

# Introduction to Power BI

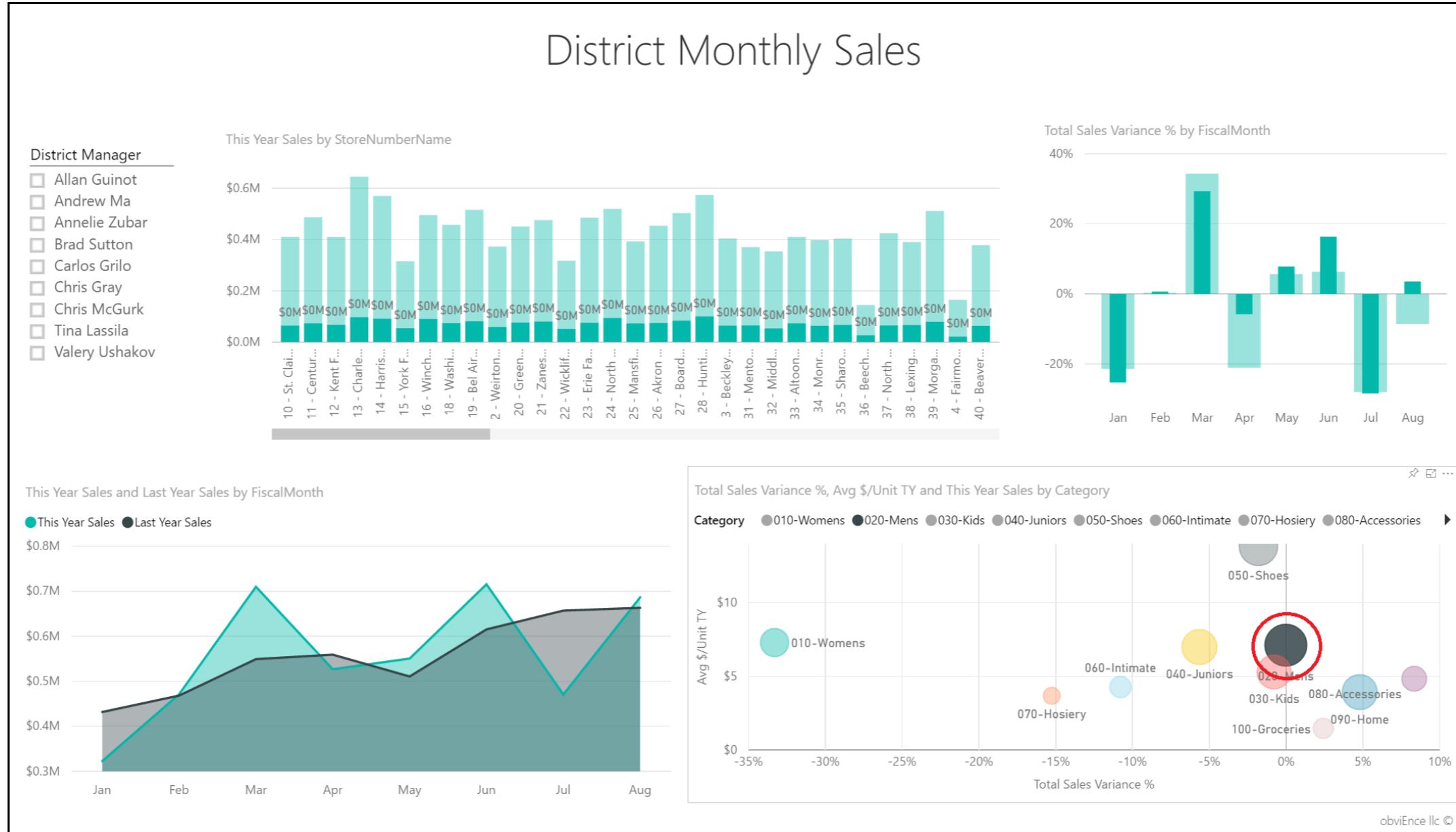
INTRODUCTION TO POWER BI



**Lis Sulmont**

Curriculum Manager, DataCamp

# What is Power BI?



<sup>1</sup> <https://docs.microsoft.com/en-us/power-bi/create-reports/sample-retail-analysis>

# Data Visualization in Power BI



Total Excluding Tax	Tax Amount	Profit	Total Including Tax
129	19.35	67.5	148.35
258	38.7	135	296.7
301	45.15	157.5	346.15
172	25.8	90	197.8
86	12.9	45	98.9
387	58.05	202.5	445.05
387	58.05	202.5	445.05
387	58.05	202.5	445.05
344	51.6	180	395.6
344	51.6	180	395.6
344	51.6	180	395.6
344	51.6	180	395.6
258	38.7	135	296.7
258	38.7	135	296.7
258	38.7	135	296.7
258	38.7	135	296.7

# Why Power BI?

- Leading data visualization tool according to Gartner
- Over 97% of Fortune 500 companies use Power BI
- Over 6 million customers



# Power BI Components

## Power BI Desktop

- Desktop version
- Data analysis and report creation tool
- Includes the Power Query Editor
- 100% free

## Power BI service

- Cloud-based version
- Light report editing
- Share and distribute reports

# Power BI Pro

## Exclusive features:

- Publish and share across the Power BI cloud platform
- Mobile app
- Collaborate with other Power BI users

# Power BI Interface

The image consists of three side-by-side screenshots of the Power BI interface.

- Power BI Desktop:** Shows the main menu bar with "File", "Home", "Visuals", "Insert", "Data", "Format", "Page", and "Help". Below the menu, there are two buttons: "Get data" and "Recent sources", both of which are highlighted with a red box. A list of recent files is shown, with the first item, "2.2.6ScreencastStart.pbix", being the most recent. At the bottom, there is a button "Open other reports".
- Sign-in Page:** Features a large circular profile icon. Below it, the text "Sign in to collaborate and share content". A paragraph explains that Power BI Pro enables collaboration across departments and distributing content. It includes a "Try free" button and a prominent yellow "Sign in" button.
- Promotional Pop-up:** A yellow box with the word "Close" in red at the top right, accompanied by a red X and a red arrow pointing to it. The text "WHAT'S NEW" is followed by a brief description: "Take a look at what's new and improved in Power BI in this month's update." Below that is a section titled "POWER BI BLOG" with a description: "Keep up to date with the latest news, resources, and updates from the Power BI team." Further down are sections for "FORUMS" (with a description: "Visit the Power BI Forum to ask questions or interact with other users in the Power BI community.") and "TUTORIALS" (with a description: "Ready to learn more about Power BI?").

2.1.6 Screencast start - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Get data Excel Power BI datasets SQL Server Enter data Recent sources Transform Refresh data New visual Text box More visual New measure Quick measure Publish Share

Clipboard Data Queries Insert Calculations

Amount by AccountType

Income Expense

1 53.64bn

2 Amount

3

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn

1bn

0bn

MonthName November December May July August June October April September March February January

ScenarioN Audio Camera and camcorders Cell phones Computers Games and Toys Home Appliances Music, Movies and TV and Video Audio Books

Actual	273,081,757.15	3,587,092,338.37	1,287,810,461.47	4,593,694,374.88	218,933,396.02	5,665,988,969.42	230,738,587.69	2,485,487,457.19
Budget	256,826,621.81	3,347,605,529.68	1,208,041,332.59	4,307,849,337.57	207,049,792.29	5,299,115,246.06	215,317,906.62	2,330,834,374.94
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Total	803,305,814.64	10,506,702,494.30	3,781,181,962.35	13,487,431,779.03	645,713,709.26	16,629,515,967.52	675,921,659.33	7,112,453,151.25

Page 1 +

Filters

Select all

2020  
2019  
2018  
2017  
2016  
2015

Search

Add data fields here

Visualizations

Fields

DimAccount  
DimDate  
DimProductCateg...  
DimScenario  
FactStrategyPlan

Values

Add data fields here

Drill through

Cross-report

Off

Keep all filters

On

Add drill-through fields here

2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Get data Excel Power BI datasets SQL Server Enter data Recent sources Transform Refresh data New visual Text box More visuals New measure Quick measure Publish Share

Clipboard Data Queries Insert Calculations

Amount by AccountType

# Report View

Expense

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn  
1bn  
0bn

MonthName: November, December, May, July, August, June, October, April, September, March, February, January

Values

Drill through

Cross-report

Off

Keep all filters

On

Add drill-through fields here

Filters

Search

Select all  
2020  
2019  
2018  
2017  
2016  
2015

Filters on this page

Add data fields here

Filters on all pages

Add data fields here

Visualizations

Fields

Search

DimAccount  
DimDate  
DimProductCateg...  
DimScenario  
FactStrategyPlan

Scenario Name

Scenario Name	Audio	Cameras and camcorders	Cell phones	Computers	Games and Toys	Home Appliances	Music, Movies and Audio Books	TV and Video
Actual	273,081,757.15	3,587,092,338.37	1,287,810,461.47	4,593,694,374.88	218,933,396.02	5,665,988,969.42	230,738,587.69	2,485,487,457.19
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Page 1 +

2.1.6Screencaststart - Power BI Desktop

File Home Help Table tools

Name DimAccount

Mark as date table v Manage relationships New measure New measure column New table Calculations

Structure Calendars Relationships Calculations

**Data View**

AccountKey	ParentAccountKey	AccountLabel	AccountName	AccountDescription	AccountType	Operator	CustomMembers	ValueType	CustomM
1	NULL		100000 Profit and Loss after tax	Profit and Loss after tax	NULL	NULL	NULL	NULL	NULL
			111000 Income	Income	Income	+	NULL	Income	+
			112000 Expense	Expense	Expense	-	NULL	Expense	-
4	2		110100 Sale Revenue	Sale Revenue	Income	+	NULL	Income	+
5	3		112100 Cost of Goods Sold	Cost of Goods Sold	Expense	+	NULL	Expense	+
6	3		112200 Selling, General & Administrative Expenses	Selling, General & Administrative Expenses	Expense	+	NULL	Expense	+
7	6		112300 Administration Expense	Administration Expense	Expense	+	NULL	Expense	+
8	6		112400 IT Cost	IT Cost	Expense	+	NULL	Expense	+
9	6		112500 Human Capital	Human Capital	Expense	+	NULL	Expense	+
10	6		112600 Light, Heat, Communication Cost	Light, Heat, Communication Cost	Expense	+	NULL	Expense	+
11	6		112700 Property Costs	Property Costs	Expense	+	NULL	Expense	+
12	6		112800 Other Expenses	Other Expenses	Expense	+	NULL	Expense	+
13	6		112900 Marketing Cost	Marketing & Advertisement Cost	Expense	+	NULL	Expense	+
14	13		112910 Holiday Ad Cost	Holiday Ad Cost	Expense	+	NULL	Expense	+
15	13		112920 Spring Ad Cost	Spring Ad Cost	Expense	+	NULL	Expense	+
16	13		112930 Back-to-School Ad Cost	Back-to-School Ad Cost	Expense	+	NULL	Expense	+
17	13		112940 Business Ad Cost	Business Ad Cost	Expense	+	NULL	Expense	+
18	13		112950 Tax Time / Summer Ad Cost	Tax Time / Summer Ad Cost	Expense	+	NULL	Expense	+
19	1		131000 Taxation	Taxation	Taxation	-	NULL	Taxation	-
20	14		112911 Radio & TV	Holiday Ad Cost by Radio & TV	Expense	+	NULL	Expense	+
21	14		112912 Print	Holiday Ad Cost by Print	Expense	+	NULL	Expense	+
22	14		112913 Internet	Holiday Ad Cost by Internet	Expense	+	NULL	Expense	+
23	14		112914 Other	Holiday Ad Cost by Other	Expense	+	NULL	Expense	+
24	1		110000 Profit and Loss before tax	Profit and Loss before tax	NULL	+	NULL	NULL	+

Fields

Search

DimAccount

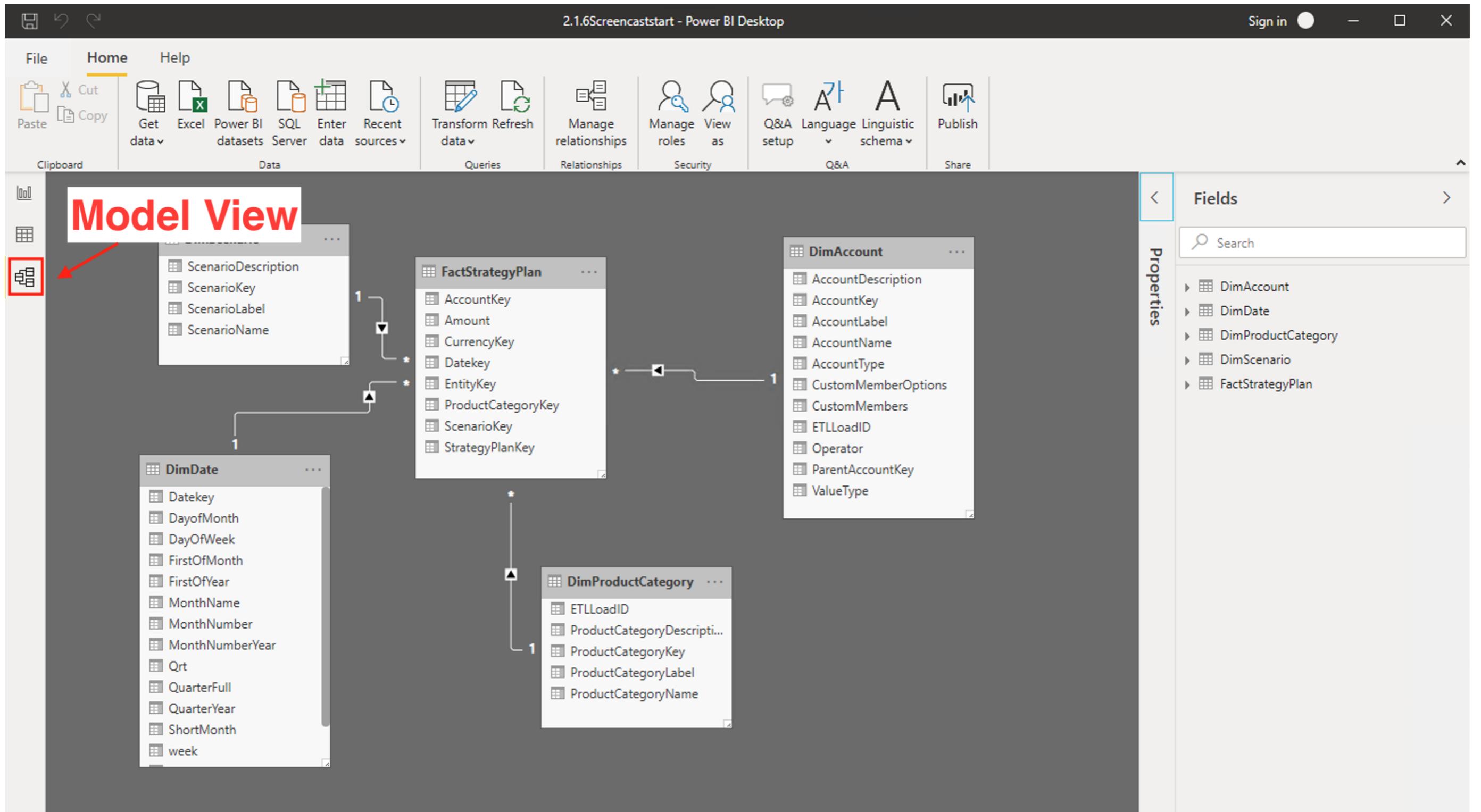
- AccountDescription
- AccountKey
- AccountLabel
- AccountName
- AccountType
- CustomMemberO...
- CustomMembers
- ETLLoadID
- Operator
- ParentAccountKey
- ValueType

DimDate

DimProductCateg...

DimScenario

FactStrategyPlan



2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Clipboard

Get data Excel Power BI datasets SQL Server Enter data Recent sources Data

Transform Refresh data New visual Text box More visuals Insert

New measure Quick measure Calculations

Share Publish

**Amount by AccountType**

53.64bn Amount

Income Expense

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn 1bn 0bn

MonthName November December May July August June October April September March February January

ScenarioName Audio cameras and camcorders Cell phones Computers Games and Toys Home Appliances Music, Movies and TV and Video Audio Books

Actual	273,081,757.15	3,587,092,338.37	1,287,810,461.47	4,593,694,374.88	218,933,396.02	5,665,988,969.42	230,738,587.69	2,485,487,457.19
Budget	256,826,621.81	3,347,605,529.68	1,208,041,332.59	4,307,849,337.57	207,049,792.29	5,299,115,246.06	215,317,906.62	2,330,834,374.94
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Total	803,305,814.64	10,506,702,494.30	3,781,181,962.35	13,487,431,779.03	645,713,709.26	16,629,515,967.52	675,921,659.33	7,112,453,151.25

Canvas

Page 1 +

**Filters**

Select all  
2020  
2019  
2018  
2017  
2016  
2015

Search

Filters on this page ...

Add data fields here

Filters on all pages ...

Add data fields here

**Visualizations**

DimAccount DimDate DimProductCateg... DimScenario FactStrategyPlan

**Fields**

Search

**Values**

Add data fields here

**Drill through**

Cross-report

Off

Keep all filters

On

Add drill-through fields here

2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Get data Excel Power BI datasets SQL Server Enter data Recent sources Transform Refresh data New visual Text box More visuals New measure Quick measure Publish Share

Clipboard Data Queries Insert Calculations

Amount by AccountType

Income Expense

53.64bn Amount

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn 1bn 0bn

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Page 1 +

**Filters**

Select all  
2020  
2019  
2018  
2017  
2016  
2015

Search

Filters on this page ...  
Add data fields here

Filters on all pages ...  
Add data fields here

**Visualizations**

DimAccount DimDate DimProductCateg... DimScenario FactStrategyPlan

Values  
Add data fields here

Drill through

Cross-report  
Off On

Keep all filters  
On

Add drill-through fields here

The screenshot shows the Power BI Desktop interface with a red box highlighting the 'Filters' pane. The pane contains a search bar and two sections: 'Filters on this page' and 'Filters on all pages'. It also includes sections for 'Visualizations', 'Values', 'Drill through', 'Cross-report', and 'Keep all filters'. A large red text overlay 'Filters Pane' is centered over the pane.

2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Clipboard

Get data Excel Power BI datasets SQL Server Enter data Recent sources

Transform Refresh data New visual Text box More visuals

New measure Quick measure

Publish Share

**Visualizations Pane**

**Filters**

- Select all
- 2020
- 2019
- 2018
- 2017
- 2016
- 2015

Amount by AccountType

Income Expense

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn 1bn 0bn

MonthName November December May July August June October April September March February January

Values

Add data fields here

Drill through

Cross-report

Off

Keep all filters

On

Add drill-through fields here

**Visualizations**

Fields

Search

DimAccount DimDate DimProductCateg... DimScenario FactStrategyPlan

Amount by AccountType

Income Expense

Amount by MonthName and ScenarioName

ScenarioName Actual Budget Forecast

2bn 1bn 0bn

MonthName November December May July August June October April September March February January

Values

Add data fields here

Drill through

Cross-report

Off

Keep all filters

On

Add drill-through fields here

53.64bn Amount

ScenarioName Audio cameras and camcorders Cell phones Computers Games and Toys Home Appliances Music, Movies and TV and Video Audio Books

ScenarioName	Actual	Budget	Forecast	Total	Cameras and camcorders	Cell phones	Computers	Games and Toys	Home Appliances	Music, Movies and TV and Video	Audio Books
Actual	273,081,757.15	3,587,092,338.37	1,287,810,461.47	803,305,814.64	3,587,092,338.37	1,287,810,461.47	4,593,694,374.88	218,933,396.02	5,665,988,969.42	230,738,587.69	2,485,487,457.19
Budget	256,826,621.81	3,347,605,529.68	1,208,041,332.59	10,506,702,494.30	3,347,605,529.68	1,208,041,332.59	4,307,849,337.57	207,049,792.29	5,299,115,246.06	215,317,906.62	2,330,834,374.94
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Total	273,081,757.15	256,826,621.81	273,397,435.67	803,305,814.64	10,506,702,494.30	3,781,181,962.35	13,487,431,779.03	645,713,709.26	16,629,515,967.52	675,921,659.33	7,112,453,151.25

Page 1 +

2.1.6Screencaststart - Power BI Desktop

Sign in

File Home Insert Modeling View Help

Paste Cut Copy Format painter Clipboard

Get data Excel Power BI datasets SQL Server Enter data Recent sources Data

Transform Refresh data New visual Text box More visuals Insert Calculations

New measure Quick measure Publish Share

**Amount by AccountType**

Income Expense

53.64bn Amount

**Amount by MonthName and ScenarioName**

ScenarioName Actual Budget Forecast

2bn 1bn 0bn

MonthName November December May July August June October April September March February January

**ScenarioName** Audio Cameras and camcorders Cell phones Computers Games and Toys Home Appliances Music, Movies and TV and Video Audio Books

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Total	803,305,814.64	10,506,702,494.30	3,781,181,962.35	13,487,431,779.03	645,713,709.26	16,629,515,967.52	675,921,659.33	7,112,453,151.25

Page 1 +

**Filters**

Select all  
2020  
2019  
2018  
2017  
2016  
2015

Search

Filters on this page ...  
Add data fields here

Filters on all pages ...  
Add data fields here

**Visualizations**

DimAccount DimDate DimProductCateg... DimScenario FactStrategyPlan

**Fields**

Search

DimAccount DimDate DimProductCateg... DimScenario FactStrategyPlan

**Values**

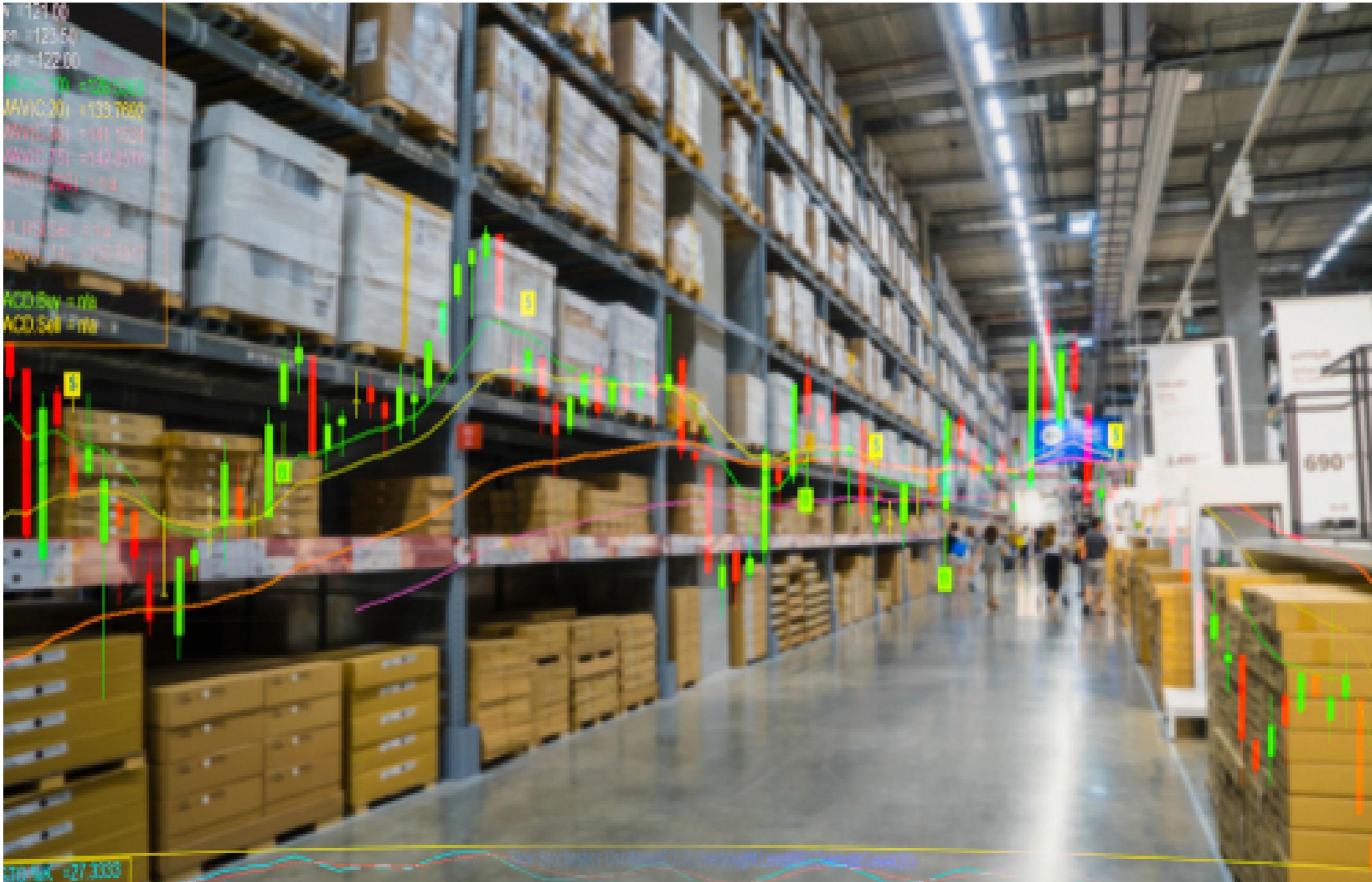
Add data fields here

**Drill through**

Cross-report  
Off  Keep all filters  
On   
Add drill-through fields here

**Fields Pane**

# Wide World Importers (wwi) dataset



# Wide World Importers (WWI) dataset structure

- Snowflake schema
- **Fact Table:**
  - FactSales.csv
- **Dimension Tables:**
  - DimCustomer.csv
  - DimEmployee.xlsx
  - DimStockItem.csv
  - DimDate.csv
  - DimCity.csv

# **Let's practice!**

## **INTRODUCTION TO POWER BI**

# Getting started!

INTRODUCTION TO POWER BI



**Lis Sulmont**

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# **Let's practice!**

## **INTRODUCTION TO POWER BI**

# Slicers and Tables

INTRODUCTION TO POWER BI



**Lis Sulmont**

Curriculum Manager, DataCamp

# **Let's practice!**

## **INTRODUCTION TO POWER BI**

# Transforming data

INTRODUCTION TO POWER BI



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# Transforming data

- Dataset may contain:
  - Columns you don't need
  - Inconvenient and inconsistent formatting
  - Extra characters
  - Blank rows
- Cleaning data

# Loading data

FactSale.csv

File Origin: 65001: Unicode (UTF-8) Delimiter: Comma Data Type Detection: Based on first 200 rows

Sale Key	City Key	Customer Key	Bill To Customer Key	Stock Item Key	Invoice Date Key	Delivery Date Key	Salesperson Key	W1
49258	71135	0	0	194	10/22/2013	10/23/2013	86	
49265	41568	0	0	204	10/22/2013	10/23/2013	83	
49456	70409	0	0	202	10/22/2013	10/23/2013	74	
49372	48937	0	0	173	10/22/2013	10/23/2013	83	
49624	41981	0	0	168	10/24/2013	10/25/2013	85	
49635	70510	0	0	164	10/24/2013	10/25/2013	84	
49908	66274	0	0	198	10/25/2013	10/26/2013	70	
50034	44106	0	0	180	10/25/2013	10/26/2013	85	
50190	56014	0	0	195	10/26/2013	10/27/2013	74	
50487	79969	0	0	164	10/28/2013	10/29/2013	19	
50367	81342	0	0	180	10/28/2013	10/29/2013	85	
50379	91464	0	0	174	10/28/2013	10/29/2013	70	
50436	38583	0	0	192	10/28/2013	10/29/2013	19	
50715	85575	0	0	190	10/29/2013	10/30/2013	39	
50739	81481	0	0	168	10/29/2013	10/30/2013	83	
50914	75393	0	0	171	10/30/2013	10/31/2013	74	
51426	87371	0	0	163	11/4/2013	11/5/2013	84	
51623	47499	0	0	179	11/5/2013	11/6/2013	19	
51656	84269	0	0	187	11/5/2013	11/6/2013	19	
51680	52627	0	0	184	11/5/2013	11/6/2013	91	

Load Transform Data Cancel

# Loading data

The screenshot shows the Power BI Data Load Editor interface. The main window displays the contents of a CSV file named "FactSale.csv". The file has 20 columns and approximately 20 rows of data. The columns are labeled: Sale Key, City Key, Customer Key, Bill To Customer Key, Stock Item Key, Invoice Date Key, Delivery Date Key, Salesperson Key, and W1. The data type detection is set to "Based on first 200 rows". The "Load" button at the bottom is highlighted with a purple oval.

Sale Key	City Key	Customer Key	Bill To Customer Key	Stock Item Key	Invoice Date Key	Delivery Date Key	Salesperson Key	W1
49258	71135	0	0	194	10/22/2013	10/23/2013	86	
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49372	48937	0	0	173	10/22/2013	10/23/2013	83	
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49908	66274	0	0	198	10/25/2013	10/26/2013	70	
50034	44106	0	0	180	10/25/2013	10/26/2013	85	
50190	56014	0	0	195	10/26/2013	10/27/2013	74	
50487	79969	0	0	164	10/28/2013	10/29/2013	19	
50367	81342	0	0	180	10/28/2013	10/29/2013	85	
50379	91464	0	0	174	10/28/2013	10/29/2013	70	
50436	38583	0	0	192	10/28/2013	10/29/2013	19	
50715	85575	0	0	190	10/29/2013	10/30/2013	39	
50739	81481	0	0	168	10/29/2013	10/30/2013	83	
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51656	84269	0	0	187	11/5/2013	11/6/2013	19	
51680	52627	0	0	184	11/5/2013	11/6/2013	91	

# Loading data

FactSale.csv

File Origin: 65001: Unicode (UTF-8)

Delimiter: Comma

Data Type Detection: Based on first 200 rows

Sale Key	City Key	Customer Key	Bill To Customer Key	Stock Item Key	Invoice Date Key	Delivery Date Key	Salesperson Key	W1
49258	71135	0	0	194	10/22/2013	10/23/2013	86	
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49908	66274	0	0	198	10/25/2013	10/26/2013	70	
50034	44106	0	0	180	10/25/2013	10/26/2013	85	
50190	56014	0	0	195	10/26/2013	10/27/2013	74	
50487	79969	0	0	164	10/28/2013	10/29/2013	19	
50367	81342	0	0	180	10/28/2013	10/29/2013	85	
50379	91464	0	0	174	10/28/2013	10/29/2013	70	
50436	38583	0	0	192	10/28/2013	10/29/2013	19	
50715	85575	0	0	190	10/29/2013	10/30/2013	39	
50739	81481	0	0	168	10/29/2013	10/30/2013	83	
50914	75393	0	0	171	10/30/2013	10/31/2013	74	
51426	87371	0	0	163	11/4/2013	11/5/2013	84	
51623	47499	0	0	179	11/5/2013	11/6/2013	19	
51656	84269	0	0	187	11/5/2013	11/6/2013	19	
51680	52627	0	0	184	11/5/2013	11/6/2013	91	

Load Transform Data Cancel

# Power Query Editor

The screenshot shows the Microsoft Power Query Editor interface. The title bar reads "Untitled - Power Query Editor". The ribbon menu is visible with tabs like File, Home, Transform, Add Column, View, Tools, and Help. The "Transform" tab is currently selected.

The main area displays a table with five columns: "Sale Key", "City Key", "Customer Key", "Bill To Customer Key", and "Stock Item". The table has 23 rows, with the first few rows containing values like 49258, 71135, 41568, etc. The last row is partially visible with values 51852 and 48937.

On the left, the "Queries [1]" pane shows a single query named "FactSale".

On the right, the "Query Settings" pane is open, showing the "PROPERTIES" section with the name set to "FactSale" and the "APPLIED STEPS" section which includes a step named "Changed Type".

At the bottom, a status bar indicates "21 COLUMNS, 999+ ROWS" and "Column profiling based on top 1000 rows". The timestamp "PREVIEW DOWNLOADED AT 3:42 PM" is also present.

# Don't forget to Close & Apply

The screenshot shows the Microsoft Power Query Editor interface. The ribbon menu is visible at the top, with the 'Home' tab selected. In the 'File' tab, the 'Close & Apply' button is highlighted with a mouse cursor. A tooltip appears over the button, containing the text: 'Close the Query Editor window and apply any pending changes.' Below the ribbon, there are several buttons: 'New Source', 'Recent Sources', 'Enter Data', 'Data source settings', 'Manage Parameters', 'Refresh Preview', 'Manage', and 'Choose Columns'. On the left side, there's a sidebar with three items: 'Ranking of best and wor...', 'States of the United Stat...', and 'Products\_by\_Categories'. The main area displays a table with four columns: 'Cost of living', 'Crime', 'Culture', and 'Health'. The table has four rows with values: Row 1 (1, 19, 21, 10), Row 2 (2, 25, 22, 15), Row 3 (3, 12, 4, 31), and Row 4 (empty cells). The 'Health' column is currently selected.

	Cost of living	Crime	Culture	Health
1	19	21	10	
2	25	22	15	
3	12	4	31	

# **Let's practice!**

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# Power Query Editor

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# Transforming and formatting columns

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