

# CONTENTS

Power BI (in-depth Understanding)

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# BUSINESS INTELLIGENCE (BI) CONCEPTS

# Business Intelligence (BI) Concepts

- 1. Introduction to Business Intelligence**
- 2. The importance of Business Intelligence**
- 3. The relation between Business Intelligence and Data Warehouse**
- 4. Tools and Technologies in Business Intelligence area**



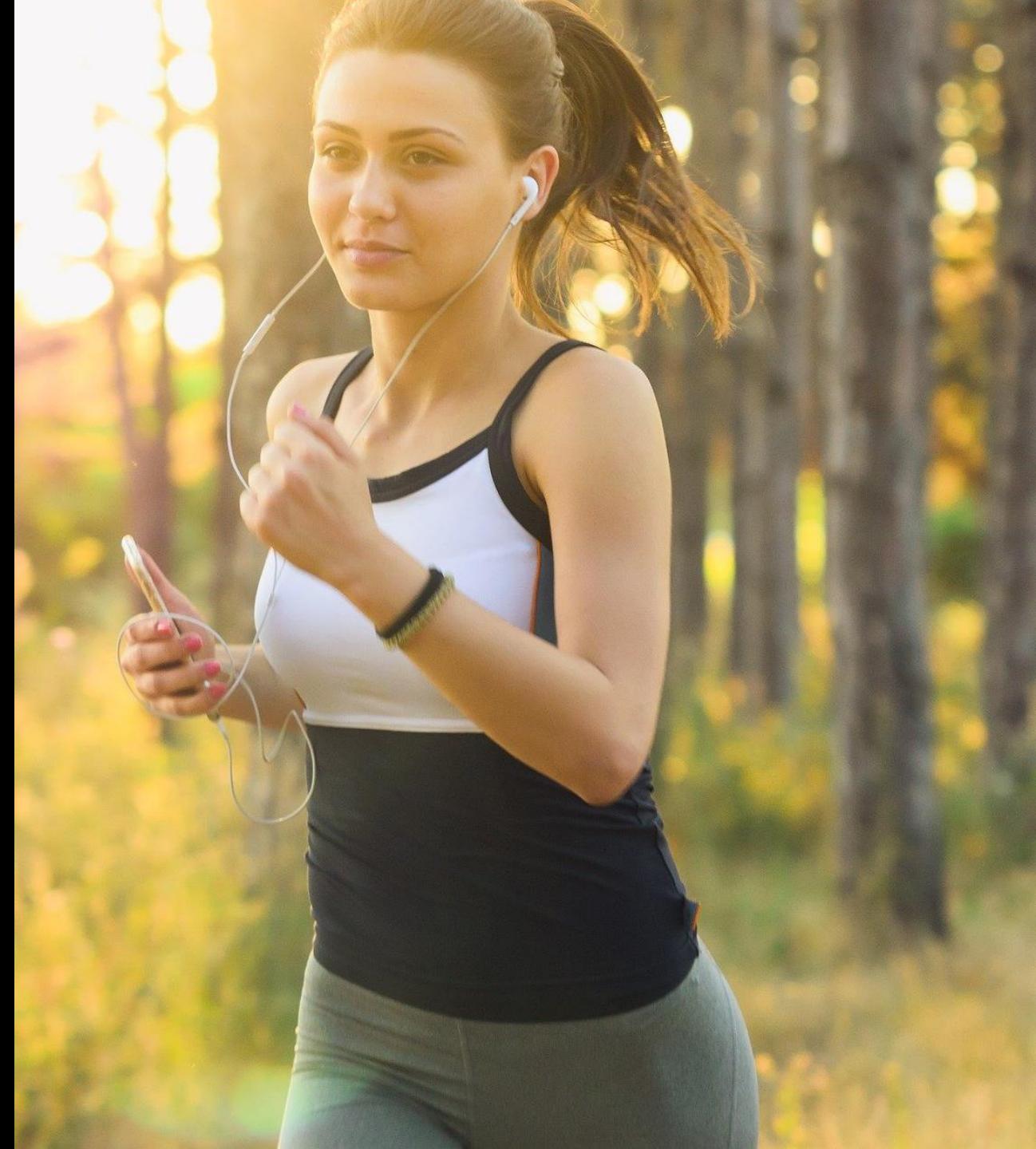
# INTRODUCTION TO BUSINESS INTELLIGENCE

Business Intelligence (BI) is a process of analysing data through technology and presenting it to the end user(s) which help them to make an informed decision. With the use of historical and current data, a BI tool serves predictive view.

Usually a BI tool can perform tasks like data connection, data mining, data transformation, data modelling through building relationships, complex calculations, report building, dashboard creation, online analytical processing and predictive analysis.

# RELATION BETWEEN BUSINESS INTELLIGENCE AND DATA WAREHOUSE

To understand the relationship between BI and Data warehouse, lets first understand what is Data warehouse?



# DATA WAREHOUSE

It consists of a huge storage of data gathered from single or many sources to aid the process of making an informed decision at any level of an enterprise.

A typical data warehouse follows an ETL (Extract, Transform, Load) process.

# ETL

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## Extract

The first step in using Data Warehousing is to extract data from single or multiple sources to load in its environment.

## Transform

The Data which has been extracted, may not come in the desired format or size etc, so there may be the need to transform the incoming data to meet business requirements and objects.

## Load

Once the data is being transformed, its ready to be loaded in targeted tables.

# RELATION BETWEEN BUSINESS INTELLIGENCE AND DATA WAREHOUSE (CONT.)

A Business Intelligence tool takes data from a Data warehouse to generate reports and help the end user to make informed decision. By this, we can call Data warehouse as a part of a complete Business Intelligence process.

# BI TOOLS

- Microsoft Power BI
- Tableau
- Sisense
- Looker
- datapine
- Zoho Analytics
- Yellowfin
- Answer Dock
- Hotjar
- ReportPlus
- QlikView
- SAP BusinessObjects Lumira
- SAP Crystal Reports
- SAP Business Intelligence
- Vista
- Clootrack

Note: These are the most commonly used BI tools available in the market.

Power BI (In-depth Understanding)

Figure 1. Magic Quadrant for Analytics and Business Intelligence Platforms



# MICROSOFT POWER BI ( MSPBI ) INTRODUCTION

# Microsoft Power BI ( MSPBI ) introduction

- 1. Power BI introduction and overview**
- 2. Power BI Architecture**
- 3. Introduction and Power BI in Excel**
- 4. Connecting with Data**
- 5. Why Choose Power BI over Excel**



# POWER BI INTRODUCTION AND OVERVIEW

Power BI is a collection of software/tools that works in synchronisation to turn unrelated sources of data into meaningful and interactive insights.

Power BI support 100's of data sources including the most common one's like Excel spreadsheets, Text/CSV, SQL, Oracle etc.

# PARTS OF POWER BI

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## Power BI Desktop

A Windows desktop application.

01

02

## Power BI service

An online SaaS (Software as a Service) service

## Power BI mobile apps

for Windows, iOS, and Android devices

03

04

## Power BI Report Server

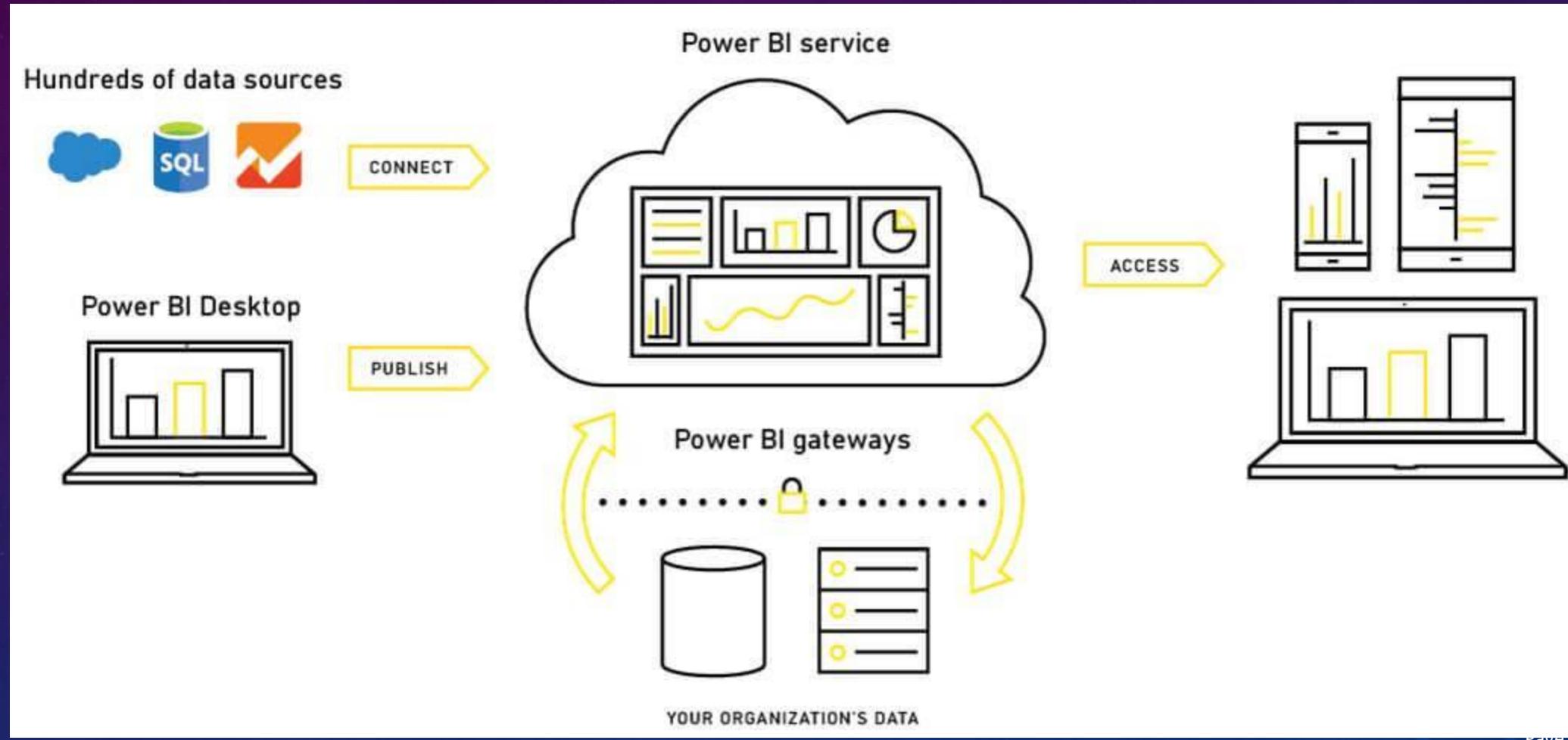
to publish Power BI reports to an on-premises report server, after creating them in

# POWER BI FLOW

## Power BI Flow

It starts with connecting to data then transforming it, building relationships and finally creating reports and publishing it to Power BI service. Later it can be shared so that end users in the Power BI service and mobile devices can view and interact with the report.

# POWER BI ARCHITECTURE



# INTRODUCTION TO POWER BI DESKTOP

## Power BI Flow

It starts with connecting to data then transforming it, building relationships and finally creating reports and publishing it to Power BI service. Later it can be shared so that end users in the Power BI service and mobile devices can view and interact with the report.

# WHY CHOOSE POWER BI OVER EXCEL

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- **Store and analyse huge amount of data smoothly:** With powerful compression algorithms to import and cache the data within the .PBIX file, it can easily handle huge data bases. On the other hand Excel struggles even in opening a file having few hundred thousands of rows.
- **Find Data insights and show trends in minutes:** With build-in time intelligence functions, it becomes very easy to dig into vast amount of data and draw trend (unlike Excel).
- **User Friendly Report Interface:** Its just about drag and drop of the fields when it comes to create impressive visualizations. Even a complex report with diverse visualizations won't take more than 10 to 20 mins to create. If you think that pre-enabled visualizations are not enough then you can import a custom visualization anytime in just few clicks from the library of 100's of custom visuals.

# WHY CHOOSE POWER BI OVER EXCEL (CONT.)

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- **Publishing and Sharing the Report:** Just by hitting the publish button, one can publish the report on Power BI service and whosoever has an access to it can view the updated report or dashboard always. On the other hand in Excel, one need to send emails or putting in the share drive or share point and telling them that we have updated the file.
- **Defining Roles:** Power BI gives us an option to define roles to make sure people from different departments or locations can see only their respective data (Which can't be done in Excel).

# PROJECT INTRODUCTION & GETTING STARTED

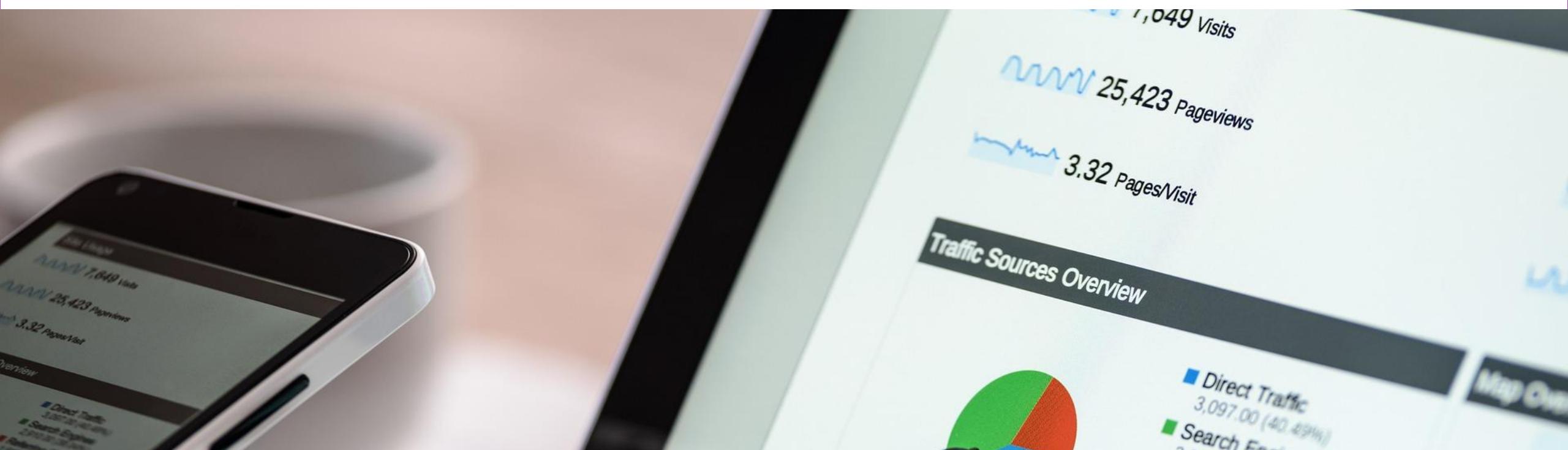
# Project Introduction & Getting Started

Project Information

How to get Power BI desktop

Power BI Desktop Interface

Change Default Settings



# PROJECT INTRODUCTION

Situation:

You have been hired by “Big Market”, an American Retail Corporation, to design and deliver the end-to-end business intelligence solution.

Given:

You will be given CSV files, containing the sales, customer, products etc for 2 years.

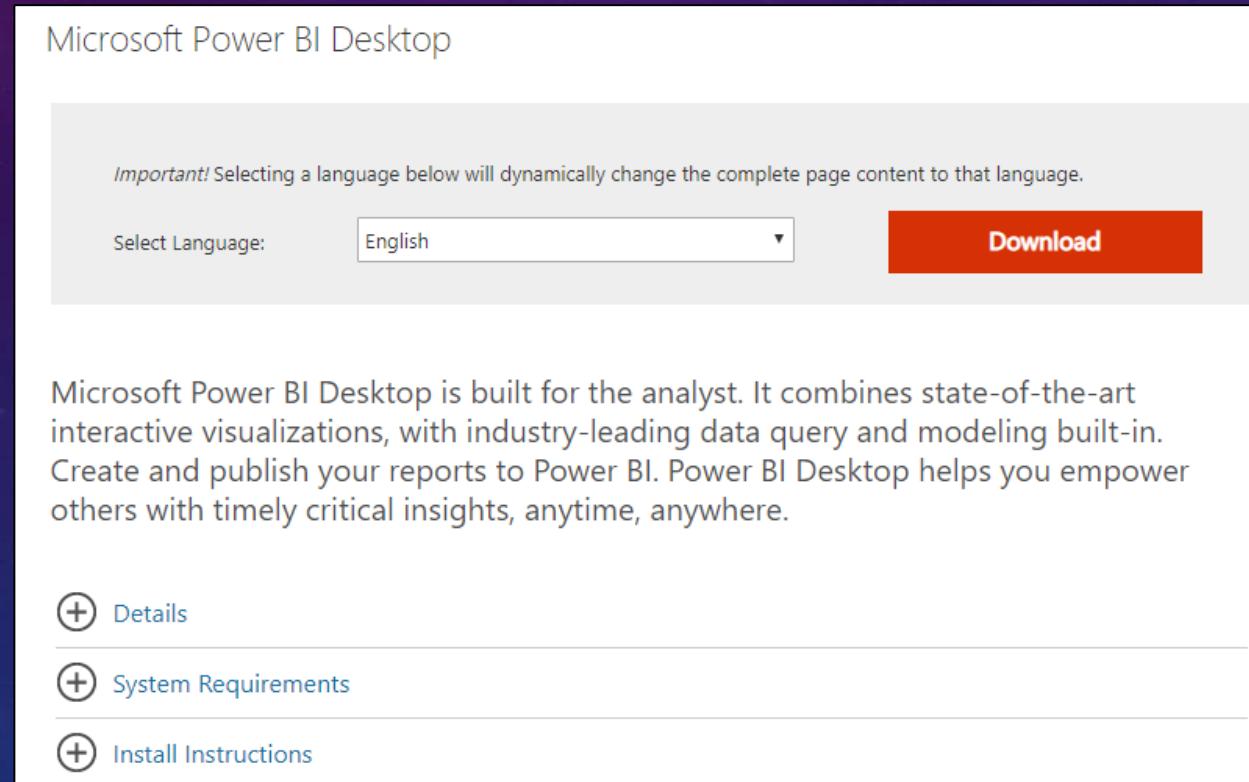
Expected:

Client want's to track not only KPI's (i.e. Sales, Profit, Cost, Return) but also the product level performance, forecast, regional level comparisons, and want to identify high value customers.

# HOW TO GET POWER BI DESKTOP?

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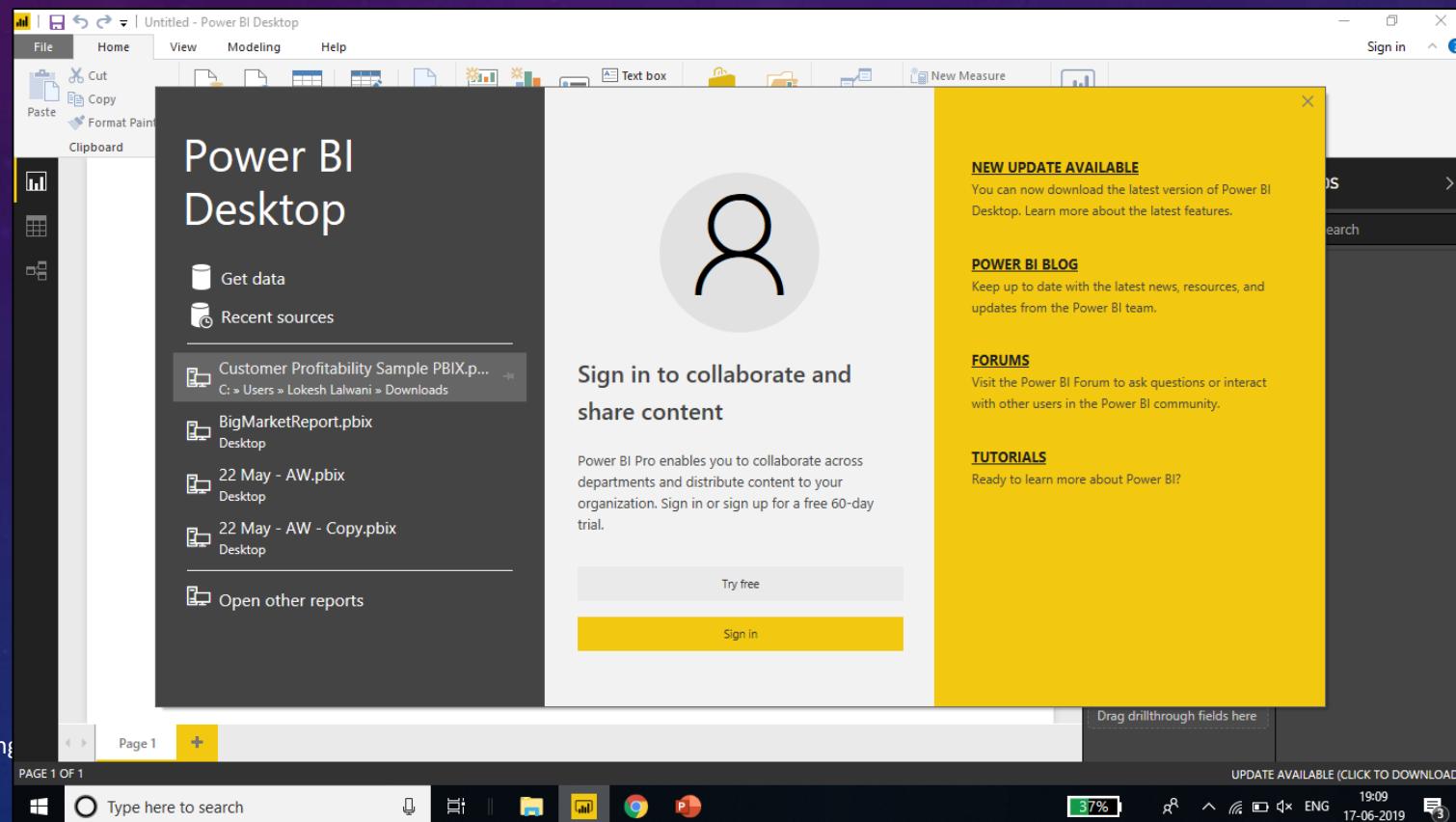
- Go to <https://www.microsoft.com/en-us/download/details.aspx?id=45331> Check for the system requirements and hit the download button and you are good to go.



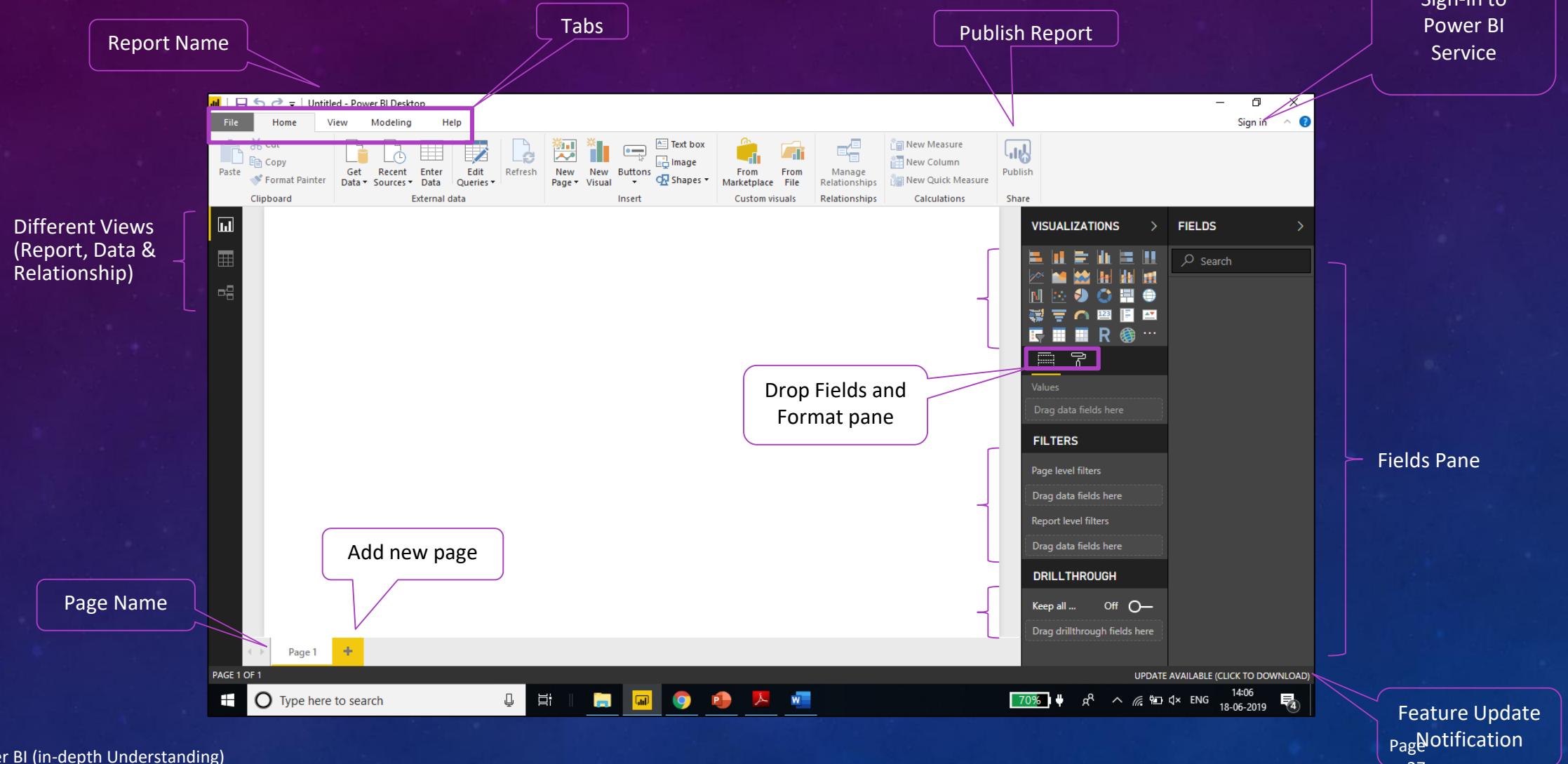
# PBI DESKTOP - FIRST SCREEN

Below is the first screen you will get, once you open PBI desktop. You will be prompted to sign-in but sign-in is required only when it comes to publish the report to PowerBI.com, rest the whole model can be created without sign-in.

Note: Sign-in can be done only using an official email ID. i.e. it can not accept personal email ids like gmail, yahoo etc.



# POWER BI DESKTOP INTERFACE



## POWER BI DESKTOP INTERFACE (CONT.)

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- Report Name: We can rename the report while saving the same for the first time.
- Views:
  - Report View – Under this we can use different visualizations to build report.
  - Data View – Once data is being loaded to PBI Desktop, the same can be seen here in the form of tables and fields. Here we can create calculated columns and measures.
  - Relationship View – This view is useful to build relationship to create data model.
- Page Name: We can have multiple pages into a single report. Each page contributes a part of a report. Its just like “Sheet” tabs in MS Excel.
- Add New Page: By clicking the plus sign, we can add new page in the report.
- Tabs:
  - Home: This is a general purpose tab and used for connecting new data, editing queries etc.
  - View: One can set the view and even design the phone layout too.
- Modelling: Creating new tables, parameters etc. can be done here.
- Help: It's a good resource to learn this program and even post your queries in PBI forums/community.

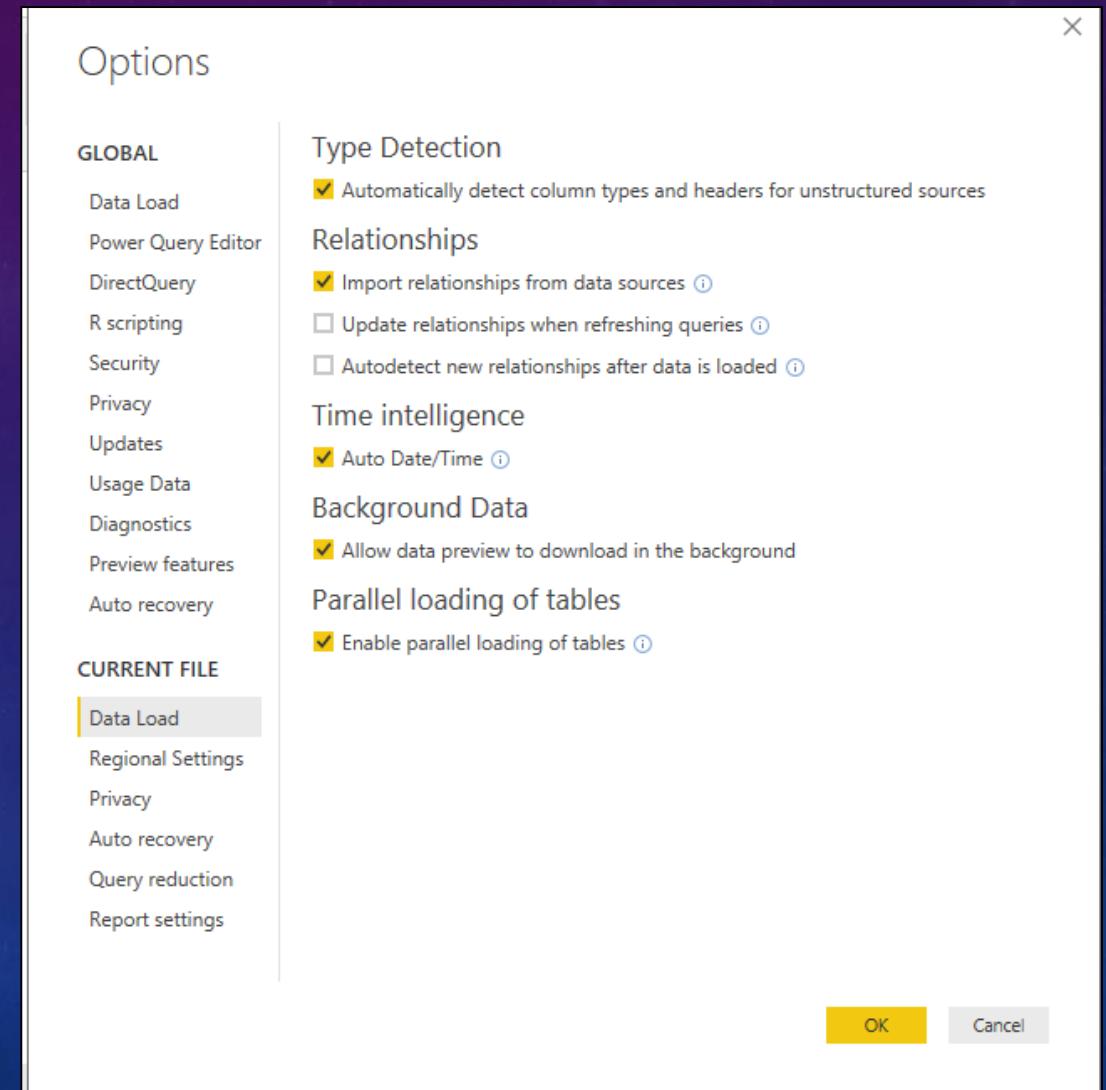
## POWER BI DESKTOP INTERFACE (CONT.)

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- Publish Report: This helps in publishing the report created in Power BI desktop to Power BI Service.
- Sign-In: To publish the report or importing new visualizations, one has to sign into Power BI service.
- Visualization Pane: Here we can choose among many visualizations like charts, slicers, maps etc.
- Filters Pane: PBI Desktop provides three levels of filters i.e. Visual, Page & Report level filter.
- Drill-Through Filter: Helps in accessing the detailed report of an item.
- Drop Fields pane: As every visualization needs one or multiple fields to show data into it. This pane facilitate to drop the desired fields from the fields pane.
- Format Pane: Every visualization has different formatting options, this pane helps in formatting the selected visualization.
- Fields Pane: Show all the connected data tables and fields.
- Feature Update Notification: This will show a notification for any new update released from Microsoft PBI team.

# CHANGE DEFAULT SETTINGS

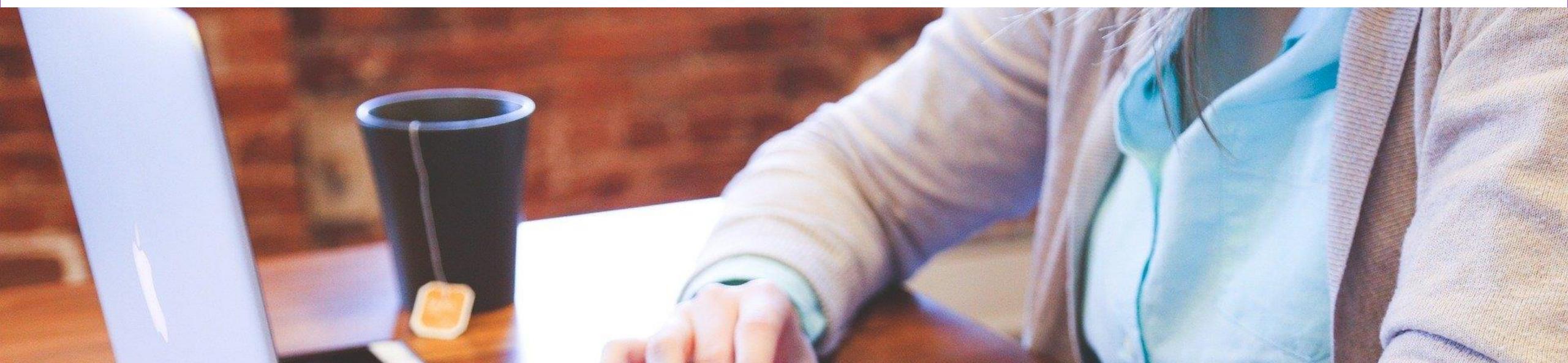
- Go to File -> Options & Setting -> Options.
  - Data Load – Deselect “Update Relationships” and “Autodetect new relationships after data is loaded”
  - Regional Settings – select “English (United States)”
  - Preview Features – deselect any active feature



# CONNECT TO VARIOUS DATA SOURCES

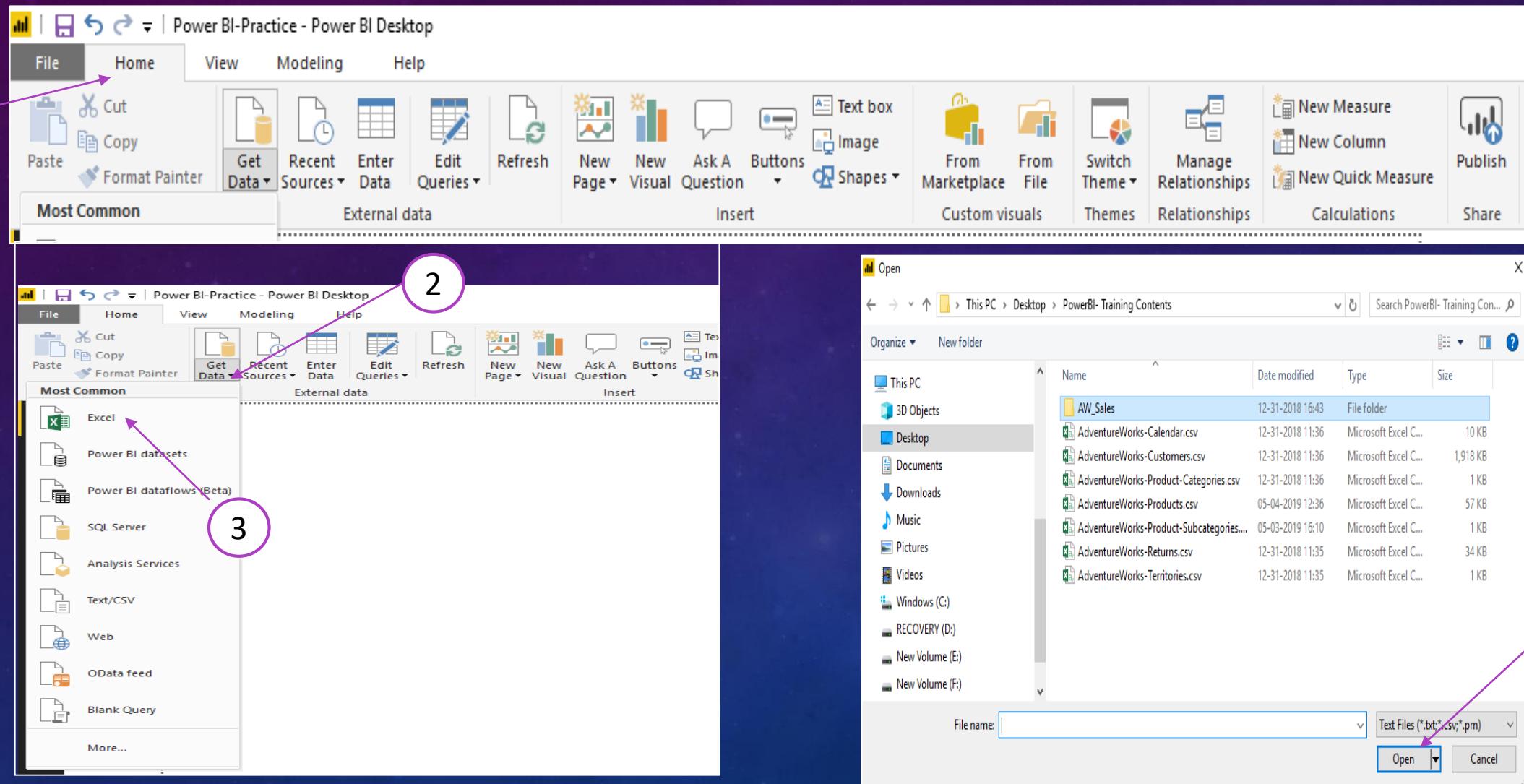
# Connecting Power BI with Different Data sources

1. Connect to CSV files
2. Connect to Excel
3. Connect to text
4. Connect to SQL Server
5. Connect to a Web page
6. Enter data directly
7. Analysis Services Tabular data
8. Connect to Direct SQL Query



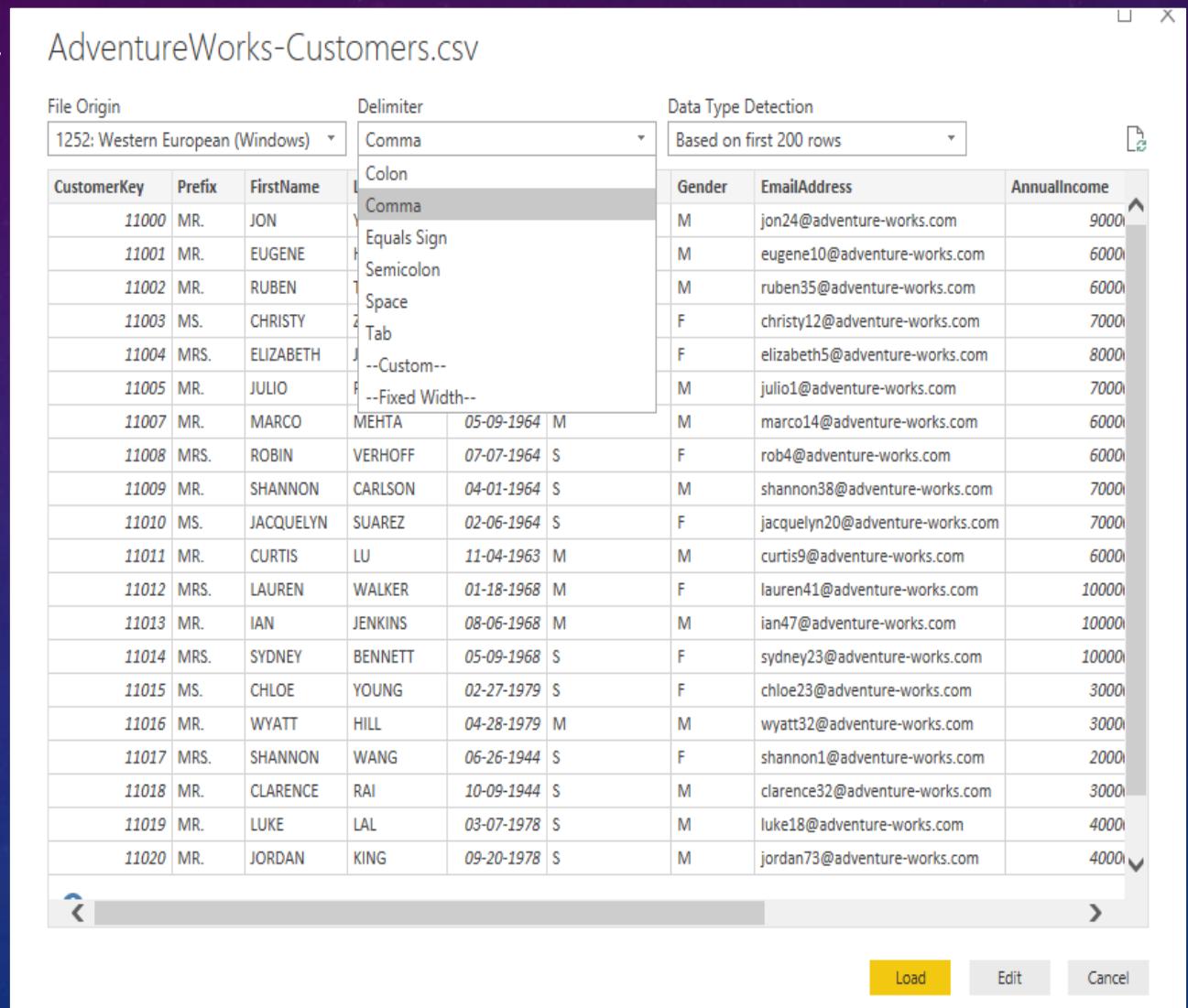
# CONNECT TO CSV/TEXT/EXCEL FILES

Home Tab -> Get Data -> Click on Text/CSV or Excel -> Choose File -> Open



## CONNECT TO CSV/TEXT/EXCEL FILES (CONT.)

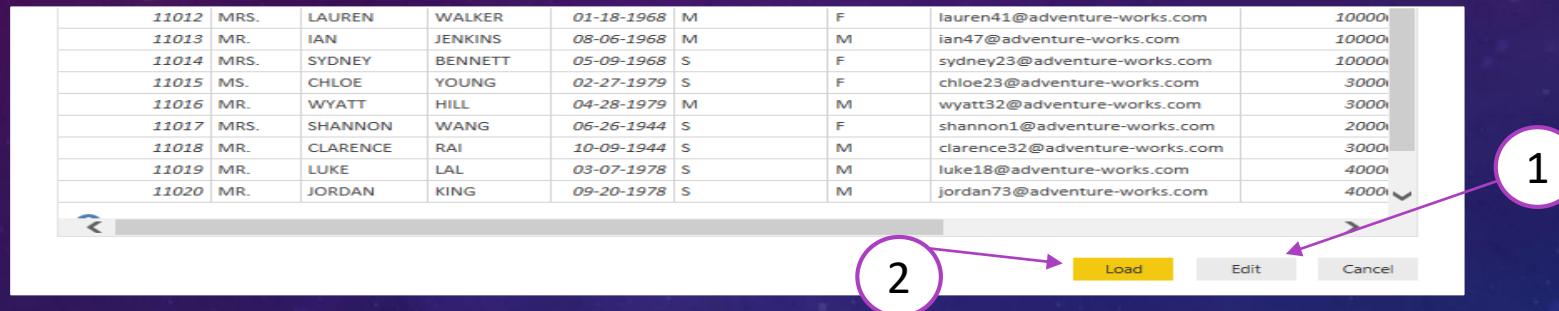
- When we click on the open button, a new dialogue box will get open. In which, following delimiter can be selected to extract the data–
  - Comma
  - Colon
  - Equal sign
  - Semicolon
  - Space
  - Tab
  - Custom
  - Fixed width



# CONNECT TO CSV/TEXT/EXCEL FILES (CONT.)

Here we have two options: Edit and Load.

1. **Edit** will take us in Power Query editor page. Where we can do necessary formatting, calculation and re-arrange data. Then click on close & Apply. Data will be upload into the PowerBI Desktop.



A screenshot of the Power Query editor within the Power BI desktop. The main area shows a table of customer data with columns: CustomerKey, Prefix, FirstName, LastName, BirthDate, MaritalStatus, Gender, and EmailAddress. The 'Transform' tab is selected in the ribbon. On the right, the 'QUERY SETTINGS' pane is open, showing 'Name: AdventureWorks-Customers'. Under 'APPLIED STEPS', it lists 'Source' (Promoted Headers) and 'Changed Type' (highlighted with a pink border).

CustomerKey	Prefix	FirstName	LastName	BirthDate	MaritalStatus	Gender	EmailAddress
11000	MR.	JON	YANG	04-08-1966	M	M	jon24@adventure-works.com
11001	MR.	EUGENE	HUANG	05-14-1965	S	M	eugene10@adventure-works.com
11002	MR.	RUBEN	TORRES	08-12-1965	M	M	ruben35@adventure-works.com
11003	MS.	CHRISTY	ZHU	02-15-1968	S	F	christy12@adventure-works.com
11004	MRS.	ELIZABETH	JOHNSON	08-08-1968	S	F	elizabeth5@adventure-works.com
11005	MR.	JULIO	RUIZ	08-05-1965	S	M	julio1@adventure-works.com
11007	MR.	MARCO	MEHTA	05-09-1964	M	M	marco14@adventure-works.com
11008	MRS.	ROBIN	VERHOFF	07-07-1964	S	F	rob4@adventure-works.com
11009	MR.	SHANNON	CARLSON	04-01-1964	S	M	shannon38@adventure-works.com
11010	MS.	JACQUELYN	SUAREZ	02-06-1964	S	F	jacquelyn20@adventure-works.com

# CONNECT TO CSV/TEXT/EXCEL FILES (CONT.)

2. Load will directly upload the data into PowerBI Desktop.

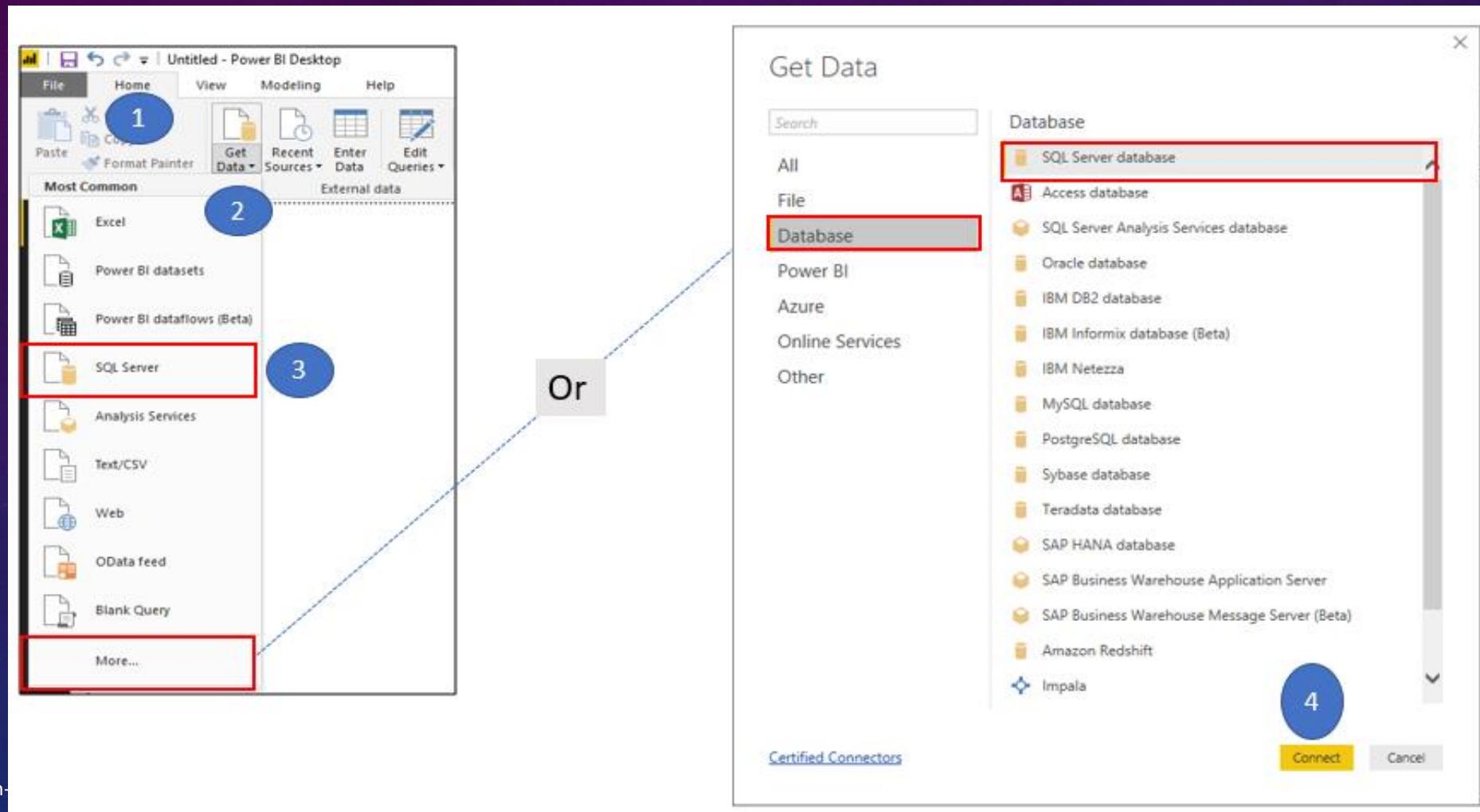
The screenshot shows the PowerBI Desktop interface. On the left, there's a navigation bar with icons for Home, View, Modeling, and Help. Below it is a ribbon menu with sections like File, Home, View, Modeling, and Help, along with various tools for data manipulation and visualization. The main workspace contains a donut chart titled "AnnualIncome by Gender" and a data card. The donut chart is divided into three segments: a large blue segment labeled "₹ 509.91M", a green segment labeled "₹ 522.5M", and a small yellow segment labeled "₹ 6.91M". To the right of the chart is a data card with the following table:

Gender	AnnualIncome
F	₹ 50,99,10,000
M	₹ 52,25,00,000
NA	₹ 69,10,000
Total	₹ 1,03,93,20,000

On the far right, there are two side panels: "VISUALIZATIONS" and "FIELDS". The "VISUALIZATIONS" panel shows various chart and report icons. The "FIELDS" panel lists fields from the "AdventureWorks-C..." dataset, including AnnualIncome, BirthDate, CustomerKey, EducationLevel, EmailAddress, FirstName, Gender, HomeOwner, LastName, MaritalStatus, Occupation, Prefix, and TotalChildren. A search bar at the top of the "FIELDS" panel is empty.

# CONNECT TO SQL SERVER

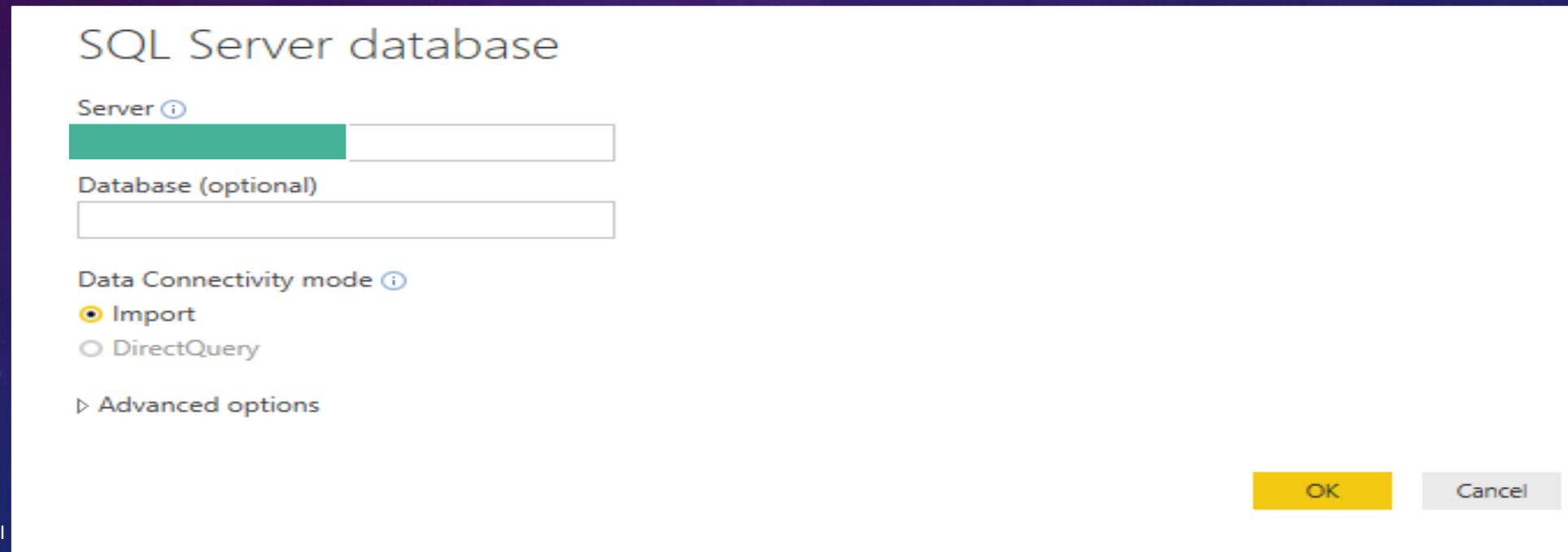
Home Tab -> Get Data-> Choose SQL server Database or More-> Choose SQL server database -> Connect



## CONNECT TO SQL SERVER (CONT.)

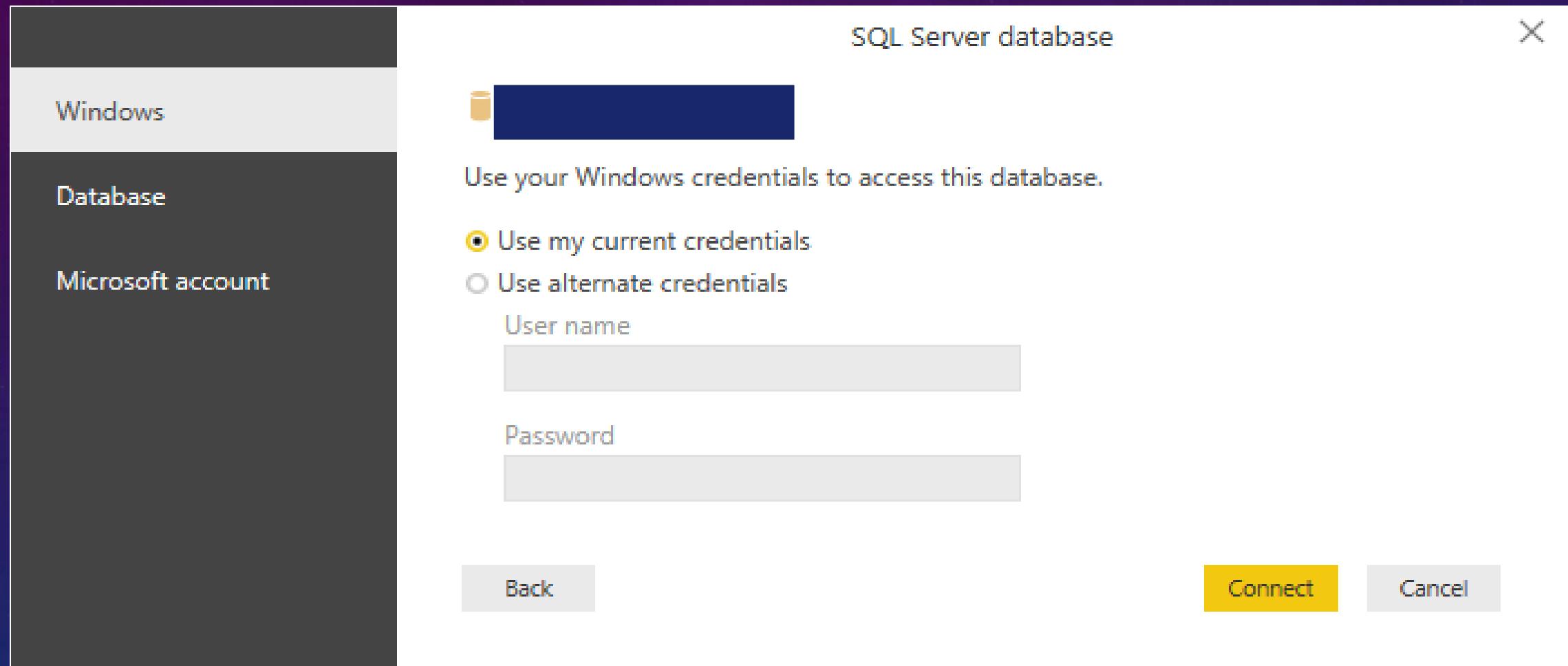
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- Following are the list of available fields in order to connect Power BI desktop to SQL Server Database
  - Server- In this section we will provide default SQL server Instance
  - Database- If we want to use custom SQL query then this option is required
  - Data Connectivity Mode- Choose whether we want to import or directly connect through query



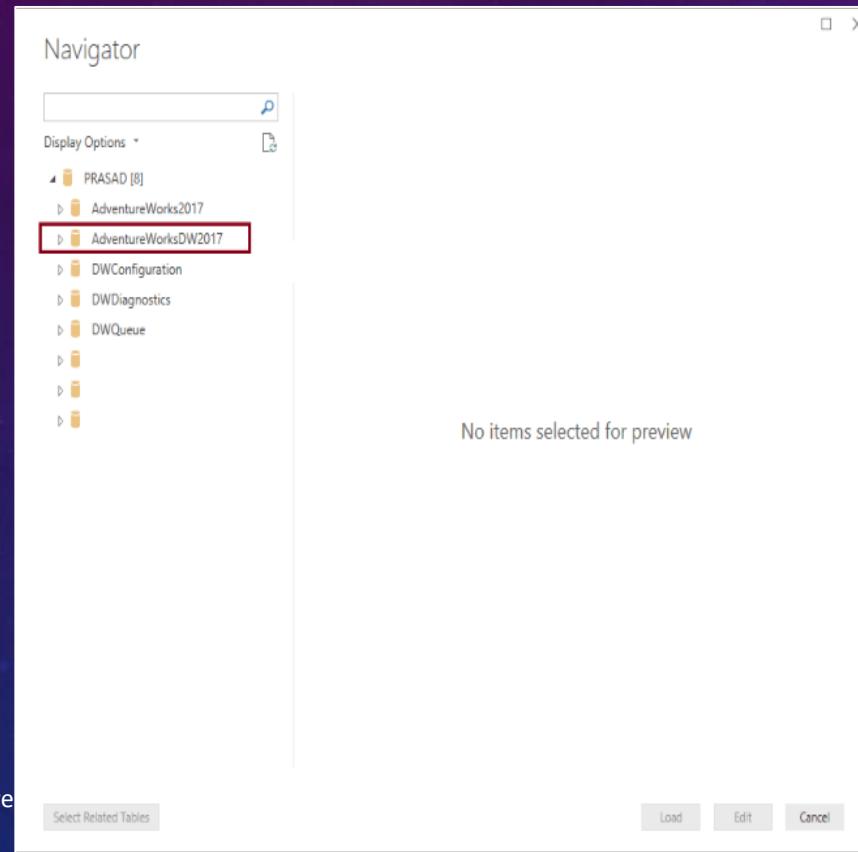
## CONNECT TO SQL SERVER (CONT.)

Windows – Here we can access the SQL Server database using our windows credentials



## CONNECT TO SQL SERVER (CONT.)

Once PBI Desktop is connected to SQL server, it will open up navigator to choose the files or tables we would like to connect in our model.



The screenshot shows the 'Navigator' dialog box displaying a list of tables from the 'DimGeography' database. The table has columns: GeographyKey, City, StateProvinceCode, StateProvinceName, CountryRegionCode, and EnglishCountryRegionName. The data includes rows for various Australian cities like Alexandria, Coffs Harbour, Derringhurst, Goulburn, Lane Cove, Lavender Bay, Malabar, Maitland, Milsons Point, Newcastle, North Ryde, North Sydney, Port Macquarie, Rhodes, Silverwater, Springwood, St. Leonards, Sydney, Wollongong, Brebbra, Caloundra, East Brisbane, and Gold Coast. At the bottom, there are buttons for 'Select Related Tables', 'Load', 'Edit', and 'Cancel'.

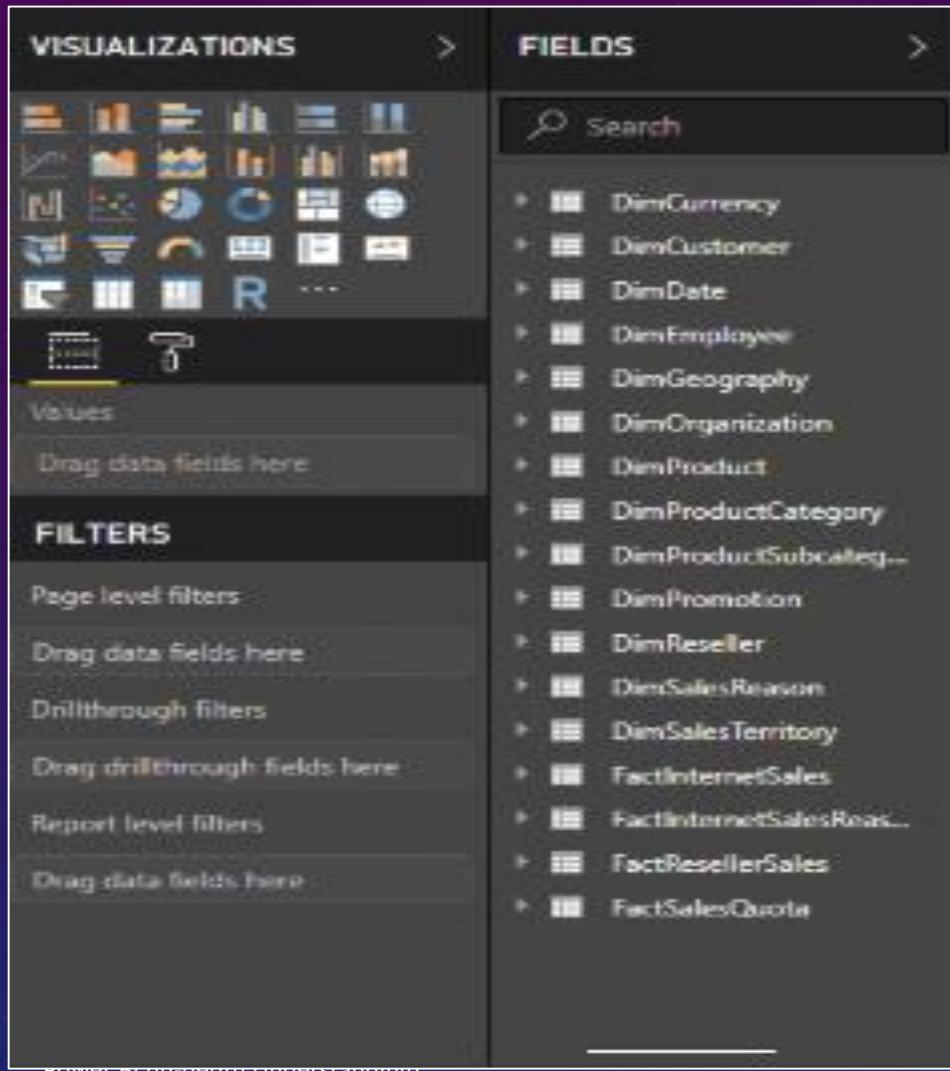
GeographyKey	City	StateProvinceCode	StateProvinceName	CountryRegionCode	EnglishCountryRegionName
1	Alexandria	NSW	New South Wales	AU	Australia
2	Coffs Harbour	NSW	New South Wales	AU	Australia
3	Derringhurst	NSW	New South Wales	AU	Australia
4	Goulburn	NSW	New South Wales	AU	Australia
5	Lane Cove	NSW	New South Wales	AU	Australia
6	Lavender Bay	NSW	New South Wales	AU	Australia
7	Malabar	NSW	New South Wales	AU	Australia
8	Maitland	NSW	New South Wales	AU	Australia
9	Milsons Point	NSW	New South Wales	AU	Australia
10	Newcastle	NSW	New South Wales	AU	Australia
11	North Ryde	NSW	New South Wales	AU	Australia
12	North Sydney	NSW	New South Wales	AU	Australia
13	Port Macquarie	NSW	New South Wales	AU	Australia
14	Rhodes	NSW	New South Wales	AU	Australia
15	Silverwater	NSW	New South Wales	AU	Australia
16	Springwood	NSW	New South Wales	AU	Australia
17	St. Leonards	NSW	New South Wales	AU	Australia
18	Sydney	NSW	New South Wales	AU	Australia
19	Wollongong	NSW	New South Wales	AU	Australia
20	Brebbra	QLD	Queensland	AU	Australia
21	Caloundra	QLD	Queensland	AU	Australia
22	East Brisbane	QLD	Queensland	AU	Australia
23	Gold Coast	QLD	Queensland	AU	Australia

## CONNECT TO SQL SERVER (CONT.)

After selecting the tables that needs to be added in the model, we can click on “Load” to load them into PBI environment directly.

The screenshot shows the Power BI Navigator interface. On the left, a tree view lists various dimensions and fact tables. The 'DimReseller' node is selected, indicated by a checked checkbox. In the center, a table preview for 'DimReseller' is displayed with columns: ResellerKey, GeographyKey, ResellerAlternateKey, Phone, BusinessType, and ResellerName. The table contains 22 rows of data. A large green arrow points from the Navigator to a 'Load' dialog box on the right. The 'Load' dialog lists several tables and their source: DimProduct (606 rows), DimProductCategory (4 rows), DimProductSubcategory (37 rows), FactInternetSales (60,398 rows), and DimCurrency (105 rows). Each entry includes the source database: PRASAD/AdventureWorksDW2017. A 'Cancel' button is at the bottom right of the dialog.

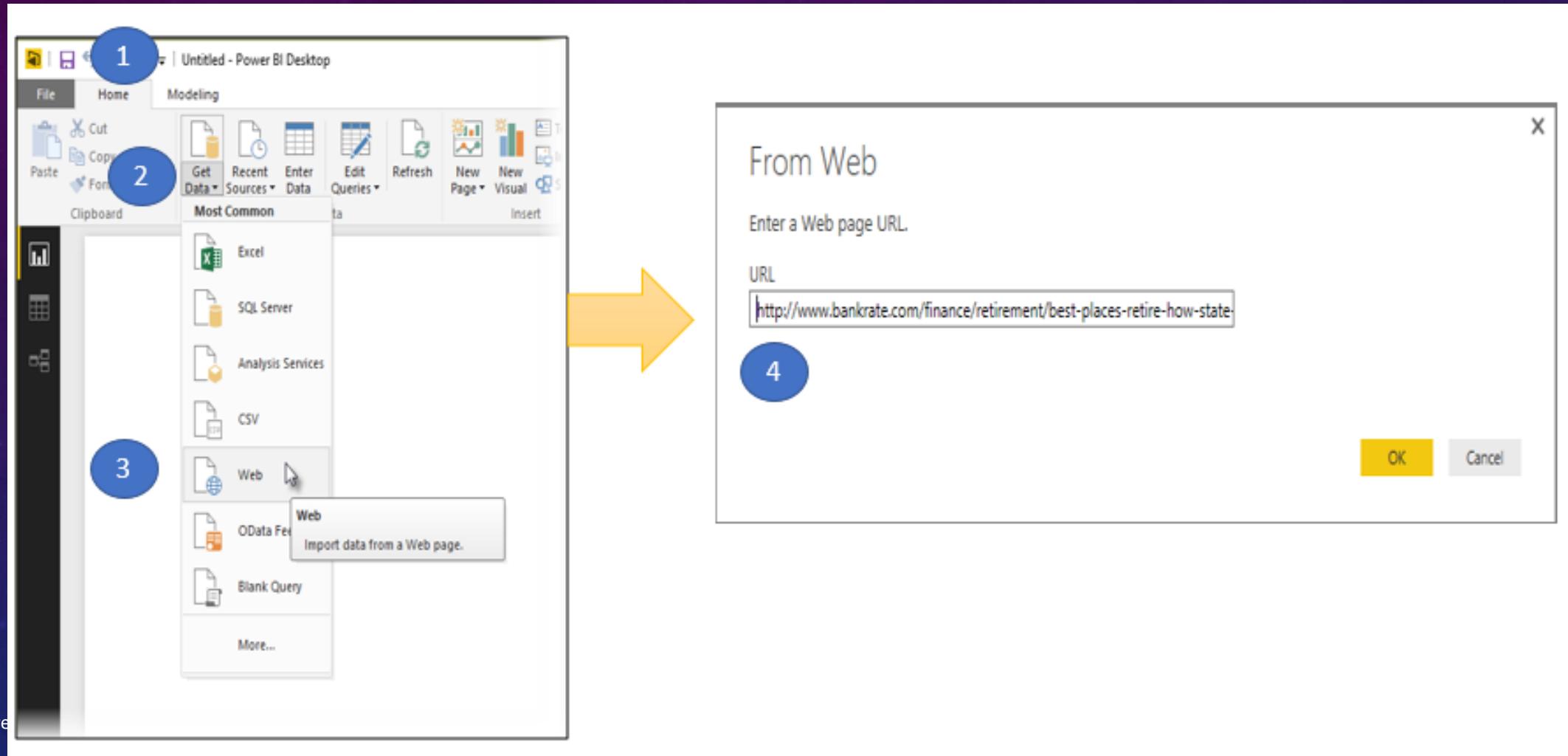
## CONNECT TO SQL SERVER (CONT.)



Once loaded, now we can access all the fields of the SQL server database tables into the report view of PBI desktop.

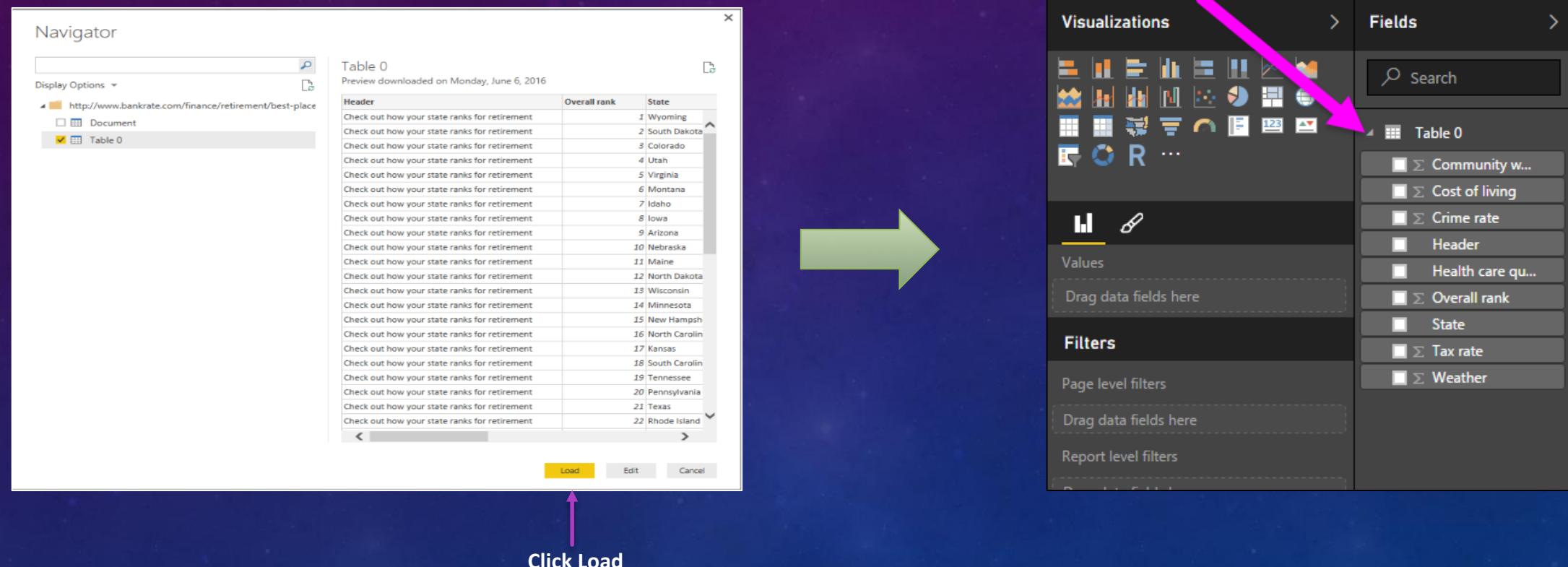
# CONNECT TO A WEB PAGE

Home Tab -> Get Data -> Web data -> Type the URL -> Connect



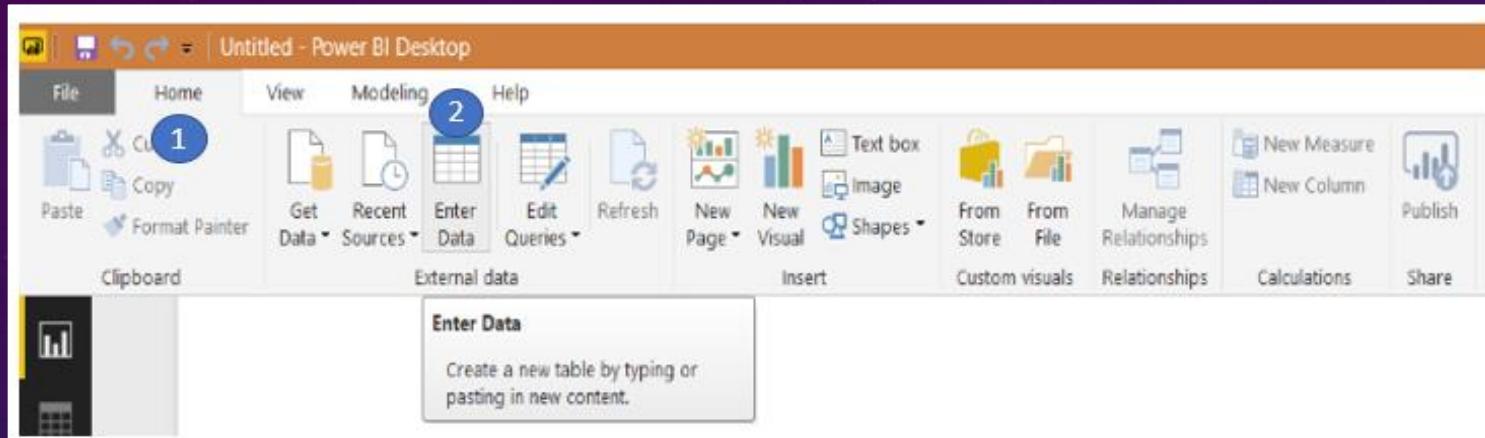
## CONNECT TO A WEB PAGE (CONT.)

Once Power BI desktop connects with the web page, it presents the data available into the navigator window. When we click on any table showing inside the navigator pane, it will display the preview of data. When we select the Load option in the navigator, Power BI imports the selected item data and make them visible inside the Fields Tab.

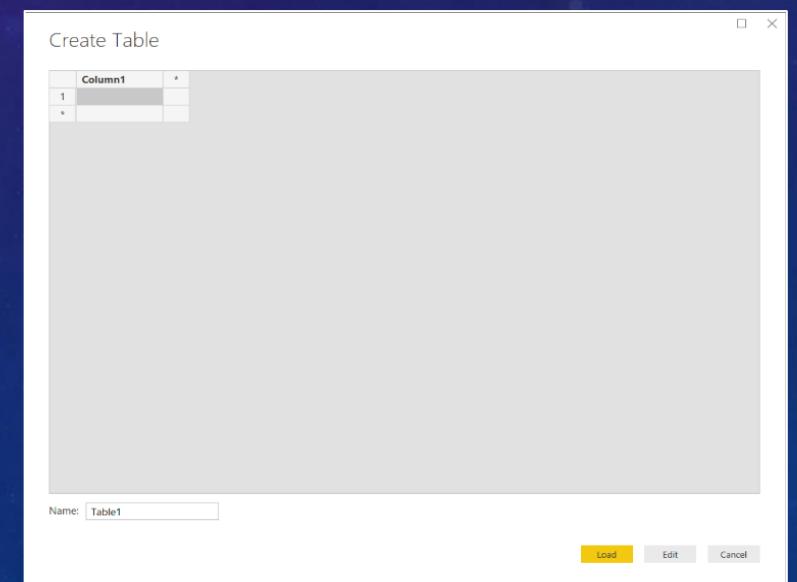


# ENTER DATA DIRECTLY

Home Tab -> Enter Data



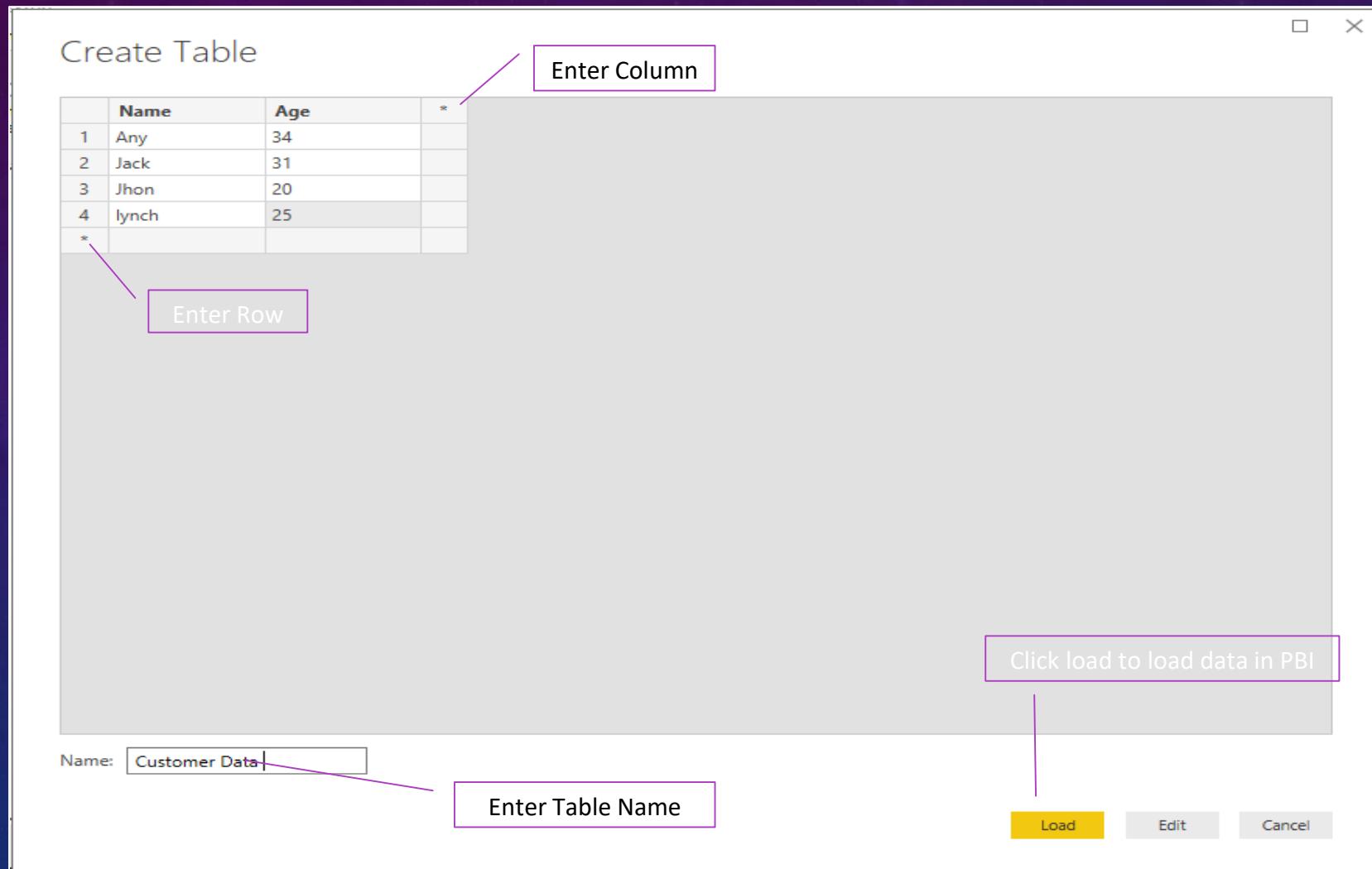
This will trigger “Create Table” dialogue box.



## ENTER DATA DIRECTLY (CONT.)

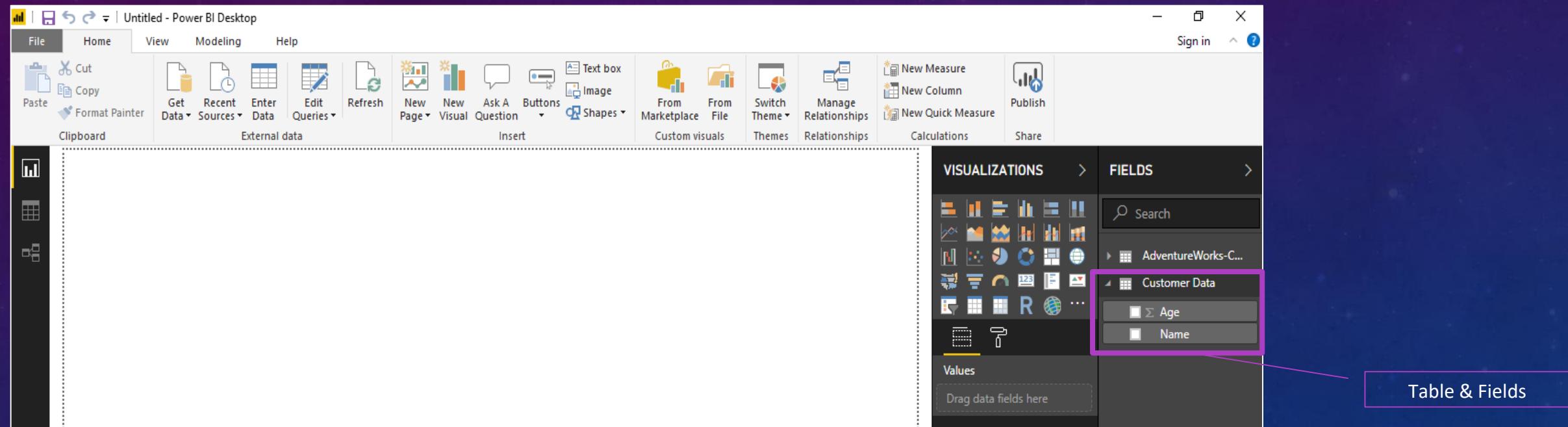
To Insert a new Column or row just click on the asterisk (\*) symbol which is showing on the both sides of the Column and Row.

At the bottom , we can define Table Name for example – Customer data



# ENTER DATA DIRECTLY (CONT.)

Once the data is loaded, all the fields can be accessed in PBI.



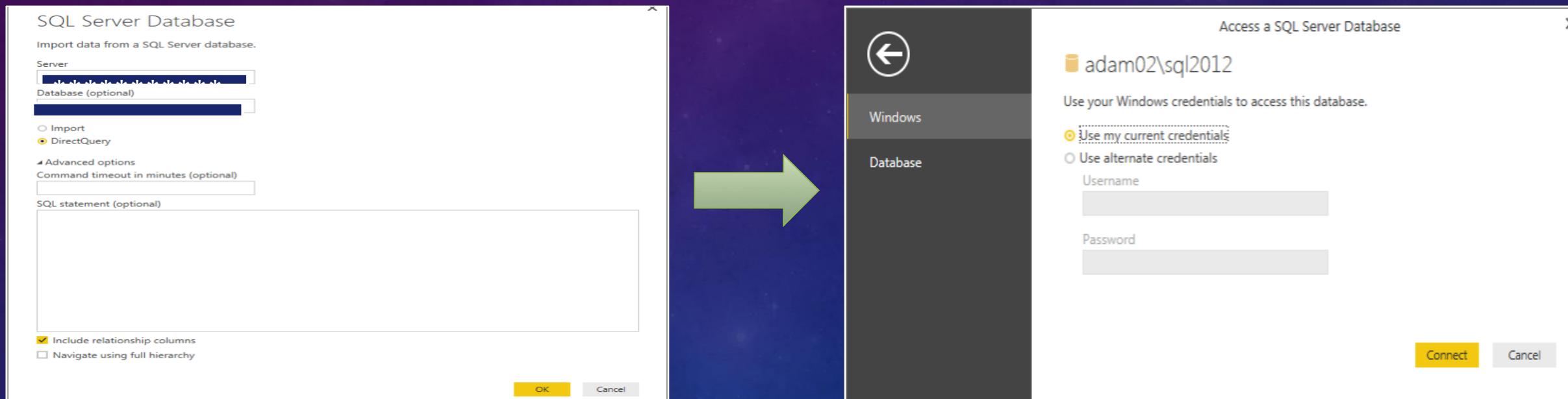
The screenshot shows the Power BI Desktop interface with the 'Home' tab selected in the ribbon. The ribbon also includes 'View', 'Modeling', and 'Help' tabs. Below the ribbon are various toolbars: 'Clipboard' (Paste, Cut, Copy, Format Painter), 'External data' (Get Data, Recent Sources, Enter Data, Edit Queries, Refresh), 'Insert' (New Page, New Visual, Ask A Question, Buttons, Text box, Image, Shapes), 'Custom visuals' (From Marketplace, From File, Switch Theme, Manage Relationships), 'Calculations' (New Measure, New Column, New Quick Measure, Publish), and 'Share'. On the left, there's a vertical ribbon bar with icons for Home, Report, and Page. The main workspace is currently empty. To the right, the 'FIELDS' pane is open, showing a tree view of loaded data sources. Under 'AdventureWorks-C...', the 'Customer Data' table is expanded, showing fields like 'Age' and 'Name'. A pink rectangular callout highlights this section, with the text 'Table & Fields' pointing to it.

# CONNECT TO DIRECT SQL QUERY

Home -> Get Data -> SQL server database -> Type server Name -> Type Database (Optional) -> Click on Direct Query.

Enter the credentials to access the database.

*Note: Rest of the steps are same as we discussed above in “Connect to SQL Server Database”.*



# Power Query for Data Transformation

# Power Query for Data Transformation

[Using SQL](#) [Different versions of Power Query](#)

[Power Query Introduction](#)

[Query Editor](#)

[Transformation GUI](#)

[Row Transformations](#)

[Column Transformations](#)

[Data Type](#)

[Adding Column](#)

[Text Transformations](#)

[Number Column Calculations](#)

[Date and Time Calculations](#)

[Data types, Lists, Records, and tables in M](#)

[M built-in functions](#)

[Writing Custom Functions](#)

## POWER QUERY

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Power Query act as an “ETL” tool for Power BI i.e. it **Extracts** data from one or multiple sources, **Transform** that data and finally **Load** it into Power BI environment.

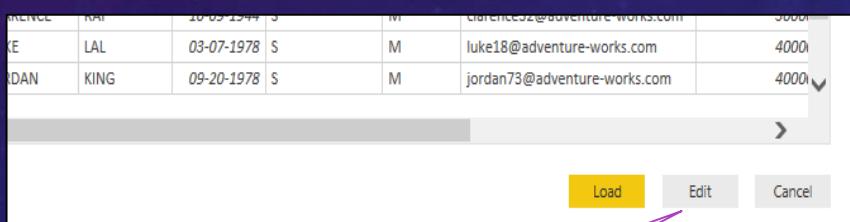
It also facilitates an “Applied Steps” feature, where whatever we do, will get recorded as steps and upon updating the source data, all those steps will get applied to them automatically and this way the creator of the report needs not to repeat the steps.

# HOW TO OPEN POWER QUERY EDITOR?

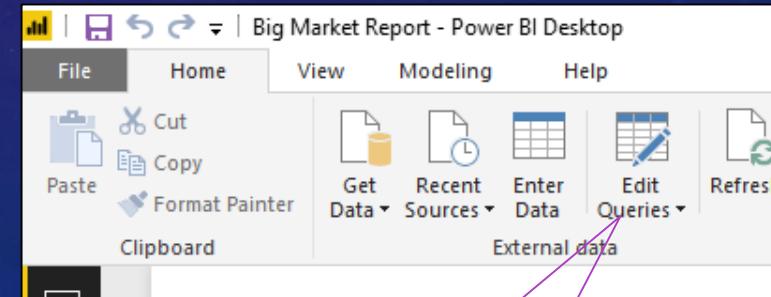
Power query editor is a separate window which can be accessed by either of the following ways:

1. Power BI window Home -> Get Data -> Choose the respective data source -> Browse the file -> “Edit”. (Here “Edit” button will open Query editor).
2. Power BI window Home -> “Edit Queries”

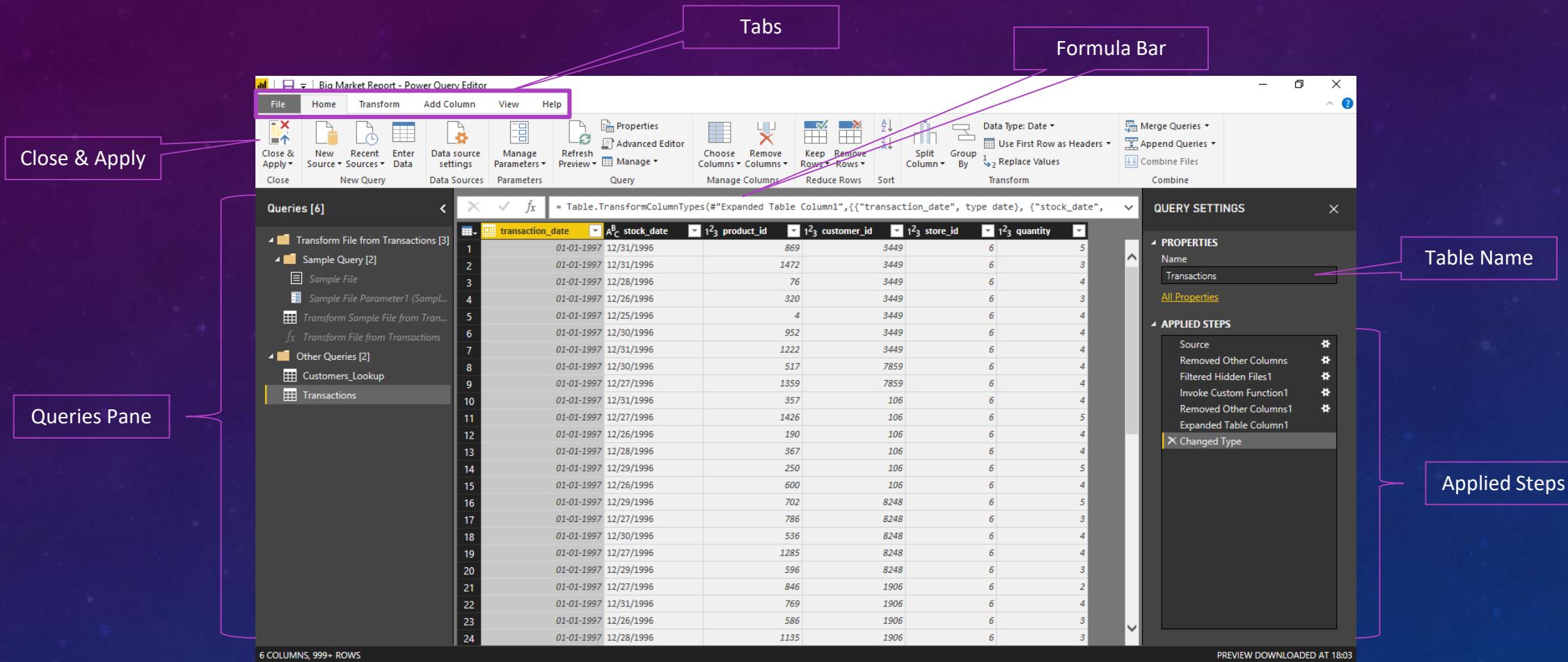
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# POWER QUERY EDITOR INTERFACE



## POWER QUERY EDITOR INTERFACE (CONT.)

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- Queries pane: This will show all the queries or the data with which our model is connected to.
- Applied Steps: List of steps that has been recorded while using the Power Query Editor. When the data in the data source will be updated then we need to just refresh our Power BI model and all the transformation steps which has been recorded by the Query Editor will get applied to updated data and that saves lots of repetitive work and time.
- Table Name: We can rename the table name to something that helps in recognizing the same in Power BI environment.
- Formula Bar: As Power BI use “M Code” language. The same can be seen here for each applied steps been recorded by Query Editor.
- Tabs:
  - File: General customizations related to Query Editor window can be done here.
  - Home: Major options can be found under this tab like Get Data, Append & Merge Query, Data source settings etc.
  - Transform: This helps in transforming the existing column(s) like changing the data types, change formatting, Pivot or Unpivot columns etc. (Note: These operations will be applied only on the selected column(s)).

## POWER QUERY EDITOR INTERFACE (CONT.)

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- Add Column: This add a new column based on calculation or existing column.
- View: Here we can turn on or off the formula bar, whitespace etc.
- Help: It's a good resource to learn this program and even post your queries in PBI forums/community.
- Close & Apply: Once transformation of the data is done, hitting this button, Power Query will load the data into Power BI and apply all the recent changes.

# DATA TYPES

- Make sure the suitable data type must be assigned to each column.

The screenshot shows the Power BI Data Editor interface. The top ribbon has tabs: File, Home, Transform, Add Column, View, and Help. The Home tab is selected. The ribbon also includes icons for Close & Apply, New Source, Recent Sources, Enter Data, Data source settings, Manage Parameters, Refresh Preview, Properties, Advanced Editor, Choose Columns, Remove Columns, Keep Rows, Remove Rows, Sort, Split Column, Group By, and Data Type dropdown. The Data Type dropdown is set to Whole Number. On the right, there's a 'QUERY SETTINGS' pane with sections for PROPERTIES (Name: AdventureWorks-Customers) and APPLIED STEPS (Source, Promoted Headers, Changed Type). The main area shows a table with 13 rows and columns for CustomerKey, Prefix, FirstName, LastName, BirthDate, and MaritalStatus. The 'CustomerKey' column is highlighted in yellow. The 'Data Type' dropdown for this column is also set to Whole Number. The table data is as follows:

	CustomerKey	Prefix	FirstName	LastName	BirthDate	MaritalStatus
1	11000	MR.	JON	YANG	4/8/1966	M
2	11001	MR.	EUGENE	HUANG	5/14/1965	S
3	11002	MR.	RUBEN	TORRES	8/12/1965	M
4	11003	MS.	CHRISTY	ZHU	2/15/1968	S
5	11004	MRS.	ELIZABETH	JOHNSON	8/8/1968	S
6	11005	MR.	JULIO	RUIZ	8/5/1965	S
7	11007	MR.	MARCO	MEHTA	5/9/1964	M
8	11008	MRS.	ROBIN	VERHOFF	7/7/1964	F
9	11009	MR.	SHANNON	CARLSON	4/1/1964	S
10	11010	MS.	JACQUELYN	SUAREZ	2/6/1964	S
11	11011	MR.	CURTIS	LU	11/4/1963	M
12	11012	MRS.	LAUREN	WALKER	1/18/1968	M
13	11013	MR.	IAN	JENKINS	8/6/1968	M

# MERGE & APPEND QUERIES

---

## Merge Queries

- This allow us to join two tables based on one common column (like Vlookup function in Excel)
- Example: Merging Sales & Product table based on Product key in both the tables.

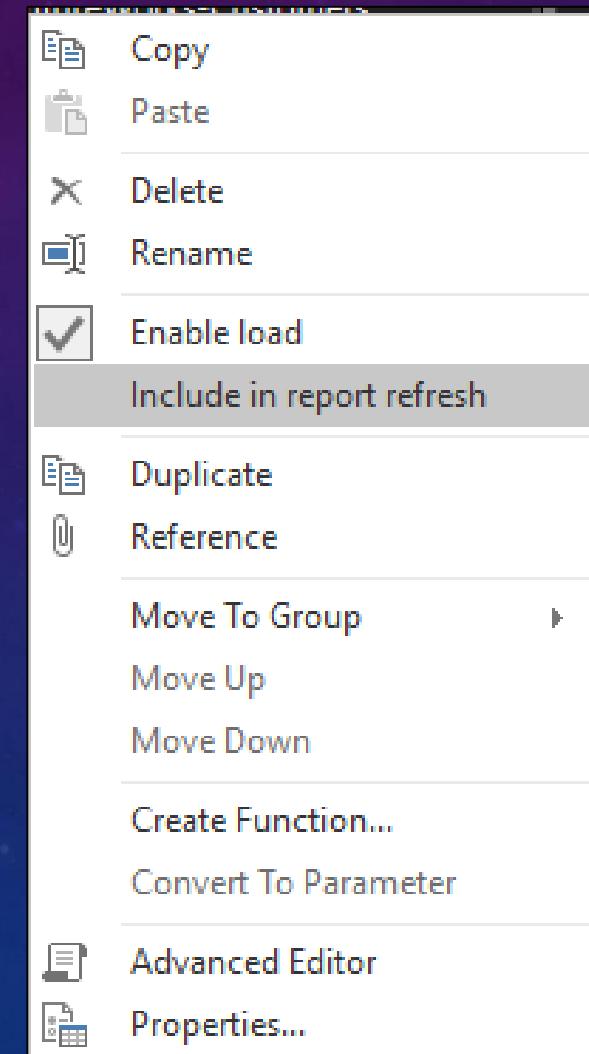
## Append Queries

- It allow us to combine two or more tables that shares the same table structure and data types.
- Example: Appending two years of sales data.

## INCLUDE IN REPORT REFRESH

---

- Once we click the “Refresh” command from the home tab in Power BI desktop window, it will refresh all the queries present in Query editor. But queries which won’t change often like lookup table (e.g. Product table, Territory Table etc.), we can set it to exclude from refresh by right clicking on the query in Query editor window and deselecting “include in Report Refresh” option.

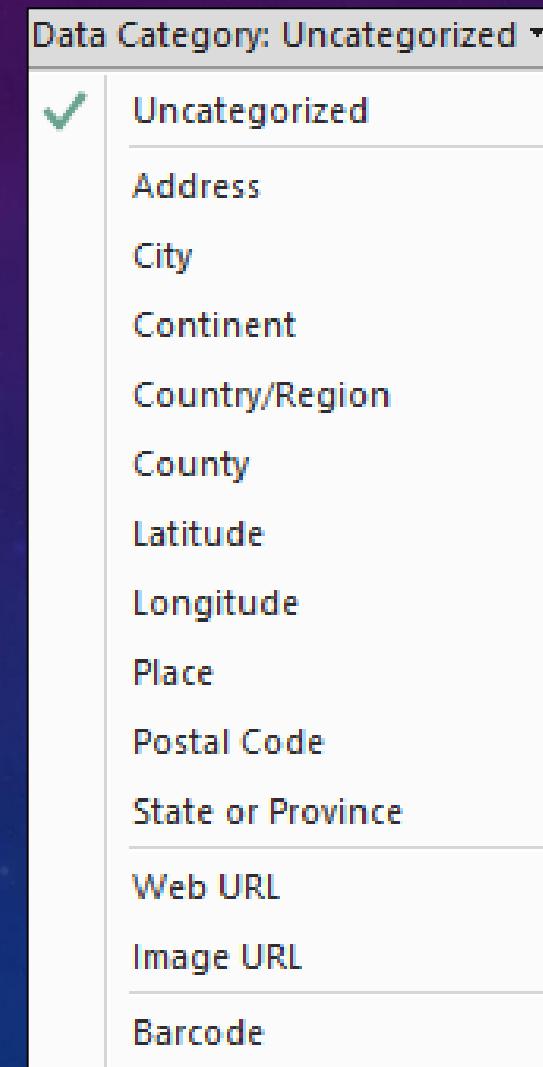


## DEFINING DATA CATEGORIES

---

Data Categories are used to define geographical data. This will help in plotting the same on the 3D map, where the “Bing map” will recognize these fields.

To define the same, select the respective column and then go to Modelling tab in Power BI desktop and choose the related option.



# Data Modelling in Power BI

# Data Modelling in Power BI

**Data Model**

**Lookup Tables**

**Primary & Foreign Key**

**Creating Table Relationships**

**Snowflake Schemas**

**Editing Relationships**

**Relationship Cardinality**

**Filter**

**Introduction to DAX**

**Calculated Columns**

**Measures**

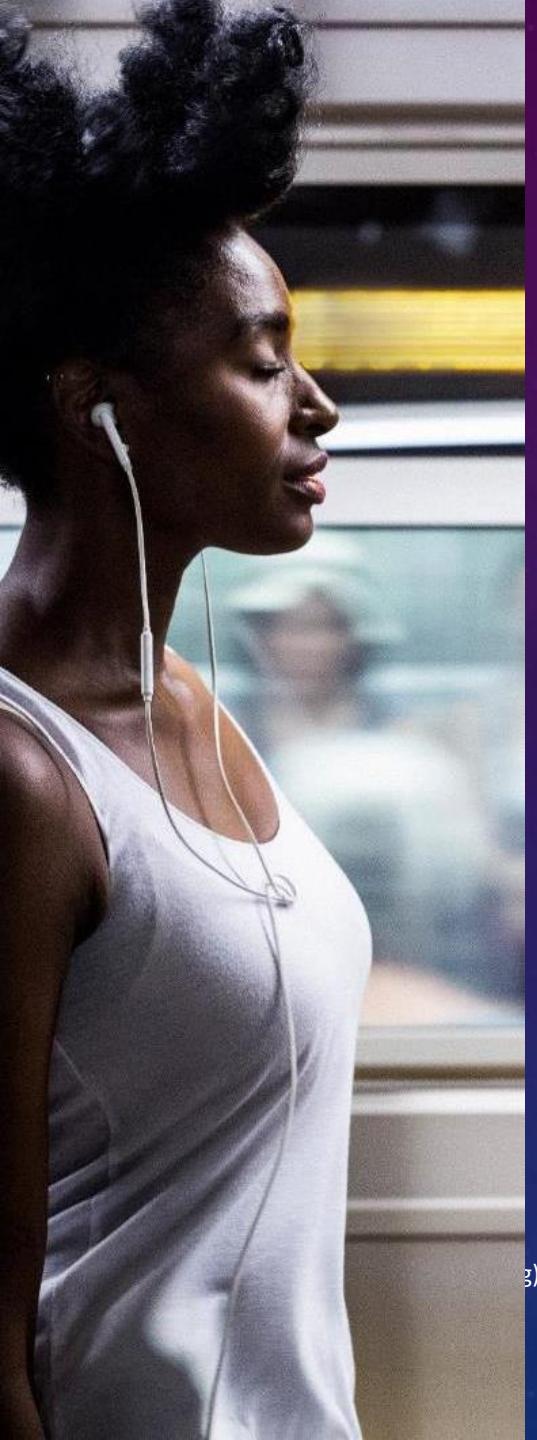
**Implicit & Explicit Measures**

**Calculated Tables**

**Row Context vs Set Context**

**Advanced calculations using Calculate functions**

**Time Intelligence Functions**



# DATA MODEL

- When the collection of two or more independent tables are connected through relationships based on common fields forms a Data Model.
- Data Modelling helps in building custom calculations on the existing tables, which can further be used directly into Power BI visualizations.

## WITHOUT DATA MODEL

---

In our sample data, if the relationship between returns table and products table do not exist then using the fields in the report view from both of these tables will leads to independent and meaningless results.

The screenshot shows the Power BI Data View interface. On the left, there is a navigation bar with icons for Home, Report, and Data. The main area displays two tables side-by-side. The first table, titled "Products-Lookup", contains the following fields: product\_id, product\_brand, product\_name, product\_sku, product\_retail\_price, and product\_cost. The second table, titled "Returns-1997-1998", contains the following fields: return\_date, product\_id, store\_id, and quantity. Both tables have a yellow border around their respective titles and field lists.

The screenshot shows the Power BI Report View interface. On the left, there is a navigation bar with icons for Home, Report, and Data. The main area displays a single table with the following data:

product_id	quantity
1	8289
2	8289
3	8289
4	8289
5	8289
6	8289
7	8289
8	8289
9	8289
10	8289
11	8289
12	8289
13	8289
Total	8289

# WITH DATA MODEL

Now both returns and Product tables are connected. Here, we are getting the correct result.

The screenshot shows the Power BI Data Model interface. On the left, there are two tables: "Products-Lookup" and "Returns-1997-1998". A relationship is established between them, indicated by a line connecting the "product\_id" column in "Products-Lookup" to the "product\_id" column in "Returns-1997-1998". The cardinality for the "Products-Lookup" table is 1, and for the "Returns-1997-1998" table is \* (many). On the right, a preview of the resulting data is shown in a table format:

product_id	quantity
1	3
2	4
3	9
4	7
5	1
6	8
7	6
8	3
9	8
10	4
11	7
12	8
13	5
Total	8289

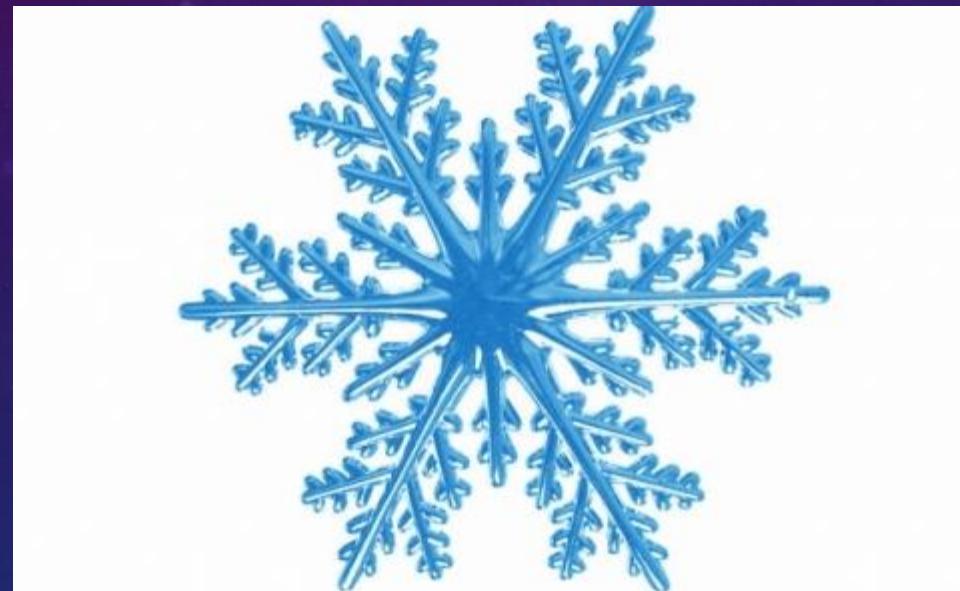
# BUILDING RELATIONSHIPS

- This can be done by either picking up common keys and dropping them on related table or by using “Manage Relationship” option.

## UNDERSTANDING “SNOWFLAKE” SCHEMAS

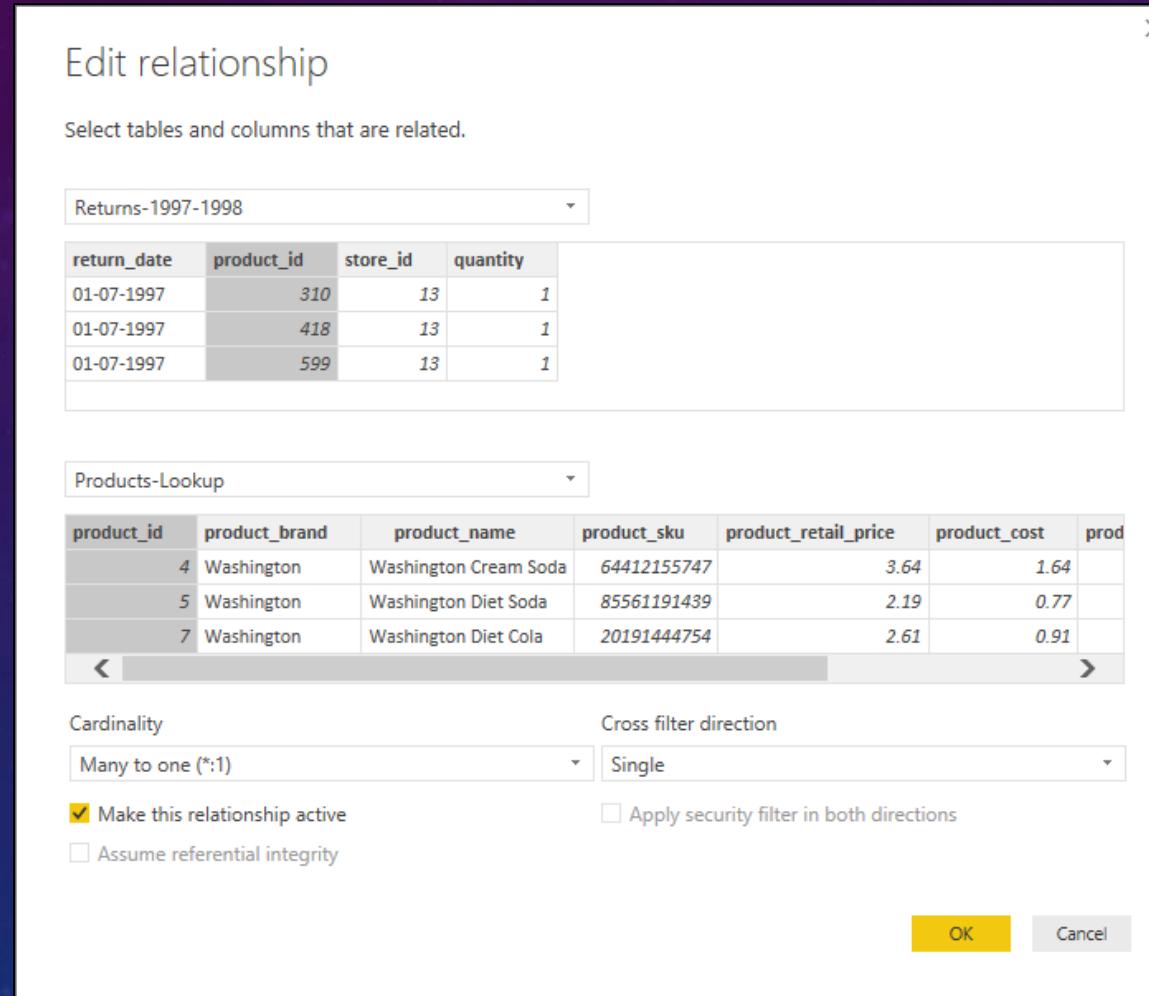
---

When a Lookup table has a primary key which doesn't exist as foreign key in a Data table but in another lookup table, which in turn is connected to the data table, the relationship formed between the Lookup Tables called a “Snowflake” schemas.



# EDITING EXISTING RELATIONSHIPS

In the relationship view either one can double click on the relationship thread or can go to Home -> Manage Relationships.

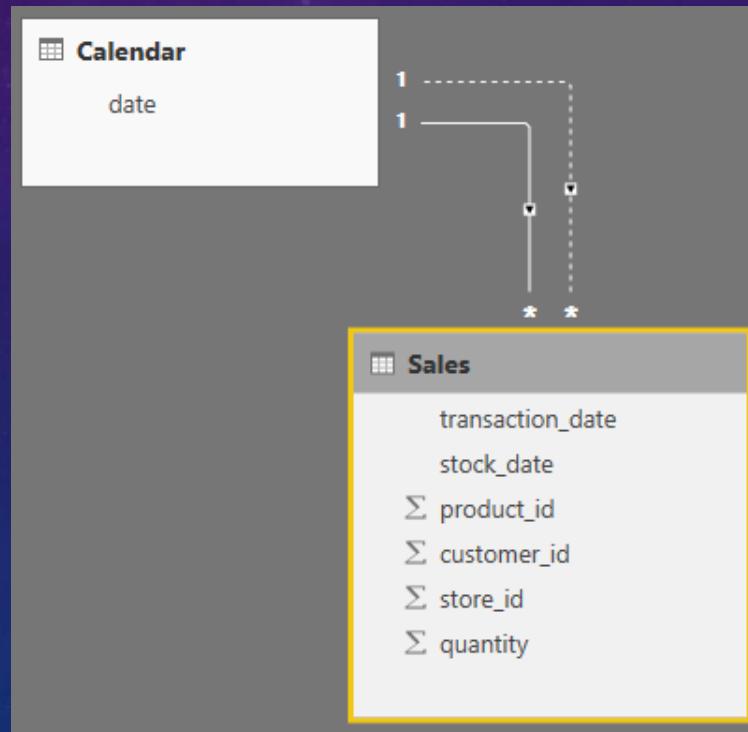


## ACTIVE AND INACTIVE RELATIONSHIPS

---

Having two foreign keys in a data table can facilitate two relationships with one Lookup Table at the same time. But only one can be activated at one time. E.g. date field in calendar lookup table can have two relationships with Sales table with “Transaction Date” and Stock Date” field. But only one can remain active at one time.

Note: An inactive relation will be shown as a dotted line in relationship view.



# RELATIONSHIP CARDINALITY

- Cardinality refers to the uniqueness of values in a column. Here, high cardinality means higher number of unique values and low cardinality means higher number of repetitive values.

# FILTER FLOW

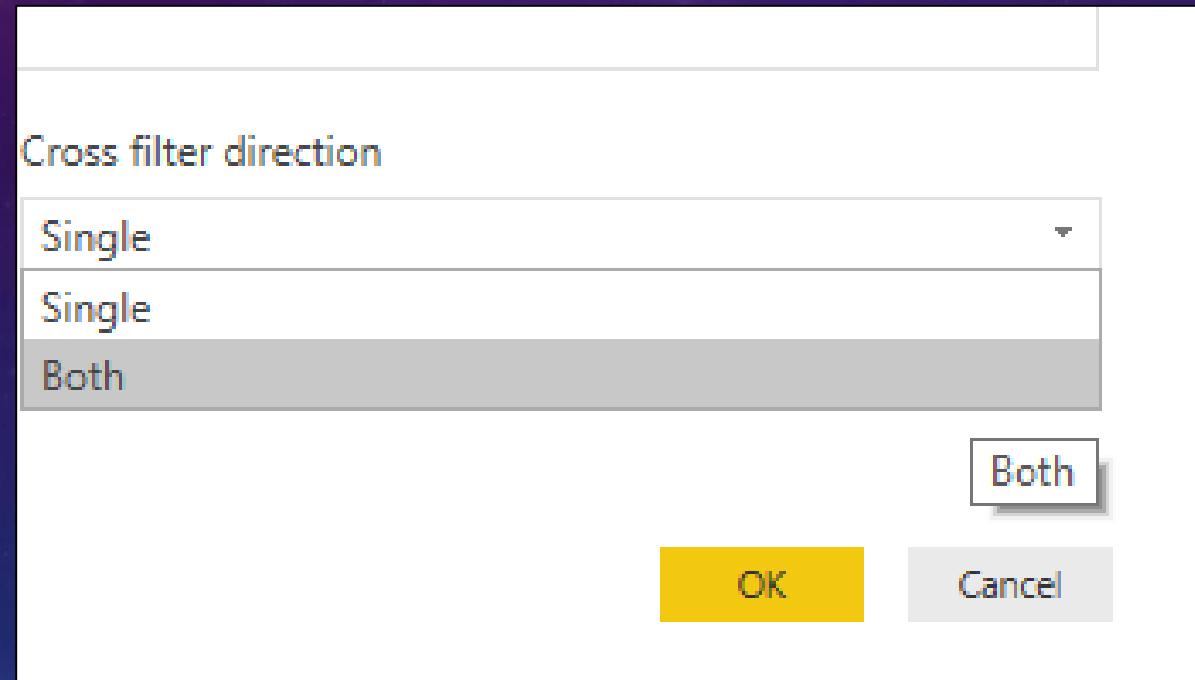
- Filter flow passes downstream from lookup tables to data tables

## BOTH-WAY FILTER

---

We can have both-way filter too i.e. it can flow from Lookup table to Data table and at the same time Data table to lookup table.

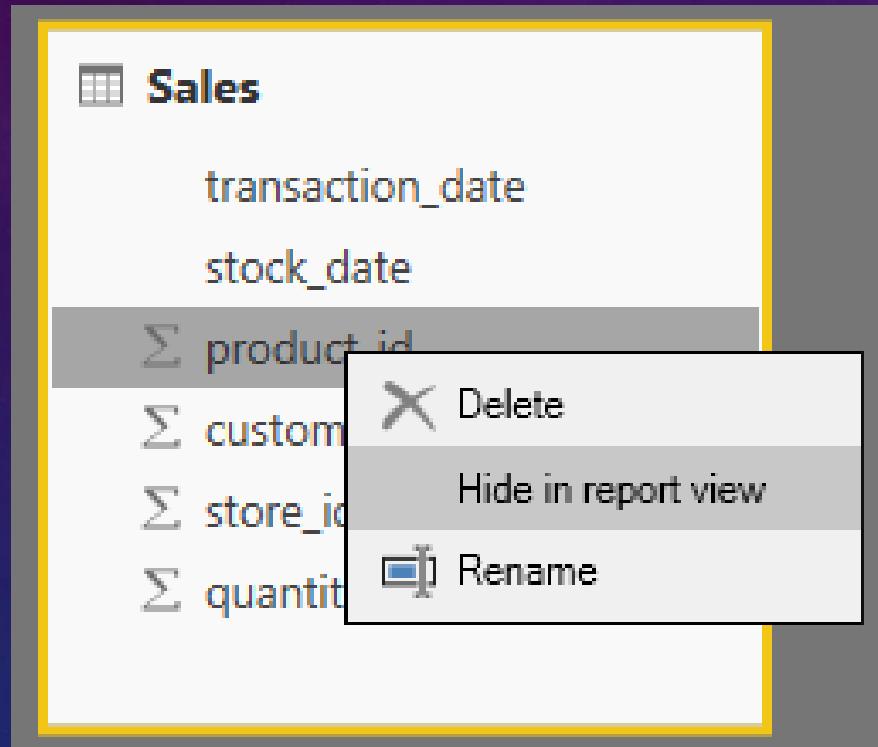
Note: This can be dangerous to have both way filter when we have more then one Data table in the model.



## HIDING FOREIGN KEYS

---

It's quite usual for any user to use foreign key, which will give us an incorrect result. To make user forcefully use a Primary key, we can hide the foreign keys from the report view.



# Introduction to DAX

Data Analysis Expressions (DAX) is a collection of operators and functions used to calculate and return one or more values. This helps in creating new and meaningful information from existing data present in our model.

We can use DAX by either creating a “Calculated Column” or by creating “Measures”.

# CALCULATED COLUMNS

- These are new formula based columns which can be added into the tables. These are calculated based entire column or table. It understand row context, so for basic statistical functions like sum, count, average etc. this will not be useful.

# MEASURES

- Measures are used to create new calculated values. These also works on entire columns or tables and entertain filter context. These values can't be seen in data view.

# MEASURES VS. CALCULATED COLUMNS

---

## Measures

- Creates new calculated value
- Understand filter context
- Works on entire column or table
- Can only be seen in Report view
- Doesn't increase file size

## Calculated Columns

- Create new column
- Understand row context
- Works on entire column or table
- Can be seen in both Data and Report view
- Increase file size

# ADDING MEASURES

- Measures can be added either by right clicking within the table or by using “Quick Measures”.

# IMPLICIT & EXPLICIT MEASURES

- **Implicit Measures**

These are being created when we drag a numerical field into the values pane of a visualization in the report view and choose any pre-defined calculation on the same like Sum, count, average etc. These can be accessed only in the visualization where these have been created.

- **Explicit Measures**

These are being created by entering the DAX function. These can be accessed anywhere in the report and can be used in other DAX calculations too.

# CALCULATED TABLES

- Calculated Tables are the new tables to be added to the model using DAX. Usually we import data from different sources and use them as tables in Data and report view but Calculated tables are being created using DAX on existing data.

# DAX Operators

# ARITHMETIC OPERATORS

Arithmetic operator	Meaning
+ (plus sign)	Addition
- (minus sign)	Subtraction or sign
* (asterisk)	Multiplication
/ (forward slash)	Division
^ (caret)	Exponentiation

# COMPARISON OPERATORS

Comparison operator	Meaning
=	Equal to
>	Greater than
<	Less than
>=	Greater than or equal to
<=	Less than or equal to
<>	Not equal to

# TEXT CONCATENATION OPERATORS

Text concatenation operator	Meaning
& (ampersand)	Connects, or concatenates, two values to produce one continuous text value

# LOGICAL OPERATORS

---

Logical operator	Meaning
&& (double ampersand)	Creates an AND condition between two expressions that each have a Boolean result. If both expressions return TRUE, the combination of the expressions also returns TRUE; otherwise the combination returns FALSE.
(double pipe symbol)	Creates an OR condition between two logical expressions. If either expression returns TRUE, the result is TRUE; only when both expressions are FALSE is the result FALSE.
IN	Creates a logical OR condition between each row being compared to a table. Note: the table constructor syntax uses curly braces.

# DAX FUNCTIONS CATEGORIES

- ▶ Date and time
- ▶ Time-intelligence
- ▶ Filter
- ▶ Information
- ▶ Logical
- ▶ Math & Trigonometry
- ▶ Other
- ▶ Parent and Child
- ▶ Statistical
- ▶ Text

# DATE AND TIME FUNCTIONS

- CALENDAR
- CALENDARAUTO
- DATE
- DATEDIFF
- DATEVALUE
- DAY
- EDATE
- EOMONTH
- HOUR
- MINUTE
- MONTH
- NOW
- SECOND
- TIME
- TIMEVALUE
- TODAY
- UTCNOW
- UTCTODAY
- WEEKDAY
- WEEKNUM
- YEAR
- YEARFRAC

# TIME-INTELLIGENCE FUNCTIONS

- CLOSINGBALANCEMONTH
- CLOSINGBALANCEQUARTER
- CLOSINGBALANCEYEAR
- DATEADD
- DATESBETWEEN
- DATESINPERIOD
- DATESMTD
- DATESQTD
- DATESYTD
- ENDOFMONTTH
- ENDOFQUARTER
- ENDOFYEAR
- FIRSTDATE
- FIRSTNONBLANK
- LASTDATE
- LASTNONBLANK
- NEXTDAY
- NEXTMONTH
- NEXTQUARTER
- NEXTYEAR
- OPENINGBALANCEMONTH
- OPENINGBALANCEQUARTER
- OPENINGBALANCEYEAR
- PARALLELPERIOD

- ▶ PREVIOUSDAY
- ▶ PREVIOUSMONTH
- ▶ PREVIOUSQUARTER
- ▶ PREVIOUSYEAR
- ▶ SAMEPERIODLASTYEAR
- ▶ STARTOFMONTH
- ▶ STARTOFQUARTER
- ▶ STARTOFYEAR
- ▶ TOTALMTD
- ▶ TOTALQTD

# FILTER FUNCTIONS

- ADDMISSINGITEMS
- ALL
- ALLCROSSFILTERED
- ALLEXCEPT
- ALLNOBLANKROW
- ALLSELECTED
- CALCULATE
- CALCULATETABLE
- CROSSFILTER
- DISTINCT (column)
- DISTINCT (table)
- EARLIER
- EARLIEST
- FILTER
- FILTERS
- HASONEFILTER
- HASONEVALUE
- ISCROSSFILTERED
- ISFILTERED
- KEEPFILTERS
- RELATED
- RELATEDTABLE
- SELECTEDVALUE
- SUBSTITUTEWITHINDEX
- USERELATIONSHIP
- VALUES

# INFORMATION FUNCTIONS

- CONTAINS
- CUSTOMDATA
- IN Operator / CONTAINSROW function
- ISBLANK
- ISERROR
- ISEVEN
- ISINSCOPE
- ISLOGICAL
- ISNONTEXT
- ISNUMBER
- ISODD
- ISONORAFTER
- ISTEXT
- LOOKUPVALUE
- USERNAME

# LOGICAL FUNCTIONS

- AND
- False
- IF
- IFERROR
- IN
- NOT
- OR
- SWITCH
- True

# MATH & TRIGONOMETRY FUNCTIONS

- ABS
- ACOS
- ACOSH
- ASIN
- ASINH
- ATAN
- ATANH
- CEILING
- COMBIN
- COMBINA
- COS
- COSH
- CURRENCY
- DEGREES
- DIVIDE
- EVEN
- EXP
- FACT
- FLOOR
- GCD
- INT
- ISO.CEILING
- LCM
- LN
- LOG
- LOG10
- MOD
- MROUND
- ODD
- PI

- ▶ POWER
- ▶ PRODUCT
- ▶ PRODUCTX
- ▶ QUOTIENT
- ▶ RADIANS
- ▶ RAND
- ▶ RANDBETWEEN
- ▶ ROUND
- ▶ ROUNDDOWN
- ▶ ROUNDUP
- ▶ SIGN
- ▶ SQRT
- ▶ SUM
- ▶ SUMX
- ▶ TRUNC

# OTHER FUNCTIONS

- DATATABLE
- ERROR
- EXCEPT
- GENERATESERIES
- GROUPBY
- INTERSECT
- ISEMPTY
- ISSELECTEDMEASURE
- NATURALINNERJOIN
- NATURALLEFTOUTERJOIN
- SELECTEDSMEASURE
- SELECTEDMEASUREFORMATSTRING
- SELECTEDSMEASURENAME
- SUMMARIZECOLUMNS
- Table Constructor
- TREATAS
- UNION
- VAR

# PARENT & CHILD FUNCTIONS

- Understanding functions for Parent-Child Hierarchies
- PATH
- PATHCONTAINS
- PATHITEM
- PATHITEMREVERSE
- PATHLENGTH

# STATISTICAL FUNCTIONS

- ADDCOLUMNS
- APPROXIMATEDISTINCTCOUNT
- AVERAGE
- AVERAGEA
- AVERAGEEX
- BETA.DIST
- BETA.INV
- CHISQ.INV
- CHISQ.INV.RT
- CONFIDENCE.NORM
- CONFIDENCE.T
- COUNT
- COUNTA
- COUNTAX
- COUNTBLANK
- COUNTROWS
- COUNTX
- CROSSJOIN
- DISTINCTCOUNT
- EXPON.DIST
- GENERATE
- GENERATEALL
- GEOMEAN
- GEOMEANX
- MAX
- MAXA
- MAXX
- MEDIAN
- MEDIANX

- ▶ MIN
- ▶ MINA
- ▶ MINX
- ▶ NORM.DIST
- ▶ NORM.INV
- ▶ NORM.S.DIST
- ▶ NORM.S.INV
- ▶ PERCENTILE.EXC
- ▶ PERCENTILE.INC
- ▶ PERCENTILEX.EX  
C
- ▶ PERCENTILEX.IN  
C
- ▶ PERMUT
- ▶ POISSON.DIST
- ▶ RANK.EQ
- ▶ RANKX
- ▶ ROW
- ▶ SAMPLE
- ▶ SELECTCOLUMN  
S
- ▶ SIN
- ▶ SINH
- ▶ STDEV.S
- ▶ STDEV.P
- ▶ STDEVX.S
- ▶ STDEVX.P
- ▶ SQRTPI
- ▶ SUMMARIZE
- ▶ T.DIST

# TEXT FUNCTIONS

- BLANK
- CODE
- COMBINEVALUES
- CONCATENATE
- CONCATENATEX
- EXACT
- FIND
- FIXED
- LEFT
- LEN
- LOWER
- MID
- REPLACE
- REPT
- RIGHT
- SEARCH
- SUBSTITUTE
- TRIM
- UNICHAR
- UPPER
- VALUE

# Reports in Power BI

# Reports in Power BI

**Connect to Direct SQL Query in Power BI Desktop**

**Create a new Power BI report**

**The report editor in Power BI**

**Add a page to a Power BI report**

**Add a filter to a report in Power BI**

**Save a report in Power BI**

**About filters and highlighting in Power BI reports**

**How to use report filters**

**Analyze in Excel**

**Change how visuals interact in a report**

**Open a Power BI report in Reading View**

**Go from Reading View to Editing View in Power BI**

**Interact with a report in Editing View in Power BI**

**Aggregates (sum, average, maximum, etc.) in Power BI**

**Rename a report in Power BI**

**Page display settings in a Power BI report**

**Duplicate a report page in Power BI**

**Delete a page from a Power BI report**

**Delete a report from Power BI**

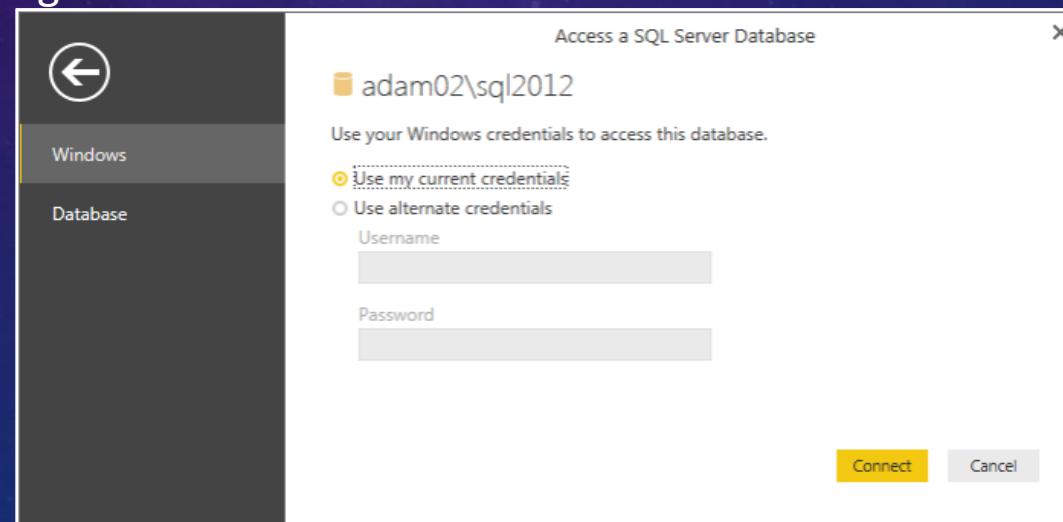
**Rename a report page in Power**

## CONNECT TO DIRECT SQL QUERY IN DESKTOP

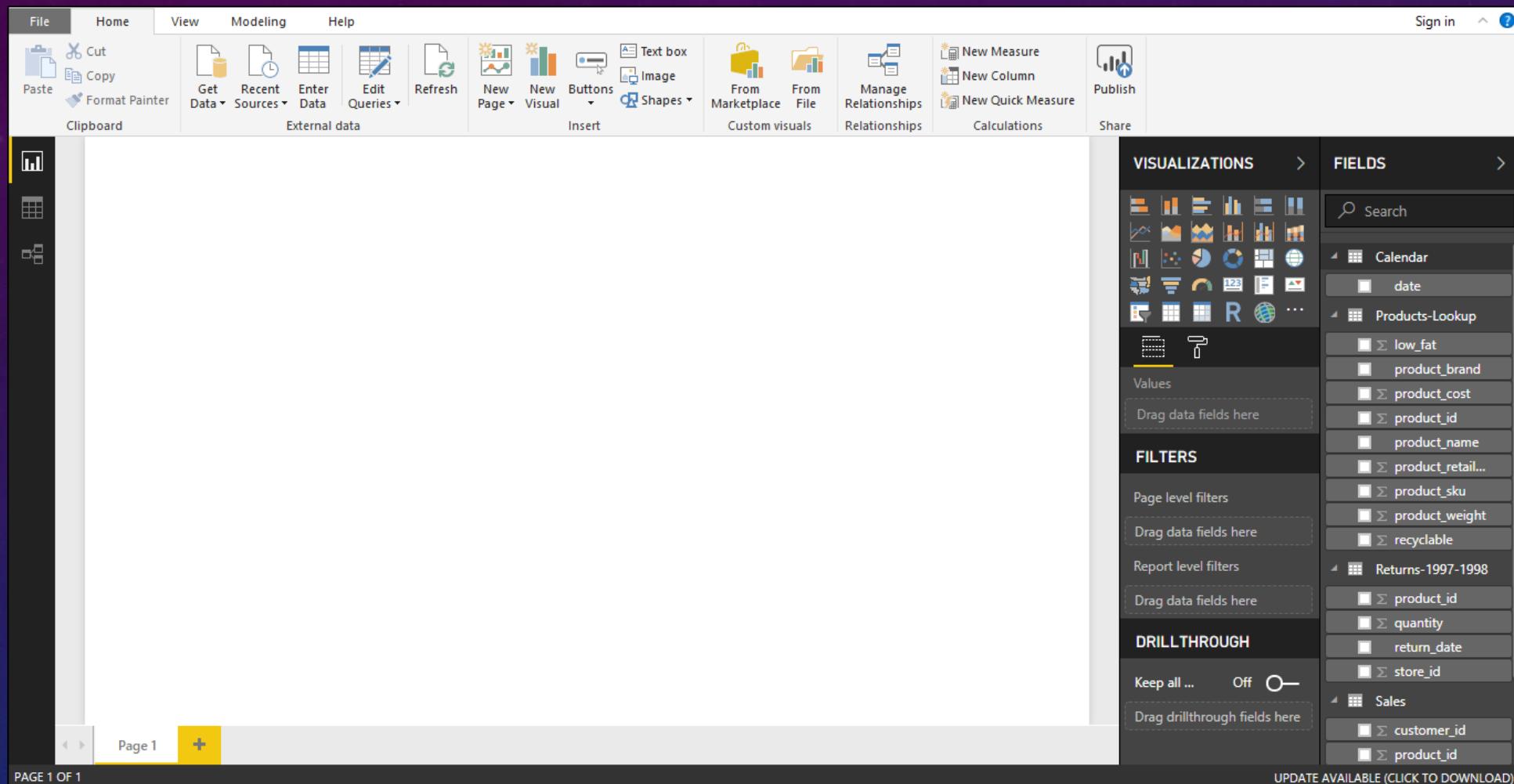
---

DirectQuery – no data is imported or copied into Power BI Desktop. For relational sources, the selected tables and columns appear in the Fields list. For multi-dimensional sources like SAP Business Warehouse, the dimensions and measures of the selected cube appear in the Fields list. As you create or interact with a visualization, Power BI Desktop queries the underlying data source, which means you're always viewing current data.

Many data modeling and data transformations are available when using DirectQuery, though with some limitations. When creating or interacting with a visualization, the underlying source must be queried and the time necessary to refresh the visualization is dependent on the performance of the underlying data source. When the data necessary to service the request has recently been requested, Power BI Desktop uses recent data to reduce the time required to display the visualization. Selecting Refresh from the Home ribbon will ensure all visualizations are refreshed with current data.



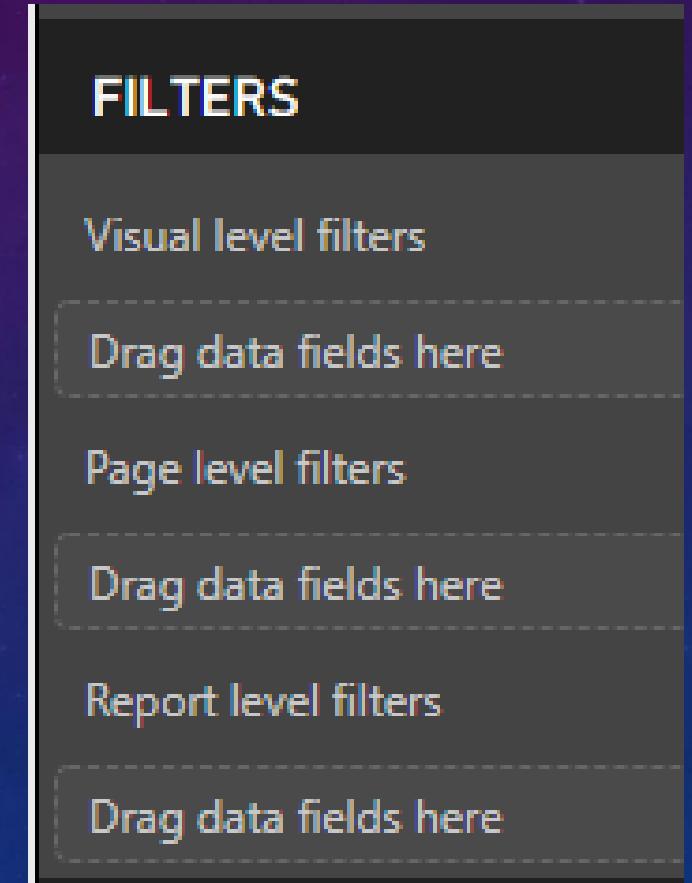
# REPORT VIEW (INTERFACE)



# POWER BI DESKTOP FILTERS

---

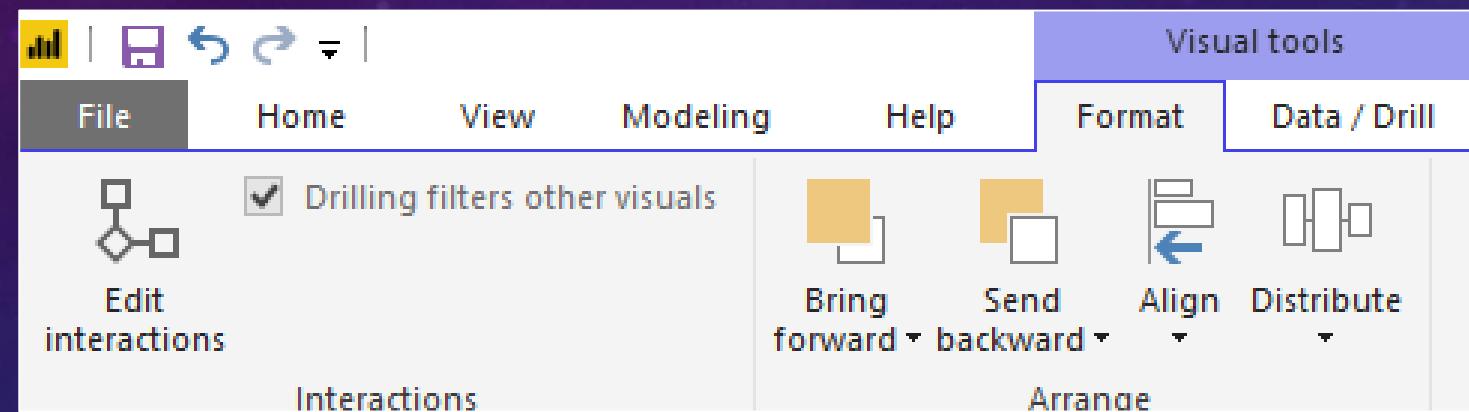
- Visual Level Filter: This gets applied to only to the active visual.
- Page Level Filter: This gets applied to all the visuals in the existing page.
- Report Level Filter: This gets applied to all the visuals in all the existing pages in the report.



# REPORT INTERACTIONS

---

By default, all the visualizations are connected to each other and filtering items in one visual will impact others too. Through “Edit interactions” we can prevent certain visualizations to get filtered.



# Reports and Visualization types in Power BI

# Reports and Visualization types in Power BI

- [\*\*Types of visualization in a Power BI report\*\*](#)
- [\*\*Custom visualization to a Power BI report\*\*](#)
- [\*\*Types of visualization in a Power BI report\*\*](#)
- [\*\*Add a custom visualization to a Power BI report\*\*](#)
- [\*\*Download a custom visual from the gallery\*\*](#)
- [\*\*Getting started with color formatting and axis properties\*\*](#)
- [\*\*Change how a chart is sorted in a Power BI report\*\*](#)
- [\*\*Move, resize, and pop out a visualization in a Power BI report\*\*](#)
- [\*\*Drill down in a visualization in Power BI\*\*](#)

# TYPES OF VISUALIZATION IN A POWER BI REPORT

- Area
- Stacked Area
- Bar/Column
- Clustered Bar/Column
- 100% Stacked Bar/Column
- Combo
- Ribbon
- Treemap
- 3D Map
- Filled Map
- Card/KPI
- Slicer
- Table
- Matrix
- Doughnut
- Funnel
- Gauge
- Line
- Pie
- Scatter
- Waterfall

# CUSTOM VISUALIZATION TO A POWER BI

Power BI also provides us an option to download custom visualization from the Microsoft App store.

Power BI Visuals

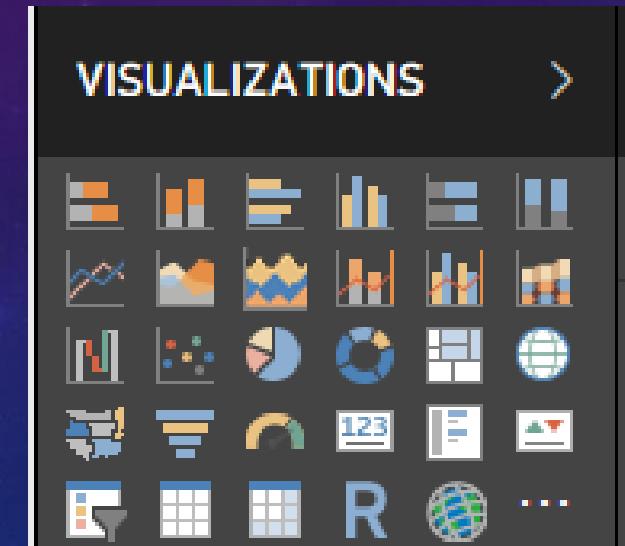
MARKETPLACE | MY ORGANIZATION

Add-ins may access personal and document information. By using an add-in, you agree to its Permissions, License Terms and Privacy Policy.

Search

Suggested for you ▾

Category	Visual Type	Description	Action
All	Histogram Chart	Visualises the distribution of data over a continuous interval or certain time period	
Editor's Picks	Bullet Chart	A bar chart with extra visual elements to provide additional context. Useful for tracking goals	
Filters	Dual KPI	Efficiently visualizes two measures over time, showing their trend on a joint timeline	
KPIs	Word Cloud	Create a fun visual from frequent text in your data	
Maps			
Advanced Analytics			
Time			
Gauges			
Infographics			
Data Visualizations			

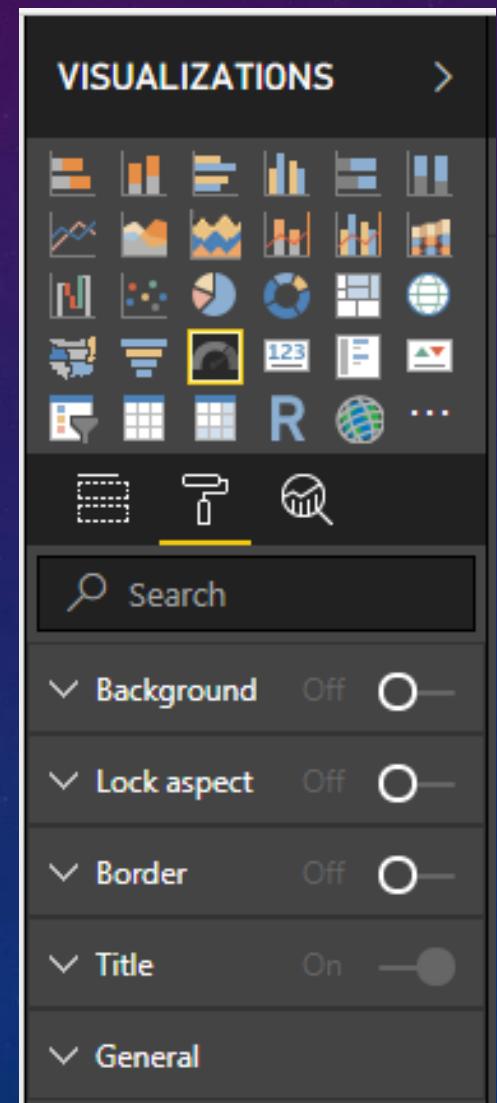


Power BI (in-depth Understanding)

# VISUALIZATION SETTINGS

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These settings are different for each visualization.



## VISUALIZATION DRILL DOWN OPTION

---

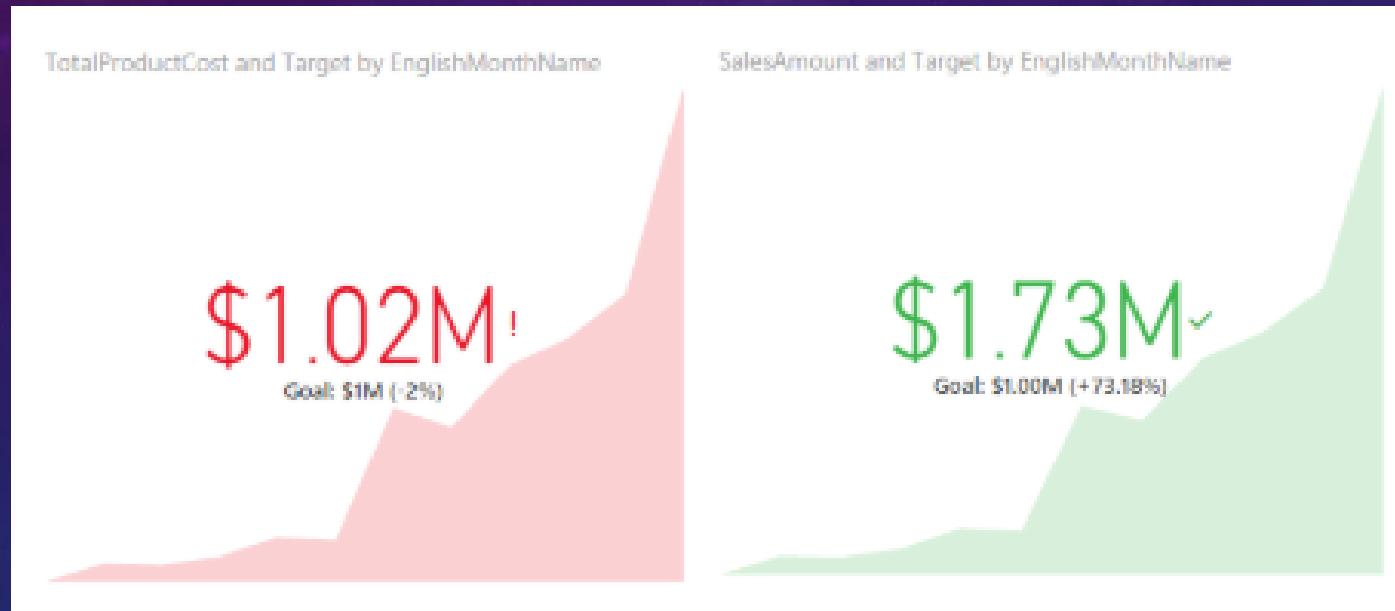
When a visual has a hierarchy, it supports drill down/up feature e.g. putting “Product Category, Sub-Category and Product” into a matrix will automatically enable drill down/up feature.



# KPI VISUAL

---

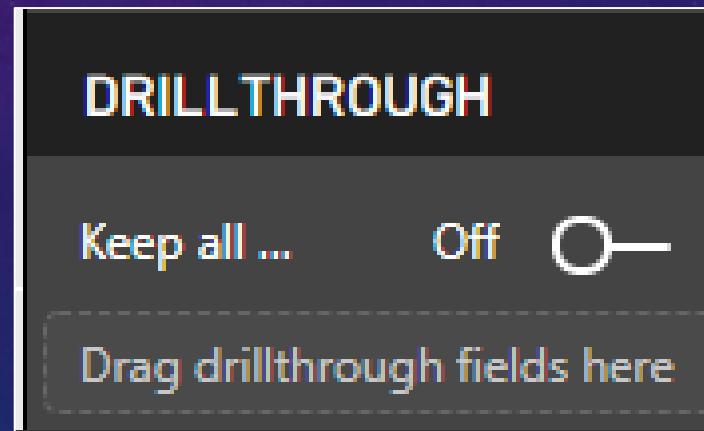
These are useful when it comes to compare actual versus target.



## DRILLTHROUGH FILTERS

---

It helps in creating a dedicated page for specific entities. A detailed page can be created for the user to dig-in from the dashboard. The moment we add a drillthrough filter, Power BI automatically adds a back button to go back to the overview.



# Dashboard in Power BI

# Dashboard in Power BI

**Create a Power BI dashboard**

**Dashboard tiles in Power BI**

**Pin a tile to a Power BI dashboard from a report**

**Pin a tile to a Power BI dashboard from Excel**

**Power BI publisher for Excel**

**Pin an entire report page to a Power BI dashboard**

**Data alerts in Power BI service**

**Add an image, text box, video, or web code to your dashboard**

**Edit a tile -- resize, move, rename, pin, delete, add hyperlink**

**Tips for designing a great Power BI dashboard**

**Print a dashboard, print a dashboard tile, print a report page**

**Display dashboards and reports in Full Screen mode (TV mode)**

**Display a dashboard tile in Focus mode**

**Featured dashboards in Power BI**

**Create a phone view of a dashboard**

**Add an image to a dashboard**

# POWER BI DASHBOARD

- This is a single page view of overall story through visualizations. For detailed summary, user can visit the related reports.
- Dashboard is a feature of Power BI Service. This is unavailable in Power BI Desktop. A pro license if needed to access Power BI Service.

# ADVANTAGES OF A DASHBOARD

- Due to one pager, it's a huge timesaving way to monitor KPI's.
- It can be accessed from anywhere using PBI Mobile app.
- Data used in the visuals may come from on-premises and/or cloud data.
- Its highly interactive.
- Tiles used in a dashboard gets updated automatically once the underlying data changes/updated.

# DIFFERENCE BETWEEN DASHBOARD & REPORT

---

## Dashboard

- Data source can be one or more reports or data sets
- Only One page
- Not available in PBI Desktop
- We can't do filtering or slicing in a Dashboard

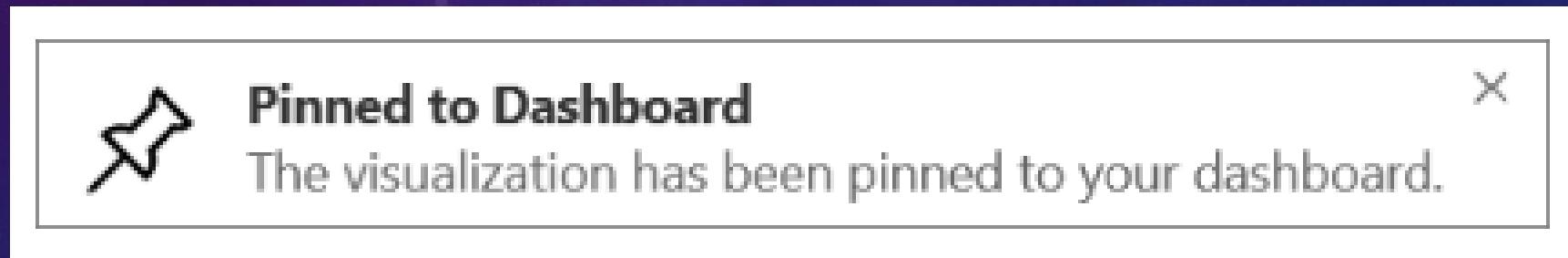
## Report

- Data source can be only single dataset per report
- One or more pages
- Available in PBI Desktop
- Filtering or slicing can be done here

## TILES IN DASHBOARD

---

One can add a new tile from within the Dashboard. Clicking on these tiles will take back into the report. Even a whole report page can be pinned to dashboard. This is also considered as pinning a live tile because tiles from reports are synced and upon any update in report will update these tiles in dashboard too.



# PIN AN ENTIRE REPORT PAGE TO PBI DASHBOARD

- If the requirement is to pin more then one visualization in the dashboard then its better to pin the entire report. When we pin the complete page then the tiles become live, we can interact with them directly from the dashboard.

# DATA ALERTS IN POWER BI SERVICE

- Setting a data alert is possible with Power BI Pro license. Alerts can only be set on the tiles pinned from report visuals, and only on gauges, KPI's and cards. Alerts can't be set on the streaming tiles created directly on the dashboard.

# CREATE A PHONE VIEW OF A DASHBOARD

- Viewing dashboard in a portrait mode on a phone will lay the tiles out as one after another in same size. In PBI service, we can create a customized view of the dashboard, specially for the portrait mode on the phone.

# Data Refresh in Power BI

# Data Refresh in Power BI

**Configure scheduled refresh**

Refresh a dataset created from a Power BI Desktop file – local

Refresh a dataset created from a Power BI Desktop file – cloud

Refresh a dataset created from an Excel workbook – local

Disable privacy settings

# CONFIGURING SCHEDULED REFRESH

- **Gateway Connection**
- **Data Source Credentials**
- **Schedule Refresh**

# Thank You

