

DIFFERENCE BETWEEN LOCAL AND GLOBAL UPDATE OF AGGREGATION FOR MEASURES

Given below are the methods to change the aggregation of measures and the differences between them

Method-I: Local update i.e., **limited to the worksheet** in which the aggregation was changed

This change is done at **worksheet level**

This aggregation change will **NOT** be applicable throughout the workbook

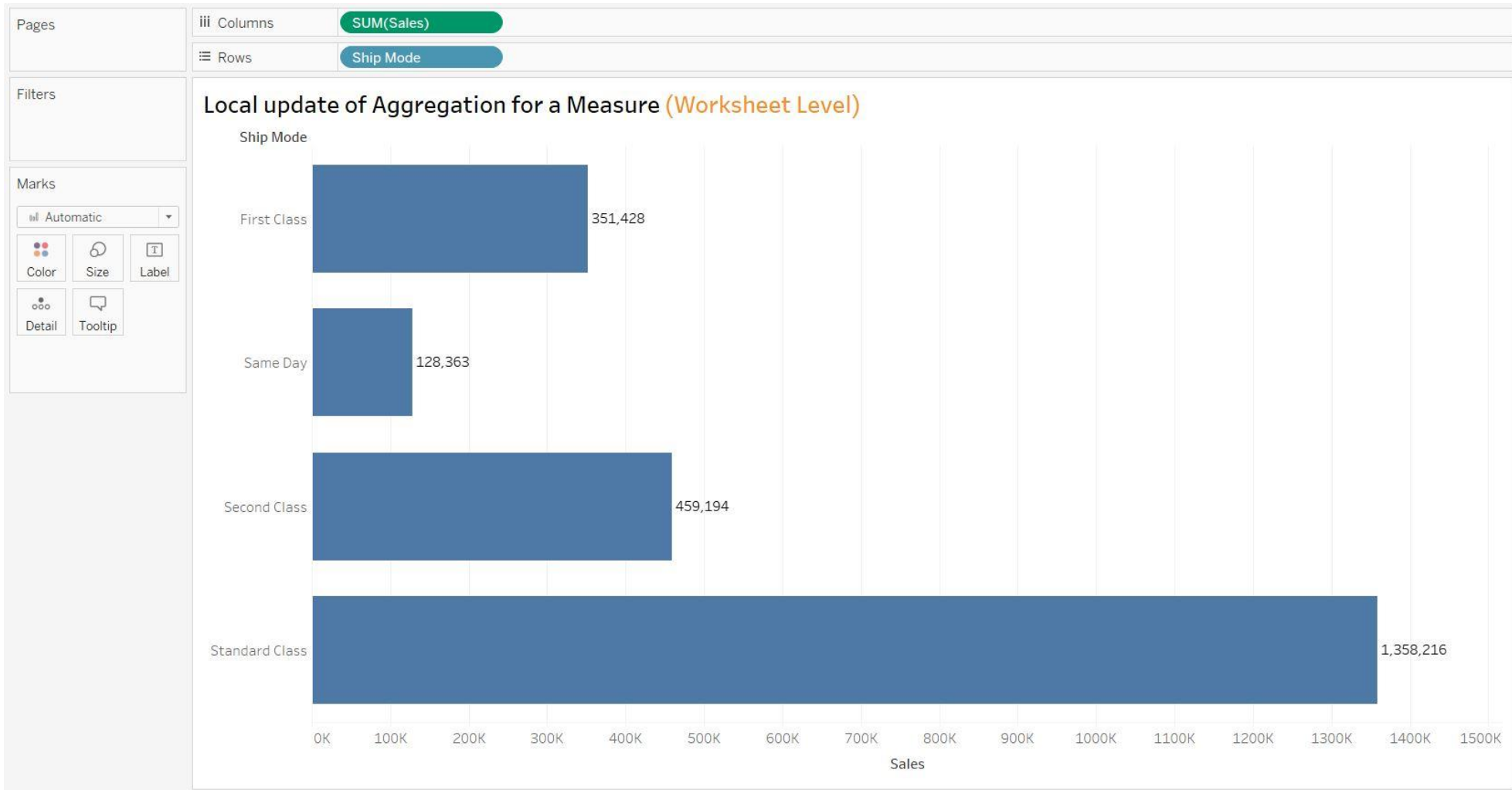
Method-II: Global update i.e., **applicable throughout the workbook**

This change is done at **Data pane level**

This aggregation change will be applicable for all worksheets, dashboards and stories

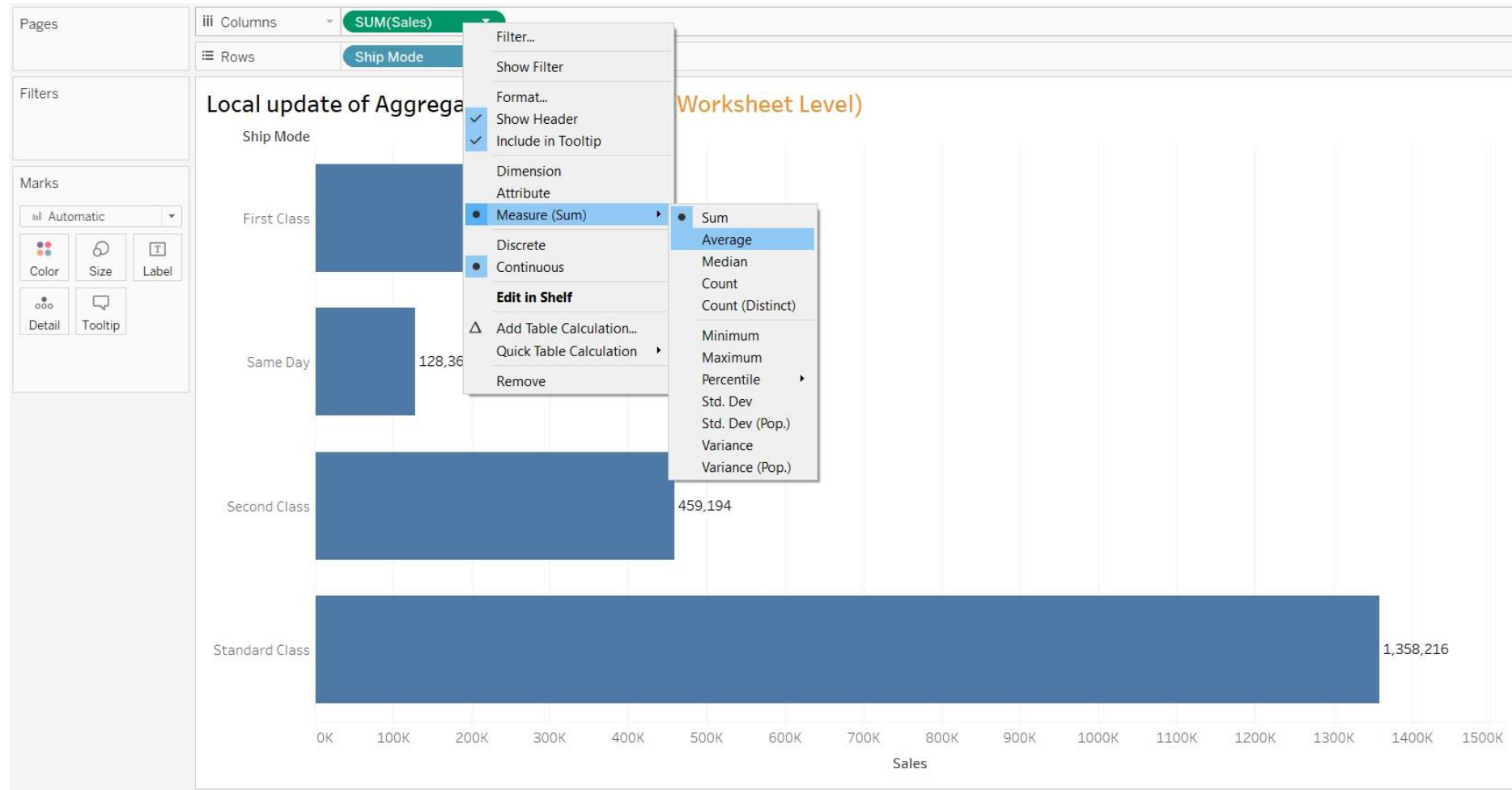
LOCAL UPDATE OF AGGREGATION FOR A MEASURE

Step 1: Assume that we have the below mentioned view of **Sales Vs Ship Mode**



LOCAL UPDATE OF AGGREGATION FOR A MEASURE

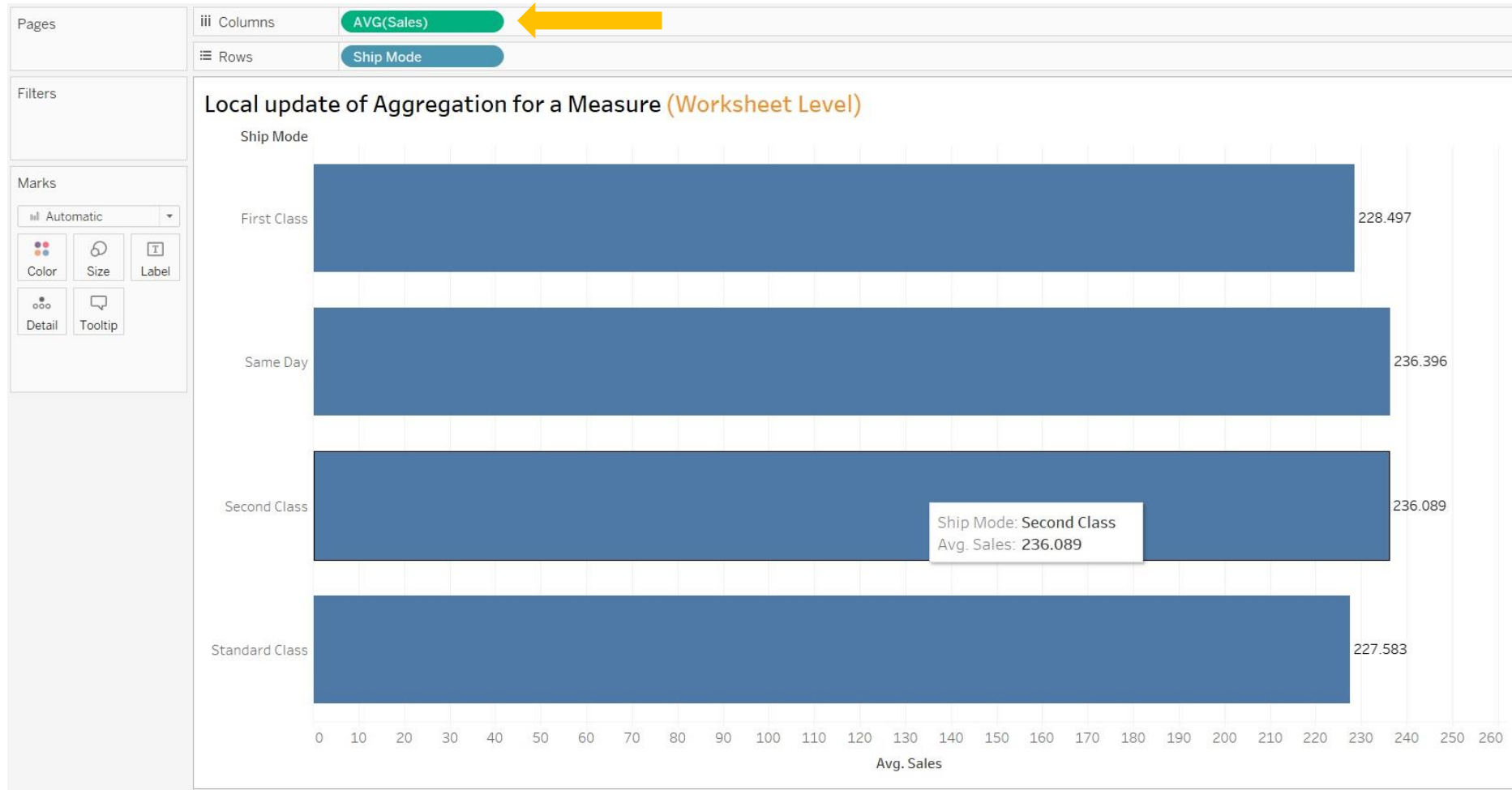
Step 2: Right-click SUM(Sales), Select Measure(Sum) > Average
Here we are changing the aggregation to **Average**



LOCAL UPDATE OF AGGREGATION FOR A MEASURE

Step 3: Observe that the pill now shows **AVG(Sales)**

The actual value can be confirmed from the Tooltip by hovering over any mark in the view



LOCAL UPDATE OF AGGREGATION FOR A MEASURE

Step 4: When we drag the **Sales** from the **Data** pane to a **NEW** worksheet, we observe that aggregation is the default **SUM**

The screenshot displays the Power BI Desktop interface. On the left, the 'Data' pane is open, showing a list of fields under the 'Tables' section. The 'Sales' measure is highlighted. In the center, the 'Marks' card is set to 'Automatic'. A yellow arrow points from the 'SUM(Sales)' measure in the 'Data' pane to the 'Marks' card. The main workspace area is titled 'Checking Aggregation for a Measure (In a NEW worksheet after Local update in previous Worksheet)' and contains a large empty area with a 'Drop field here' prompt.

Data | Analytics | Pages | Columns | Rows

Orders (Sample - Superst...)

Search

Tables

- Category
- City
- Country/Region
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names
- Discount
- Profit
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Orders (Count)
- Measure Values

Filters

Marks

Automatic

Color | Size | Text

Detail | Tooltip

SUM(Sales)

Drop field here

Drop field here

LOCAL UPDATE OF AGGREGATION FOR A MEASURE

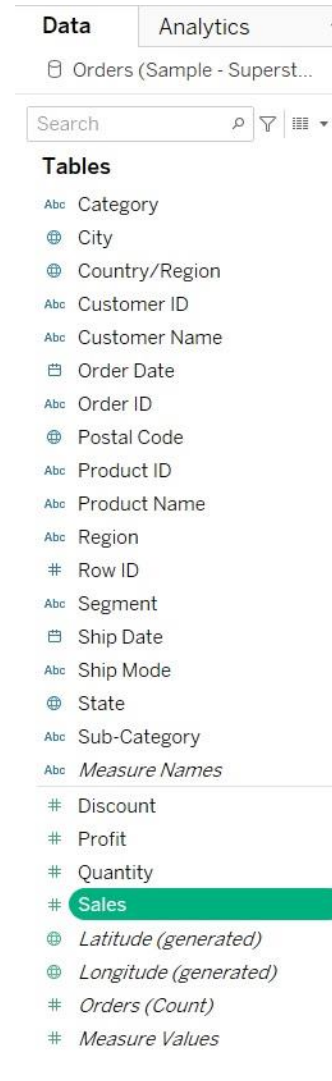
Step 5: After building the view in a **NEW** worksheet it is confirmed the aggregation for **Sales** is **SUM** and not **AVG** (that was updated in the previous worksheet)

The actual value can be confirmed from the Tooltip by hovering over any mark in the view



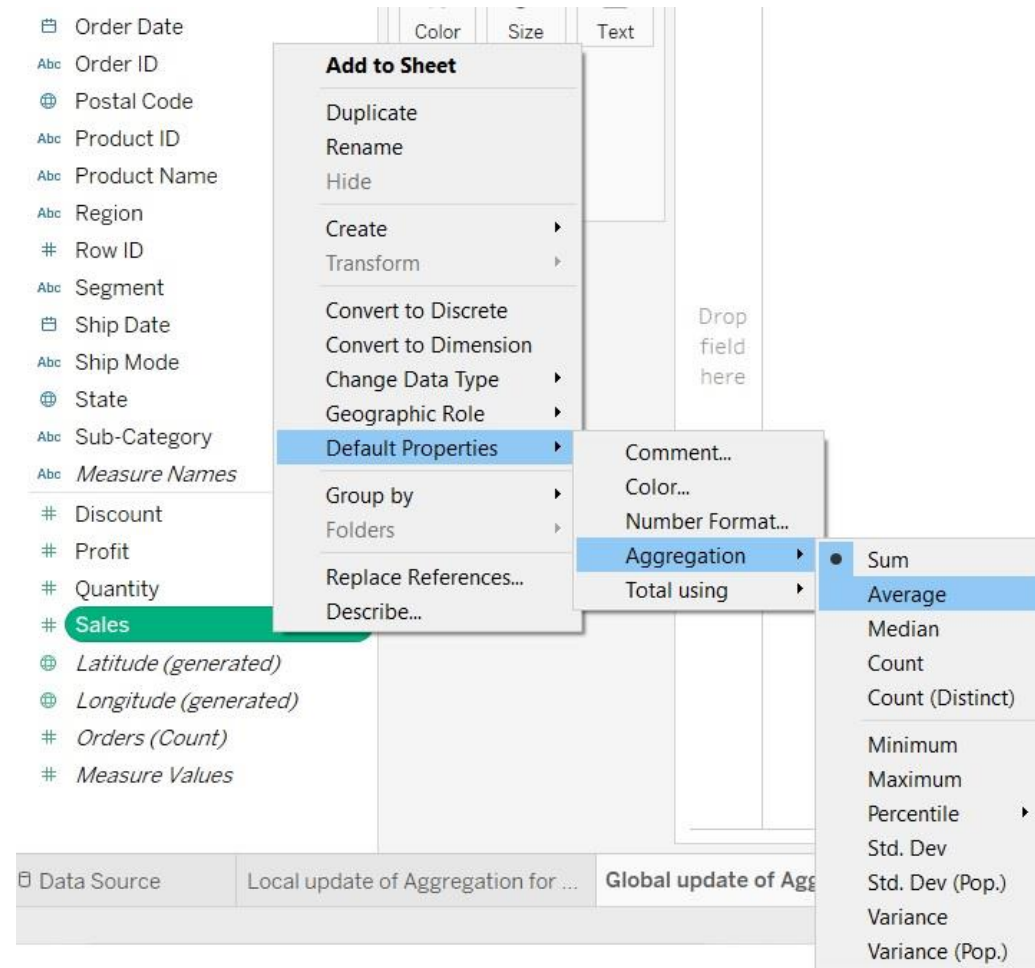
GLOBAL UPDATE OF AGGREGATION FOR A MEASURE

Step 1: Select the measure e.g: **Sales** in the **Data** pane



GLOBAL UPDATE OF AGGREGATION FOR A MEASURE

Step 2: Right-click **Sales, Click **Default Properties** > **Aggregation** > **Average****



GLOBAL UPDATE OF AGGREGATION FOR A MEASURE

Step 3: When we drag the **Sales** from the **Data** pane to the worksheet, we observe that aggregation is **AVG**

The screenshot displays a data visualization tool interface. On the left, the 'Data' pane is visible, showing a list of fields under 'Tables' and 'Measure Names'. The 'Sales' field is highlighted in green. A yellow arrow points from the 'Sales' field to the 'AVG(Sales)' measure in the 'Marks' pane. The 'Marks' pane also shows 'Automatic' as the aggregation type. The main workspace area is titled 'Global update of Aggregation for a Measure (Workbook Level)' and contains a large empty area with 'Drop field here' text.

Data | Analytics | Pages | Columns | Rows

Orders (Sample - Superst...)

Search

Tables

- Category
- City
- Country/Region
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names

Measure Names

- Discount
- Profit
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Orders (Count)
- Measure Values

Marks

Automatic

Color Size Text

Detail Tooltip

Global update of Aggregation for a Measure (Workbook Level)

Drop field here

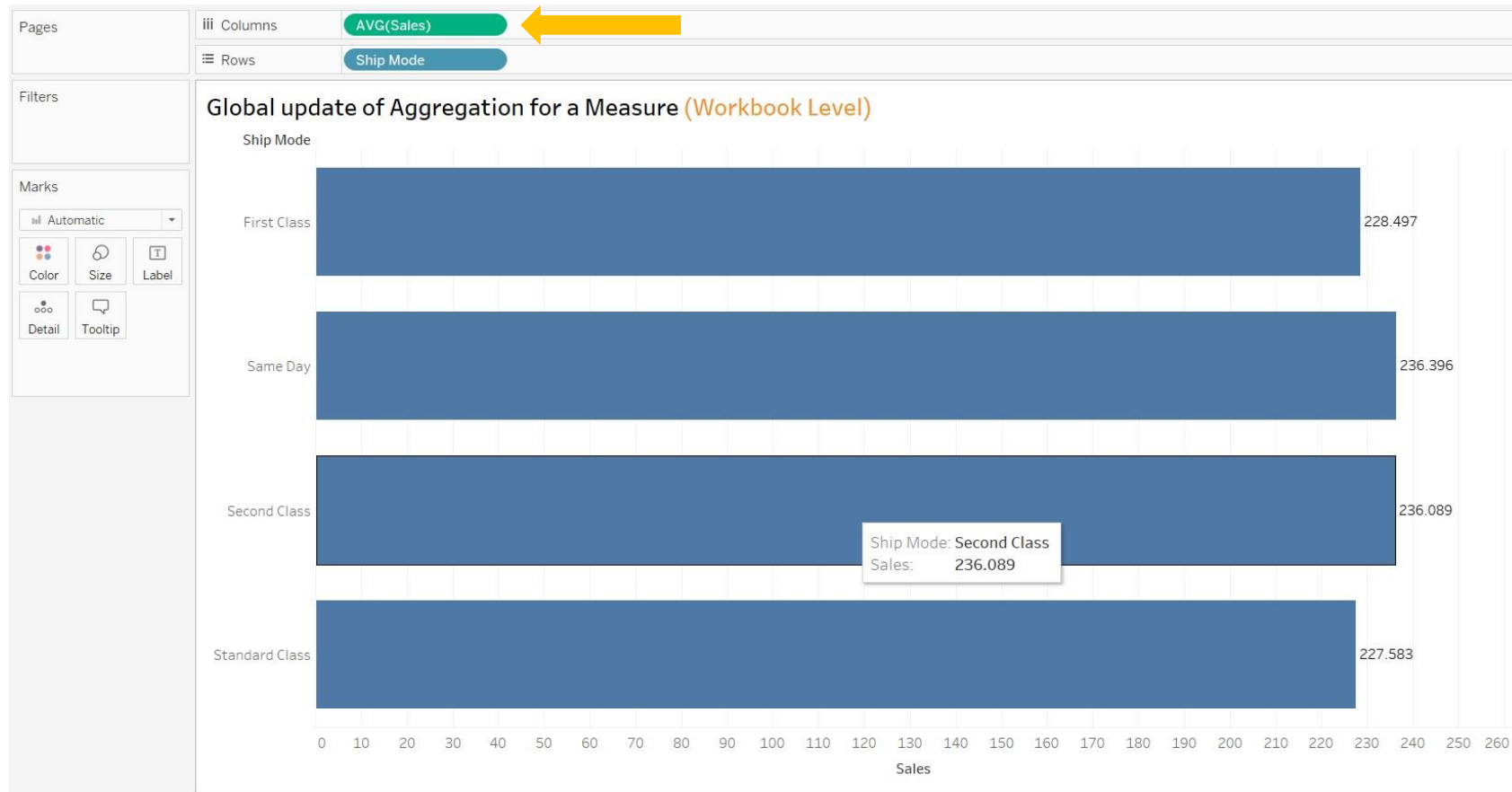
Drop field here

Drop field here

AVG(Sales)

GLOBAL UPDATE OF AGGREGATION FOR A MEASURE

Step 4: After building the view in the worksheet it is confirmed the aggregation for **Sales** is **AVG** (that was updated in the **Data** pane)
The actual value can be confirmed from the Tooltip by hovering over any mark in the view



GLOBAL UPDATE OF AGGREGATION FOR A MEASURE

Step 5: When we drag the **Sales** from the **Data** pane to a **NEW** worksheet, we observe that aggregation is the default **AVG**

The screenshot displays the Tableau Desktop interface. On the left, the **Data** pane is visible, showing a list of fields under the **Tables** section. The **Sales** field is highlighted in green. A yellow arrow points to the **Sales** field. The main view area shows a title **Checking Aggregation for a Measure (In a NEW worksheet after Global update in Data pane)** and a large empty space with **Drop field here** text.

Data | Analytics <

Orders (Sample - Superst...)

Search

Tables

- Category
- City
- Country/Region
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names
- Discount
- Profit
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Orders (Count)
- Measure Values

Filters

Marks

Automatic

Color Size Text

Detail Tooltip

Drop field here

Drop field here

Drop field here

Drop field here

GLOBAL UPDATE OF AGGREGATION FOR A MEASURE

Step 6: After building the view in the **NEW** worksheet it is confirmed the aggregation for **Sales** is **AVG** (that was updated in the **Data** pane)
The actual value can be confirmed from the Tooltip by hovering over any mark in the view

