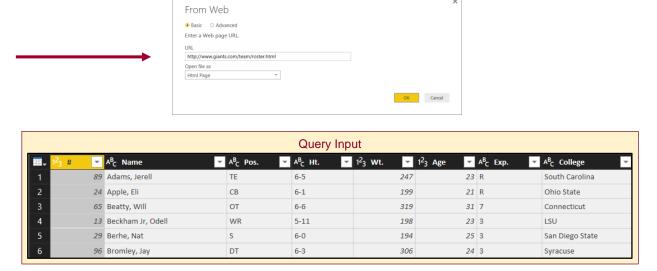


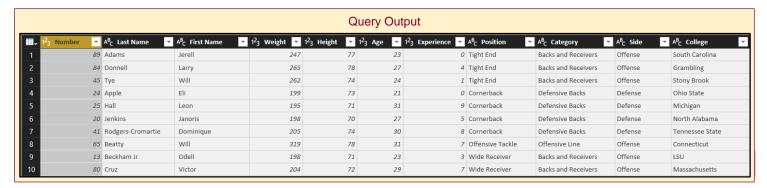


#### **Working with Web Data Sources**

- Many public websites publish data using HTML tables
  - Power BI desktop can scrape data from tables in HTML pages



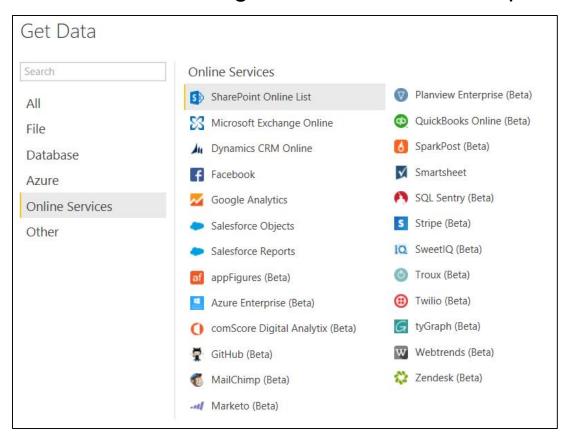






#### **Online Service Data Sources**

- Power BI Desktop Supports Online Services
  - Includes popular Software-as-a-Service (SaaS) applications
  - Microsoft is working with 3<sup>rd</sup> vendors to expand this list

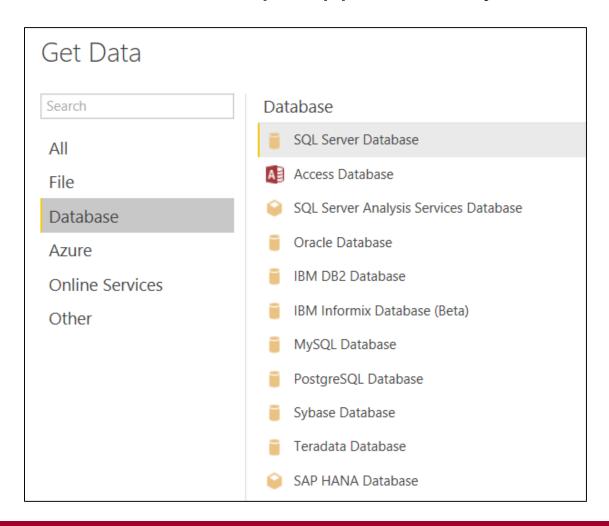






#### **Supported Databases**

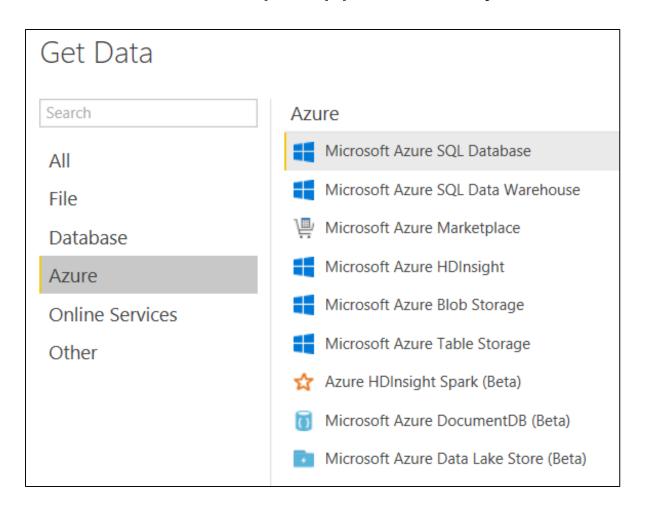
Power BI Desktop supports many database systems





#### **Azure Data Sources**

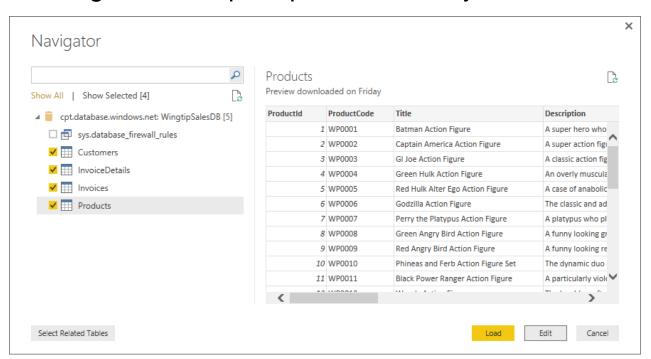
Power BI Desktop supports many Azure data sources





#### Selecting Tables from a SQL Database

- Power BI Desktop provides Navigator dialog
  - Allows you to select tables
  - Navigator understands existing table relationships
  - Clicking Load will run query and import data
  - Clicking Edit will open queries in Query Editor window

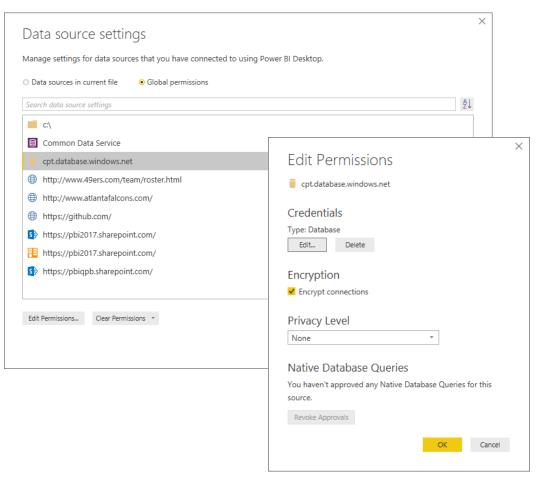






## Managing Datasources and Credentials







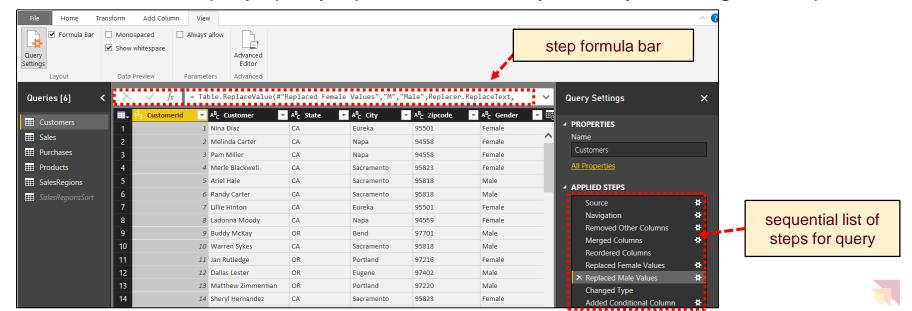
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#### **Query Steps**

- A query is created as a sequence of steps
  - Each step is a parameterized operation on the data
  - Each step has formula which can be viewed/edited in formula bar
  - Query starts with Source step to extract data from a data source
  - Additional steps added to perform transform operations on data
  - You can replay query operations one by one by clicking on steps

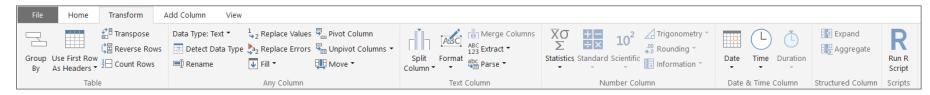


#### **Query Editor Ribbon Tabs**

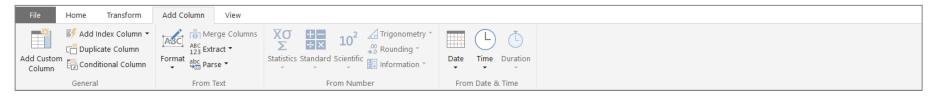
#### Home tab



#### **Transform** tab



#### Add Column tab



#### View tab





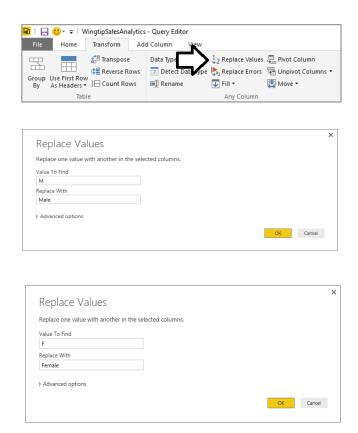
## **Examples of Basic Power BI Desktop Steps**

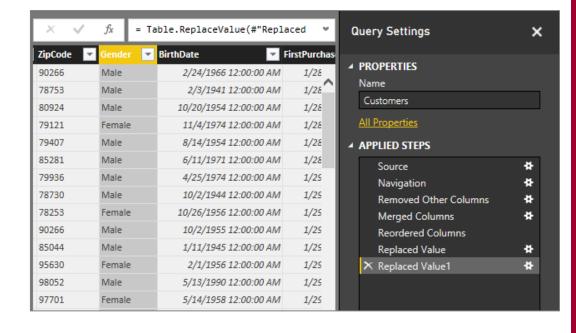
- Rename column
- Convert column type
- Format column values
- Reorder columns
- Replace column values
- Expanding related column
- Merging columns
- Splitting columns



### Replacing Values

Used to substitute values during import







#### **Converting Column Types**

- Transform data to make it more reliable
  - Convert date-time column to date column
- Transform data to make it more efficient
  - Convert decimal to fixed decimal number for currency

## PurchaseDate	1 <sup>2</sup> <sub>3</sub> Quantity	\$ SalesAmount	\$	ProductCost 🔻
1/28/2012	1	2.95	1.2	Decimal Number
1/28/2012	6		\$	Fixed Decimal Number
1/28/2012	1	19.95	1 <sup>2</sup> 3	Whole Number
1/28/2012	5	249.75		Date/Time
1/28/2012	1	2.95	<u> </u>	Date

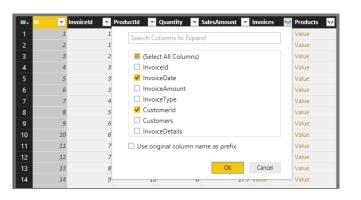
Beware: Conversion can have destructive effect on data



## **Expanding Related Columns**

- Used to pull data from related tables
  - Saves you from performing SQL joins or VLOOKUP



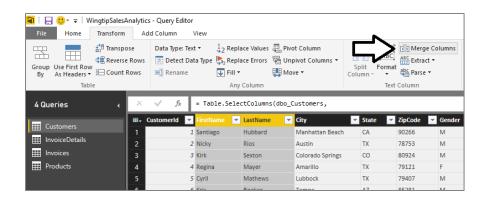






### **Merging Columns**

Merge two columns into a single column

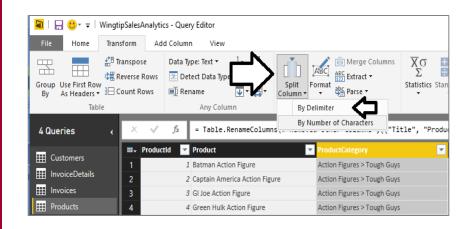


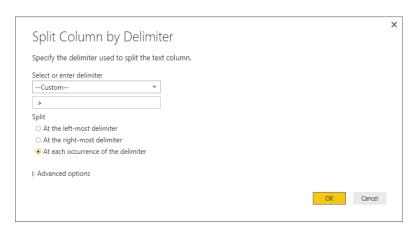


	CustomerId 🔻	Customer
1	1	Santiago Hubbard
2	2	Nicky Rios
3	3	Kirk Sexton
4	4	Regina Mayer
5	5	Cyril Mathews
6	6	Kris Booker
7	7	Tracy Christensen
8	8	Reed Glover

### **Splitting Columns**

Split a single column up into two columns



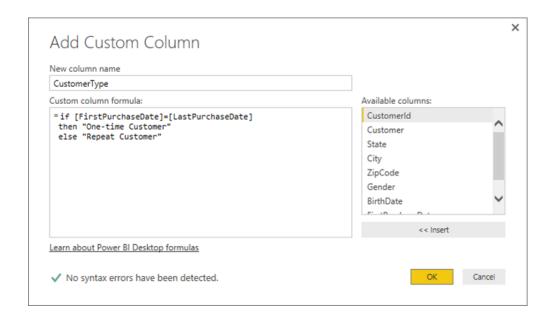


	ProductId 🔻	Product	Category	Subcategory
1	1	Batman Action Figure	Action Figures	Tough Guys
2	2	Captain America Action Figure	Action Figures	Tough Guys
3	3	GI Joe Action Figure	Action Figures	Tough Guys
4	4	Green Hulk Action Figure	Action Figures	Tough Guys
5	5	Red Hulk Alter Ego Action Figure	Action Figures	Tough Guys
6	6	Godzilla Action Figure	Action Figures	Tough Guys
7	7	Perry the Platypus Action Figure	Action Figures	Cute and Huggable
8	8	Green Angry Bird Action Figure	Action Figures	Cute and Huggable

#### **Adding a Custom Column**

- Custom column provide custom logic
  - Logic must be written in M programming language





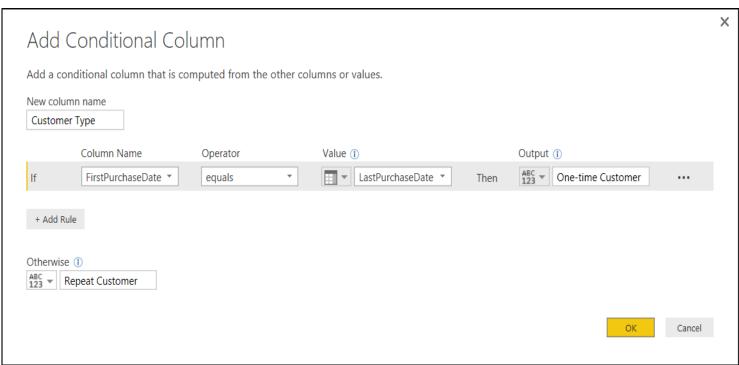
FirstPurchaseDate 🔻	LastPurchaseDate 🔻	CustomerType ~
1/28/2012	1/28/2012	One-time Customer
1/29/2012	11/22/2015	Repeat Customer
1/29/2012	10/2/2015	Repeat Customer
1/29/2012	1/29/2012	One-time Customer
1/29/2012	5/6/2015	Repeat Customer
1/29/2012	1/29/2012	One-time Customer



#### **Adding a Conditional Column**

Abstracts away need to write M code

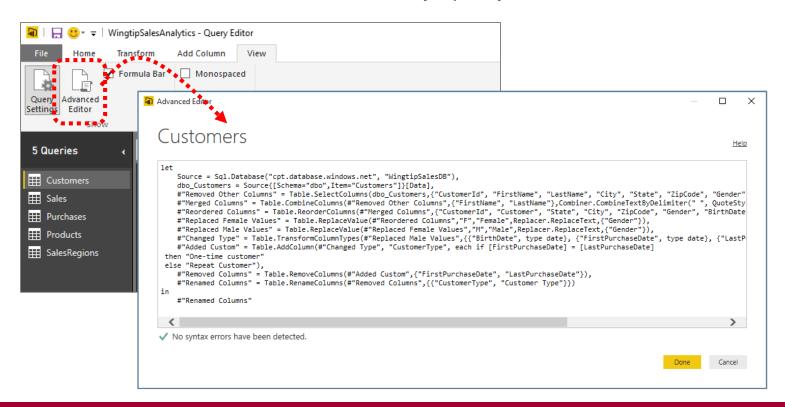






#### **Advanced Editor**

- Power BI Desktop based on "M" functional language
  - Query in Power BI Desktop saved as set of M statements in code
  - Query Editor generates code in M behind the scenes
  - Advanced users can view & modify query code in Advanced Editor





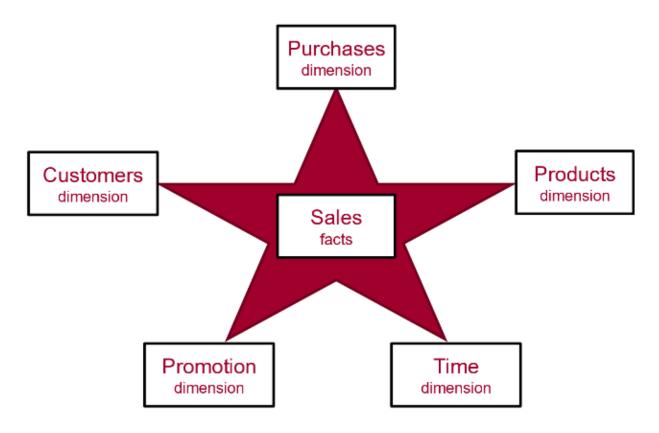
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#### **Data Modeling using a Star Schema**

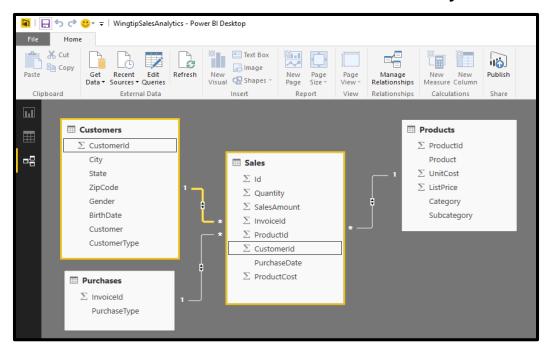
- OLAP Modeling often based on Star Schema
  - Tables defined as fact tables or dimension tables
  - Fact tables related to dimension table using 1-to-many relationships





#### **Designing Queries to Build a Star Schema**

- Converts OLTP Data Model to OLAP Data Model
  - Sales table is modeled as a OLAP Fact Table
  - Other tables are modeled as OLAP Dimension tables
  - Requires pulling CustomerId column into Sales table
  - All dimension tables should be directly related to fact table







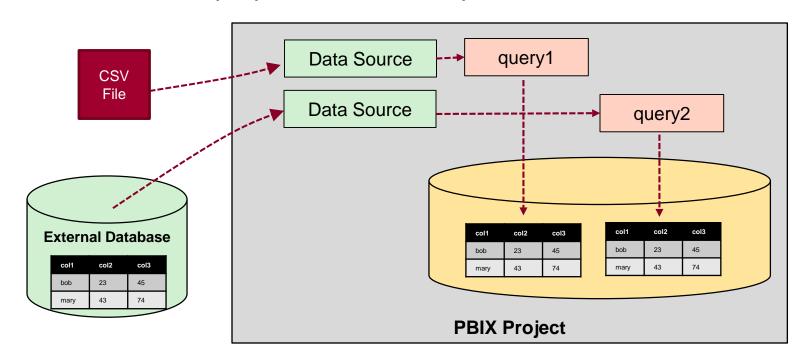
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## **Understanding Query Input and Output**

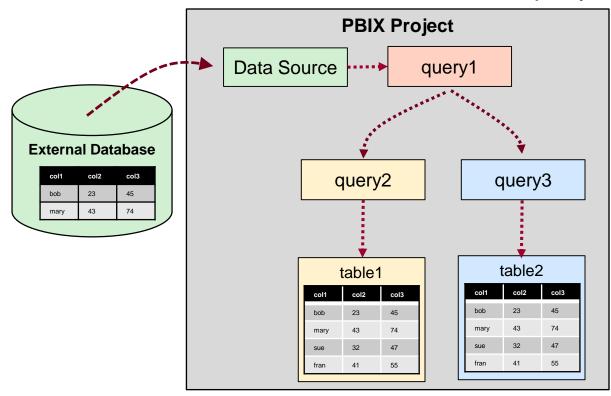
- PBIX project is container for data sources and queries
  - Queries created and saved within scope of Power BI project
  - Queries can pull data from local files
  - Queries can pull data from external content sources
  - Queries main purpose is to load imported data into data model

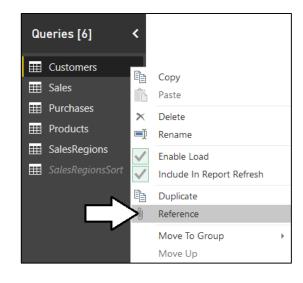




### **Query Composition**

- Query can serve as source for other queries
  - Allows for creation of reusable base queries & query composition
  - Complexity can be hidden in base queries
  - Reference command creates new query based on another query

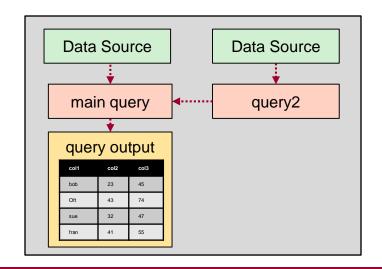


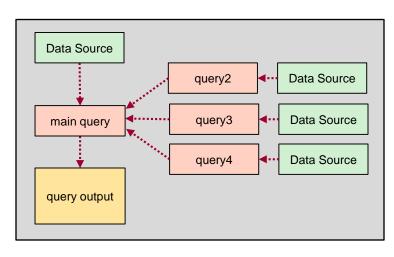




#### **Combining Queries**

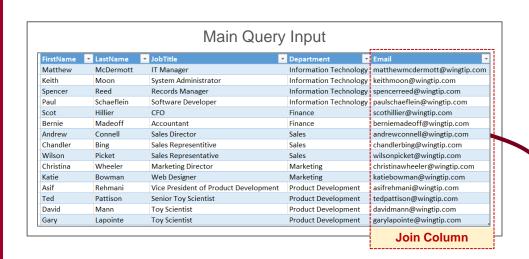
- Query can be merged or appended with another query
  - Merge operation allows you combine columns from two tables
  - Append operation allows you to combine rows from two tables
- Two queries are combined into single output for loading
  - Load settings of main query determines where output is loaded
  - Secondary query acts as source for main query
  - Secondary query be can created with connection-only load setting

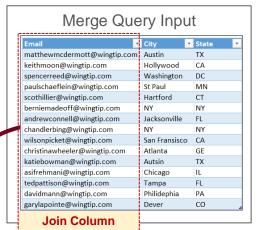






### **Merging Columns**





#### **Query Output**

First Name	Last Name 💌	Email -	Job Title	Department <b>*</b>	City	State *
Matthew	McDermott	matthewmcdermott@wingtip.com	IT Manager	Information Technology	Austin	TX
Keith	Moon	keithmoon@wingtip.com	System Administrator	Information Technology	Hollywood	CA
Spencer	Reed	spencerreed@wingtip.com	Records Manager	Information Technology	Washington	DC
Paul	Schaeflein	paulschaeflein@wingtip.com	Software Developer	Information Technology	St Paul	MN
Scot	Hillier	scothillier@wingtip.com	CFO	Finance	Hartford	CT
Bernie	Madeoff	berniemadeoff@wingtip.com	Accountant	Finance	NY	NY
Andrew	Connell	andrewconnell@wingtip.com	Sales Director	Sales	Jacksonville	FL
Chandler	Bing	chandlerbing@wingtip.com	Sales Representitive	Sales	NY	NY
Wilson	Picket	wilsonpicket@wingtip.com	Sales Representative	Sales	San Fransisco	CA
Christina	Wheeler	christinawheeler@wingtip.com	Marketing Director	Marketing	Atlanta	GE
Katie	Bowman	katiebowman@wingtip.com	Web Designer	Marketing	Autsin	TX
Asif	Rehmani	asifrehmani@wingtip.com	Vice President of Product Development	Product Development	Chicago	IL
Ted	Pattison	tedpattison@wingtip.com	Senior Toy Scientist	Product Development	Tampa	FL
David	Mann	davidmann@wingtip.com	Toy Scientist	Product Development	Philidephia	PA
Gary	Lapointe	garylapointe@wingtip.com	Toy Scientist	Product Development	Dever	СО





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# **Appending Rows**



Main Query Input							
FirstName *	LastName *	Company	Email Email	▼ City ▼	State 💌	ZipCode 💌	
Joe	Stephens	Initech	Joe.Stephens@Initech.com	Sacramento	CA	95823	
Basil	Frazier	Nordyne Defense Dynamics	Basil.Frazier@NordyneDefenseDynamics.com	Sacramento	CA	95823	
Ignacio	Duran	Yoyodyne Propulsion Systems	Ignacio.Duran@YoyodynePropulsionSystems.com	Beaverton	OR	97005	
Alvaro	Brock	W.C. Boggs & Co.	Alvaro.Brock@W.C.Boggs&Cocom	Beaverton	OR	97005	
Alec	Miller	Krusty Burger	Alec.Miller@KrustyBurger.com	Vancouver	WA	98662	
Maureen	Griffin	VersaLife Corporation	Maureen.Griffin@VersaLifeCorporation.com	Vancouver	WA	98662	
Guillermo	Sykes	Soar Airlines	Guillermo.Sykes@SoarAirlines.com	Sacramento	CA	95818	
Solomon	Warner	Wayne Enterprises	Solomon.Warner@WayneEnterprises.com	Seattle	WA	98125	
Humberto	Petersen	W.C. Boggs & Co.	Humberto.Petersen@W.C.Boggs&Cocom	San Francisco	CA	94118	
Keven	Griffith	Fabrikam	Keven.Griffith@Fabrikam.com	Bend	OR	97701	

	Append Query Input							
FirstName -	LastName 💌	Company	Email	- City	State -	ZipCode <b>▼</b>		
Rich	Pierce	The Regal Beagle	Rich.Pierce@TheRegalBeagle.com	Portland	OR	97216		
Ronnie	Donaldson	Union Aerospace Corporation	Ronnie.Donaldson@UnionAerospaceCorporation.com	Vancouver	WA	98684		
Willard	Frazier	Benthic Petroleum	Willard.Frazier@BenthicPetroleum.com	Portland	OR	97220		
Marina	Caldwell	Ewing Oil	Marina.Caldwell@EwingOil.com	Portland	OR	97205		
Milagros	Mercer	Hishii Industries	Milagros.Mercer@HishiiIndustries.com	Salem	OR	97301		
Kirsten	Little	Binford	Kirsten.Little@Binford.com	Ventura	CA	93003		
Terri	Ferrell	Black Mesa Research Facility	Terri.Ferrell@BlackMesaResearchFacility.com	Portland	OR	97205		
Francine	Doyle	Peach Pit	Francine.Doyle@PeachPit.com	Vancouver	WA	98662		
Dannie	Powers	Deon International	Dannie.Powers@DeonInternational.com	Issaquah	WA	98027		
Noah	Best	Shinra Electric Power Company	Noah.Best@ShinraElectricPowerCompany.com	Portland	OR	97217		
Keenan	Holmes	Biffco	Keenan.Holmes@Biffco.com	Portland	OR	97220		
Douglas	Maynard	Cyberdyne Systems	Douglas.Maynard@CyberdyneSystems.com	San Francisco	CA	94118		
Gerald	Harrington	Yoyodyne Propulsion Systems	Gerald.Harrington@YoyodynePropulsionSystems.com	Portland	OR	97217		
Josue	Robinson	North Western Railway	Josue.Robinson@NorthWesternRailway.com	Beaverton	OR	97005		

			Query Output			
FirstName	▼ LastName	Company	Email	City	State -	ZipCode
Joe	Stephens	Initech	Joe.Stephens@Initech.com	Sacramento	CA	95823
Basil	Frazier	Nordyne Defense Dynamics	Basil.Frazier@NordyneDefenseDynamics.com	Sacramento	CA	95823
Ignacio	Duran	Yoyodyne Propulsion Systems	Ignacio.Duran@YoyodynePropulsionSystems.com	Beaverton	OR	97005
Alvaro	Brock	W.C. Boggs & Co.	Alvaro.Brock@W.C.Boggs&Cocom	Beaverton	OR	97005
Alec	Miller	Krusty Burger	Alec.Miller@KrustyBurger.com	Vancouver	WA	98662
Maureen	Griffin	VersaLife Corporation	Maureen.Griffin@VersaLifeCorporation.com	Vancouver	WA	98662
Guillermo	Sykes	Soar Airlines	Guillermo.Sykes@SoarAirlines.com	Sacramento	CA	95818
Solomon	Warner	Wayne Enterprises	Solomon.Warner@WayneEnterprises.com	Seattle	WA	98125
Humberto	Petersen	W.C. Boggs & Co.	Humberto.Petersen@W.C.Boggs&Cocom	San Francisco	CA	94118
Keven	Griffith	Fabrikam	Keven.Griffith@Fabrikam.com	Bend	OR	97701
Rich	Pierce	The Regal Beagle	Rich.Pierce@TheRegalBeagle.com	Portland	OR	97216
Ronnie	Donaldson	Union Aerospace Corporation	Ronnie.Donaldson@UnionAerospaceCorporation.com	Vancouver	WA	98684
Willard	Frazier	Benthic Petroleum	Willard.Frazier@BenthicPetroleum.com	Portland	OR	97220
Marina	Caldwell	Ewing Oil	Marina.Caldwell@EwingOil.com	Portland	OR	97205
Milagros	Mercer	Hishii Industries	Milagros.Mercer@HishiiIndustries.com	Salem	OR	97301
Kirsten	Little	Binford	Kirsten.Little@Binford.com	Ventura	CA	93003
Terri	Ferrell	Black Mesa Research Facility	Terri.Ferrell@BlackMesaResearchFacility.com	Portland	OR	97205
Francine	Doyle	Peach Pit	Francine.Doyle@PeachPit.com	Vancouver	WA	98662
Dannie	Powers	Deon International	Dannie.Powers@DeonInternational.com	Issaquah	WA	98027
Noah	Best	Shinra Electric Power Company	Noah.Best@ShinraElectricPowerCompany.com	Portland	OR	97217
Keenan	Holmes	Biffco	Keenan.Holmes@Biffco.com	Portland	OR	97220
Douglas	Maynard	Cyberdyne Systems	Douglas.Maynard@CyberdyneSystems.com	San Francisco	CA	94118
Gerald	Harrington	Yoyodyne Propulsion Systems	Gerald.Harrington@YoyodynePropulsionSystems.com	Portland	OR	97217
Josue	Robinson	North Western Railway	Josue.Robinson@NorthWesternRailway.com	Beaverton	OR	97005





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