Power BI Lab Day 2 Document

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POWER BI LAB DOCUMENT

DAY 2- LAB 1

| Version | Author | Comment | Reviewed By | Date |
|---------|---------------|---------------|-------------|------|
| V 1.0 | I&D Microsoft | Initial draft | Moupiya Das | |
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Pre-requisites

Installed and working Power BI Desktop setup.

Environment Setup

To install Power BI Desktop to your machine or to sign up for Power BI Service, Refer to <u>Power BI Lab</u> Exercise Day 1.

Lab Overview

This lab comprises of four tasks:

- 1. In the first task, you import the data from an excel sheet, data base, online services & azure services.
- 2. In the second task, you will edit queries using query editor.
- 3. In the third task, you will perform various transformations.

Case Scenario

The AdventureWorks Database is a sample database file which supports a fictitious, multinational manufacturing company called Adventure Works Cycles. The AdventureWorksdatabase excel sheet has 27 different sheets in total.

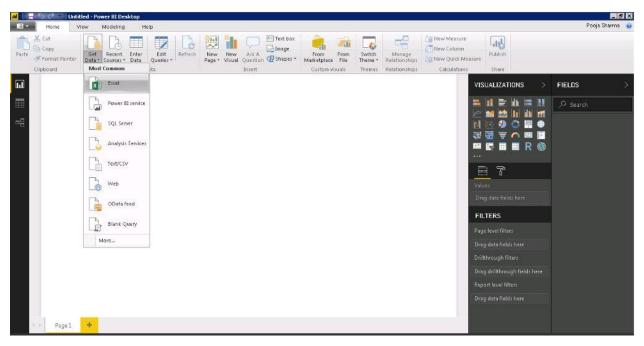
We will be importing 3 sheets to perform the various tasks in the Lab. We would be performing various data transformations on different types of data.

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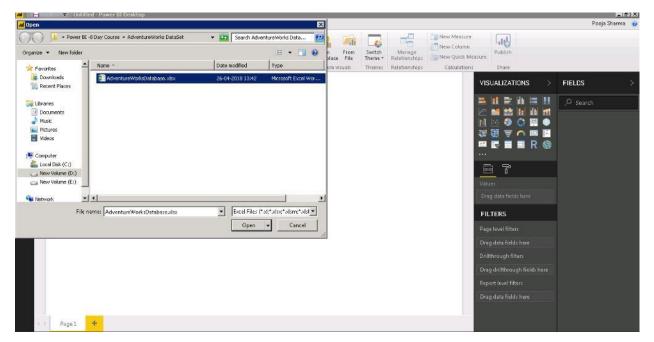
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1. Import Data into Power BI

- 1. Excel Source:
- Start with a blank Power BI Desktop file.
- Click on Get Data option in the 'Home' tab and choose Excel.

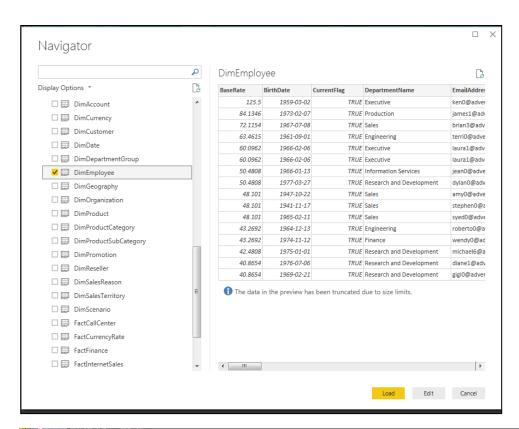


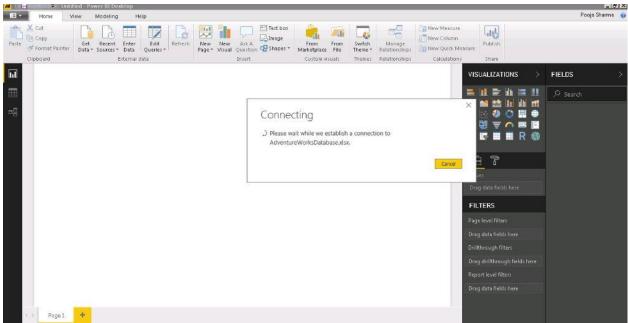
2. Select AdventureWorksDatabase, from the browse menu and click Open.



It would take a little time to connect to your database.

Select **DimEmployee** sheet to load data.



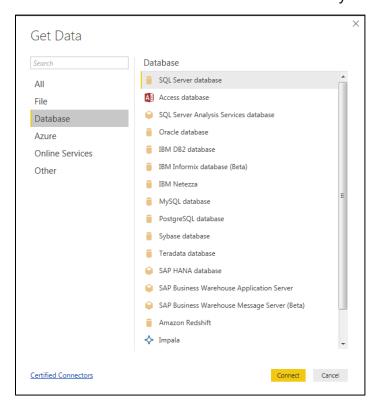


Data Set will be created as below:



2.DataBase:

Select Get Data and select DataBase as your source:

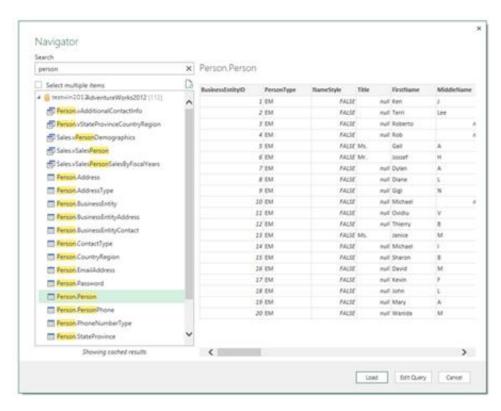


If you are on the list of all Data Sources, we want to select **SQL Server Database** and then click **Connect**.

You will then see a screen to enter the SQL Server name and the Database name. This would be where the data is going to come from.







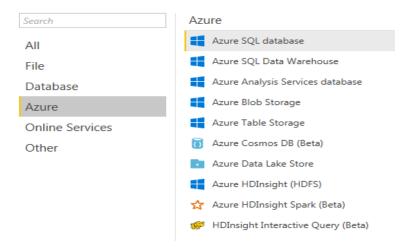
Once you have selected the item, click **Load**. This will pull the data into the Data Model.



3.Azure Services:

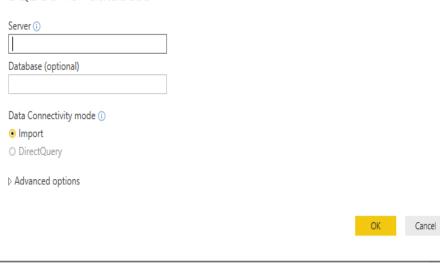
• The following image shows the **Get Data** window for **Azure**.

Get Data



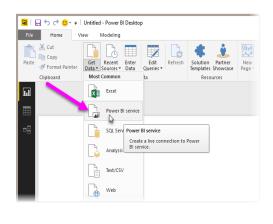
• You can either import data or use Direct Query to connect to azure database.

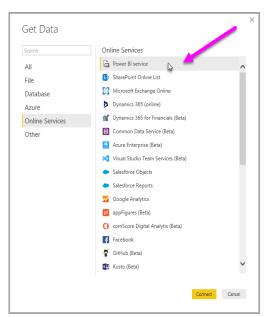
SQL Server database



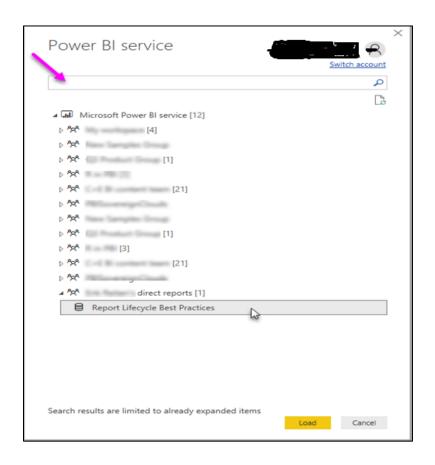
4. Online Services:

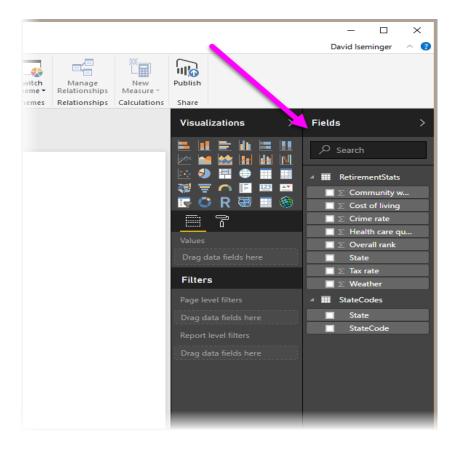
To establish a connection to the published report, and create your own report based on the published dataset, select **Get Data** from the **Home** ribbon in **Power BI Desktop**, and select **Power BI service**. You can also select it from **Get Data > Online Services > Power BI service**.





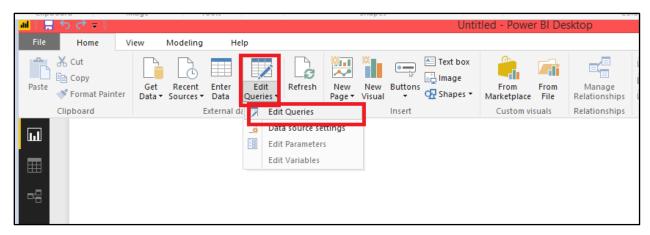
When you select **Load** from the window, you establish a live connection to the selected dataset, which means the data you see (the fields, and their values) are loaded into **Power BI Desktop** in real time.





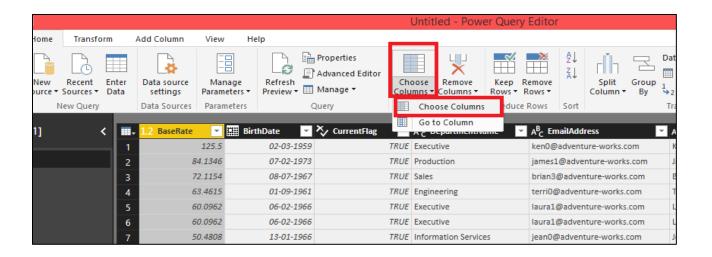
2.Data Transformations in Power BI:

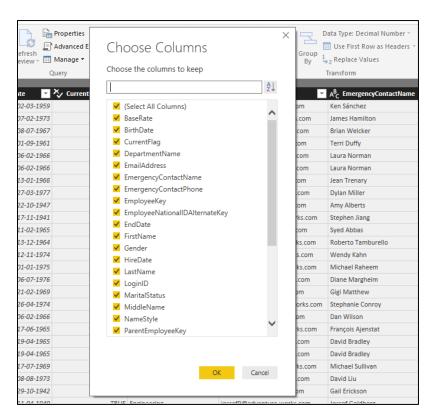
- Import the DimEmployee, FactInternetSales, DimProductSubcategory data from the excel sheet as shown in Step 1 of Importing Data From Excel.
- Open the query editor as shown below for doing all the transformations:



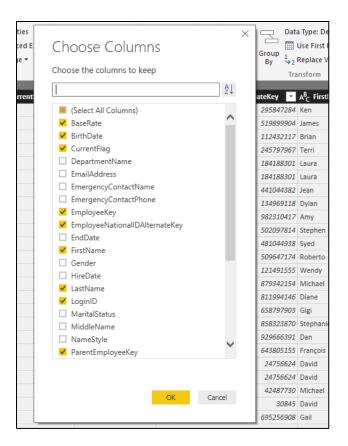
1. Choose Columns:

• Select Choose Column from the menu bar above :

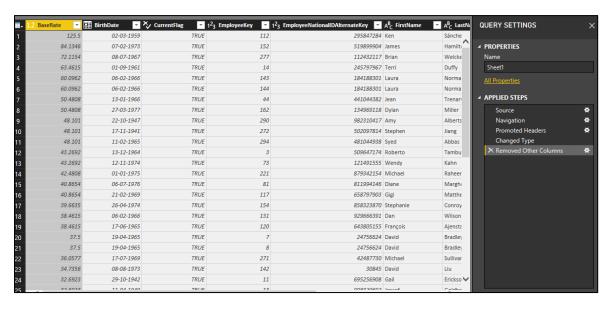




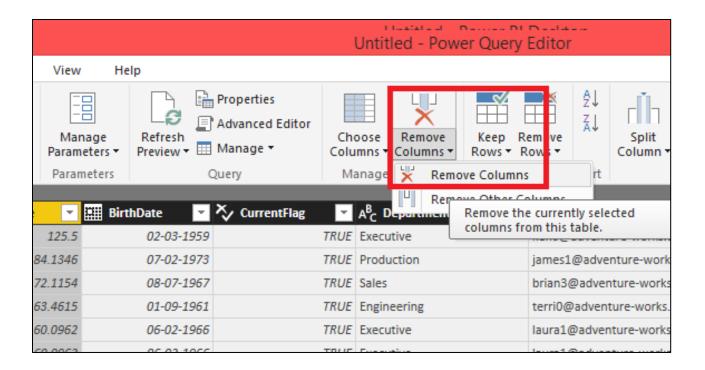
Choose Selected Columns:



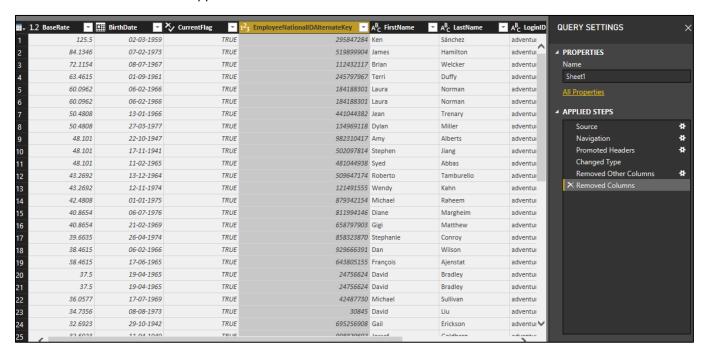
The result would be:



2. Remove Columns:

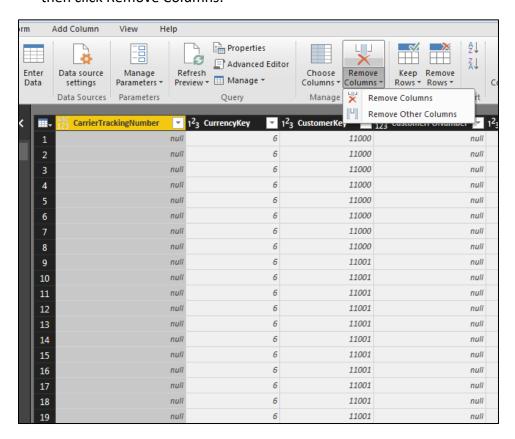


- Selecting Employee Key Column to be removed:
- The column does not appear as shown below:



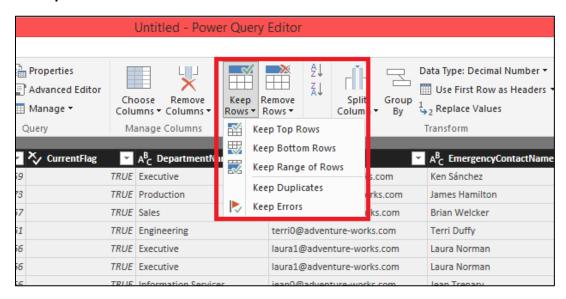
- Now,let's look at another example of a Fact Table:
- Take FactInternetSales dataset.

- Now we do not need all the columns from the fact table.
- So let's remove the columns "CarrierTrackingNumber", "PromotionKey", "RevisionNumber".
- Select the column "CarrierTrackingNumber", "PromotionKey", "RevisionNumber" and then click Remove Columns.

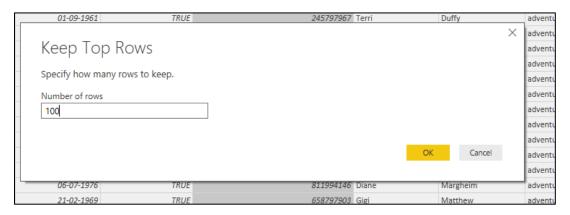


• The columns are removed.

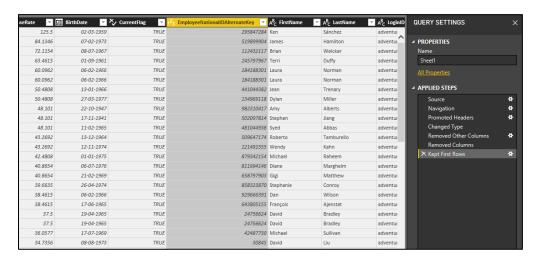
3. Keep Rows:



Selecting Keep top rows, we get:

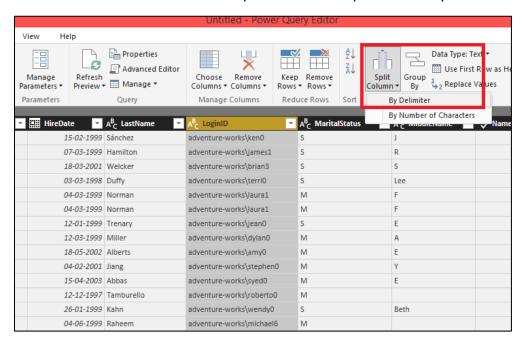


• The top 100 Rows remain.



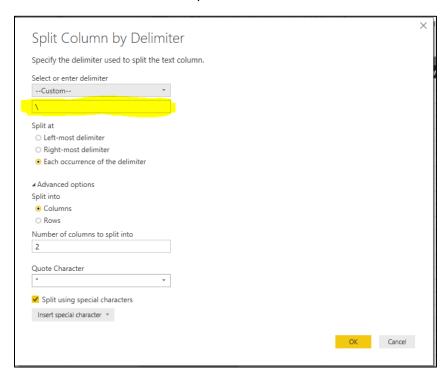
4. Split Column:

- If we need to split the login ID column into to domain name and user id, follow the below steps:
 - i. Select the column to be split and choose Split Column by Delimiter:

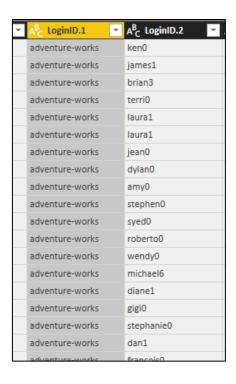


ii. The following dialogue box appears.

Enter the Delimiter '\'

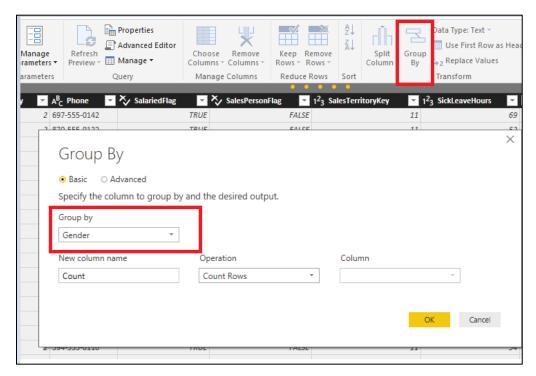


iii. Now as we can see the LoginID column has been split into 2 different columns



5. Group By:

• In this we have Group by Gender:



The results are as below:



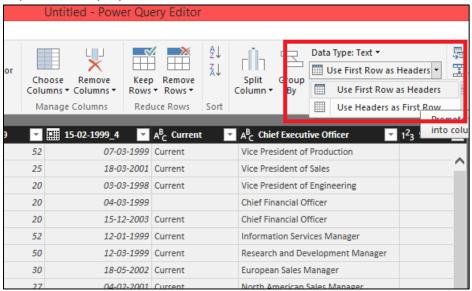
The transformations from 1-5 are attached below:



Transformation1-5.pbix

6. Use First Rows as Headers:

Import DimEmployee as shown in Section 1.



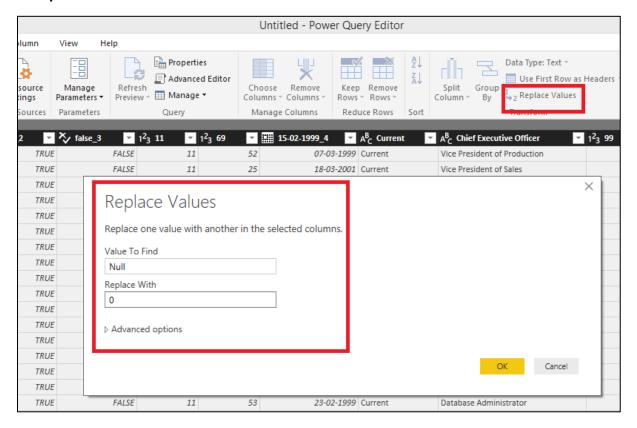
Before applying transformation the headers are as follows:



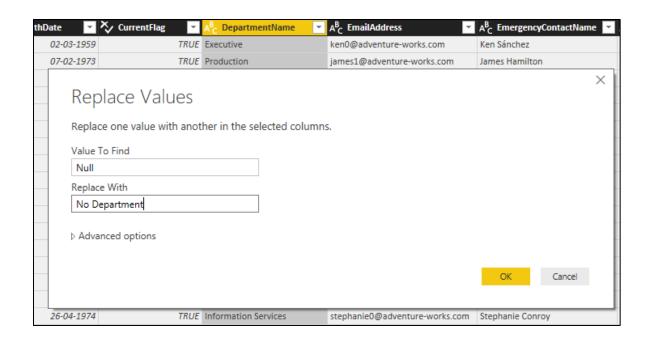
After applying transformation, the first row becomes the header:

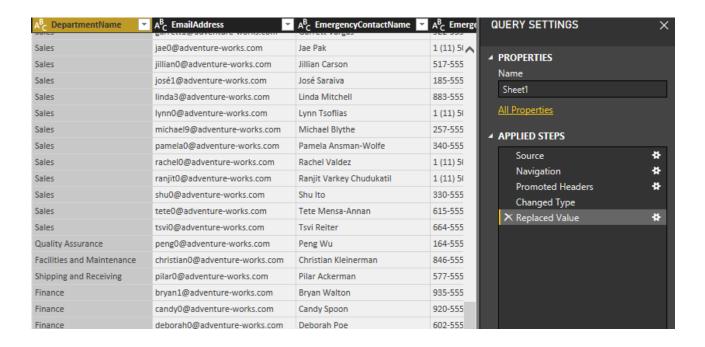


7. Replace Values:

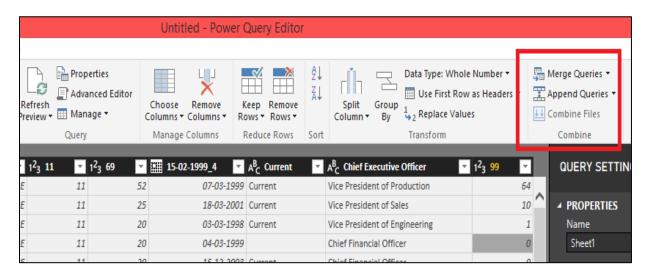


 Here we are replacing the Null values in **Department Name** column with No department:

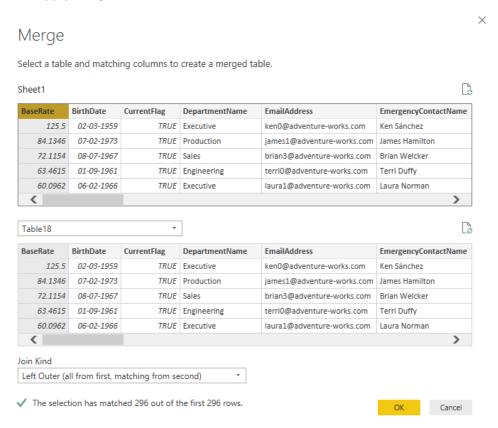




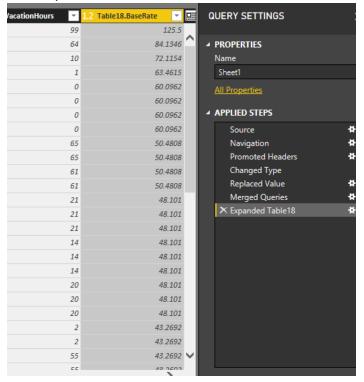
8. Combine:



Now apply merge transformation:

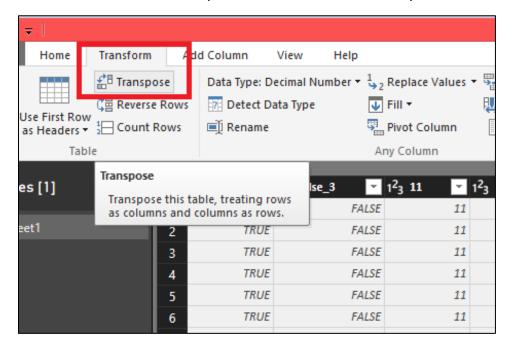


Now as you can see the column base rate has been added:



9. Transpose:

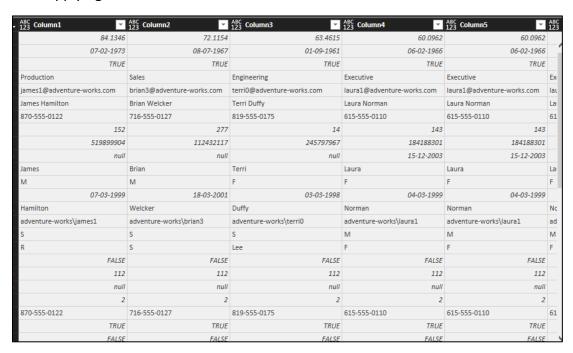
Go in Transform tab up in the menu bar. Select Transpose.



Before applying transpose:

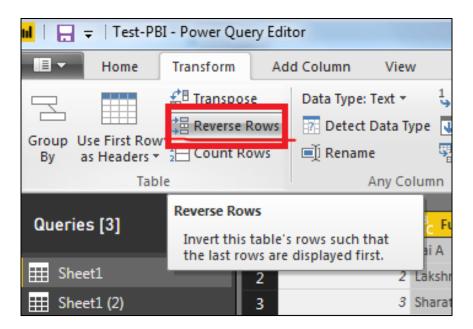
| .2 125.5 | 02-03-1959 | Xy true ▼ | A ^B _C Executive | A ^B _C ken0@adventure-works.com | A ^B _C Ken Sánchez | → AB _C 6 |
|----------|------------|-------------|---------------------------------------|------------------------------------------------------|-----------------------------------------|---------------------|
| 84.1346 | 07-02-1973 | TRUE | Production | james1@adventure-works.com | James Hamilton | 870-5 |
| 72.1154 | 08-07-1967 | TRUE | Sales | brian3@adventure-works.com | Brian Welcker | 716-5 |
| 63.4615 | 01-09-1961 | TRUE | Engineering | terri0@adventure-works.com | Terri Duffy | 819-5 |
| 60.0962 | 06-02-1966 | TRUE | Executive | laura1@adventure-works.com | Laura Norman | 615-5 |
| 60.0962 | 06-02-1966 | TRUE | Executive | laura1@adventure-works.com | Laura Norman | 615-5 |
| 60.0962 | 06-02-1966 | TRUE | Executive | laura1@adventure-works.com | Laura Norman | 615-5 |
| 60.0962 | 06-02-1966 | TRUE | Executive | laura1@adventure-works.com | Laura Norman | 615-5 |
| 50.4808 | 13-01-1966 | TRUE | Information Services | jean0@adventure-works.com | Jean Trenary | 685-5 |
| 50.4808 | 13-01-1966 | TRUE | Information Services | jean0@adventure-works.com | Jean Trenary | 685-5 |
| 50.4808 | 27-03-1977 | TRUE | Research and Development | dylan0@adventure-works.com | Dylan Miller | 181-5 |
| 50.4808 | 27-03-1977 | TRUE | Research and Development | dylan0@adventure-works.com | Dylan Miller | 181-5 |
| 48.101 | 22-10-1947 | TRUE | Sales | amy0@adventure-works.com | Amy Alberts | 775-5 |
| 48.101 | 22-10-1947 | TRUE | Sales | amy0@adventure-works.com | Amy Alberts | 775-5 |
| 48.101 | 22-10-1947 | TRUE | Sales | amy0@adventure-works.com | Amy Alberts | 775-5 |
| 48.101 | 17-11-1941 | TRUE | Sales | stephen0@adventure-works.com | Stephen Jiang | 238-5 |
| 48.101 | 17-11-1941 | TRUE | Sales | stephen0@adventure-works.com | Stephen Jiang | 238-5 |
| 48.101 | 17-11-1941 | TRUE | Sales | stephen0@adventure-works.com | Stephen Jiang | 238-5 |
| 48.101 | 11-02-1965 | TRUE | Sales | syed0@adventure-works.com | Syed Abbas | 926-5 |
| 48.101 | 11-02-1965 | TRUE | Sales | syed0@adventure-works.com | Syed Abbas | 926-5 |
| 48.101 | 11-02-1965 | TRUE | Sales | syed0@adventure-works.com | Syed Abbas | 926-5 |
| 43.2692 | 13-12-1964 | TRUE | Engineering | roberto0@adventure-works.com | Roberto Tamburello | 212-5 |
| 43.2692 | 13-12-1964 | TRUE | Engineering | roberto0@adventure-works.com | Roberto Tamburello | 212-5 |

After applying:

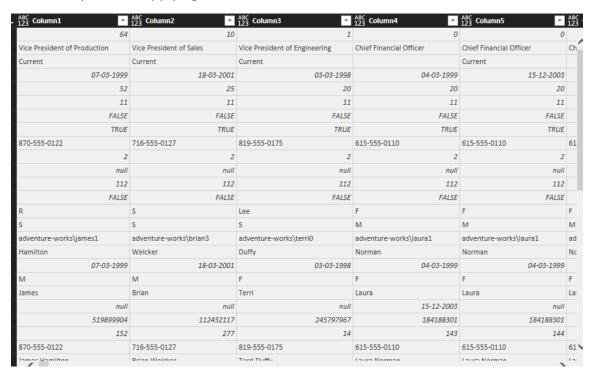


10. Reverse Rows:

Select Reverse Rows from Transform tab.



After transpose and applying reverse:



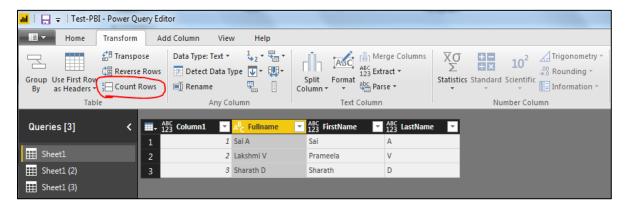
Transformation 6-10:



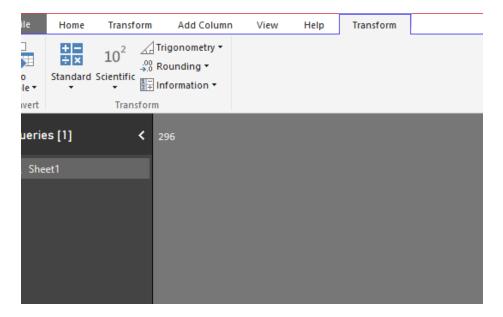
Transformation6-10.pbix

11. Count Rows:

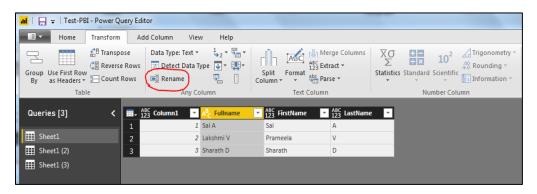
• Import **DimEmployee** as shown in Section 1.

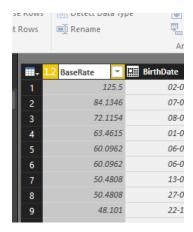


Result:

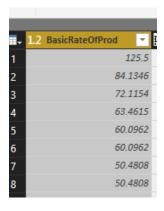


12. Rename:

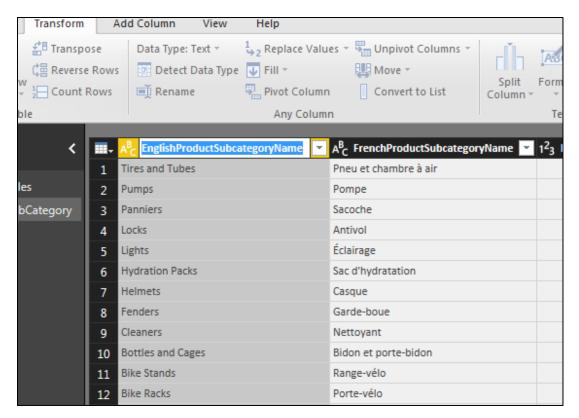


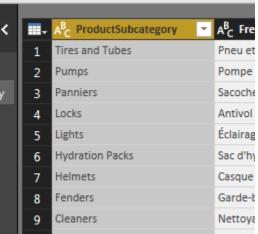


After Renaming the BaseRate column:



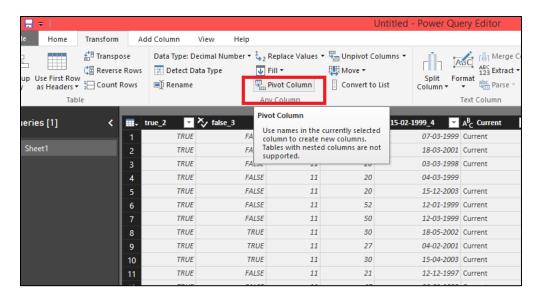
- Now,let's take DimProductSubcategory data set as another example of renaming columns
- Let's rename the column **EnglishProductSubcategoryName** to **ProductSubcategory**:



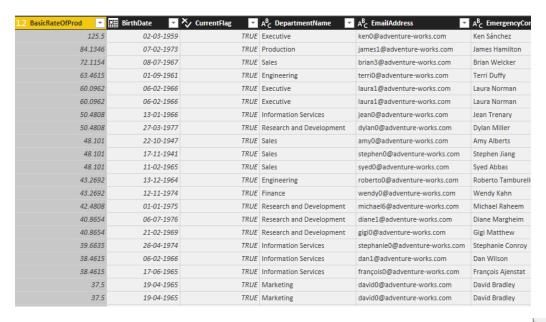


13. Pivot Column:

• Use Pivot Column on BirthDate.

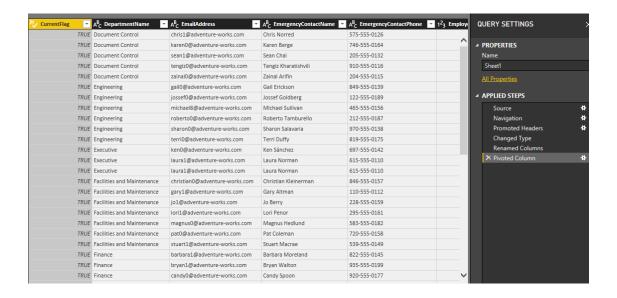


Before:



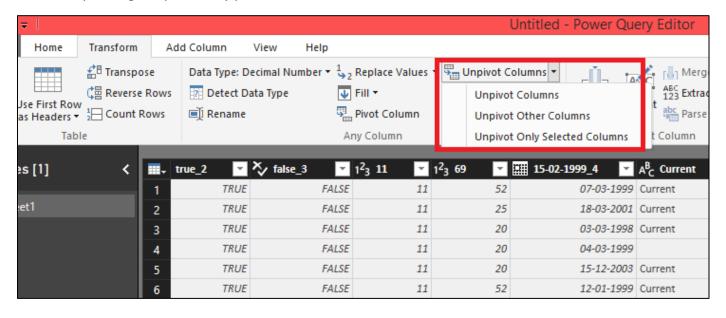


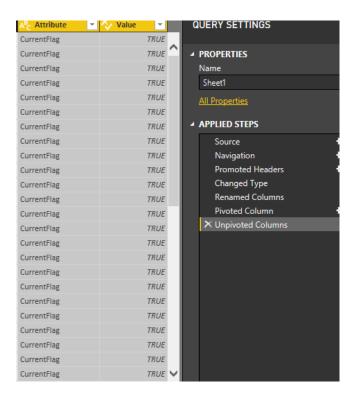
After:



14. Unpivot Columns:

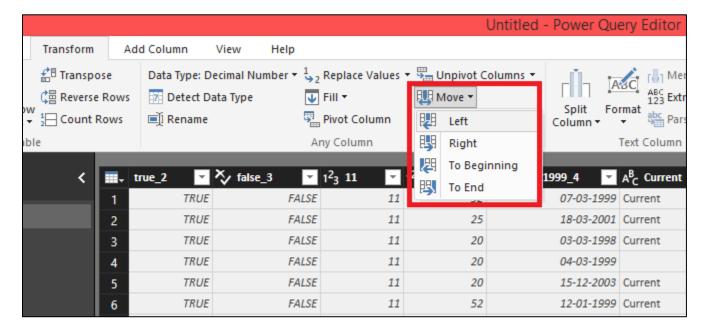
Unpivoting the previously pivoted columns.

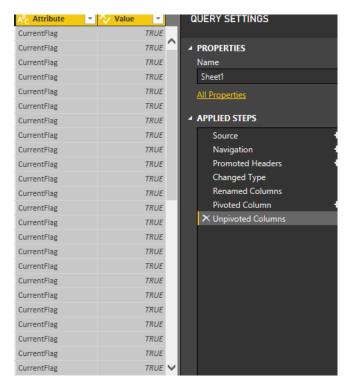




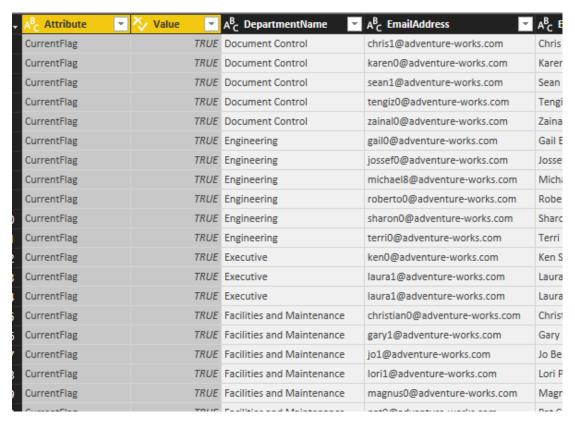
15. Move:

• Select a column and then Click Move and now you can move that column to any given position as shown below:

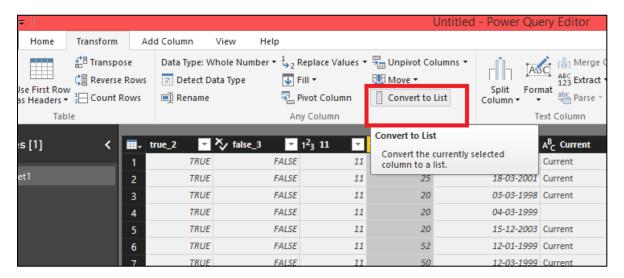




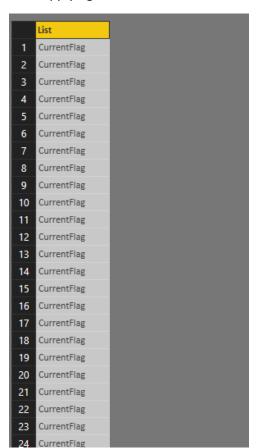
After applying move to beginning for Attribute and value:



16. Convert to List:



After applying Convert to list to Attribute Column:



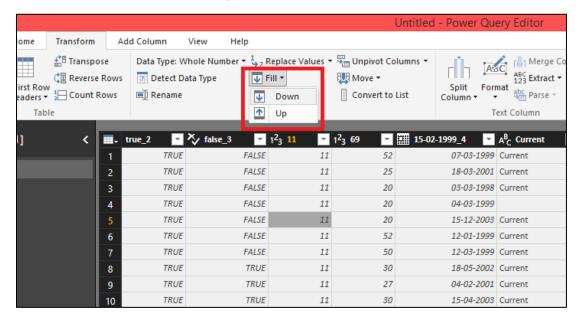
Transformations from 11-16:



Transformation11-16.pbix

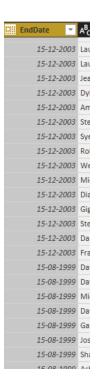
17. Fill:

- Import DimEmployee as shown in Section 1.
- Select the column in which you have to fill the values.

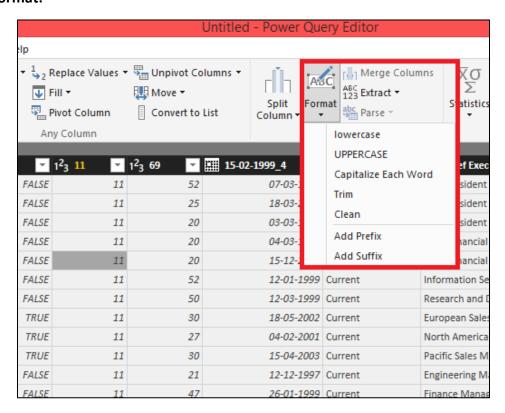


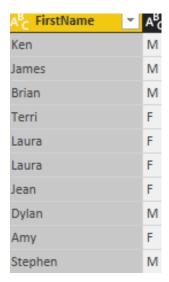


After selecting Fill Down:

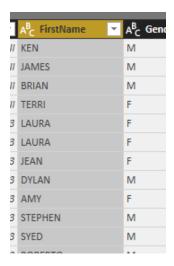


18. Format:

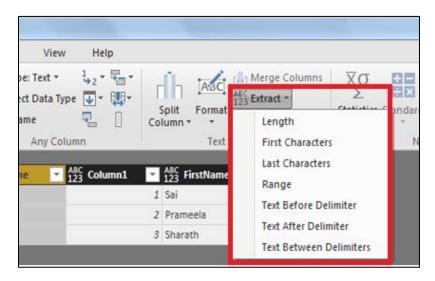




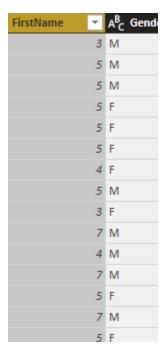
After Applying Uppercase Formatting:



19. Extract:

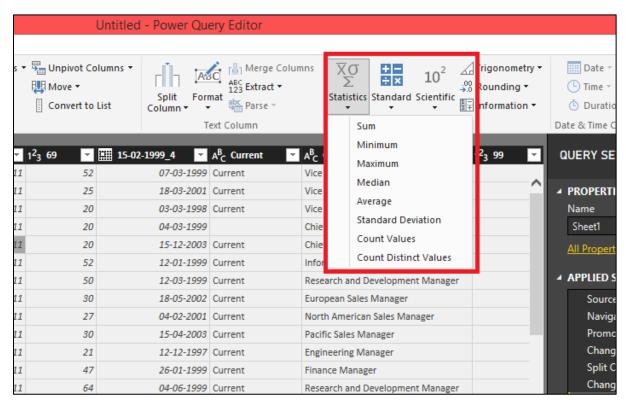


Extracting Length Of First Name:



20. Statistics:

• Perform statistical operations like Sum, Minimum, Maximum, etc. as shown below:

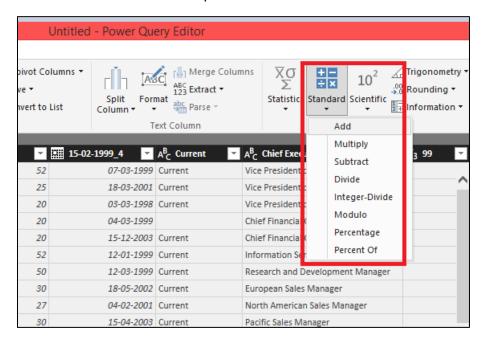


Calculating Minimum Of BaseRate:

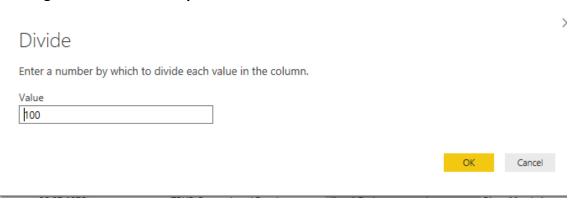


21. Standard:

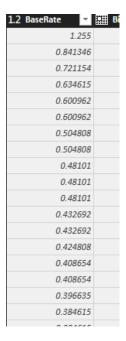
Perform basic math operations.



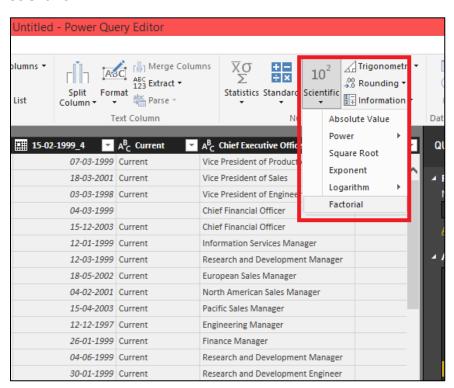
Dividing Base Rate column by 100:



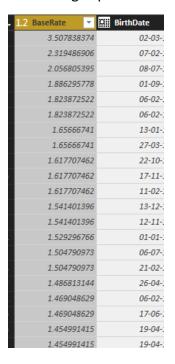
Result:



22. Scientific:



Calculating Exponent of Base Rate Column:



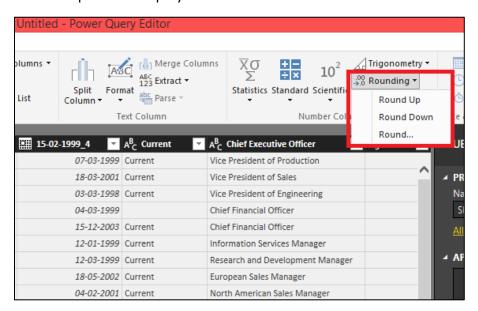
Transformation 17-22:

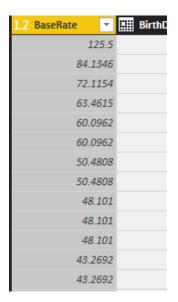


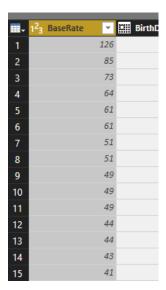
Transformation17-22.pbix

23. Rounding:

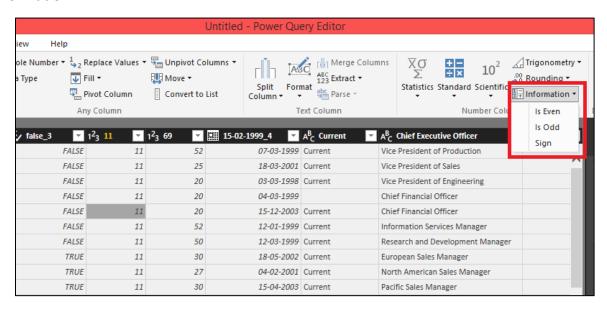
• Import DimEmployee as shown in Section 1.



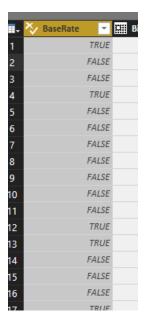




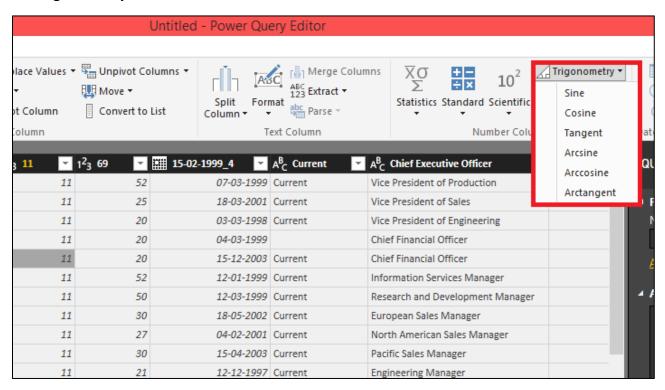
24. Information:

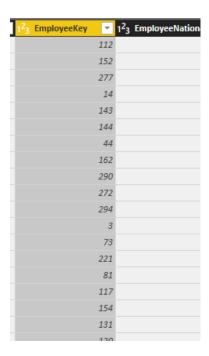


If Base Rate Information is selected to Is even:

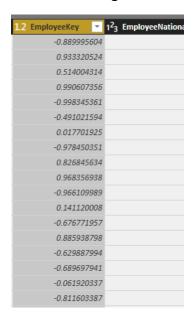


25. Trigonometry:

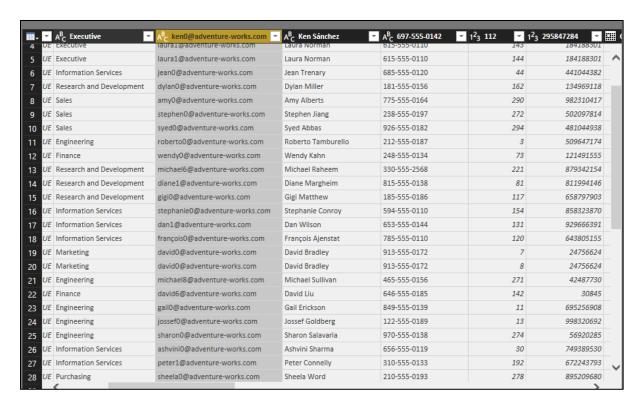




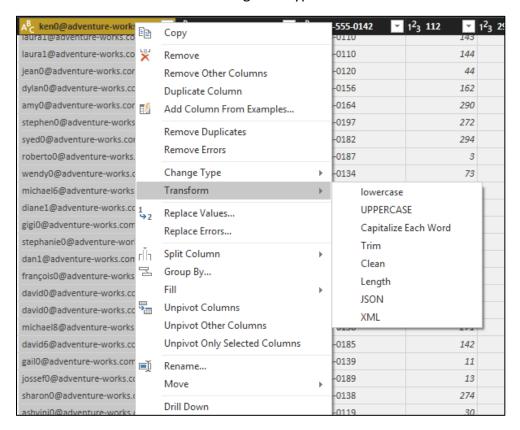
After Calculating Sine:



26. Transform:



- Right Click on the column Header and a dialogue box will appear, further select transform and the transformation options will be displayed as shown below:
 - A. For Columns of String Data type:

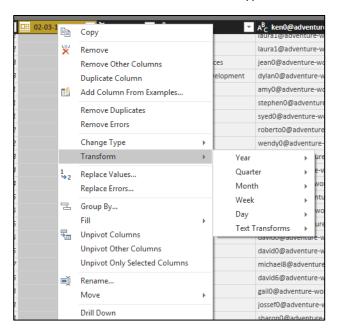




After applying Uppercase transformation on Department Column:

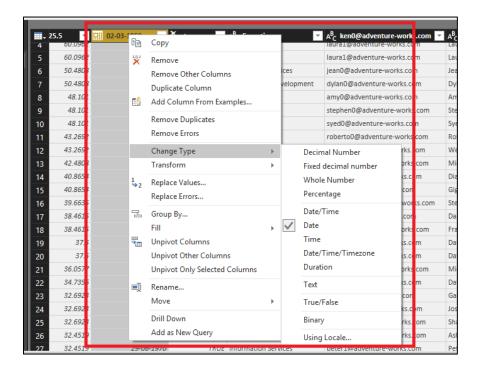


B. For Columns of Date data type:



27. Change Type:

Step 1 : same as above and then select Change Type:



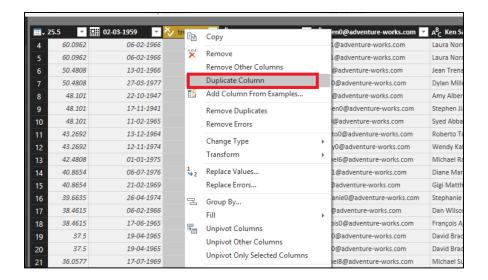


After applying Date/Time Type to the Birth date column:

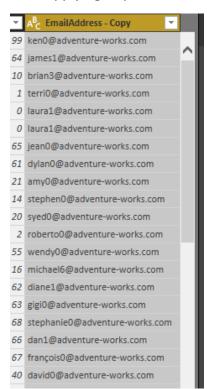


28. Duplicate Column:

• Step 1 as above and then select Duplicate Column.



After applying Duplicate Column to email id:



Transformations 23-28:



Transformation23-28.pbix

Summary

In this Lab exercise, we have learnt:

- To import data from an Excel File, Database, Online Services, Azure Services.
- To use query editor.
- To use various data transformations.