Power BI Desktop: New Data Modeling & Analytics Features

# **Summary**

The purpose of this document is to serve as supporting reference to new data modeling and analysis 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, transformations, report authoring and general Power BI features are outside the scope of this document.
* Power BI Documentation Update Archive is maintained here: <http://bit.ly/2t6fRUE>
* This document will be updated with future Power BI report authoring updates (e.g. Oct 2018 Update).
* No data modeling enhancements or new features were released in the months with red background formatting.

# **Monthly Update Links**

|  |  |  |
| --- | --- | --- |
| [Sep-2015](#Sep2015) | [Oct-2015](#Oct2015) | [Nov-2015](#Nov2015) |
| [Dec-2015](#Dec2015) | [Jan-2016](#Jan2016) | [Feb-2016](#Feb2016) |
| [Mar-2016](#Mar2016) | [Apr-2016](#Apr2016) | May-2016 |
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| Sep-2016 | Oct-2016 | Nov-2016 |
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| Dec-2017 | Jan-2018 | [Feb-2018](#Feb2018) |
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# **Feature Updates**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Feature or Improvement** | **Detail** | **Image(s)** | **Update Month** |
| 1 | Calculated Tables | * Like a calculated column, created via DAX based on other tables and relationships in model * Can be used just like other tables in the model – relationships, metrics * Top use: simplify DAX metrics (like a Temp Table via Join, Union) * Second use: help optimize performance of a metric such as banding or ranking   \*Calculated tables are not supported in Excel 2016 | \*Hit Enter and table expression will be created (persisted in model) | Sep-2015 |
| 2 | Relationships View | * Drag/Drop to create relationships between tables   + Columns for relationships will be detected   + Type of relationship (may to one) will be detected * Delete relationships via Delete key * Rename tables and columns * Delete tables and columns |  | Sep-2015 |
| 3 | Data View | * Copy table contents to clipboard   + Copy whole table or just selected column * Useful for easy analysis of model data in Excel or other applications (Outlook, Word) |  | Sep-2015 |
| 4 | Field Summarization | * Additional Operations in Fields Pane (Report View)   + Median   + Variance, Std Dev * Defaul Summarization   + Customize default summarization for any field in model |  | Sep-2015 |
| 5 | Semi-Select for DAX formulas in Data View | * When authoring in Table view you can click a column to include it in formula (rather than type) |  | Oct-2015 |
| 6 | Basic Time Intelligence | * By dragging a date column into the axis, PBI Desktop creates hierarchy Year, Quarter, Month, Day by default * Can use drill down mode and drill up/down all buttons * Can toggle back to just the date column via the dropdown |  | Nov-2015 |
| 7 | Relationships View | * Zooming Slider * Fit Zoom to Screen * Reset Layout button * Ability to Zoom in using Ctrl + Mouse selection | Zoom in and out at bottom right right of relationship view  Can return to default layout  Highlight rectangle and zoom in on only one area of the model | Dec-2015 |
| 8 | Suggested Relationships | * When trying to create visuals involving tables without relationships * Relationships can be created automatically from error window |  | Dec-2015 |
| 9 | Enhanced Hierarchy Support | * User can now specify levels within hierarchy to add to visual * Previously ‘all or nothing’ of hierarchy in visual |  | Jan-2016 |
| 10 | Define hierarchies | * Can define hierarchies in fields pane (report view) * Use hierarchies in visuals (drill down/updat * Right-click a field name, New Hierarchy * Can now right-click a different field and ‘add to the hierarchy’ * Can rename hierarchy | Adding a hierarchy to a visual will default to top level of hierarchy (can drill down)  In the future the hierarchy context (via concatenation) will be included in PBI desktop defined hierarchies | Feb-2016 |
| 11 | Performance improvmenet | * Faster to rename tables and columns in data view and report view |  | Feb-2016 |
| 12 | Change datatype of a column in DQ mode | * Modeling tab and select data column from the Fields Pane |  | Mar-2016 |
| 13 | Assume Ref Integrity on relationships in DQ mode | * Applies to imported and created relationships * Only enabled when connecting in DQ mode * Enables more efficient queries | 1. Home Tab 2. Manage Relationships 3. Select Relationship 4. Edit     Allows inner join queries to be sent to database rather than outer join queries  From column is never null and for every value of from column there is a corresponding value in To column | Mar-2016 |
| 14 | Modeling operations not blocked during visual refresh | * Performance improvement of authoring experience |  | Apr-2016 |
| 15 | Time intelligence functions with built-in date hierarchy fields | * Apply standard DAX time intelligence metrics for date hierarchy fields |  | Apr-2016 |
| 16 | Data model synonyms | * Enable use of Q&A on top of model by providing synonyms for different metrics and columns |  | Apr-2016 |
| 17 | Row Level Security | * Define roles and security filters for those role within the PBIX file * Assign members to the given Role in the PBI service * Available via the Modeling tab in ribbon |  | June-2016 |
| 18 | Q & A in Spanish | * Relationship view (Model Diagram window) |  | Apr-2017 |
| 19 | Bidirectional crossfiltering for DirectQuery models is now GA |  |  | Jul-2017 |
| 20 | New Quick Measures | Star Rating and Concatenated list of values |  | Jul-2017 |
| 21 | What if parameters | Currently limited to decimal number, fixed decimal number, and whole number | Can specify min, max, increment, and default value via UI  Creates a table with a single column via GENERATESERIES() DAX function  Creates a measure with the SELECTEDVALUE() DAX function | Aug-2017 |
| 22 | Scatter Chart Analytics | Symmetry Shading  Ratio Line | Helpful to understand which measure (X axis or Y axis) does a point favor | Aug-2017 |
| 23 | Quick Measure: Weighted Average |  |  | Aug-2017 |
| 24 | Quick Measures for SSAS Live Connections |  | Might see a different list of available quick measures depending on which version of SSAS you’re connected to | Oct-2017 |
| 25 | New Quick Measure: Sales from new customers quick measure |  |  | Oct-2017 |
| 26 | Cell-level formatting for multidimensional SSAS models |  | Cell level formatting will now flow through to Power BI tables, matrices, single value cards | Oct-2017 |
| 27 | Cell-level formatting for SSAS models | Will now support multi-row cards (unlike last month) |  | Nov-2017 |
| 28 | Mark custom date table | If you’re bringing in your own date table  Can now mark that in PbI Desktop direclty  can use time intelligence functions with table marked as a date table | Right click the table from the Fields list and mark as date table  Alternatively, use the Mark as Date Table feature in the Modeling tab | Feb-2018 |
| 29 | Quick measures are now GA | No longer need to turn on the preview switch |  | Feb-2018 |
| 30 | Update linguistic schema | Modeling tab  Export and import linguistic schema | 1. Export out schema 2. Edit in any text editor 3. Import the schema file back into PBIX   Changes will be reflected in Q & A experience | Apr-2018 |
| 31 | New DAX function: COMBINEVALUES() | Supports multi-part keys when using DirectQuery | The input columns are decomposed when sent to source to result in using the source columns of the data source. This usually results in more efficient SQL query. | Apr-2018 |
| 32 | Filtering and sorting in Data View | Basic and advanced filtering options | Status bar at bottom includes both total and filtered rows | Jun-2018 |
| 33 | Improved locale formatting | Better default locale formatting | Any format you specify for a column or measure will be respected | Jun-2018 |
| 34 | Composite Models (Preview) | * Can now have multiple DirectQuery sources in the same model as well as both DirectQuery and import sources * Can create relationships between the tables and fully utilize normal report authoring features (e.g. cross-highlight) * In Preview, only supporting relational DQ sources, not multidimensional * In Preview, can only work with model in PBI Desktop, not in the service | * Hovering over tables in fields list of composite model displays sources and/or last refresh of table depending on the source type * Relationships between tables of different source types are many-to-many by default   Machine generated alternative text: | Jul-2018 |
| 35 | Conditional formatting by values | * New conditional formatting option for table and matrix * Can format by the values of a field | Format by – Field value  Can define a measure which returns a specific color name “red” or hexcodes  Example: SWITCH….measure < 1000, “#b20000”, <15000, “#ffc04c”….)  Can also use a column such as Product Color to drive the formatting | Aug-2018 |
| 36 | Python integration | * Python connector for retrieving data * Python available in Query Editor for transformation * Create new visuals via Python | Get Data – Other category  Power Query Editor – Scripts – Ryn Python Script (next to Run R script)  Very similar experience to using R in Power BI  Python installed on PC…choose where to edit Python instead of default editor  Python visual will reflect filters from other visuals and data refresh but not be interactive itself | Aug-2018 |
| 37 | Q & A Improvements | * Q & A in PBI Desktop now GA * Better matching experience for PBI Desktop and PBI Premium | \*reports in PBI shared capacity will not take advantage of better matching experience | Aug-2018 |
| 38 | Data categories for measures | * Example: Generate Web URLs, Image URLs | Can create a measure which appends the selected value in a report to a URL with a filter parameter…creating a certain drillthrough/browse experience | Aug-2018 |
| 39 | Statistical DAX functions | * Several new functions now supported that match the behavior of Excel functions | * NORM.DIST, NORM.S.DIST, NORM.INV, NORM.S.INV, * T.DIST, T.DIST.RT, T.DIST.2, T.INV, T.INV.2T | Aug-2018 |
| 40 | Aggegations (Preview) | * Import only summarized values in memory into model. | * Will only have to go back to DirectQuery for certain details * Boost performance of report queries and reduce data refresh times * Limit the volume of queries sent to DirectQuery source to stay within concurrency limits of the high scale data source (e.g. Azure SQL DW) * The detailed (filter) queries that do get sent to DQ source are usually the kinds of queries that the source system can handle well * Example: all tables are DQ except the Agg Table     Aggs table has the most common grain – day, customer, product and aggs of columns  Properties for table – switched storage mode to Import  PBI automaticallly converted related tables to dual mode  If query use aggs table, use the tables in-memory,  If query uses DQ, use the source  Right-click table - Manage aggregations    Hide table from users  Like composite models, it’s not yet supported in the Power BI service… | Sep-2018 |