Power BI Desktop: New Data Transformation Features

# **Summary**

The purpose of this document is to serve as supporting reference to new data transformation features added to the Power BI Desktop application. Power BI Desktop is a free business intelligence design and development application containing rich capabilities in data connectivity, transformation, modeling, and report/dashboard development. Business intelligence artifacts created within Power BI Desktop such as datasets and reports can be published to the Power BI Service and consumed by Power BI users.

* New features and enhancements related to data connectivity, modeling, and general Power BI features are outside the scope of this document.
* This document will be updated with future Power BI report authoring updates and may be enhanced with further details and examples.
  + As of 8/28/16, this document only identifies new report authoring features and improvements since the September 2015 update.
* No new transformation features/enhancements were released in the December 2015 update

# **Monthly Update Links**

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| --- | --- | --- |
| [Sep-2015](#Sep2015) | [Oct-2015](#Oct2015) | [Nov-2015](#Nov2015) |
| Dec-2015 | Jan-2016 | [Feb-2016](#Feb2016) |
| [Mar-2016](#Mar2016) | [Apr-2016](#Apr2016) | [May-2016](#May2016) |
| [Jun-2016](#Jun2016) | [Jul-2016](#July2016) | [Aug-2016](#Aug2016) |
| [Sep-2016](#Sep2016) |  |  |

# **Feature Updates**

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| --- | --- | --- | --- | --- |
| **#** | **Feature or Improvement** | **Detail** | **Image(s)** | **Update Month** |
| 1 | Copy to clipboard | * Available for individual Cells, Column(s) and Tables * Data View and Query Editor Window |  | Sep-2015 |
| 2 | Filter date columns by earliest/latest date (dynamic filter) | * See Is Earliest and Is Latest * A dynamic filter; could be very useful to always pass the earliest or latest date from a query into the model/report as a parameter |  | Sep-2015 |
| 3 | Extract Min or Max Date/Time value from a column | * Transform tab, Date and Time options have this filter option as well |  | Sep-2015 |
| 4 | Replace Values – support for special characters | * Replace Values dialog has advanced options to make it easy to swap between line break indications |  | Sep-2015 |
| 5 | Detect Column Types Option | * ‘On Demand’ column type detection (previously only when first loaded data) * Available on Transform tab * PBI Desktop will detect which column type is now best for the columns selected |  | Sep-2015 |
| 6 | Refresh All Preview | * Refresh All Query Editor previews with a single click * Previously had to refresh each query individually |  | Sep-2015 |
| 7 | Performance Improvements | * Choose columns dialog (Home tab) faster for wide table * Filter and Expand/Aggregate popups faster for large numbers of values/fields | Items within a filter dropdown (e.g. list of products) will populate faster as well  Much more fluent to work with query editor | Sep-2015 |
| 8 | Filter by “Not Earliest/Latest Date” | * Also included in the “In the Next..” and “In the Previous” filter dialog * Makes it easy to define dynamic rolling queries (last 7 days, ex) |  | Oct-2015 |
| 9 | Filter by “is in Previous N minutes/hours/seconds” | * Select a Date Column in Query Editor Window * Click dropdown * Click Date/Time Filters   + In previous or In next options |  | Oct-2015 |
| 10 | Copy/Paste Queries between PBI Desktop and Excel | * Copy query from Query Editor * Open a different PBI Desktop file * Can also copy an entire group of queries by clicking on the folder group of queries * Can Paste to Excel 2010/2013/2016 (with PQ add in for 2010 and 2013) |  | Oct-2015 |
| 11 | Special Characters in Split Column | * Split Column Dialog supports a split by special character if Delimiter property is set to –Custom— * Selecting the special character at botton will insert this character into the second input box |  | Oct-2015 |
| 12 | Refresh Previews in Merge Queries Dialog | * Refreshing both tables in preview gives updated matches in join |  | Oct-2015 |
| 13 | Monospaced font for Query Editor Preview | * Easier to spot data cleanliness issues via preview (see additional characters or spaces) |  | Oct-2015 |
| 14 | Improved Function Invocation experience | * Easier to provide parameter values in navigator and preview when connecting to data sources * Available for data sources that support functions |  | Nov-2015 |
| 15 | Option to set credentials at Server vs. Database level | * New radio button in credentials dialog prompt |  | Nov-2015 |
| 16 | Add Prefix/Suffix to a Text column | * Transform Tab   + Format   + Add Prefix or Sufix * Also available in Add Column tab for creating a derived column with suffix or prefix * Previously had to use a custom column and ampersand symbol |  | Nov-2015 |
| 17 | Append Multiple Tables | * Have always supported only two tables at a time and had to create multiple queries to support many source tables * Can also append multiple copies of an existing table |  |  |
| 18 | “Refresh Data” for individual tables from Field List (Report and Data Views) | * Previously had to click Refresh from Home Tab and this would refresh all queries in the model | Option also exists from dialog in Data View with Table selected |  |
| 19 | Option to Disable Data Previews to download in background | * Some data previews could be consuming CPU on machine * File scoped option; only applied to given PBIX file (not a Global Option) * File – Options and Settings - |  |  |
| 20 | Alphabetic sort of columns in Choose Columns dialog | * By default choose columns will show natural order of columns but now you can sort the columns displayed alphabetically |  | Feb-2016 |
| 21 | Improved performance | * Renaming columns is faster * Removing colums is faster * Reordering columns is faster   These three operations now happen locally rather than sending queries to server for refreshing the preview  This feature will be extended to other operations |  | Feb-2016 |
| 22 | Virtualized Preview in Query Editor | * Improved Query Editor preview * No longer any limitation in the amount of data that can be displayed * Previously about 3,000 cells and would cut * As you scroll the table you’ll see more rows & columns |  | Feb-2016 |
| 23 | Visual Indicator for Unloaded queries in Query Editor | * Easier to identify which queries are actually loaded to data model and which are just used by other queries * Tables not loaded show up in Italics |  | Feb-2016 |
| 24 | 1-click % Transform | * Select a column within Query Editor * Specify a % to apply to column in a dialog   Avoids need to create a custom derived column  More one click transforms to come.. |  | Feb-2016 |
| 25 | New Transforms | * Remove Blanks via Column Filter * Convert duration to Years * Keep Duplicates | Remove all rows where value for current column is null or empty.  Accessible via Column Filter menu dropdown  Duration to Years: Divide # of days of duration type column by 365  Available in Transfor or Add Colum tab  Keep duplicates – keep only rows with duplicated values on selected columns  Available on Home tab under Remove Duplicates split button | Mar-2016 |
| 26 | Preview: whitespace and line feeds in Query Editor preview | * View tab – “Show whitespace” (now default) – in Query Editor Window |  | Mar-2016 |
| 27 | Option to disable preview from Navigator | * Reduces the # of calls being made to the data source to retrieve previews |  | Mar-2016 |
| 28 | Technical name support | * Can switch between ‘physical name’ (previous behavior) and ‘technical name’ (new behavior |  | Mar-2016 |
| 29 | Load: auto-step to disambiguate conflicting column names | * Power BI Desktop will automatically rename conflicting column names * New steps in Query Editor that can be customized by user |  | Mar-2016 |
| 30 | Rename queries directly from queries pane | * Query Editor * Select and Right-click the query to Rename |  | Mar-2016 |
| 31 | Smarsheet Connector now GA | * Automatic type detection of columns in sheets you import * “changed type” step in Query Editor shows transforms applied |  | Mar-2016 |
| 32 | Query Parameters | * Create and manage parameters in Query Editor to make the PBI file dynamic * Apply parameters to filter definitions for different columns * Edit Parameters only allows you to edit the values of the parameters, not their definition. | Access parameters from Query Editor (Edit Queries on Home tab) or from Home tab directly.      From Query Editor: | Apr-2016 |
| 33 | Power BI Template files | * PBIT files ony contain the queries, visuals, formatting, model metadata, etc…not the data * Can be used with parameters like an SSRS report – user accesses a template | Main Menu – Export – Power BI Template | Apr-2016 |
| 34 | Conditional Columns | * GUI interface for creating conditional expressions and rules * Can eliminate need for custom M expression |  | Apr-2016 |
| 35 | Column type indicator in Query Editor preview column headers | * Visual indicator distinguishes between Date/Time and Date, Decimal versus Whole Number, and more | ABC, 123, 1.23, Date…easy visual indicator as opposed to seeing Data Type property | Apr-2016 |
| 36 | Reorder Queries and Query Groups via Drag & Drop gestures | * From Query Editor, can right-click to create group rolders and can drag-drop queries and parameters to folders |  | Apr-2016 |
| 37 | Query Mangement menu in the ribbon | * Can use Manage dropdown from Home tab rather than right-clicking an individual query |  | Apr-2016 |
| 38 | Text/CSV connector exposes editable settings in preview dialog | * Preview dialog allows user to configure File Origin, Delimiter, and Data Type Detection |  | May-2016 |
| 39 | Advanced Filter Rows dialog | * Filter rows dialog now has ‘advanced mode’ that allows multiple filter clauses within a single Filter Rows step * Can now combine filter clauses based on multiple columns   (previously all clauses where applied to same column) | Just pick a column and apply a filter to bring up Filter Rows dialog  Basic mode supports only 1 column supports only two clauses combined with an And or OR | May-2016 |
| 40 | Inline Input controls for Function invocation within the Query Editor | * Improved inline preview for M functions – both standard M Engine functions and user defined functions |  | May-2016 |
| 41 | Query Parameters | * Convert queries to parameters and vice versa * URL parameterization   + Can now parameterize part of aURL * Conditional Column Parameterization   + Can pass parameter to a conditional column * Can ONLY convert queries that contain scalar values (text value, number, Date/Time)   + Option is disabled if query returns a list   \*\*in next 2-3 months will be able to populate list of accepted values in parameter from output of a query | Queries Pane in Query Editor as context menu | May-2016 |
| 42 | Support for reordering Query Steps via drag and drop |  |  | May-2016 |
| 43 | Data picker support in Conditional Columns dialog |  |  | May-2016 |
| 44 | New context menu to create new queries from Queries Pane |  |  | May-2016 |
| 45 | Option to load or edit a template when importing template |  |  | June-2016 |
| 46 | Always allow parameterization | * View tab in Query Editor window   + Previously had to create a parameter beforehand |  | June-2016 |
| 47 | Create New parameter in context | * For common dialog boxes you may need/want to parameterize |  | June-2016 |
| 48 | Generate Query Steps in English | * File – Options – Global   + Option only shows up in non-English version of product |  | June-2016 |
| 49 | Description for query steps | * Previously it was possible to provide a description for queries but not steps of queries |  | June-2016 |
| 50 | Extract Week Day and Month Name from a DateTime column | * Available in both Transform and Add Column * Per image, use the Date dropdown * Date – Day – Weekday * Date – Month – Month Name |  | June-2016 |
| 51 | Merge Date and Time columns into a DateTime column | * Select both columns and click “Combine Date and Time” * Use Date or Time dropdown menu * Available in Transform and Add Colum |  | June-2016 |
| 52 | Extract Start or End of an Hour based on a Date/Time or a Time column | * Use the Time dropdown   + Hour * Available for both Transform and Add Column |  | June-2016 |
| 53 | Use R Scripts inside the Query Editor | * Use R script to perform cleansing, shaping, and analytics (predictions, clustering, etc) * Need to have R installed locally * Need to change privacy setting to public for source using R script | 1. Run R Script from the Transform tab in Query Editor | July-2016 |
| 54 | Query Parameters provided by output of other query | * Can now dynamically compute list of allowed values for a parameter (instead of static) * Limitations:   + only queries that produce a List are supported   + In PBI Service, user doesn’t get list of values |  | July-2016 |
| 55 | Overwrite existing UDFs | * Background: can convert query to function (query parameters become function parameters) | Can now overwrite functions when exporting multiple times from the same query | July-2016 |
| 56 | Merge or Append as New Query | * Merge or append operations are added as steps to existing query * ‘as new’ creates new query |  | Aug-2016 |
| 57 | Query Dependencies view | * Open Query Editor * View * Query Dependencies * Can see all queries and dependencies between queries and data sources * Also have indicator of query load status |  | Sep-2016 |
| 58 | Show Errors experience | * Previously, would only see cell level errors within query editor preview. Errors during load were converted to null |  | Sep-2016 |
| 59 | Query Editor Ribbon – Support for Scalar Values |  |  | Sep-2016 |
| 60 | Add Function Invocation Column | * Previously have had to create custom columns and type M expressions to invoke functions against rows to table * Can now use UI to invoke function against rows of a table * Add Column tab – Invoke Custom Function | Can pick a function defined in current file and specify input arguments – static values or references to other columns in the current table query | Sep-2016 |
| 61 | Expand and Aggregate Columns – Support for load more values | * A ‘load more’ option exists for Power BI Desktop will scan up to 1,000 rows of nested data to determine the list of columns to display in the Expand & Agg Columns lists |  | Sep-2016 |
| 62 | New Transform – Convert Table Column to a List | * Select a column of a table in Query Editor and click Convert to List from the Transform tab * Can further modify the list with List Tools ribbon tab * List Queries can be used as input for the Accepted values property in Query Parameters |  | Sep-2016 |
| 63 | Keyboarding – support for ‘smart typing’ in dropdown menus | * Can now type one or more characters and these will get matched with the prefix of dropdown menu items. |  | Sep-2016 |