

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 your sample dataset into Power BI.

2. Insert Rectangle Shape:

- Click on "Format tab" on right side and perform changes on visual.
- 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])`

Year	Quarter	Month	Day	Sum of Quantity	Mtd item qty
2020	Qtr 1	January	26	38	291
2020	Qtr 1	January	27	8	299
2020	Qtr 1	January	28	1	300
2020	Qtr 1	January	29		300
2020	Qtr 1	January	30	4	304
2020	Qtr 1	January	31	2	306
2020	Qtr 1	February	1	6	6
2020	Qtr 1	February	2	12	18
2020	Qtr 1	February	3	5	23
2020	Qtr 1	February	4	9	32
2020	Qtr 1	February	5		32
2020	Qtr 1	February	6	12	44
Total				38654	1820

4. Create table:

- Home > Enter data > Create table by giving values to the columns
- Visualizations > Columns > orderDate > 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])`

Year	Quarter	Month	Sum of Quantity	qtd item qty
	Qtr 2	April	536	536
	Qtr 2	May	504	1040
	Qtr 2	June	524	1564
	Qtr 3	July	550	550
	Qtr 3	August	624	1174
	Qtr 3	September	1015	2189
	Qtr 4	October	605	605
	Qtr 4	November	1235	1840
	Qtr 4	December	1158	2998
	Qtr 1	January	260	260
	Qtr 1	February	239	499
	Qtr 1	March	528	1027
	Qtr 2	April	543	543
Total			38654	4828

5. Create table:

- Home > Enter data > Create table by giving values to the columns
- Visualizations > Columns > orderDate > 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])`

Year	Quarter	Sum of Quantity	year item qty
2020	Qtr 1	1062	1062
2020	Qtr 2	1564	2626
2020	Qtr 3	2189	4815
2020	Qtr 4	2998	7813
2021	Qtr 1	1027	1027
2021	Qtr 2	1624	2651
2021	Qtr 3	2250	4901
2021	Qtr 4	3185	8086
2022	Qtr 1	1280	1280
2022	Qtr 2	2283	3563
2022	Qtr 3	2803	6366
2022	Qtr 4	3652	10018
2022	Qtr 1	1808	1808
Total		38654	12737

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])`

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
2020	Qtr 3	August	158	301	993
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	Qtr 1	April	150	150	430
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]))`

Year	Quarter	Month	Day	Sum of Profit	MTDprofit
2020	Qtr 1	January	26	130.33	2,523.00
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	Qtr 1	January	30	11.65	2,535.97
2020	Qtr 1	January	31	3.42	2,539.39
2020	Qtr 1	February	1	206.32	206.32
2020	Qtr 1	February	2	7.15	213.47
2020	Qtr 1	February	3	31.56	245.03
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	Qtr 1	February	10		437.54
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]))`

Year	Quarter	Month	Sum of Profit	QTDprofit
2021	Qtr 1	January	-3,189.80	-3,189.80
2021	Qtr 1	February	2,813.85	-375.95
2021	Qtr 1	March	9,930.61	9,554.66
2021	Qtr 2	April	4,187.50	4,187.50
2021	Qtr 2	May	4,677.14	8,864.63
2021	Qtr 2	June	3,335.56	12,200.19
2021	Qtr 3	July	3,288.65	3,288.65
2021	Qtr 3	August	5,371.63	8,660.28
2021	Qtr 3	September	8,220.03	16,880.30
2021	Qtr 4	October	2,817.97	2,817.97
2021	Qtr 4	November	12,474.79	15,292.75
2021	Qtr 4	December	8,093.06	23,385.82
2022	Qtr 1	January	2,916.02	2,916.02
2022	Qtr 1	February	5,004.58	7,920.60
2022	Qtr 1	March	3,707.89	11,628.49
Total			2,92,296.81	29,018.46

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]))`

Year	Quarter	Sum of Profit	YTDprofit
2020	Qtr 1	4,095.15	4,095.15
2020	Qtr 2	11,684.99	11,684.99
2020	Qtr 3	13,517.37	13,517.37
2020	Qtr 4	22,386.79	22,386.79
2021	Qtr 1	9,554.66	9,554.66
2021	Qtr 2	12,200.19	12,200.19
2021	Qtr 3	16,880.30	16,880.30
2021	Qtr 4	23,385.82	23,385.82
2022	Qtr 1	11,628.49	11,628.49
2022	Qtr 2	16,594.68	16,594.68
2022	Qtr 3	16,247.49	16,247.49
2022	Qtr 4	38,194.55	38,194.55
2023	Qtr 1	23,858.60	23,858.60
2023	Qtr 2	15,503.91	15,503.91
2023	Qtr 3	27,545.38	27,545.38
2023	Qtr 4	29,018.46	29,018.46
Total		2,92,296.81	29,018.46

Final Output:

Year	Quarter	Month	Day	Sum of Quantity	Mtd item qty	Year	Quarter	Month	Sum of Quantity	qtd item qt	Year	Quarter	Month	Total Mtd Orders	Total qtd Orders	Total Ytd Orders		
2020	Qtr 1	January	27	8	299		Qtr 1	January	306	30	2020	Qtr 3	August	158	301	993		
2020	Qtr 1	January	28	1	300		Qtr 1	February	159	46	2020	Qtr 3	September	273	574	1266		
2020	Qtr 1	January	29		300		Qtr 1	March	597	106	2020	Qtr 4	October	168	168	1434		
2020	Qtr 1	January	30	4	304		Qtr 2	April	536	53	2020	Qtr 4	November	320	488	1754		
2020	Qtr 1	January	31	2	306		Qtr 2	May	504	104	2020	Qtr 4	December	297	785	2051		
2020	Qtr 1	February	1	6	6		Qtr 2	June	524	156	2021	Qtr 1	January	64	64	64		
2020	Qtr 1	February	2	12	18		Qtr 3	July	550	55	2021	Qtr 1	February	64	128	128		
2020	Qtr 1	February	3	5	23		Qtr 3	August	624	117	2021	Qtr 1	March	141	269	269		
2020	Qtr 1	February	4	9	32		Qtr 3	September	1015	218	2021	Qtr 2	April	160	160	429		
2020	Qtr 1	February	5		32		Qtr 4	October	605	60	2021	Qtr 2	May	150	310	579		
2020	Qtr 1	February	6	12	44		Qtr 4	November	1235	184	2021	Qtr 2	June	138	448	717		
2020	Qtr 1	February	7	11	55		Qtr 4	December	1158	299	2021	Qtr 3	July	140	140	857		
Total					38654	1820	Total					38654	482	Total		482	1251	3379

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