



This cheat sheet provides a quick reference for essential Power BI features and functionalities, helping you analyze data, create interactive reports, and design insightful dashboards with ease. It covers a wide range of categories, including data interaction, transformation, modeling, analytics, visualization, and workspace, ensuring you have the tools needed to perform tasks from basic data exploration to advanced scenario modeling.

Each entry includes clear syntax and concise explanations, paired with practical examples to demonstrate how the feature operates in real-world scenarios. Whether you're writing DAX formulas, transforming or designing semantic models, or creating advanced visualizations, this cheat sheet simplifies Power BI's robust capabilities.

Designed to be accessible and actionable, this resource is perfect for professionals, students, and business analysts looking to improve their efficiency and confidence in Power BI. Keep it handy for quick guidance on Power BI's versatile functionality.

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DAX Functions

Syntax for	How to use	Explained	Syntax for	How to use	Explained
CALCULATE	<code>CALCULATE(Expression, Filters)</code>	Modifies the filter context of an expression, enabling advanced calculations like conditional totals or time intelligence analysis.	CALENDARAUTO	<code>CALENDARAUTO()</code>	Automatically creates a date table based on the minimum and maximum values of date columns in the model.
SUM	<code>SUM(Table[Column])</code>	Adds all numerical values in a column, commonly used in measures.	RELATED	<code>RELATED(Table[Column])</code>	Retrieves a related value from another table using an existing relationship.
AVERAGE	<code>AVERAGE(Table[Column])</code>	Calculates the average of a column's numerical values.	CONCATENATE	<code>CONCATENATE(Value1, Value2)</code>	Combines two values into a single text string.
TOTALYTD	<code>TOTALYTD(Table[Column])</code>	Calculates the Year-To-Date total for an expression.	DIVIDE	<code>DIVIDE(Numerator, Denominator, AlternateResult)</code>	Performs division while handling divide-by-zero errors gracefully by returning an alternate result.
LASTDATE	<code>LASTDATE(Dates[Column])</code>	Returns the last date in a given date column, often used in semi-additive measures.	IF	<code>IF(Condition, TrueResult, FalseResult)</code>	Evaluates a condition and returns different results based on whether the condition is true or false.
PATH	<code>PATH(Table[Child_Column], Table[Parent_Column])</code>	Creates a string that shows the hierarchical path from a parent to a child.	DISTINCTCOUNT	<code>DISTINCTCOUNT(Table[Column])</code>	Counts the number of unique values in a column.
USERELATIONSHIP	<code>USERELATIONSHIP(Table1[Column1], Table2[Column2])</code>	Activates an inactive relationship between two tables for a specific calculation.	RANKX	<code>RANKX(Table, Expression, Value, Order, Ties)</code>	Returns the rank of a value in a table based on an expression, with options for handling ties.
CALENDAR	<code>CALENDAR(START_DATE, END_DATE)</code>	Generates a continuous range of dates between two specified dates.			



DAX Functions

Syntax for	How to use	Explained	Syntax for	How to use	Explained
SWITCH	<code>SWITCH(Expression, Value1, Result1, [Value2, Result2], ..., [ElseResult])</code>	Evaluates an expression and returns a matching result for the first case.	MAX	<code>MAX(Table[Column])</code>	Returns the largest numeric value in a column.
FORMAT	<code>FORMAT(Value, FormatString)</code>	Formats a value as a string using a specified format (e.g., currency, percentage).	MIN	<code>MIN(Table[Column])</code>	Returns the smallest numeric value in a column.
VALUES	<code>VALUES(Table[Column])</code>	Returns a single-column table with unique values from the specified column.	COUNTROWS	<code>COUNTROWS(Table)</code>	Counts the number of rows in a table.
EARLIER	<code>EARLIER(Column, Offset)</code>	Refers to a row context in an earlier iteration of the same calculation.	SUMMARIZE	<code>SUMMARIZE(Table, GroupByColumnName, [Name, Expression], ...)</code>	Groups data by specified columns and calculates aggregated values.
ALLEXCEPT	<code>ALLEXCEPT(Table, Column1, Column2, ...)</code>	Removes all filters except those applied to the specified columns.	LOOKUPVALUE	<code>LOOKUPVALUE(Result_Column, Search_Column, Search_Value, [Search_Column2, Search_Value2])</code>	Returns the value of a result column based on search criteria.
FILTER	<code>FILTER(Table, Condition)</code>	Returns a table that contains only rows matching a specified condition.	ISBLANK	<code>ISBLANK(Value)</code>	Returns <code>TRUE</code> if the specified value is blank.
ALL	<code>ALL(Table[Column])</code>	Removes all filters from a table or column, returning all rows.	ROUND	<code>ROUND(Number, NumDigits)</code>	Rounds a number to the specified number of digits.
HASONEVALUE	<code>HASONEVALUE(Table[Column])</code>	Returns <code>TRUE</code> if the column contains only one distinct value in the current filter context.			





DAX Operators

Syntax for	How to use	Explained	Syntax for	How to use	Explained
Addition (+)	<code>Sales[Amount] + Sales[Tax]</code>	Adds two numerical values or columns.	Less Than (<)	<code>Sales[Price] < 100</code>	Checks if one value is less than another.
Subtraction (-)	<code>Sales[Amount] - Sales[Discount]</code>	Subtracts one numerical value or column from another.	Greater Than or Equal (>=)	<code>Sales[Price] >= 100</code>	Checks if one value is greater than or equal to another.
Multiplication (*)	<code>Sales[Price] * Sales[Quantity]</code>	Multiplies two numerical values or columns.	Less Than or Equal (<=)	<code>Sales[Price] <= 100</code>	Checks if one value is less than or equal to another.
Division (/)	<code>Sales[Total] / Sales[Units]</code>	Divides one numerical value or column by another.	Logical AND (&&)	<code>(Sales[Price] > 100) && (Sales[Units] > 10)</code>	Returns <code>TRUE</code> if both conditions are true.
Exponentiation (^)	<code>Value ^ 2</code>	Raises a number to the power of another number.	Logical OR ()	<code>(Sales[Price] > 100) (Sales[Units] > 10)</code>	Returns <code>TRUE</code> if at least one condition is true.
Concatenation (&)	<code>Customer[FirstName] & " " & Customer[LastName]</code>	Combines two text strings into one.	Logical NOT (NOT)	<code>NOT(Sales[Category] = "Electronics")</code>	Reverses the logical value of an expression (<code>TRUE</code> to <code>FALSE</code> and vice versa).
Equal To (=)	<code>Sales[Category] = "Electronics"</code>	Compares two values for equality.	Inclusion (IN)	<code>Sales[Category] IN {"Electronics", "Books"}</code>	Checks if a value exists in a specified list of values.
Not Equal To (<>)	<code>Sales[Category] <> "Electronics"</code>	Compares two values for inequality.			
Greater Than (>)	<code>Sales[Price] > 100</code>	Checks if one value is greater than another.			



DAX Operators

Syntax for How to use

Parenthesis
()

```
(Sales[Price] * Sales[Units]) +  
Sales[Tax]
```

Table
Constructor
{}

```
{1, 2, 3}
```

Equality for
Relationships
(=)

```
Customer[ID] = Sales[CustomerID]
```

Explained

Groups expressions or specifies the order of operations in calculations.

Creates a table with a single column containing the listed values.

Creates relationships between tables based on key columns.

Data Interaction

Syntax for How to use

Power BI
Workflows

- > Connect to data
- > Transform and model data
- > Create visualizations
- > Publish and share

Connect to
Data

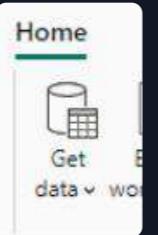
- > Home
- > Get data
- > Select File Type (e.g., CSV, Excel)
- > Open File
- > Load or Transform Data

Explained

Workflow includes importing data from sources like Excel or CSV, transforming data in Power Query Editor, building reports, and sharing insights via Power BI Service.

Data
Transformation

- > Home
- > Transform Data
- > Use Power Query Editor



Publish
Reports

- > File
- > Publish
- > Power BI Service



Manage
Data
Sources

- > Transform Data
- > Data Source Settings
- > Change Source



Clean and shape your data, such as renaming columns, filtering rows, and changing data types, to prepare it for analysis.

Share your reports with others by publishing them to Power BI Service, where dashboards and access can be managed.

Update data source paths or settings to maintain the accuracy of your reports when file locations change.

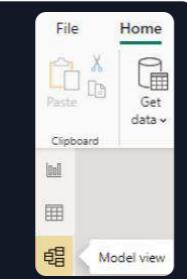
Data Modeling

Syntax for

How to use

View Model Layout

- > Home Tab
- > **Model view**
- > View Diagram



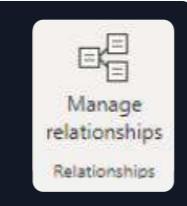
Create Relationships

- > Modeling Tab
- > **Manage Relationships**
- > New
- > Choose Columns
- > Define Cardinality



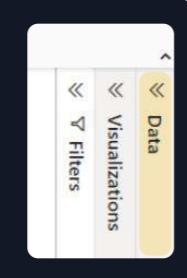
Autodetect Relationships

- > Modeling Tab
- > **Manage Relationships**
- > Autodetect



Mark a Table as a Date Table

- > Data Pane
- > Right-click Table
- > Mark as Date Table
- > Select Date Column



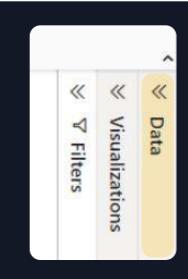
Explained

Allows managing table relationships, creating measures, and organizing data for effective data modeling.

Syntax for

How to use

- > **Data Pane**
- > Right-click
- > New Measure

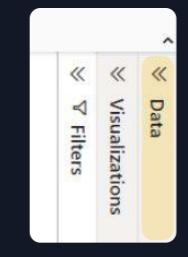


Explained

Use DAX to calculate values like sums, averages, or percentages, enabling dynamic and reusable calculations.

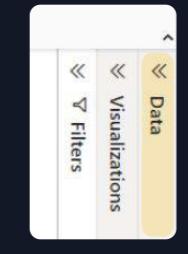
Create DAX Calculated Columns

- > **Data Pane**
- > Right-click
- > New Column
- > Enter DAX Formula



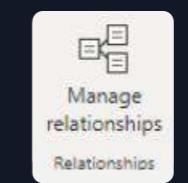
Hierarchies in Dimension Tables

- > **Data Pane**
- > Right-click
- > New Hierarchy



Manage Cardinality

- > Modeling Tab
- > **Manage Relationships**
- > New
- > Define Cardinality (e.g., Many-to-One, One-to-Many)



Organize columns (e.g., Year > Month > Day) into a hierarchy for drill-down capabilities in visualizations.

Adjusts how tables relate to each other (e.g., many-to-many for flexible connections).



Data Modeling

Syntax for

How to use

Flatten Hierarchies

- > Model Tab
- > View Diagram
- > Select Flattened Table Option

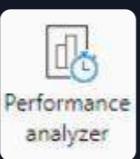


Explained

Breaks down hierarchical relationships into a single-level table for simpler analysis.

Performance Optimization

- > View Tab
- > Performance Analyzer



Analyzes report performance, identifying areas for improvement like visuals or DAX queries.

Aggregation Columns

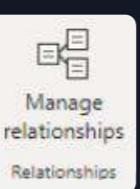
- > Power Query Editor
- > Group By
- > Add Aggregation



Pre-aggregate data by grouping and summarizing at desired levels of detail.

Bidirectional Cross-Filtering

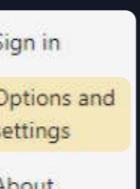
- > Manage Relationships
- > Enable Bi-Directional Filtering



Allows filters to flow both ways in relationships, ensuring comprehensive filtering.

Enable Auto Date/Time

- > File
- > Options
- > Data Load
- > Auto Date/Time for New Files



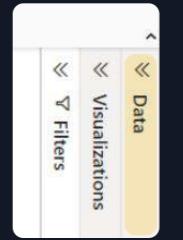
Automatically generates date hierarchies for date columns, simplifying time-based analysis.

Syntax for

How to use

Create Quick Measures

- > Data Pane
- > Right-click
- > New Quick Measure



Concatenate Columns

- > Power Query Editor
- > Add Column
- > Custom Column
- > Define Concatenation Formula

Generate commonly used calculations like totals or averages without writing DAX.

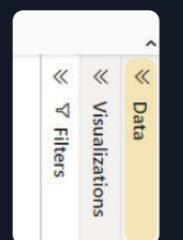
Circular Relationship Detection

- > Model Tab
- > Analyze Relationships
- > Resolve Circular References

Combine multiple columns into a single column (e.g., concatenating Year and Month to create "MonthYear").

Use Aggregation Manager

- > Data Pane
- > Right-click Table
- > Manage Aggregations



Identifies and resolves circular dependencies in relationships to avoid calculation errors.

Defines pre-aggregations for tables, improving performance when querying large datasets.





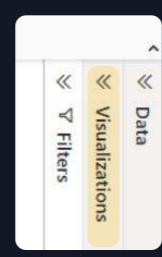
Power BI Visuals and Analytics

Syntax for

How to use

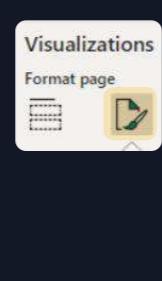
Add Visuals

- > **Visualizations Pane**
- > Select Visual Icon (e.g., Table, Chart)



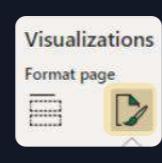
Tooltips

- > **Format Pane**
- > Tooltip Section
- > Configure Custom Tooltip



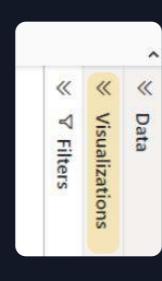
Conditional Formatting

- > **Format Pane**
- > Conditional Formatting Options



Add Slicer

- > **Visualizations Pane**
- > Slicer Icon
- > Drag Fields to Slicer Visualization



Explained

Allows adding visuals such as tables, bar charts, line charts, etc., to represent data insights effectively.

Adds customized hover-over descriptions for enhanced data context in visuals.

Specifies cell colors, data bars, KPI icons, or web links based on field values.

Adds a slicer to filter data interactively by specific criteria (e.g., year or region).

Syntax for

How to use

Sorting Data

- > **More Options (Three Dots)**
- > Sort Ascending/Descending or By Field

Filters

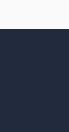
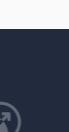
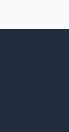
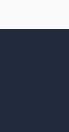
- > Drag Fields to **Filter Pane**
- > Configure Filters

Background and Borders

- > **Format Pane**
- > Background/Border Sections
- > Configure Color or Image

Drillthrough

- > Add **Drillthrough Fields**
- > Configure Target Page



Explained

Organizes data logically, highlighting the most relevant information without removing any.

Removes unnecessary data, enabling focus on relevant information in reports.

Adds visual elements like colors or borders to highlight and isolate specific visuals on the canvas.

Allows users to navigate to detailed pages for in-depth analysis by clicking on a specific field or value.



Power BI Visuals and Analytics

Syntax for

How to use

Bookmarks

- > View Tab
- > **Bookmarks**
- > Add Bookmark

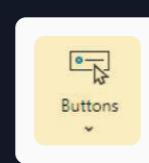


Explained

Saves the current view of a report page for quick access, enhancing navigation and storytelling.

Buttons

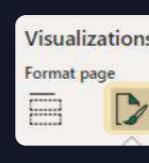
- > Insert Tab
- > **Buttons**
- > Add Button
- > Configure Action
(e.g., Page Navigation)



Adds interactive buttons for navigation or specific actions in a report.

Align and Distribute Visuals

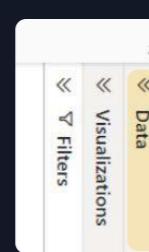
- > CTRL + Click Visuals
- > Format Tab
- > Align/Distribute Options



Aligns and evenly distributes visuals on the canvas for a clean, professional layout.

Hierarchy

- > **Data Pane**
- > Drag Fields to Create Hierarchy



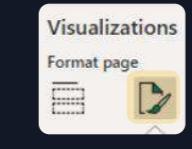
Groups data into hierarchical levels (e.g., Year > Month > Day) for drill-down capabilities.

Syntax for

How to use

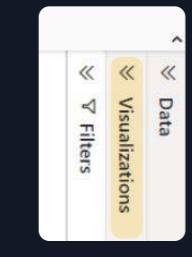
Add Alt Text

- > **Format Pane**
- > General Section
- > Alt Text
- > Enter Description



Key Performance Indicators (KPIs)

- > **Visualizations Pane**
- > KPI Icon
- > Add Value, Goal, and Time Frame

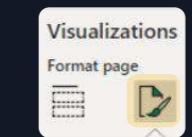


Clustering

- > Scatter Chart
- > More Options
- > Automatically Find Clusters

Top N Analysis

- > **Filters Pane**
- > Field
- > Filter Type
- > Top N



Explained

Ensures accessibility by providing descriptions for visuals that screen readers can interpret.

Tracks performance against a target using metrics, goals, and timelines (e.g., total sales vs. sales target).

Analyzes and groups similar data points in a scatter chart based on attribute values.

Displays the top N records based on a selected value (e.g., Top 10 selling products).





Power BI Visuals and Analytics

Syntax for

How to use

Histograms
and Bell
Curves

- Use Column Charts for Histograms;
- Use Area Charts for Bell Curves

Analyze
Feature

- > Right-click Visual Data Point
- > Analyze
- > Choose Option (Explain Increase or Distribution Differences)

AI Insights

- > Power Query Editor
- > Add Column Tab
- > Select Text Analytics, Vision, or Azure Machine Learning

Key
Influencers
Visual

- > Visualizations Pane
- > Key Influencers Icon
- > Add Metric to Analyze and Dimensions to Explain By

Explained

Represents statistical data distributions for insights into data patterns.

Provides AI-generated insights into why data has changed or its distribution differences.

Applies pretrained machine learning models for tasks like sentiment analysis, image processing, or anomaly detection.

Identifies and ranks factors that influence a specific metric, aiding in root cause analysis.

Syntax for

How to use

- > Visualizations Pane
- > Decomposition Tree Icon
- > Add Fields to Analyze and Explain

Q&A Visual

- > Double-Click Canvas
- > Enter Natural Language Question

Statistical
Summary

- > Visualizations Pane
- > Add Summary Visual

Advanced
Analytics
Visuals

- > Visualizations Pane
- > Get More Visuals
- > Select Advanced Analytics Category

Explained

Allows data exploration across multiple dimensions, providing insights into high and low values in hierarchical data.

Uses natural language processing to generate visual answers to data-related questions.

Provides quick descriptive statistics like averages, distributions, and clusters for high-level insights.

Imports specialized visuals from Microsoft AppSource for complex analytical needs.





Power BI Visuals and Analytics

Syntax for

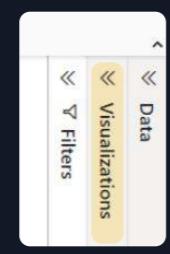
How to use

Time Series Analysis

Use Line Charts, Gantt Charts, or Area Charts

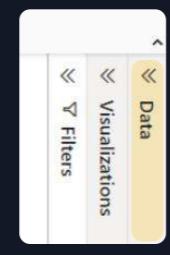
Slicers

- > Visualizations Pane
- > Slicer Icon
- > Add Field to Slicer



Custom Bin Groups

- > Data Pane
- > Right-click Field
- > New Group
- > Set Bin Size



Quick Insights

- > Power BI Web Service
- > Report
- > More Options
- > Quick Insights



Explained

Tracks and visualizes data trends over time, useful for identifying disruptions or seasonal patterns.

Filters data interactively by categories such as time or geography, enabling segmentation of data.

Groups continuous data (e.g., numerical values or dates) into equal intervals for better analysis.

Automatically generates insights using machine learning algorithms, ideal for initial dashboard exploration.

Syntax for

How to use

Promote Headers

- > Home
- > Use First Row as Headers



Rename Queries

- > Queries Pane
- > Right-click on Query
- > Rename



Rename Columns

- > Right-click on column
- > Rename OR Double-click column header
- > Enter new name

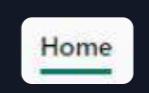
Replace Values

- > Transform Tab
- > Replace Values
- > Enter Value to Find and Replace
- > Close & Apply



Remove Rows

- > Select rows
- > Home
- > Remove Rows
- > Remove Top Rows



Explained

Converts the first row of data into column headers.

Updates query names to make them meaningful and organized.

Updates column names for clarity and organization of the dataset.

Substitutes specific values or nulls with new ones to resolve inconsistencies or make values user-friendly.

Deletes unnecessary rows to clean the dataset and improve analysis accuracy.





Transform Data in Power BI

Syntax for How to use

Remove Columns

- > Select columns
- > Home
- > Remove Columns OR Remove Other Columns

Remove Duplicates

- > Right-click Column Header
- > Remove Duplicates

Pivot Columns

- > Transform
- > Pivot Column
- > Select Value Column
- > Choose Aggregate Function

Unpivot Columns

- > Select columns
- > Transform
- > Unpivot Columns

Explained

Deletes unwanted columns or retains only necessary ones.

Eliminates duplicate values to ensure accuracy and uniqueness in data.

Summarizes data by converting rows into columns using aggregate functions like **SUM**, **COUNT**, or **AVERAGE**.

Converts column data into rows, enabling easier analysis of wide datasets.

Syntax for

Split Columns

- > Home
- > Split Column
- > By Delimiter

Combine Columns

- > Add Column
- > Custom Column
- > Concatenate values with delimiter

Sort Columns

- > Home
- > Sort Ascending/Descending
- > Choose column

Group By

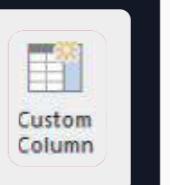
- > Transform
- > Group By
- > Select column(s)
- > Define operation (SUM, COUNT, etc.)

Explained

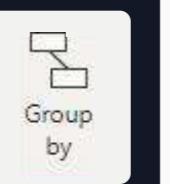
Divides a column into two or more based on a specified delimiter (e.g., comma, space).



Merges multiple columns into one, improving readability or preparing data for analysis.



Reorders data within a column alphabetically, numerically, or by other criteria.



Aggregates data based on selected columns to perform calculations like sums or counts.



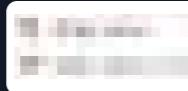


Transform Data in Power BI

Syntax for How to use

Merge Queries

- > Home
- > Merge Queries
- > Choose Tables and Columns
- > Select Join Type



Explained

Combines data from multiple queries into one using a join operation (e.g., INNER JOIN, OUTER JOIN).

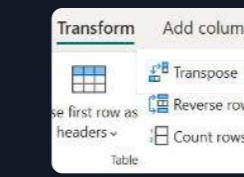
Duplicate Columns

- > Right-click column
- > Duplicate Column

Creates a copy of a column for further transformations without altering the original.

Transpose Data

- > Transform
- > Transpose



Switches rows to columns or columns to rows for reformatting data.

Fill Down/Up

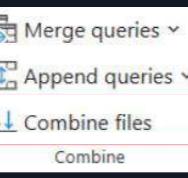
- > Transform
- > Fill
- > Fill Down or Fill Up



Fills blank cells in a column with values from the cell above or below.

Combine Files

- > Home
- > Combine Files
- > Select Folder



Consolidates data from multiple files (e.g., Excel or CSV) into one query.

Syntax for How to use

Change Column Data Type

- > Select Column
- > Transform Tab
- > Data Type
- > Choose Correct Data Type

Find Anomalies

- > View Tab
- > Data Preview
- > Check Column Distribution, Quality, and Profile

Modify M Code

- > View Tab
- > Advanced Editor
- > Edit Code
- > Click Done

Add Conditional Columns

- > Home
- > Add Column
- > Conditional Column
- > Define conditions and values

Explained

Fixes data type issues by selecting the correct type for calculations and transformations.

Identifies irregularities or quality issues in data through visual summaries like column statistics and value distributions.

Edits the underlying M code for advanced or customized transformations.

Adds a new column based on defined conditions (e.g., categorizing data into ranges).



Workspaces and Security

Syntax for	How to use	Explained	Syntax for	How to use	Explained
Create a Workspace	<ul style="list-style-type: none">> Power BI Service> Workspaces> Create a Workspace	Enables you to organize and collaborate on dashboards, reports, and datasets.	Usage Metrics	<ul style="list-style-type: none">> Workspace> Report> More Options> View Usage Metrics	Tracks performance and user interaction metrics for reports and dashboards.
Assign Workspace Roles	<ul style="list-style-type: none">> Workspace> Access> Add Email or Group> Assign Role (Admin, Member, Contributor, Viewer)	Defines user permissions for collaboration and content management within the workspace.	Sensitivity Labels	<ul style="list-style-type: none">> Power BI Desktop> Apply Sensitivity Labels> Publish	Protects sensitive data by specifying export permissions.
Deployment Pipelines	<ul style="list-style-type: none">> Power BI Service> Deployment Pipelines> Create Pipeline> Configure Workspace	Manages content migration between development, testing, and production environments (Premium accounts only).	Scheduled Refresh	<ul style="list-style-type: none">> Dataset> Settings> Scheduled Refresh	Automates data updates to ensure reports and dashboards display the latest information.
Lineage View	<ul style="list-style-type: none">> Workspace> View Drop-Down> Lineage	Visualizes relationships between workspace artifacts (reports, datasets) and external dependencies.	Promote and Certify Datasets	<ul style="list-style-type: none">> Power BI Service> Dataset> Promote or Certify	Endorses high-quality datasets for organizational use, ensuring reliability and consistency.



Workspaces and Security

Syntax for	How to use	Explained	Syntax for	How to use	Explained
Test RLS Roles	<ul style="list-style-type: none">> Power BI Desktop> Modeling Tab> View as Roles	Simulates role-specific views to verify correct implementation of row-level security.	What-If Parameters	<ul style="list-style-type: none">> Modeling Tab> New Parameter> Define Parameter> Create Measure	Runs scenario analysis by dynamically changing parameter values (e.g., forecasting sales impact with variable discounts).
Gateways for On-Premises Data	<ul style="list-style-type: none">> Install Power BI Gateway> Configure Gateway in Power BI Service	Connects on-premises data sources to Power BI cloud services, enabling seamless data access and refresh.	Manage Semantic Models	<ul style="list-style-type: none">> Power BI Desktop> Create Relationships> Define Star Schema	Organizes data into fact and dimension tables for optimized performance and analysis.
Parameters for Dynamic Reports	<ul style="list-style-type: none">> Power Query Editor> Manage Parameters> Create New Parameter> Replace Filter with Parameter	Enables dynamic filtering of reports based on user input or predefined values.	Create Dynamic Measures	DAX: Measure = <code>SUM(Data[Field]) * Parameter[Value]</code>	Dynamically changes calculations in reports based on input parameters.

