

Designing a Data Model with Power BI Desktop



Agenda

- Modeling Data in Power BI Desktop
- Understanding Table Relationships
- Writing DAX Expressions
- Creating Calculated Columns
- Creating Measures to Aggregate Data
- Adding Geographic Fields to a Data Model



Data Modeling with Power BI Desktop

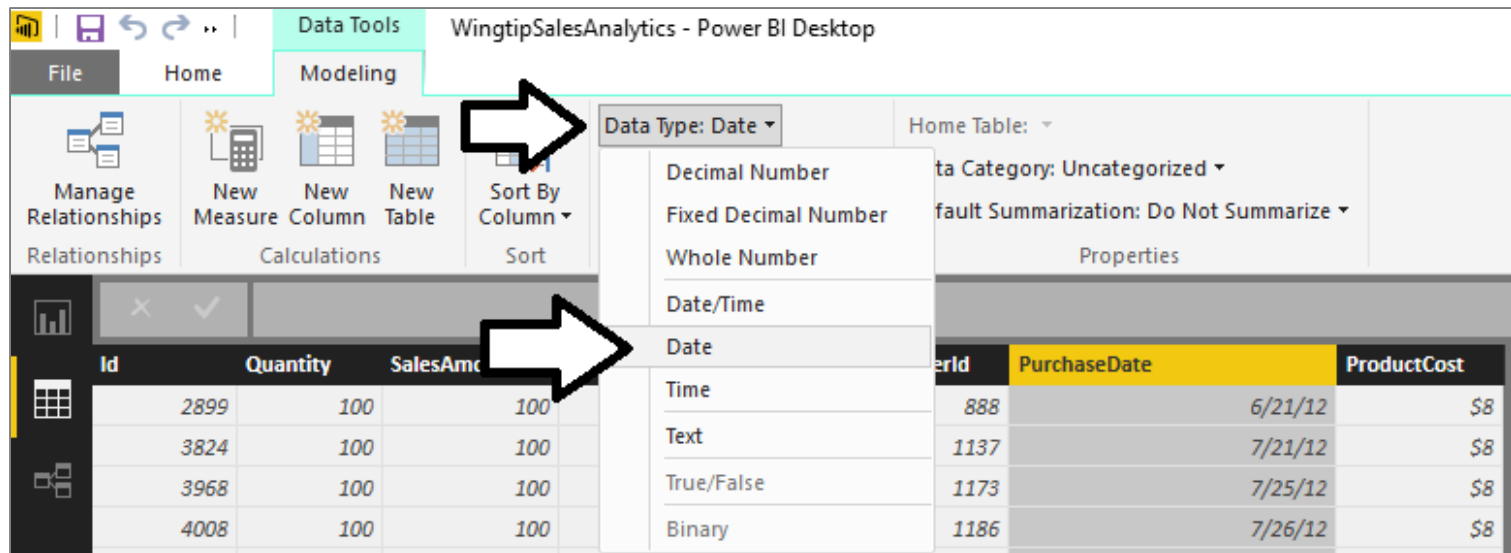
- Steps to create a data model with Power Pivot
 - Create relationships between tables
 - Modify columns (rename, set formatting, convert type)
 - Create calculated columns
 - Create measures
 - Add column metadata
 - Create dimensional hierarchies
 - Add Calendar table(s)

Covered in next module



Converting Column Types

- Power Pivot allows you to convert columns
 - Alternative to converting column with Power Query



The screenshot shows the Power BI Desktop interface with the 'Data Tools' ribbon selected. The 'Modeling' tab is active, and the 'Sort By Column' dropdown is open, showing a list of data types. A large white arrow points from the 'Sort By Column' dropdown to the 'Date' option in the list. Another large white arrow points from the 'Date' option to the 'PurchaseDate' column in the data table below.

The data table shows the following columns and values:

Id	Quantity	SalesAmt	ProductId	PurchaseDate	ProductCost
2899	100	100	888	6/21/12	\$8
3824	100	100	1137	7/21/12	\$8
3968	100	100	1173	7/25/12	\$8
4008	100	100	1186	7/26/12	\$8



Formatting Columns

- Each column has its own formatting properties
 - Formatting propagated to reports and visuals
 - Makes it easier on data model consumers

The screenshot shows the Power BI Desktop interface with the 'Modeling' ribbon selected. The ribbon includes options for 'Manage Relationships', 'New Measure', 'New Column', 'New Table', and 'Sort Column'. The 'Sort Column' dropdown is open, showing 'Sort' as the selected option. The 'Data Type' is set to 'Fixed Decimal Number' and the 'Format' is set to '\$ English (United States)'. The 'Home Table' is set to 'Sales'. The 'Data Category' is set to 'Uncategorized' and the 'Default Summarization' is set to 'Sum'.

The data table below shows the following columns and values:

Id	Quantity	SalesAmount	InvoiceId	ProductId	CustomerId	PurchaseDate	ProductCost
2899	100	\$100.00	1457	14	888	Thursday, June 21, 2012	\$8
3824	100	\$100.00	1901	14	1137	Saturday, July 21, 2012	\$8
3968	100	\$100.00	1969	14	1173	Wednesday, July 25, 2012	\$8
4008	100	\$100.00	1987	14	1186	Thursday, July 26, 2012	\$8
4224	100	\$100.00	2096	14	1239	Friday, August 3, 2012	\$8
4724	100	\$100.00	2352	14	1390	Sunday, August 19, 2012	\$8

The 'Fields' pane on the right shows the 'Sales' table selected.



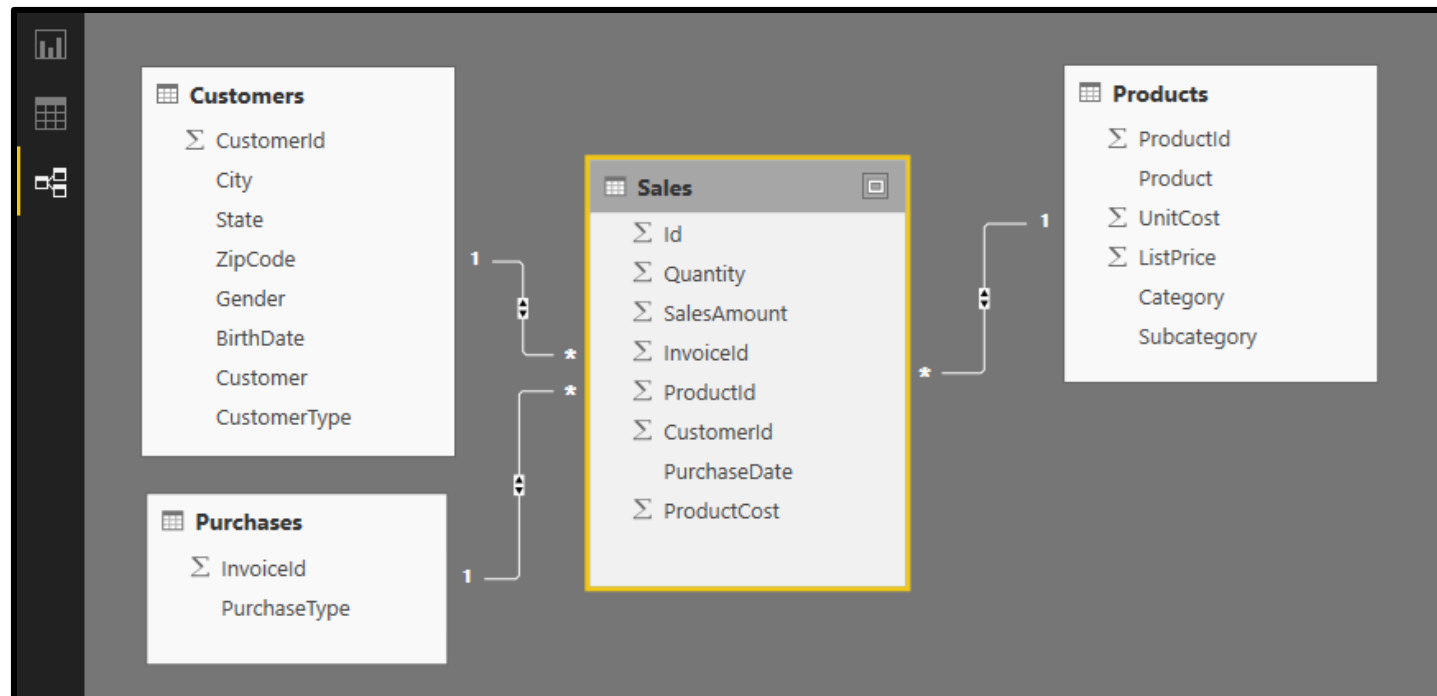
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Table Relationships

- Tables in data model associated with relationships
 - Relationships based on single columns
 - Tabular model supports [1-to-1] and [1-to-many] relationships
 - Relationships based on single column in each table



Relationship Properties

- Cardinality

Cardinality

Many to One (*:1)

Many to One (*:1)

One to One (1:1)

One to Many (1:*)

- Cross filter direction

Cross filter direction

Both

Single

Both

Edit Relationship

Select tables and columns that relate to one another.

Sales

Id	Quantity	SalesAmount	InvoiceId	ProductId	CustomerId	PurchaseDate	ProductCost
2899	100	100	1457	14	888	Thursday, June 21, 2012	\$8
3824	100	100	1901	14	1137	Saturday, July 21, 2012	\$8
3968	100	100	1969	14	1173	Wednesday, July 25, 2012	\$8

Customers

CustomerId	City	State	ZipCode	Gender	BirthDate	Customer	CustomerType
55	San Jose	CA	95110	Female	Thursday, March 10, 1949	Jewell Ryan	Repeat Customer
73	San Jose	CA	95123	Male	Thursday, May 9, 1985	Granville Perry	Repeat Customer
74	San Jose	CA	95122	Female	Tuesday, June 19, 1979	Sheri Mercado	Repeat Customer

Cardinality

Many to One (*:1)

Cross filter direction

Both

☒ Make this relationship active

OK Cancel



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Working with DAX

- DAX is the language used to create data model
 - DAX stands for "Data Analysis Expression Language"
- DAX expressions are similar to Excel formulas
 - They always start with an equal sign (=)
 - DAX provides many built-in functions similar to Excel
- DAX Expressions are unlike Excel formulas...
 - DAX expressions cannot reference cells (e.g. A1 or C4)
 - Instead DAX expressions reference columns and tables

```
=SUM('Sales' [SalesAmount])
```



Writing DAX Expressions

- Some DAX expressions are simple

```
Sales Revenue = Sum(Sales[SalesAmount])
```

- Some DAX expressions are far more complex

```
Sales Growth PM = IF(
  ( ISFILTERED(Calendar[Month]) && ISFILTERED(Calendar[Date]) = FALSE() ),
  DIVIDE(
    SUM(Sales[SalesAmount]) -
    CALCULATE(
      SUM(Sales[SalesAmount]),
      PREVIOUSMONTH(Calendar[Date])
    ),
    CALCULATE(
      SUM(Sales[SalesAmount]),
      PREVIOUSMONTH(Calendar[Date])
    )
  ),
  BLANK()
)
```



Types of DAX Functions

- Date and Time Functions
- Information Functions
- Logical Functions
- Mathematical and Trigonometric Functions
- Statistical Functions
- Filter Functions
- Text Functions
- Time Intelligence Functions



Calculated Columns vs Measures

- Calculated Columns (aka Columns)
 - Evaluated based on context of a single row
 - Evaluated when data is loaded into memory

`Column1 = <DAX expression>`

- Measures
 - Evaluated at query time based on current filter context
 - Commonly used for aggregations (e.g. SUM, AVG, etc.)
 - Used more frequently than calculated columns

`Measure1 = <DAX expression>`



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When to Create Calculated Columns

- Measures often better choice than calculate columns
 - Don't create calculated column when you need a measure
 - Prefer to create calculated columns only in specific scenarios
- When should you create calculated columns?
 - To create headers for row labels or column labels
 - To place calculated results in a slicer for filtering
 - Define an expression strictly bound to current row
 - Categories text or numbers (e.g. customer age groups)



Creating Calculated Columns

- Edited in formula bar of Power Pivot data view
 - Start with name and then equals (=) sign
 - Enter a valid DAX expression
 - Clicking on column adds it into expression

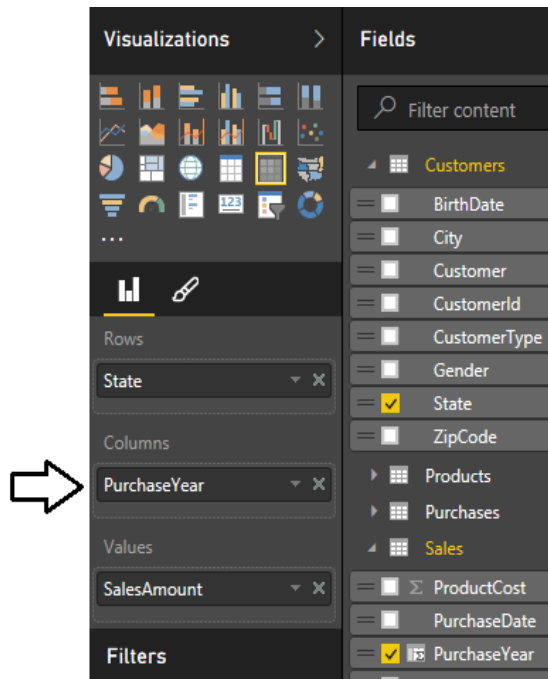


PurchaseYear = YEAR(Sales[PurchaseDate])									
Id	Quantity	SalesAmount	InvoiceId	ProductId	CustomerId	PurchaseDate	ProductCost	SalesProfit	PurchaseYear
2899	100	\$100.00	1457	14	888	6/21/12	\$8.00	\$92.00	2012
3824	100	\$100.00	1901	14	1137	7/21/12	\$8.00	\$92.00	2012
3968	100	\$100.00	1969	14	1173	7/25/12	\$8.00	\$92.00	2012
4008	100	\$100.00	1987	14	1186	7/26/12	\$8.00	\$92.00	2012
4224	100	\$100.00	2096	14	1239	8/3/12	\$8.00	\$92.00	2012
4724	100	\$100.00	2352	14	1390	8/19/12	\$8.00	\$92.00	2012



Calculated Column as a Column Label

- Calculate column can serve as...
 - Row labels
 - Column labels

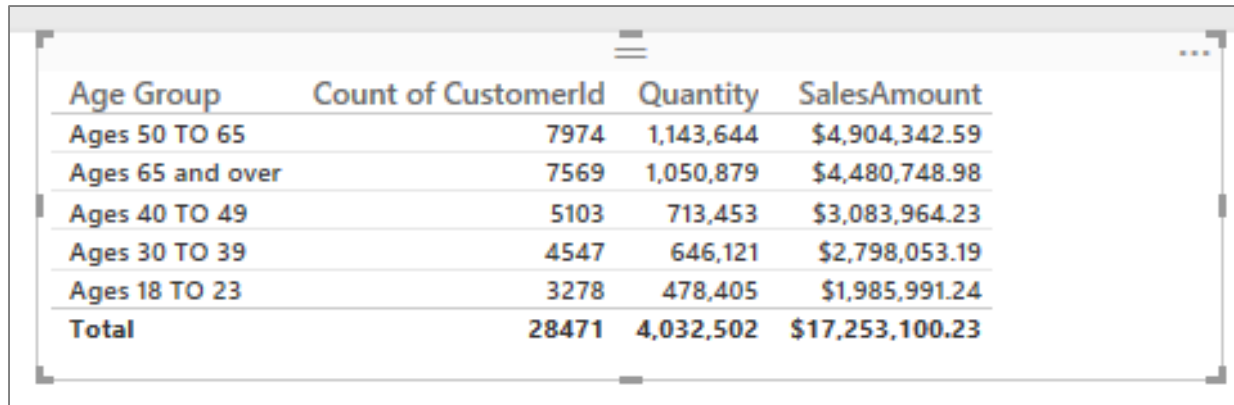


State	2012	2013	2014	2015	Total
CA	\$270,926.32	\$550,160.02	\$737,878.53	\$770,402.11	\$2,329,366.98
TX	\$212,085.08	\$490,643.98	\$683,079.11	\$919,030.36	\$2,304,838.53
FL	\$51,730.85	\$300,866.87	\$535,693.94	\$891,344.92	\$1,779,636.58
NC	\$11,018.02	\$164,804.24	\$315,139.92	\$448,638.72	\$939,600.90
NY	\$24,207.43	\$165,046.23	\$256,294.27	\$430,971.24	\$876,519.17
GA	\$40,305.80	\$152,807.51	\$239,451.05	\$417,037.28	\$849,601.64



Calculated Column as a Row Label

- Age Group can now be used as row label

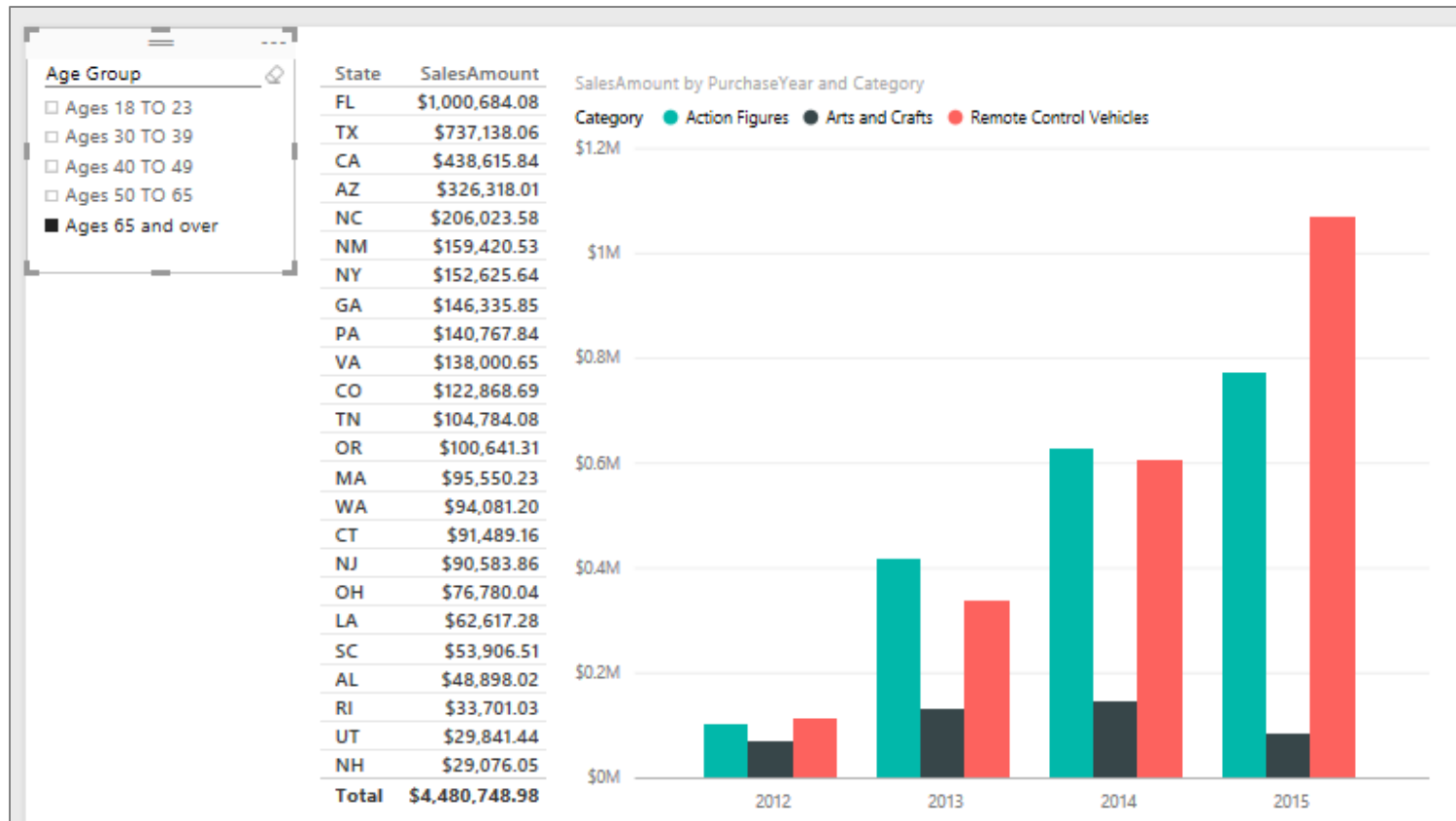


Age Group	Count of CustomerId	Quantity	SalesAmount
Ages 50 TO 65	7974	1,143,644	\$4,904,342.59
Ages 65 and over	7569	1,050,879	\$4,480,748.98
Ages 40 TO 49	5103	713,453	\$3,083,964.23
Ages 30 TO 39	4547	646,121	\$2,798,053.19
Ages 18 TO 23	3278	478,405	\$1,985,991.24
Total	28471	4,032,502	\$17,253,100.23



Calculated Column used in a Slicer

- Calculated column can populate slicer values



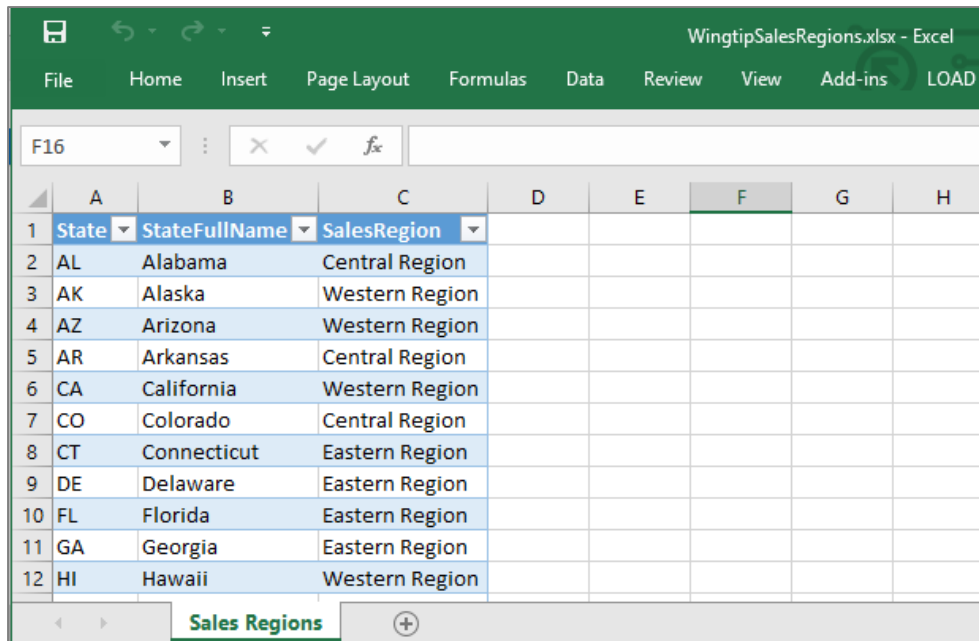
The background of the slide is a close-up, low-angle shot of a server rack. The rack is filled with numerous server units, each featuring a grid of small, glowing blue lights. The perspective is looking up the length of the rack, creating a sense of depth and scale. The lighting is predominantly blue, giving it a high-tech, digital feel.

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Creating Calculated Columns

Adding Lookup Tables to the Data Model

- Data modeling might required adding lookup tables
 - Lookup tables inject extra related data into data model
- Example: Sales Regions table
 - Assign each state to specific sales region
 - Include full state name it required in reporting



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H
1	State	StateFullName	SalesRegion					
2	AL	Alabama	Central Region					
3	AK	Alaska	Western Region					
4	AZ	Arizona	Western Region					
5	AR	Arkansas	Central Region					
6	CA	California	Western Region					
7	CO	Colorado	Central Region					
8	CT	Connecticut	Eastern Region					
9	DE	Delaware	Eastern Region					
10	FL	Florida	Eastern Region					
11	GA	Georgia	Eastern Region					
12	HI	Hawaii	Western Region					

The spreadsheet is titled 'WingtipSalesRegions.xlsx - Excel' and has tabs for File, Home, Insert, Page Layout, Formulas, Data, Review, View, Add-ins, and LOAD T. The active cell is F16. The table is named 'Sales Regions'.

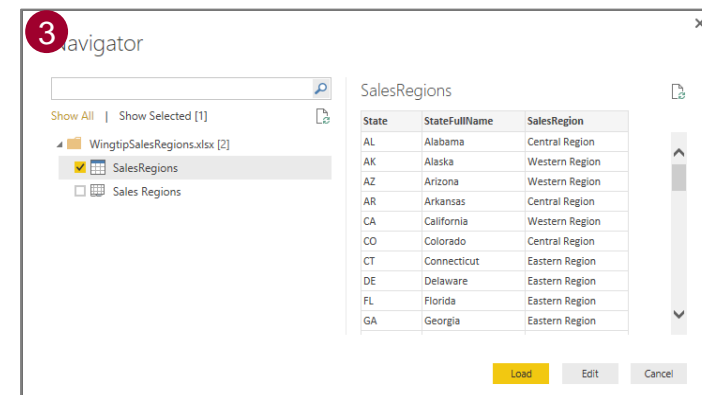
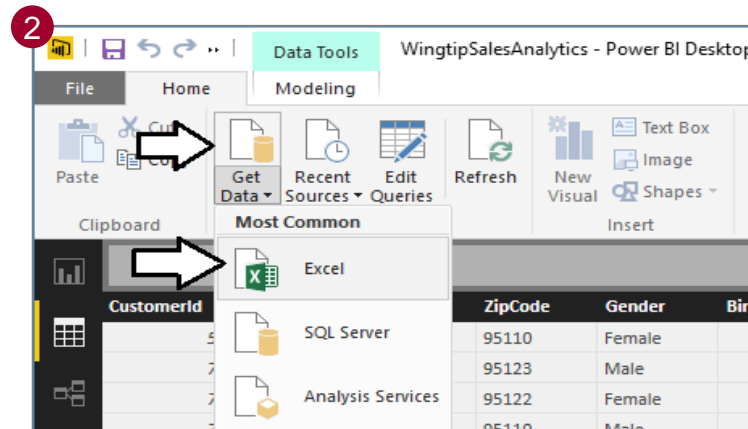


Importing the SalesRegions Table from Excel

- Import table from Excel using Power Query

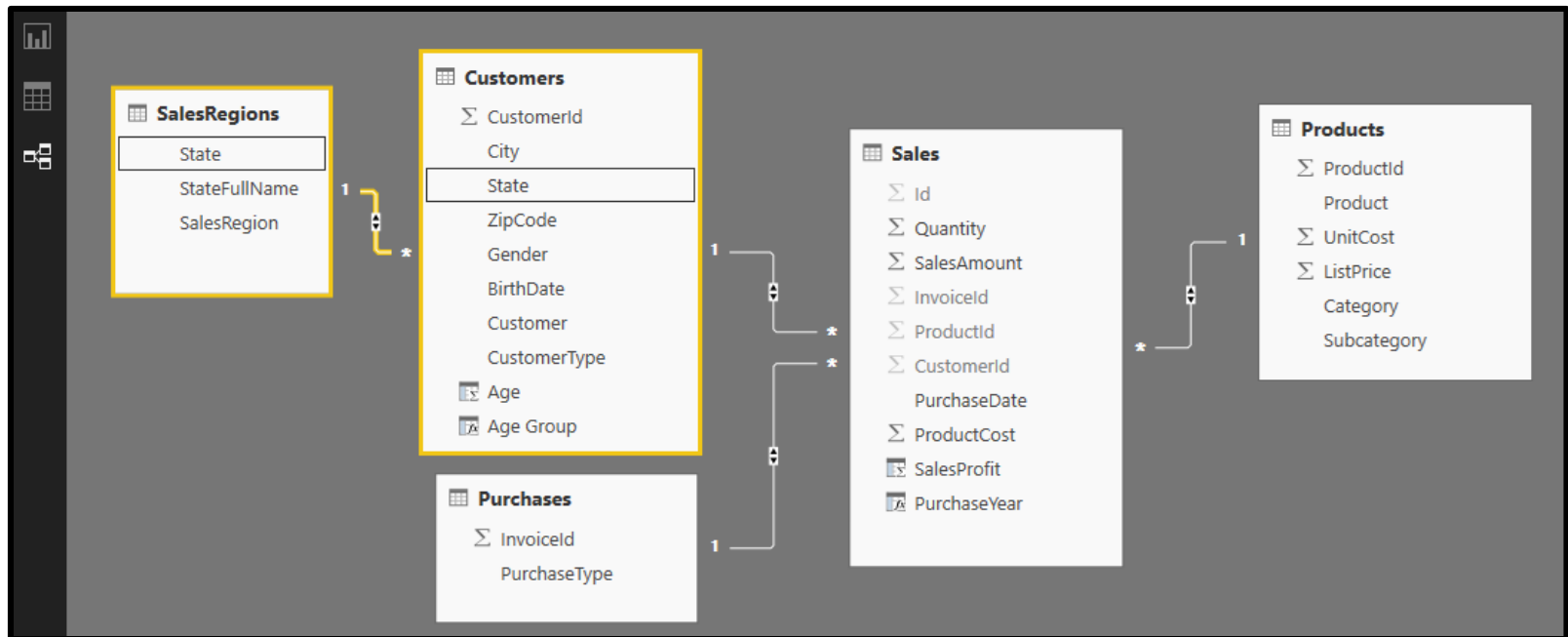
1

	A	B	C
1	State	StateFullName	SalesRegion
2	AL	Alabama	Central Region
3	AK	Alaska	Western Region
4	AZ	Arizona	Western Region
5	AR	Arkansas	Central Region
6	CA	California	Western Region
7	CO	Colorado	Central Region
8	CT	Connecticut	Eastern Region
9	DE	Delaware	Eastern Region
10	FL	Florida	Eastern Region
11	GA	Georgia	Eastern Region
12	HI	Hawaii	Western Region



Integrating the Lookup Table into the Data Model

- Lookup table must be integrated into data model
 - Accomplished by creating relationship to one or more tables



The RELATED Function

- RELATED function performs cross-table lookup
 - Effectively replaces older VLOOKUP function
 - Used in many-side table to look up value from one-side
 - Used to pull data from lookup table into primary table

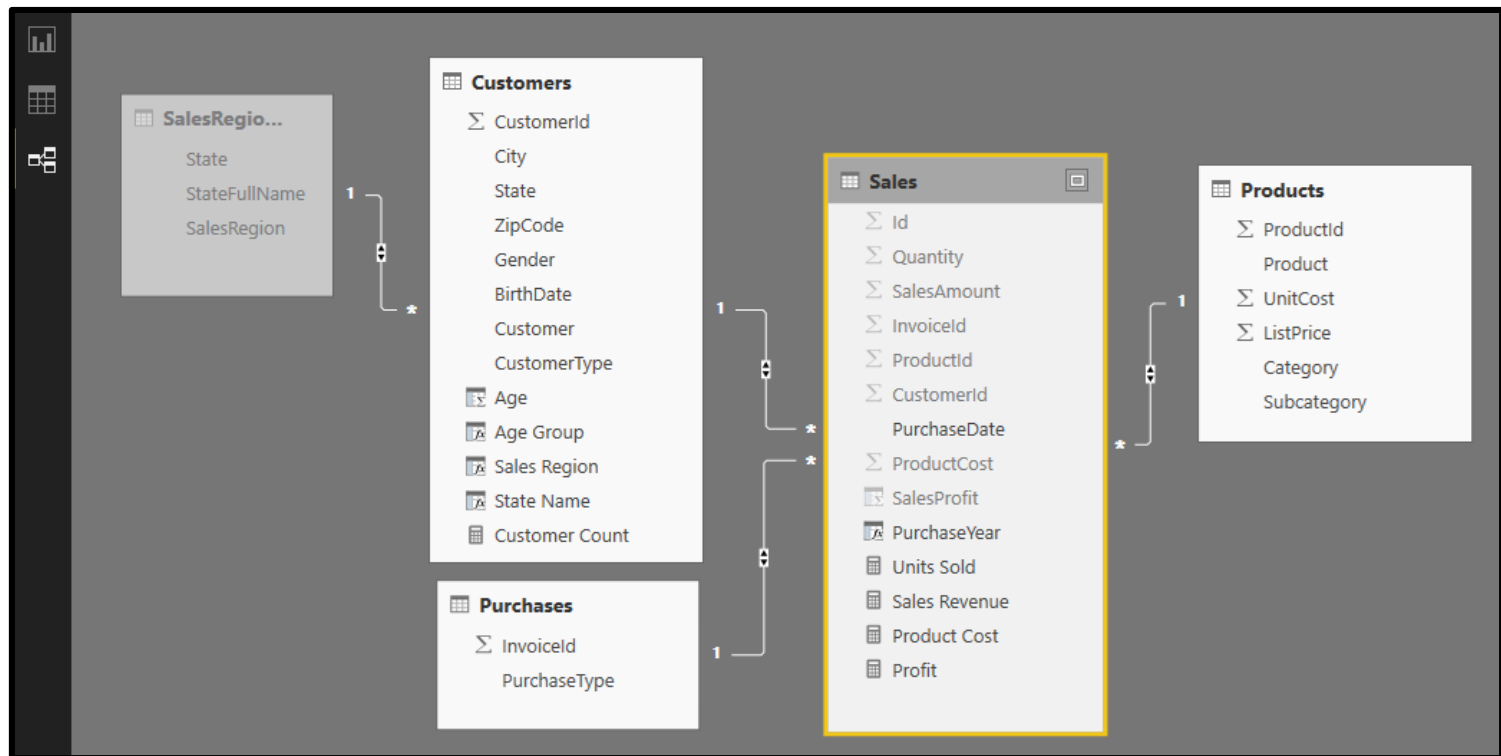
Sales Region = RELATED(SalesRegions[SalesRegion])										
CustomerId	City	State	ZipCode	Gender	BirthDate	Customer	CustomerType	Age	Age Group	Sales Region
55	San Jose	CA	95110	Female	3/10/49	Jewell Ryan	Repeat Customer	66	Ages 65 and over	Western Region
73	San Jose	CA	95123	Male	5/9/85	Granville Perry	Repeat Customer	30	Ages 30 TO 39	Western Region
74	San Jose	CA	95122	Female	6/19/79	Sheri Mercado	Repeat Customer	36	Ages 30 TO 39	Western Region
78	San Jose	CA	95110	Male	6/16/78	Raleigh Olson	Repeat Customer	37	Ages 30 TO 39	Western Region
136	San Jose	CA	95124	Female	1/2/45	Carrie Foreman	Repeat Customer	70	Ages 65 and over	Western Region
150	San Jose	CA	95134	Female	8/11/84	Renee McMillan	Repeat Customer	31	Ages 30 TO 39	Western Region

State Name = RELATED(SalesRegions[StateFullName])

State	ZipCode	Gender	BirthDate	Customer	CustomerType	Age	Age Group	Sales Region	State Name
CA	95110	Female	3/10/49	Jewell Ryan	Repeat Customer	66	Ages 65 and over	Western Region	California
CA	95123	Male	5/9/85	Granville Perry	Repeat Customer	30	Ages 30 TO 39	Western Region	California
CA	95122	Female	6/19/79	Sheri Mercado	Repeat Customer	36	Ages 30 TO 39	Western Region	California
CA	95110	Male	6/16/78	Raleigh Olson	Repeat Customer	37	Ages 30 TO 39	Western Region	California
CA	95124	Female	1/2/45	Carrie Foreman	Repeat Customer	70	Ages 65 and over	Western Region	California
CA	95134	Female	8/11/84	Renee McMillan	Repeat Customer	31	Ages 30 TO 39	Western Region	California

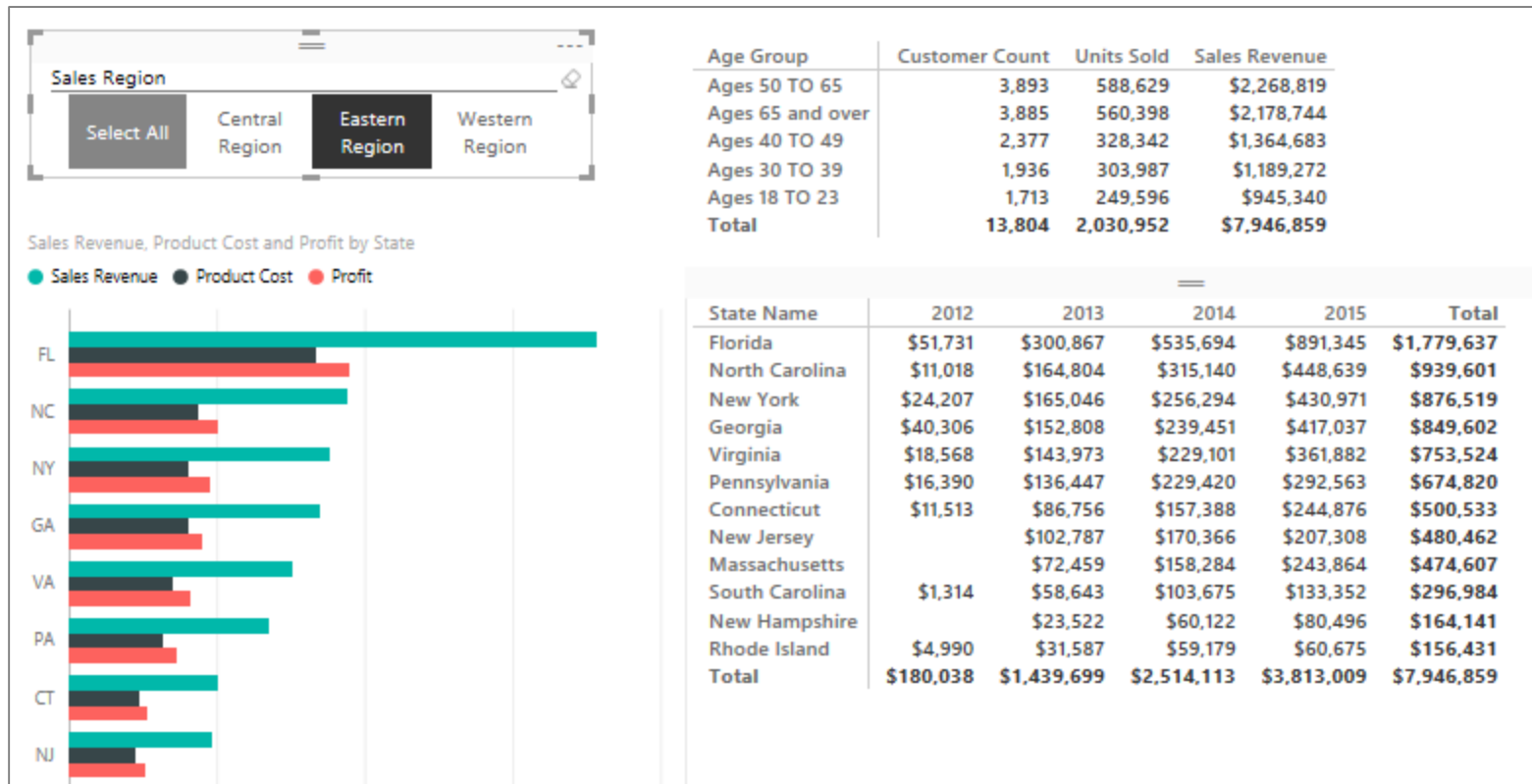
Hiding the Lookup Table

- Lookup table can often be hidden
 - simplifies reporting for data model consumers



Filtering on Sales Region

- Calculated column used to calculate slicer values



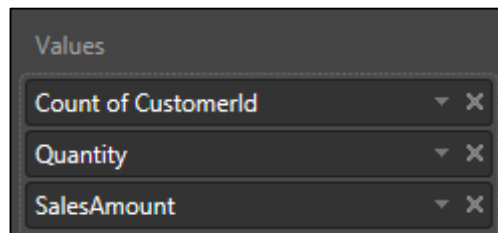
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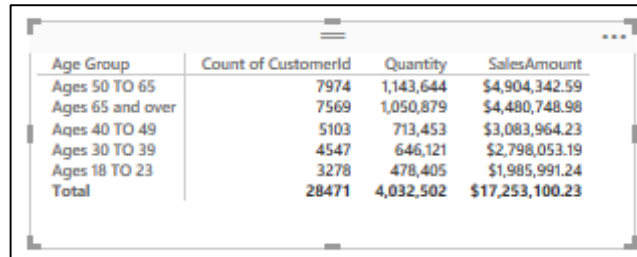


Benefits of Measures over Calculated Columns

- Calculated columns can be aggregated in visual
 - However, aggregation details are stored in visual
 - Visual doesn't offer control over name and formatting

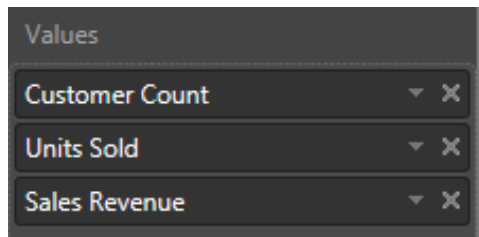


Values
Count of CustomerId
Quantity
SalesAmount

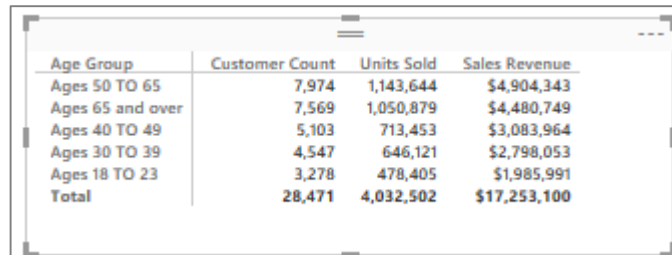


Age Group	Count of CustomerId	Quantity	SalesAmount
Ages 50 TO 65	7974	1,143,644	\$4,904,342.59
Ages 65 and over	7569	1,050,879	\$4,480,748.98
Ages 40 TO 49	5103	713,453	\$3,083,964.23
Ages 30 TO 39	4547	646,121	\$2,798,053.19
Ages 18 TO 23	3278	478,405	\$1,985,991.24
Total	28471	4,032,502	\$17,253,100.23

- Measure defines name, aggregation and formatting
 - Work is done once and reused across many visuals
 - Makes data model more fool-proof for report designers



Values
Customer Count
Units Sold
Sales Revenue

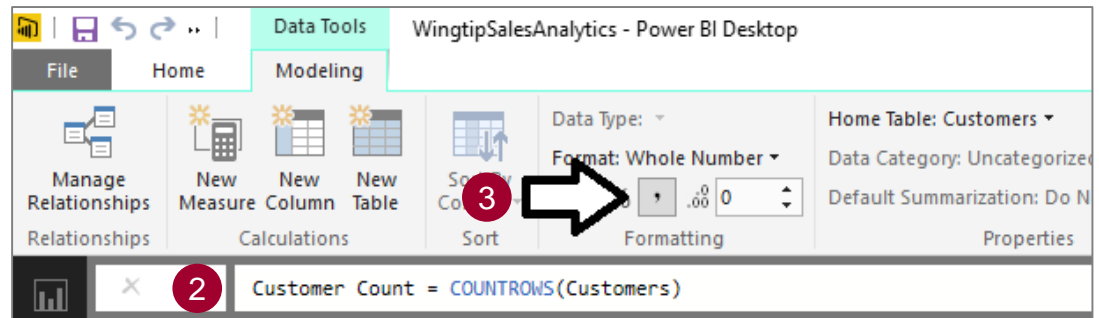
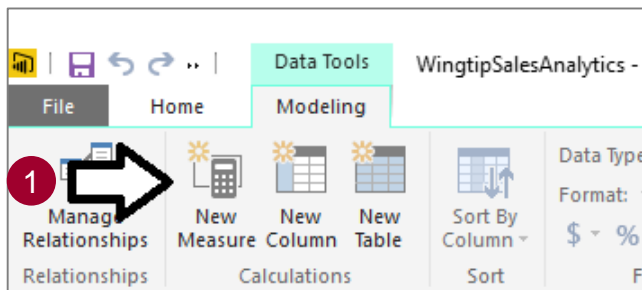


Age Group	Customer Count	Units Sold	Sales Revenue
Ages 50 TO 65	7,974	1,143,644	\$4,904,343
Ages 65 and over	7,569	1,050,879	\$4,480,749
Ages 40 TO 49	5,103	713,453	\$3,083,964
Ages 30 TO 39	4,547	646,121	\$2,798,053
Ages 18 TO 23	3,278	478,405	\$1,985,991
Total	28,471	4,032,502	\$17,253,100



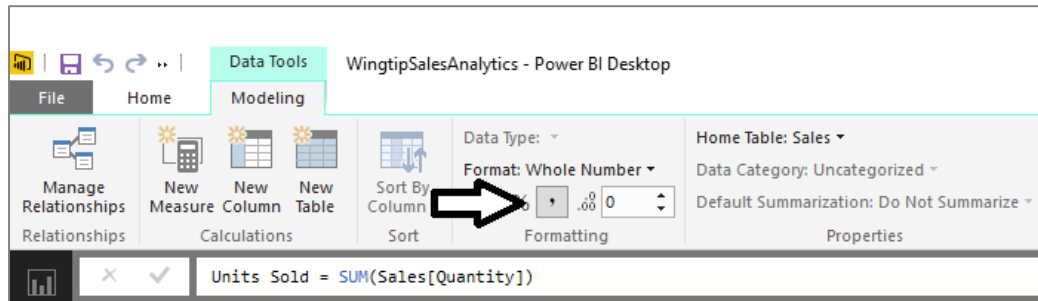
Creating Measures

- Measures have advantage over calculated columns
 - They are evaluated based on the current evaluation context
- Creating a measure with Power BI Desktop
 - Click New Measure button
 - Give measure a name and write DAX expressions
 - Configure formatting

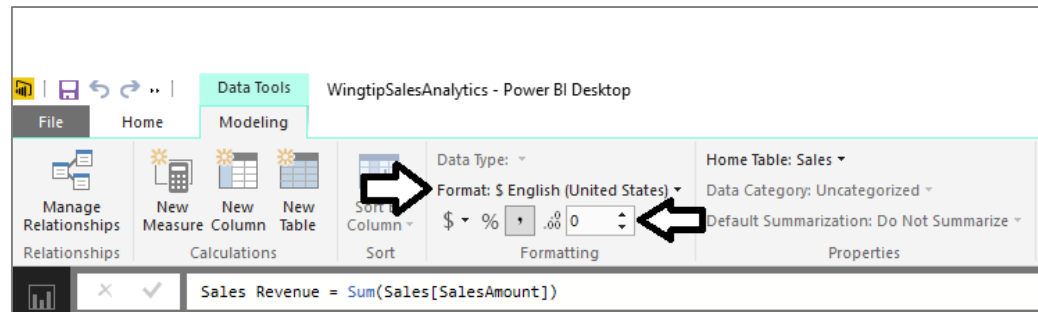


Formatting Measures

- Format as whole number



- Format as currency





DEMO

Creating Measures

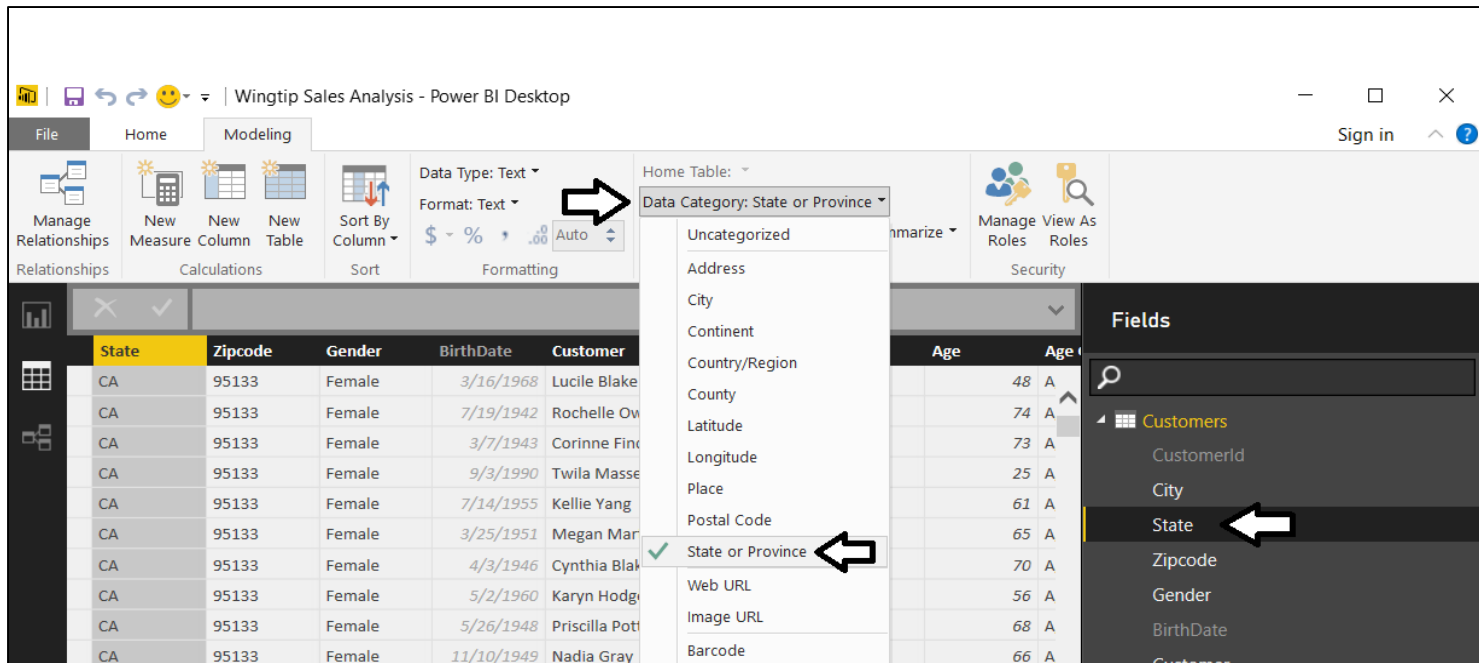
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Geographic Field Metadata

- Fields in data model have metadata properties
 - Metadata used by visuals and reporting tools
 - Used as hints to Bing Mapping service



Eliminate Geographic Ambiguity

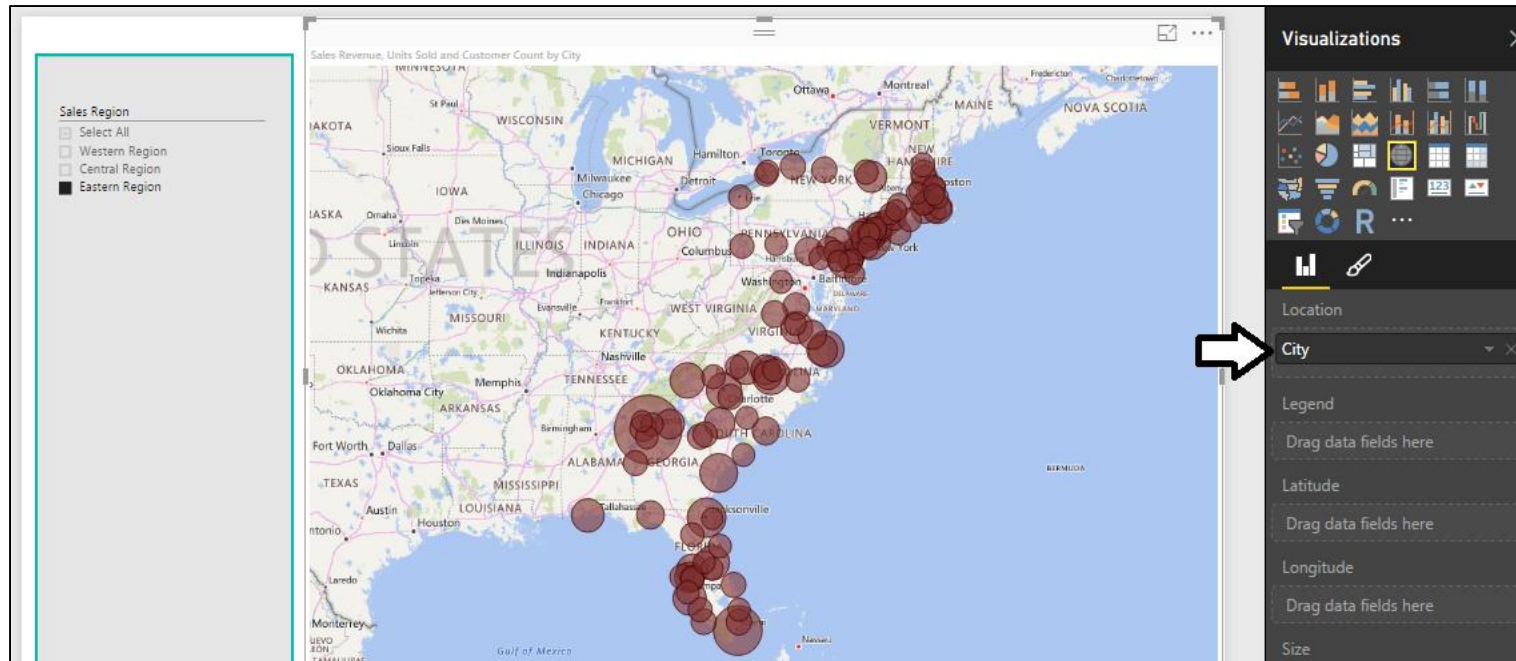
- City name alone is ambiguous
 - "Athens" defaults to Greece not Georgia
 - Concatenate city name with state to disambiguate

✕		✓		City = [City Name] & ", " & [State]	
Age Group		Sales Region	State Name	SalesRegionSort	City
48	Ages 40 TO 49	Western Region	California	1	San Jose, CA
74	Ages 65 and over	Western Region	California	1	San Jose, CA
73	Ages 65 and over	Western Region	California	1	San Jose, CA
25	Ages 18 TO 23	Western Region	California	1	San Jose, CA
61	Ages 50 TO 65	Western Region	California	1	San Jose, CA
65	Ages 65 and over	Western Region	California	1	San Jose, CA



Using Map Visual with a Geographic Field

- Map Visual shows distribution over geographic area
 - Visual automatically updates when filtered



Summary

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