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Budgeting with Power Pivot

Alberto Ferrari
SQLBI

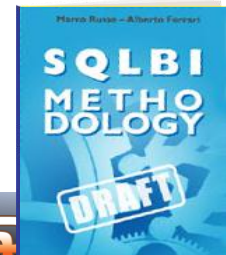
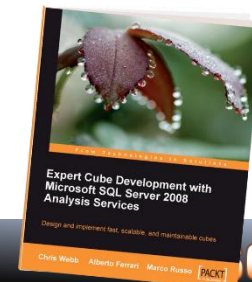
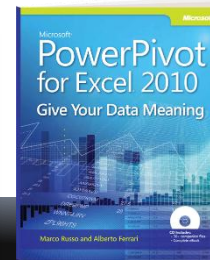
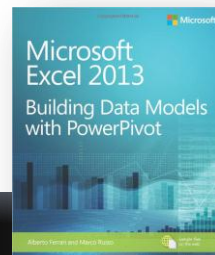
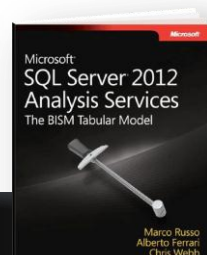
www.sqlbi.com



Alberto Ferrari



- BI Expert and Consultant
- Founder of www.sqlbi.com
 - Problem Solving
 - Complex Project Assistance
 - Data Warehouse Assessments and Development
 - Courses, Trainings and Workshops
- Book Writer
- Microsoft Gold Business Intelligence Partner
- SSAS Maestro – MVP – MCP




The Scenario

- End of 2009
- Contoso prepares the budget for 2010
- Need to browse budget with a PivotTable
- Perform calculations with Power Pivot




DAX Patterns

www.daxpatterns.com/budget-patterns/




HOME **PATTERNS** REQUESTS BOOK COURSES

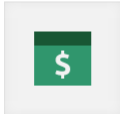
ALL PATTERNS USE CASES **BUDGET PATTERNS**

POWERED BY 


Budget Patterns

FOR MICROSOFT EXCEL® 2010 / 2013

 THE PATTERN IS INCLUDED IN THE BOOK DAX PATTERNS 2015



The budget patterns are techniques you use to compare budget information with other data. They are an extension of the handling of different granularities and, as such, use allocation algorithms to display the budget at granularities for which it is not available.



Get all the patterns in a book, available now!

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Basic Pattern Example

Suppose you have sales data at the day and product level, and the budget for each product at the year level, as shown in Figure 1.

Date	Product	SalesAmount
1/1/2014	Bike	100
1/1/2014	Shirt	11
1/15/2014	Bike	90
1/15/2014	Shirt	8
1/29/2014	Bike	85

Year	Product	BudgetAmount
2014	Bike	2,500
2014	Shirt	270

LEVEL

17 COMMENTS

SKIP TO

Basic Pattern Example

Use Cases

Fixed Allocation of Budget over Time

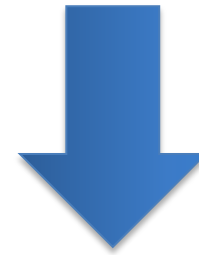
Budget Allocation

SQLDay 2015

SQLDay

Fixing granularity and reallocation

Country	Category	Sales
Italy	MP3 Players	24,000
Italy	TV	12,000



Country	Category	Month	Sales
Italy	MP3 Players	Jan	2,500
Italy	MP3 Players	Feb	1,650
Italy	MP3 Players	Mar	850
...



Different techniques

- Static reallocation
 - DAX Queries
 - Power Query
 - Useful for complex reallocation
- Dynamic reallocation
 - DAX code
 - Simpler algorithm
 - Greater flexibility



Static reallocation

- Sales by Month
 - In 2009
 - Using DAX to gather data
- Forecasts by brand and year
- Power Query to join them together



Relationships

- Some relationships are easy
- Other ones require more efforts
 - Date (month granularity)
 - Country (no country dimension)
 - Brand (no brand dimension)
- DAX is the key to solve relationships at different granularity



Dynamic reallocation

- Below the budget granularity
 - Same number repeated
- Two options
 - Hide the number (easy)
 - Dynamically reallocate
 - Based on the sales of previous year



Conclusions

- Static allocation
 - DAX as a query language
 - Power View
- Dynamic allocation
 - DAX is your best friend





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