Experiment Number: 08

Aim:

Create reports using MTD,YTD,QTD In power-bi?

Procedure:

1. Importing the Dataset:

- Launch Power BI Desktop.
- > Click on "Get Data" in the Home tab of the ribbon.
- > Select the appropriate data source option "Excel" and follow the prompts to import yoursample dataset into Power BI.

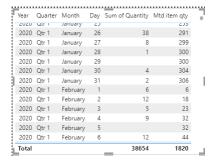
2. Insert Rectangle Shape:

- o Click on "Format tab" on right side and perform changes on visual.
- \circ Shape > Style > #E66C37
- Shape > Text > Text = "Page1", Font Size = 46, Horizontal Alignment = "Center".

3. Create table:

- ➤ Home > Enter data > Create table by giving values to the columns
- ➤ Visualizations > Columns > orderDate > Quantity > mtd item quantity
- Click on new measure>and enter the below dax formula:

Mtd item qty = TOTALMTD(SUM(Orders[Quantity]),Orders[Order Date].[Date])



4. Create table:

- ➤ Home > Enter data > Create table by giving values to the columns
- ➤ Visualizations > Columns > order Date > Quantity > qtd item quantity
- Click on new measure>and enter the below dax formula:

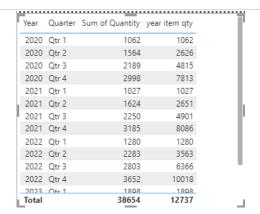
qtd item qty = TOTALQTD(SUM(Orders[Quantity]),Orders[Order Date].[Date])



5. Create table:

- ➤ Home > Enter data > Create table by giving values to the columns
- ➤ Visualizations > Columns > order Date > Quantity > ytd item quantity
- Click on new measure>and enter the below dax formula:

Ytd item qty = TOTALYTD(SUM(Orders[Quantity]),Orders[Order Date].[Date])



6. Create table:

- ➤ Home > Enter data > Create table by giving values to the columns
- ➤ Visualizations > Columns > orderDate > Total Mtd Orders
- ➤ Visualizations > Columns > orderDate > Total qtd Orders
- ➤ Visualizations > Columns > orderDate > Total ytd Orders
- Click on new measure>and enter the below dax formula:

```
Total Mtd Orders = TOTALMTD(Count(Orders[Order ID]),Orders[Order Date].[date])
Total Qtd Orders = TOTALQTD(Count(Orders[Order ID]),Orders[Order Date].[date])
Total Ytd Orders = TOTALYTD(Count(Orders[Order ID]),Orders[Order Date].[date])
```

| 1 | Year | Quarter | Month | Total Mtd Orders | Total qtd Orders | Total Ytd Orders |
|---|-------|---------|-----------|------------------|------------------|------------------|
| | 2020 | Qtr 1 | January | 84 | 84 | 84 |
| | 2020 | Qtr 1 | February | 46 | 130 | 130 |
| | 2020 | Qtr 1 | March | 159 | 289 | 289 |
| | 2020 | Qtr 2 | April | 135 | 135 | 424 |
| | 2020 | Qtr 2 | May | 132 | 267 | 556 |
| | 2020 | Qtr 2 | June | 136 | 403 | 692 |
| | 2020 | Qtr 3 | July | 143 | 143 | 835 |
| ı | 2020 | Qtr 3 | August | 158 | 301 | 993 |
| Ī | 2020 | Qtr 3 | September | 273 | 574 | 1266 |
| | 2020 | Qtr 4 | October | 168 | 168 | 1434 |
| | 2020 | Qtr 4 | November | 320 | 488 | 1754 |
| | 2020 | Qtr 4 | December | 297 | 785 | 2051 |
| | 2021 | Qtr 1 | January | 64 | 64 | 64 |
| | 2021 | Qtr 1 | February | 64 | 128 | 128 |
| | 2021 | Qtr 1 | March | 141 | 269 | 269 |
| | 2021 | 0+- 3 | A.m.il | 160 | 160 | 420 |
| d | Total | | | 482 | 1251 | 3379 |

7. Create table:

- ➤ Home > Enter data > Create table by giving values to the columns
- ➤ Visualizations > Columns > orderDate > profit > mtdProfit
- Click on new measure>and enter the below dax formula:

MTDprofit = CALCULATE(sum(Orders[Profit]),DATESMTD(Orders[Order Date].[Date]))

| ľ | Year | Quarter | | Day | Sum of Profit | | 7 |
|---|-------|---------|----------|-----|---------------|----------|---|
| 1 | LULU | Qti | Junuary | 20 | 150.55 | 2,313,31 | |
| | 2020 | Qtr 1 | January | 27 | 9.68 | 2,523.00 | |
| | 2020 | Qtr 1 | January | 28 | 1.33 | 2,524.32 | |
| | 2020 | Qtr 1 | January | 29 | | 2,524.32 | |
| | 2020 | - | January | 30 | 11.65 | 2,535.97 | |
| | 2020 | | January | 31 | 3.42 | 2,539.39 | |
| | 2020 | Qtr 1 | February | 1 | 206.32 | 206.32 | |
| ŀ | 2020 | Qtr 1 | February | 2 | 7.15 | 213.47 | |
| И | 2020 | Qtr 1 | February | 3 | 31.56 | 245.03 | ч |
| | 2020 | Qtr 1 | February | 4 | 51.14 | 296.17 | |
| | 2020 | Qtr 1 | February | 5 | | 296.17 | |
| | 2020 | Qtr 1 | February | 6 | 76.48 | 372.66 | |
| | 2020 | Qtr 1 | February | 7 | 59.35 | 432.01 | |
| | 2020 | Qtr 1 | February | 8 | 5.53 | 437.54 | |
| | 2020 | Qtr 1 | February | 9 | | 437.54 | |
| | 2020 | Otr 1 | February | 10 | | 437 54 | |
| L | Total | | | | 2,92,296.81 | 8,655.83 | |

8. Create table:

- ➤ Home > Enter data > Create table by giving values to the columns
- ➤ Visualizations > Columns > orderDate > profit > qtdProfit
- Click on new measure>and enter the below dax formula:

QTDprofit = CALCULATE(sum(Orders[Profit]),DATESQTD(Orders[Order Date].[Date]))



9..Create table:

- ➤ Home > Enter data > Create table by giving values to the columns
- Visualizations > Columns > orderDate > profit > ytdProfit
- Click on new measure>and enter the below dax formula:

YTDprofit = CALCULATE(sum(Orders[Profit]),DATESYTD(Orders[Order Date].[Date]))



Final Output:

