



# POWER BI

AN IN-DEPTH UNDERSTANDING

BY

LOKESH LALWANI

Power BI (in-depth Understanding)

# A WORD FROM THE AUTHOR



Great to see that you are reading this.

I have created this E-Book to share my knowledge on one of the most awesome Business intelligence tools i.e. Microsoft Power BI. This will help you kick start your knowledge on this tool. Hope you will enjoy this.

I would appreciate if you can share this further with your connections. Also, if you are looking to use Power BI in your current job role or switching to a Data analytics and visualization career then I would recommend you to learn this tool in-depth.

I would be happy to share my in-depth knowledge with you either through live classes or through a Pre-recorded course. You can simply reach us out at [trainingbylokesh@gmail.com](mailto:trainingbylokesh@gmail.com) or call my team at +91 9899 366 218

Cheers!!

Lokesh Lalwani

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Power BI (in-depth Understanding)

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- 2 Microsoft Power BI ( MSPBI ) introduction
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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

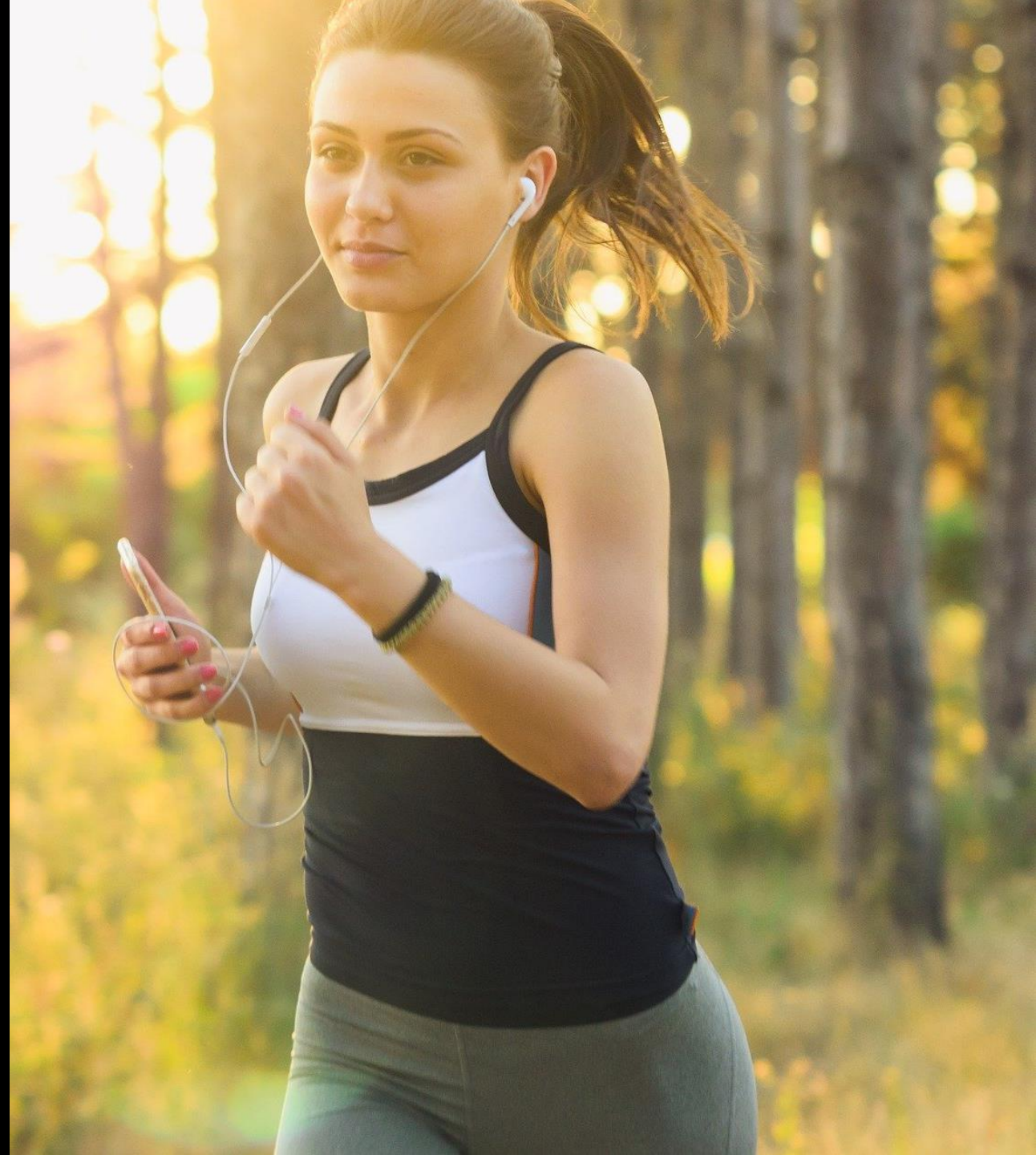
Business Intelligence (BI) is a process of analysing data through technology and presenting it to the end user(s) which help them to make an informed decision. With the use of historical and current data, a BI tool serves predictive view.

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.

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# 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.

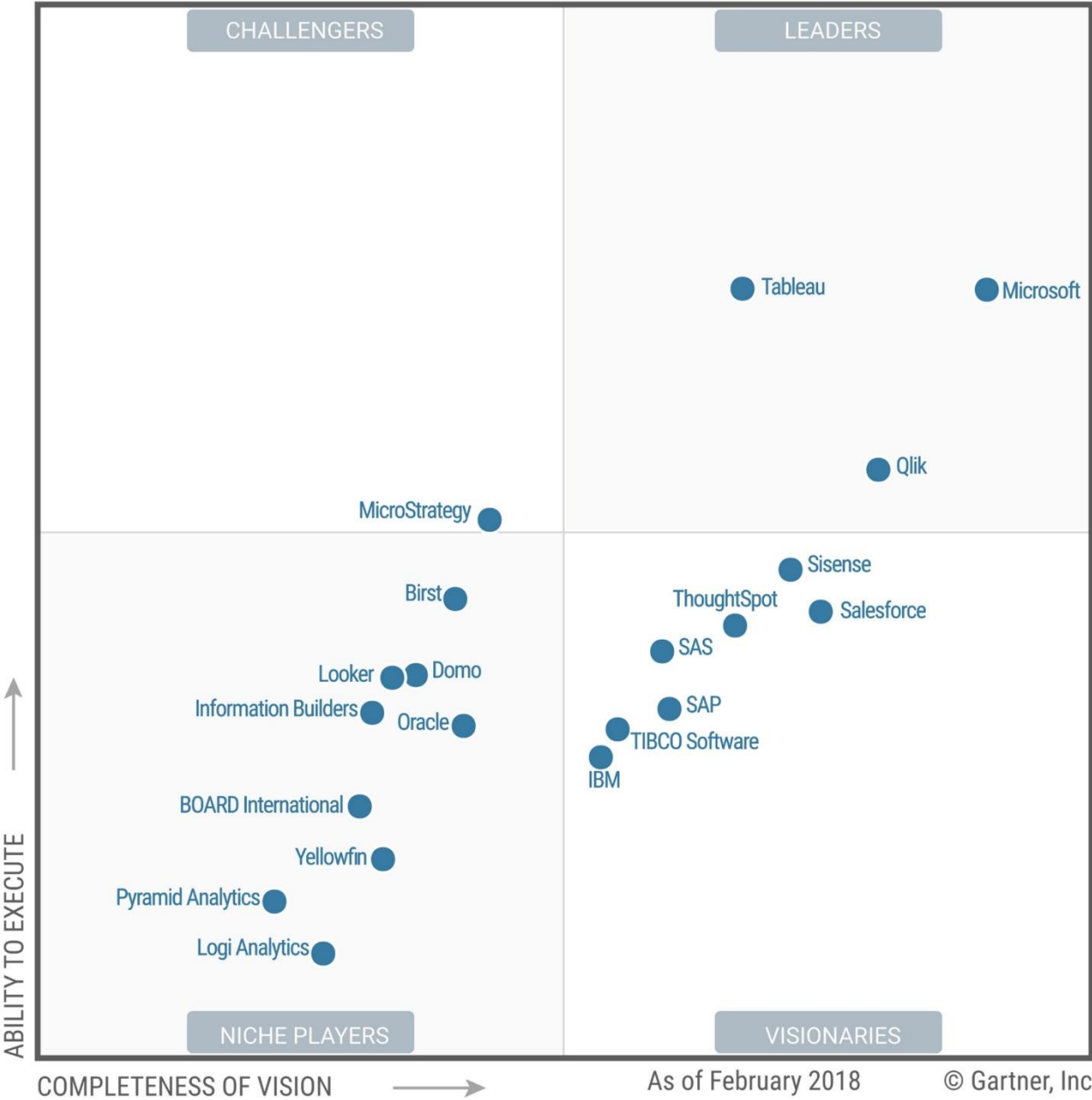
# BI TOOLS

- 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
- Cloutrack

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



Source: Gartner (February 2018)

Power BI (in-depth Understanding)

# 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

## **Power BI mobile apps**

for Windows, iOS, and Android devices

03

02

## **Power BI service**

An online SaaS (Software as a Service) service

04

## **Power BI Report Server**

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

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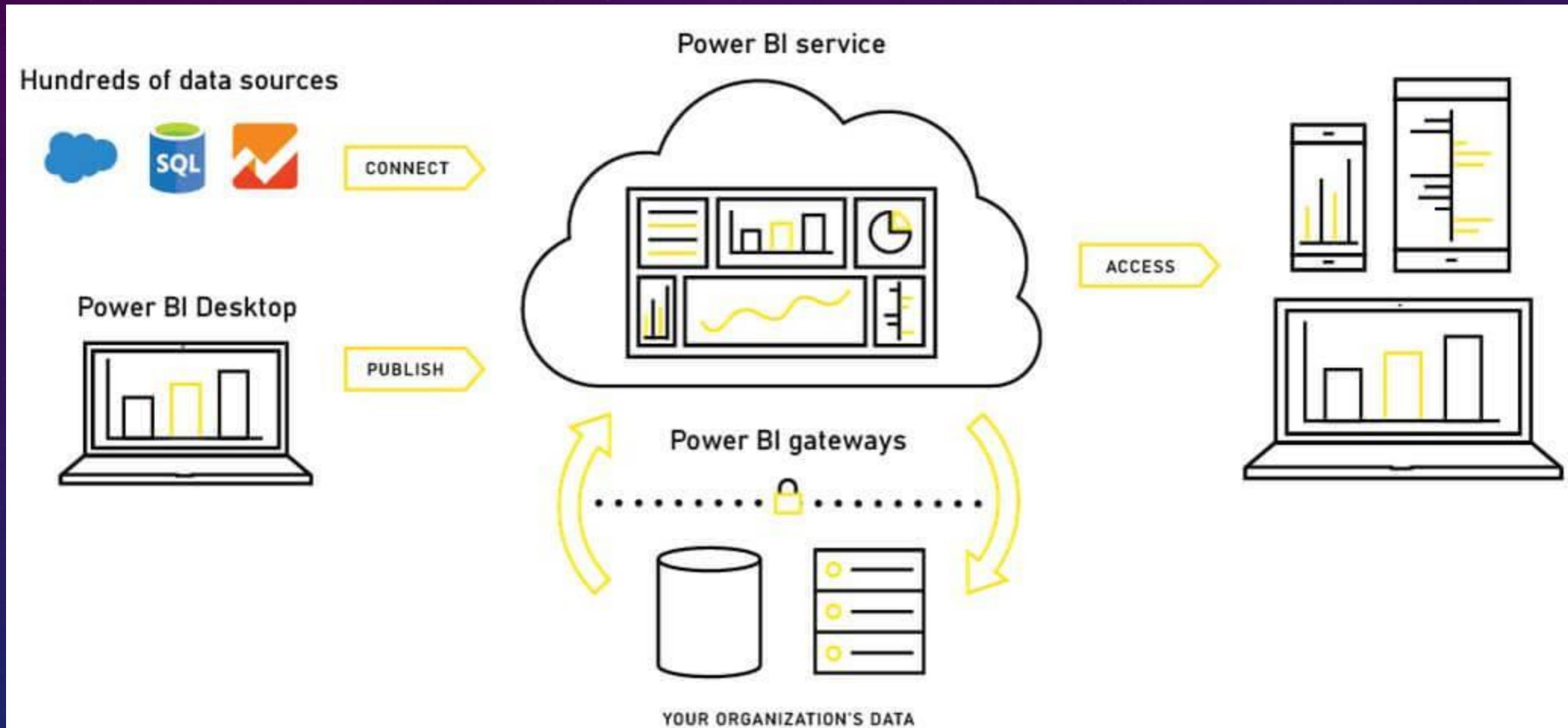
# POWER BI FLOW

## 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 an 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 create impressive visualizations. Even a complex report with diverse visualizations won't take more then 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

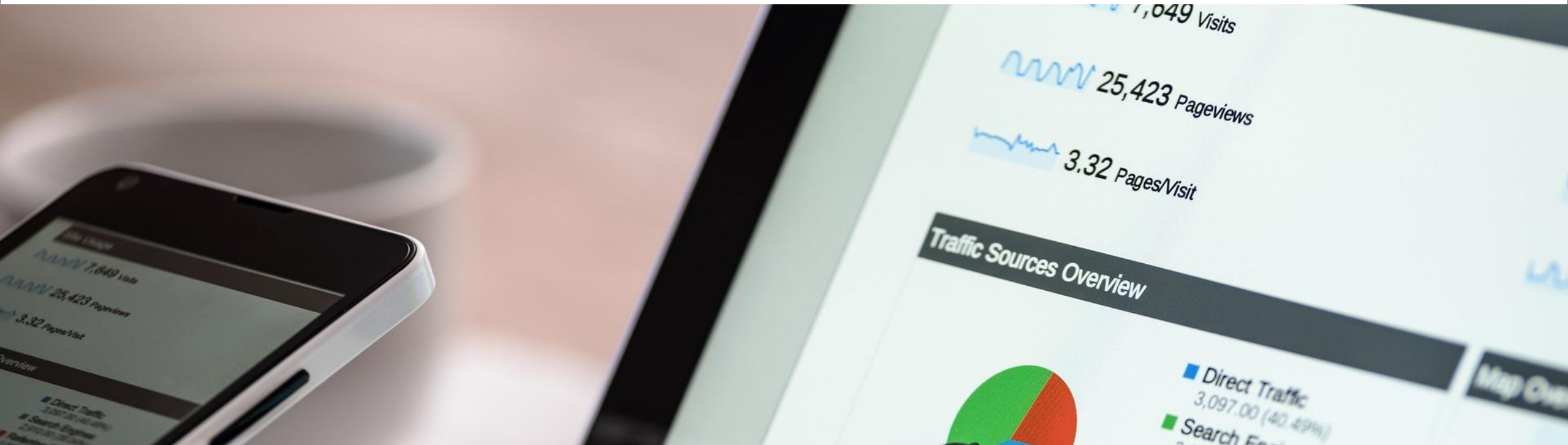
# Project Introduction & Getting Started

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.




## Microsoft Power BI Desktop

*Important!* Selecting a language below will dynamically change the complete page content to that language.

Select Language:  

**Download**

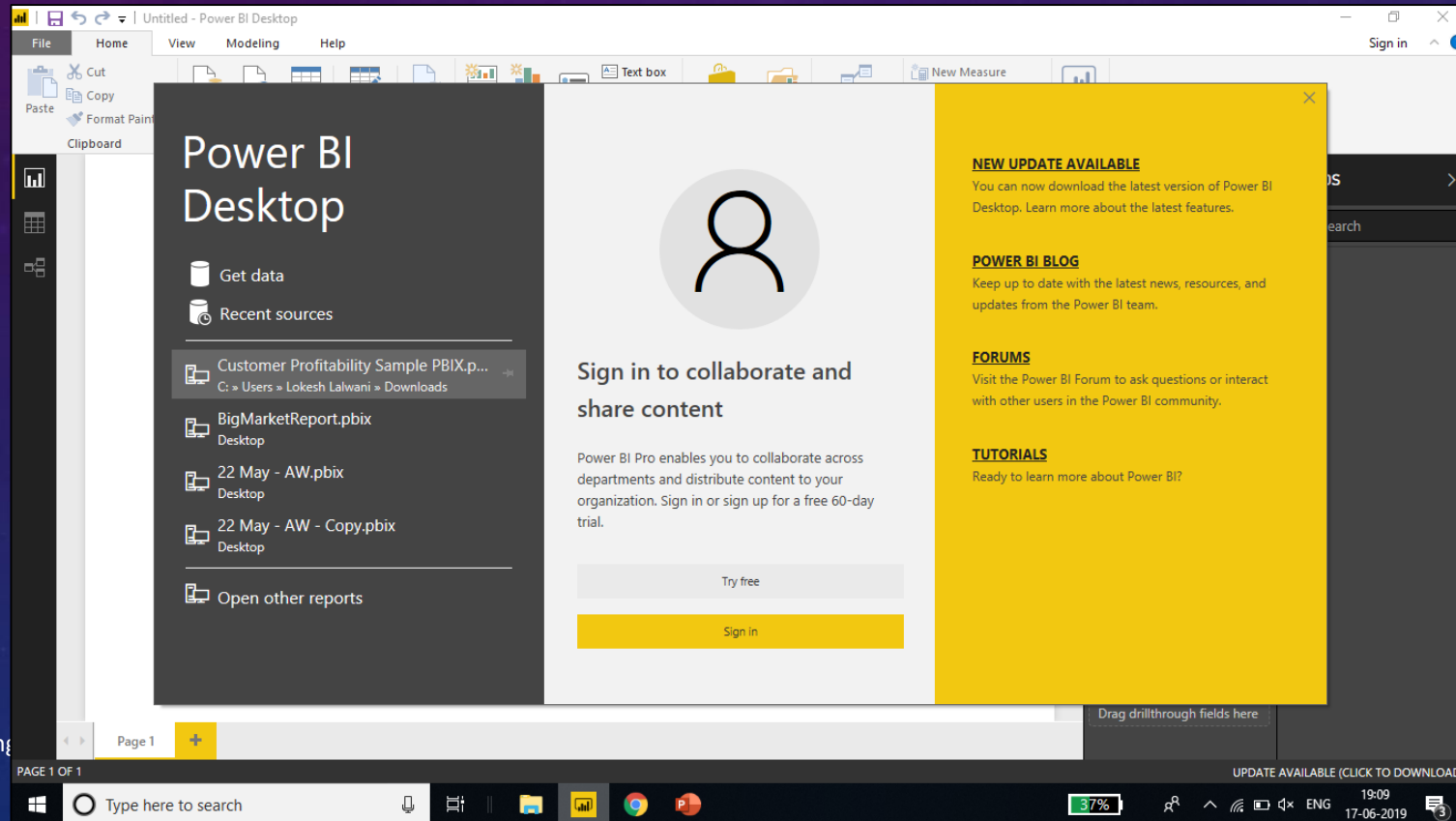
Microsoft Power BI Desktop is built for the analyst. It combines state-of-the-art interactive visualizations, with industry-leading data query and modeling built-in. Create and publish your reports to Power BI. Power BI Desktop helps you empower others with timely critical insights, anytime, anywhere.

-  Details
-  System Requirements
-  Install Instructions

# PBI DESKTOP - FIRST SCREEN

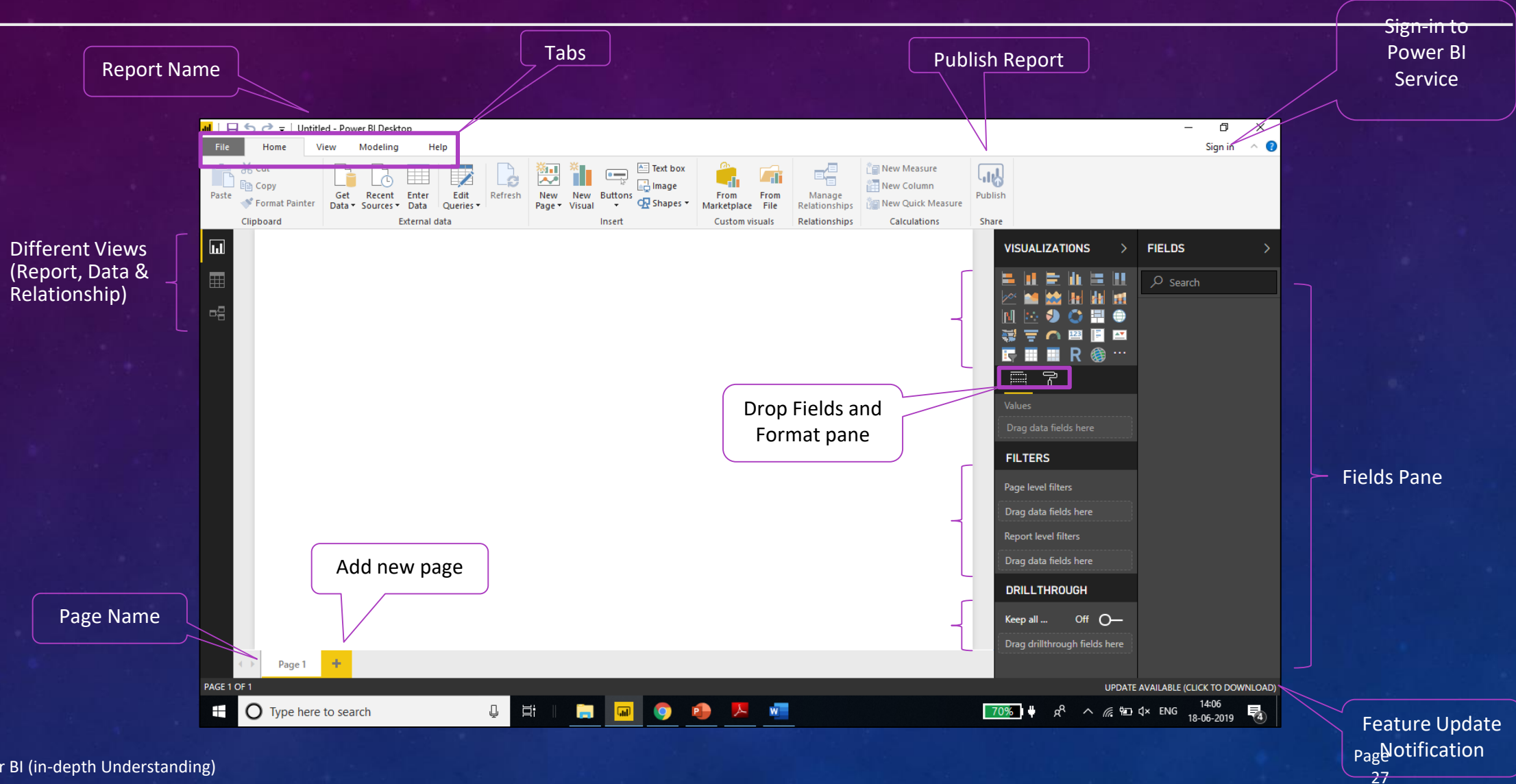
Below is the first screen you will get, once you open PBI desktop. You will be prompted to sign-in but sign-in is required only when it comes to publish the report to PowerBI.com, rest the whole model can be created without sign-in.

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.)

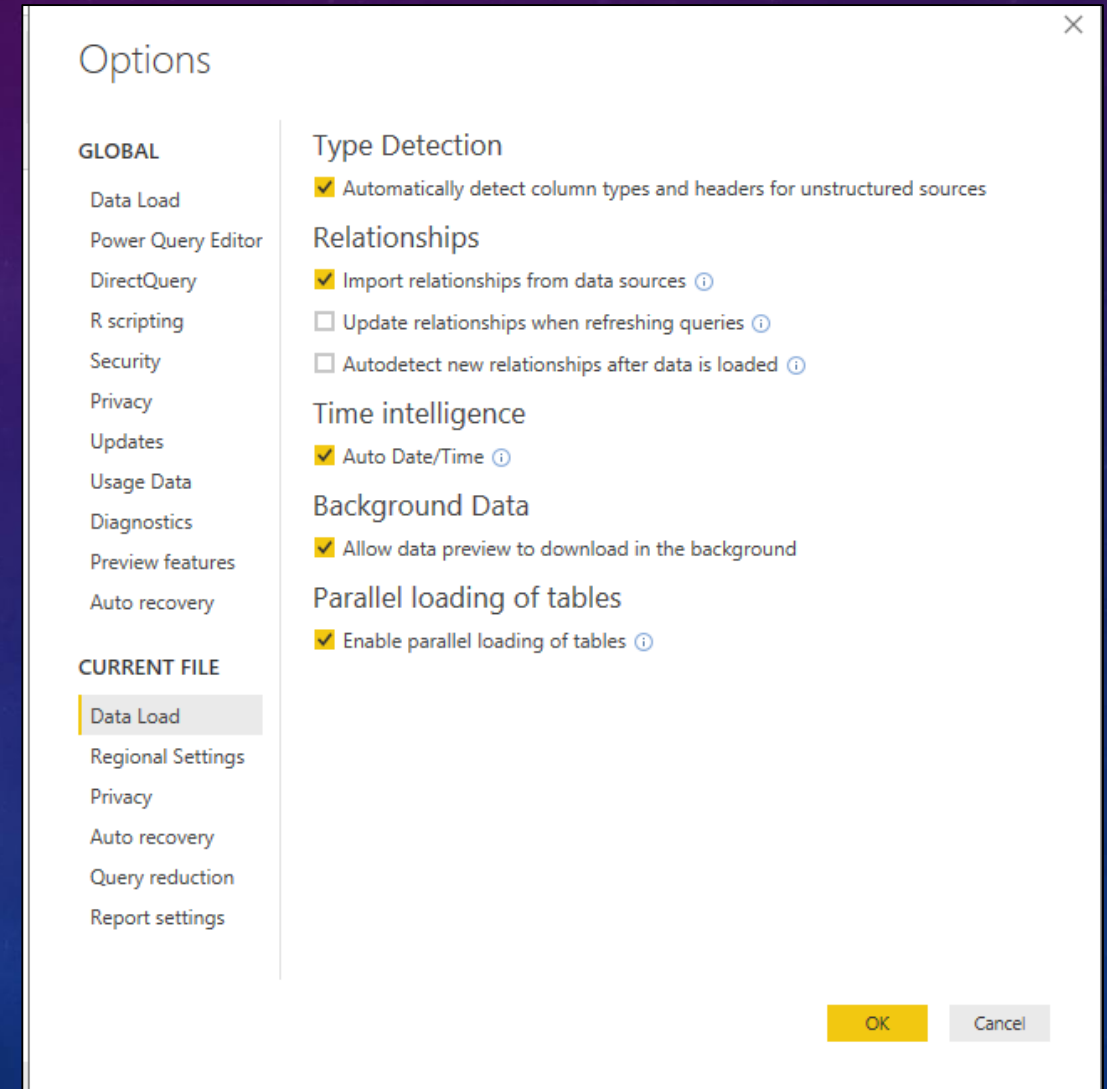
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- Publish Report: This helps in publishing the reported created in Power BI desktop to Power BI Service.
- Sign-In: To publish the report or importing new visualizations, one has to sign into Power BI service.
- Visualization Pane: Here we can choose 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

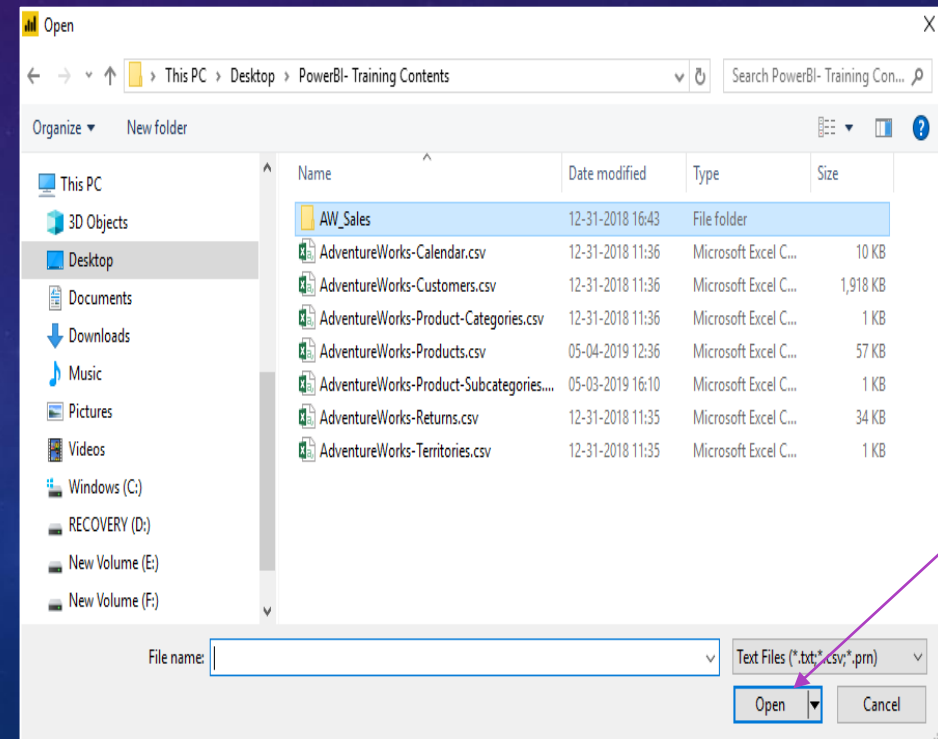
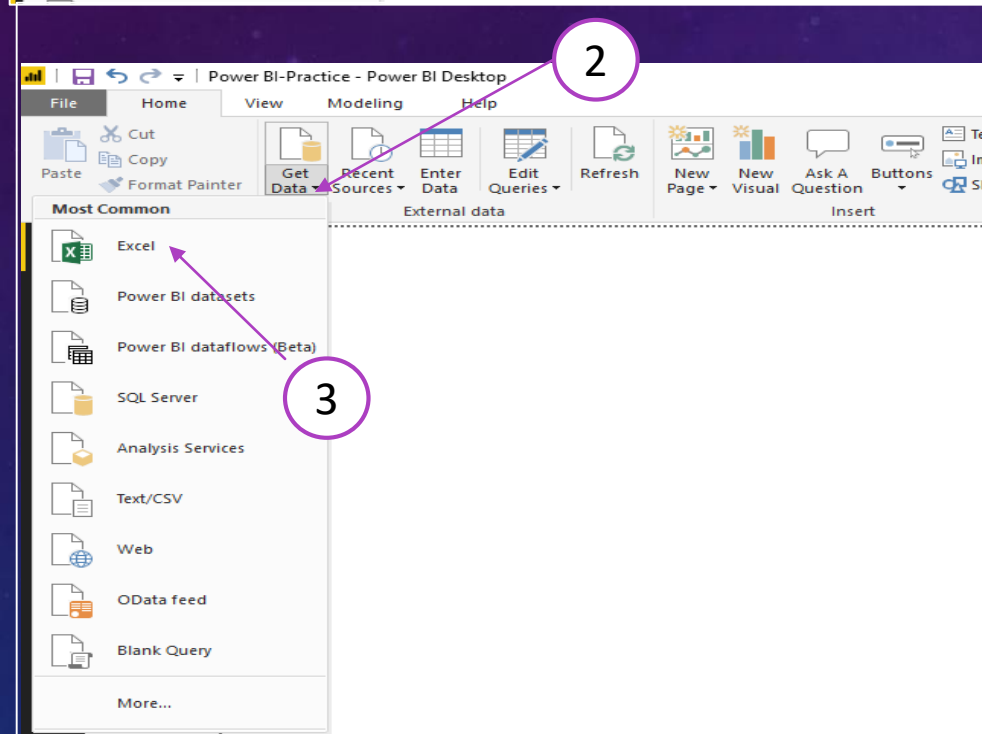
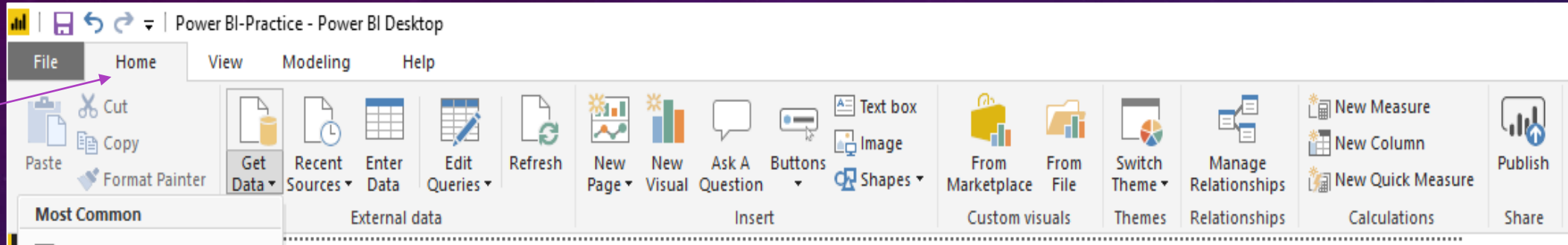
1. **Connect to CSV files**
2. **Connect to Excel**
3. **Connect to text**
4. **Connect to SQL Server**
5. **Connect to a Web page**
6. **Enter data directly**
7. **Analysis Services Tabular data**
8. **Connect to Direct SQL Query**





# 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 with

AdventureWorks-Customers.csv

File Origin: 1252: Western European (Windows) | Delimiter: Comma | Data Type Detection: Based on first 200 rows

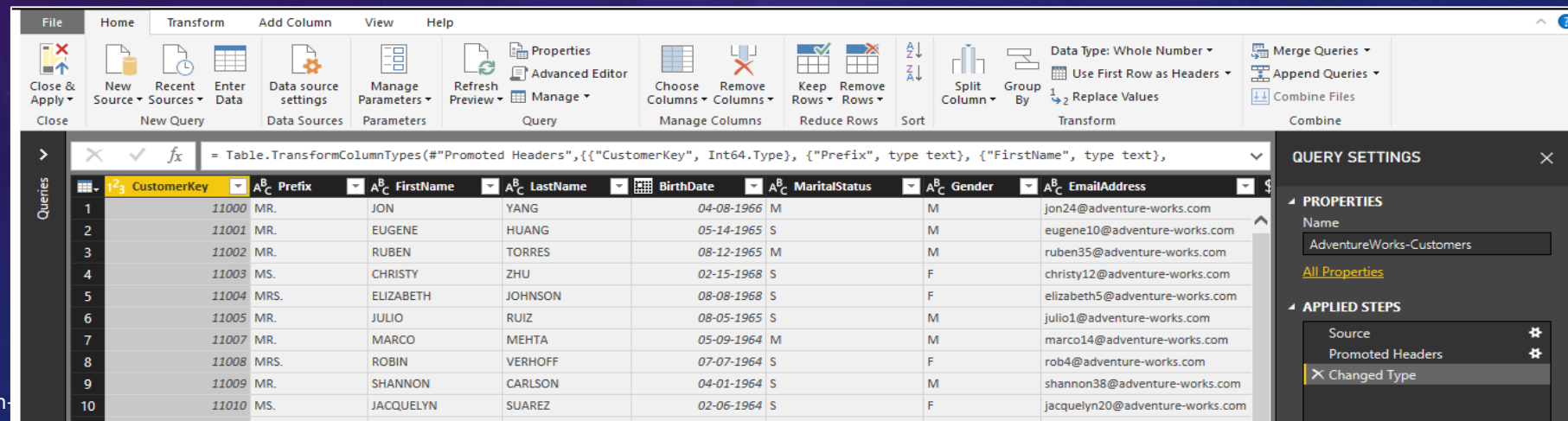
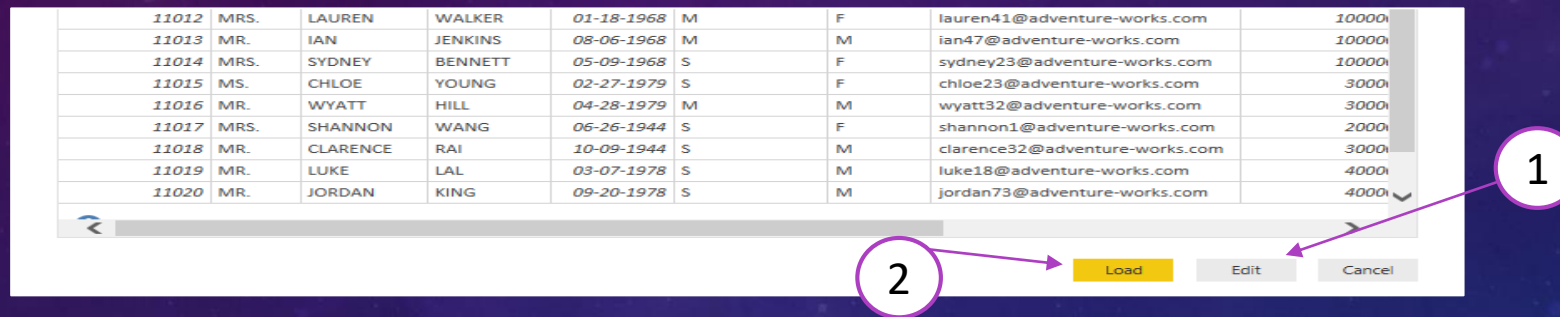
CustomerKey	Prefix	FirstName	LastName	BirthDate	Gender	EmailAddress	AnnualIncome
11000	MR.	JON	ALLEN	01-09-1964	M	jon24@adventure-works.com	9000
11001	MR.	EUGENE	DEW	03-03-1968	M	eugene10@adventure-works.com	6000
11002	MR.	RUBEN	BARBER	05-08-1987	M	ruben35@adventure-works.com	6000
11003	MS.	CHRISTY	NEWBERG	04-10-1963	F	christy12@adventure-works.com	7000
11004	MRS.	ELIZABETH	ROBB	01-20-1959	F	elizabeth5@adventure-works.com	8000
11005	MR.	JULIO	PEREZ	09-16-1990	M	julio1@adventure-works.com	7000
11007	MR.	MARCO	MEHTA	05-09-1964	M	marco14@adventure-works.com	6000
11008	MRS.	ROBIN	VERHOFF	07-07-1964	F	rob4@adventure-works.com	6000
11009	MR.	SHANNON	CARLSON	04-01-1964	M	shannon38@adventure-works.com	7000
11010	MS.	JACQUELYN	SUAREZ	02-06-1964	F	jacquelyn20@adventure-works.com	7000
11011	MR.	CURTIS	LU	11-04-1963	M	curtis9@adventure-works.com	6000
11012	MRS.	LAUREN	WALKER	01-18-1968	F	lauren41@adventure-works.com	10000
11013	MR.	IAN	JENKINS	08-06-1968	M	ian47@adventure-works.com	10000
11014	MRS.	SYDNEY	BENNETT	05-09-1968	F	sydney23@adventure-works.com	10000
11015	MS.	CHLOE	YOUNG	02-27-1979	F	chloe23@adventure-works.com	3000
11016	MR.	WYATT	HILL	04-28-1979	M	wyatt32@adventure-works.com	3000
11017	MRS.	SHANNON	WANG	06-26-1944	F	shannon1@adventure-works.com	2000
11018	MR.	CLARENCE	RAI	10-09-1944	M	clarence32@adventure-works.com	3000
11019	MR.	LUKE	LAL	03-07-1978	M	luke18@adventure-works.com	4000
11020	MR.	JORDAN	KING	09-20-1978	M	jordan73@adventure-works.com	4000

Load Edit Cancel

# 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 rearrange data. Then click on close & Apply. Data will be upload into the PowerBI Desktop.



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

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

The screenshot displays the Microsoft Power BI Desktop interface. The top ribbon includes tabs for File, Home, View, Modeling, and Help. The Home tab is active, showing various toolbars such as Clipboard, External data, Insert, Custom visuals, Themes, Relationships, Calculations, and Share. The main workspace area contains a donut chart titled 'AnnualIncome by Gender' and a data table.

**AnnualIncome by Gender**

The donut chart shows the distribution of annual income by gender. The data is as follows:

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

The donut chart segments are labeled with their respective values: ₹ 6.91M (top), ₹ 509.91M (bottom left), and ₹ 522.5M (bottom right).

**Visualizations**

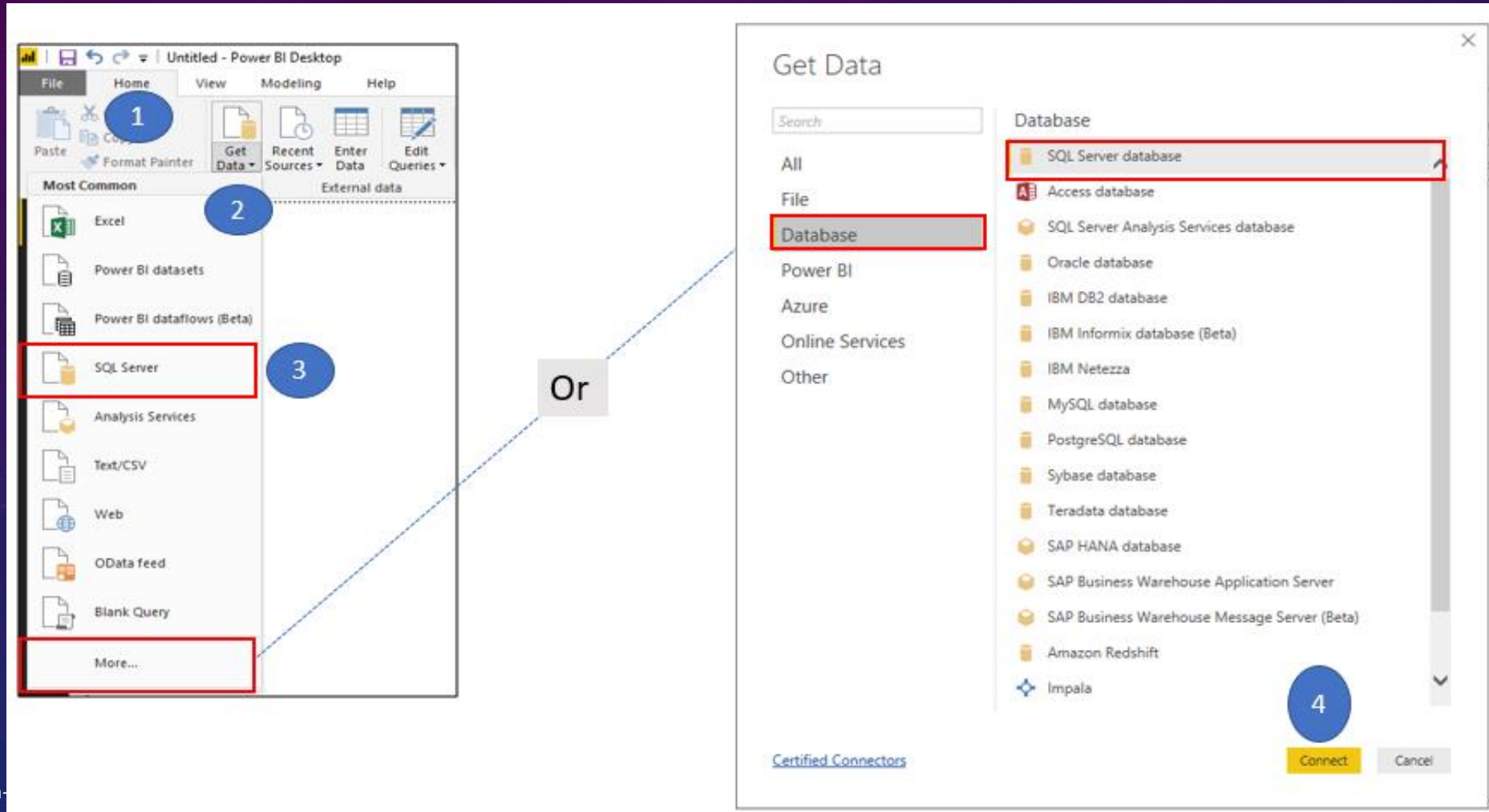
The Visualizations pane on the right shows various chart types. The Fields pane on the right shows the data fields available for the visualization.

**Fields**

AdventureWorks-C...  
AnnualIncome  
BirthDate  
CustomerKey  
EducationLevel  
EmailAddress  
FirstName  
Gender  
HomeOwner  
LastName  
MaritalStatus  
Occupation  
Prefix  
TotalChildren

# CONNECT TO SQL SERVER

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





## CONNECT TO SQL SERVER (CONT.)

- 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

SQL Server database

Server ⓘ

Database (optional)

Data Connectivity mode ⓘ

☒ Import

☐ DirectQuery

▶ Advanced options

OK Cancel

## CONNECT TO SQL SERVER (CONT.)

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

SQL Server database

Windows

Database

Microsoft account

Use your Windows credentials to access this database.

☒ Use my current credentials

☐ Use alternate credentials

User name

Password

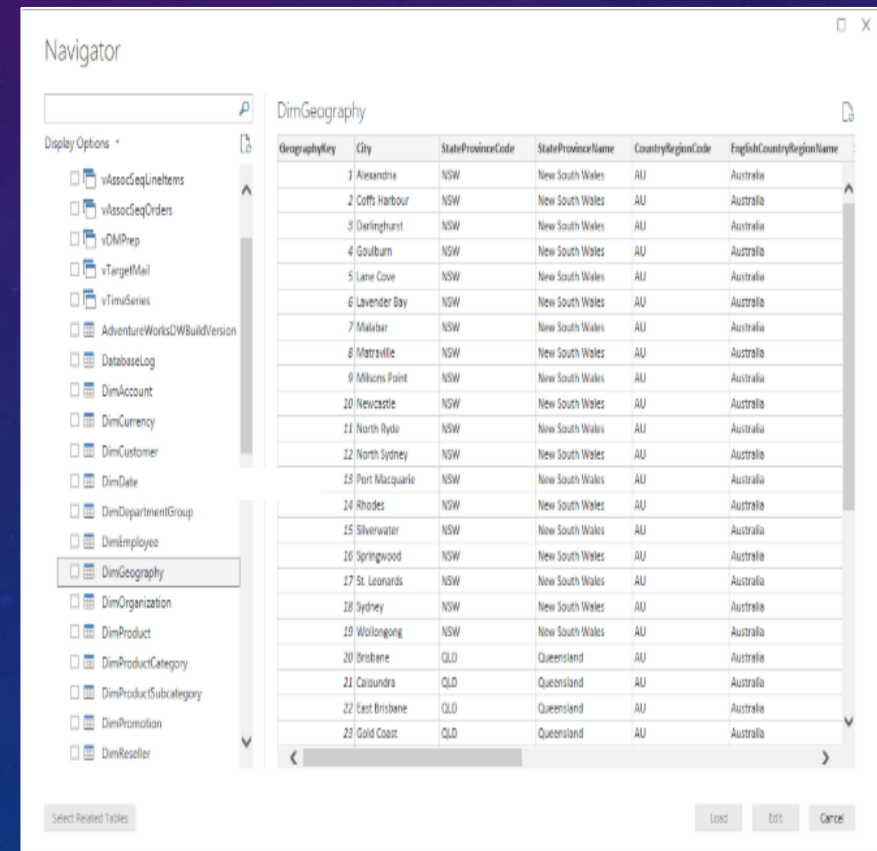
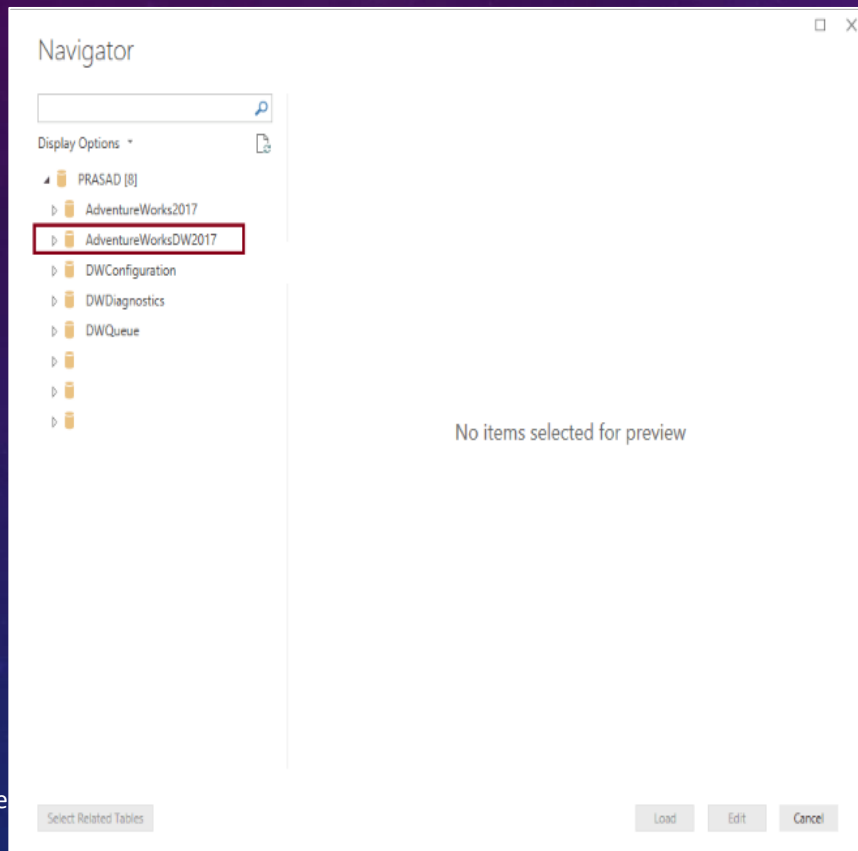
Back

Connect

Cancel

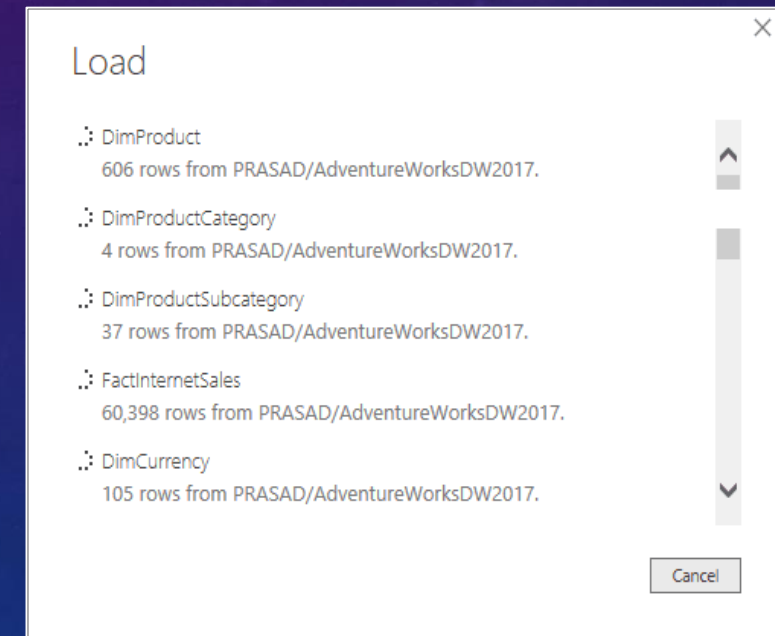
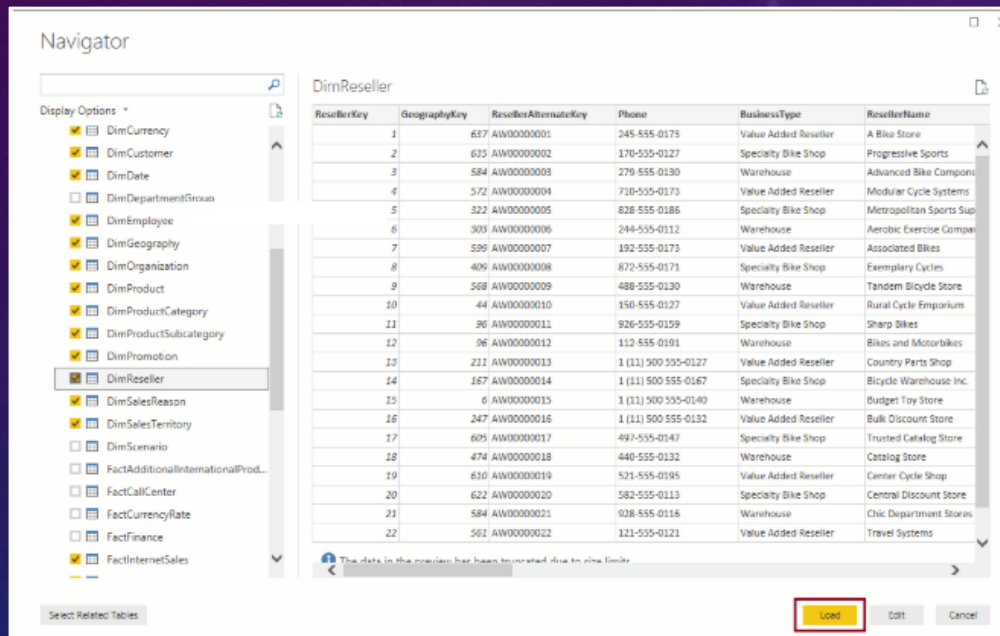
# CONNECT TO SQL SERVER (CONT.)

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.



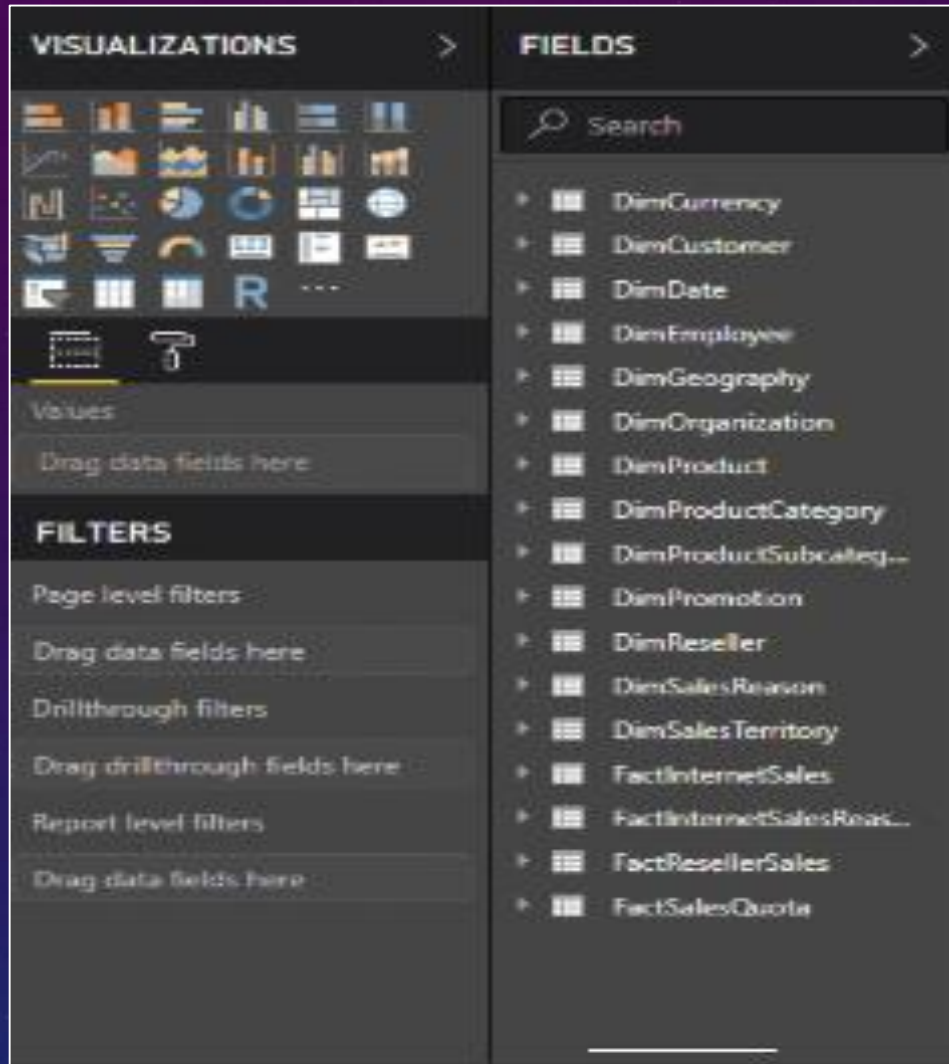
# CONNECT TO SQL SERVER (CONT.)

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





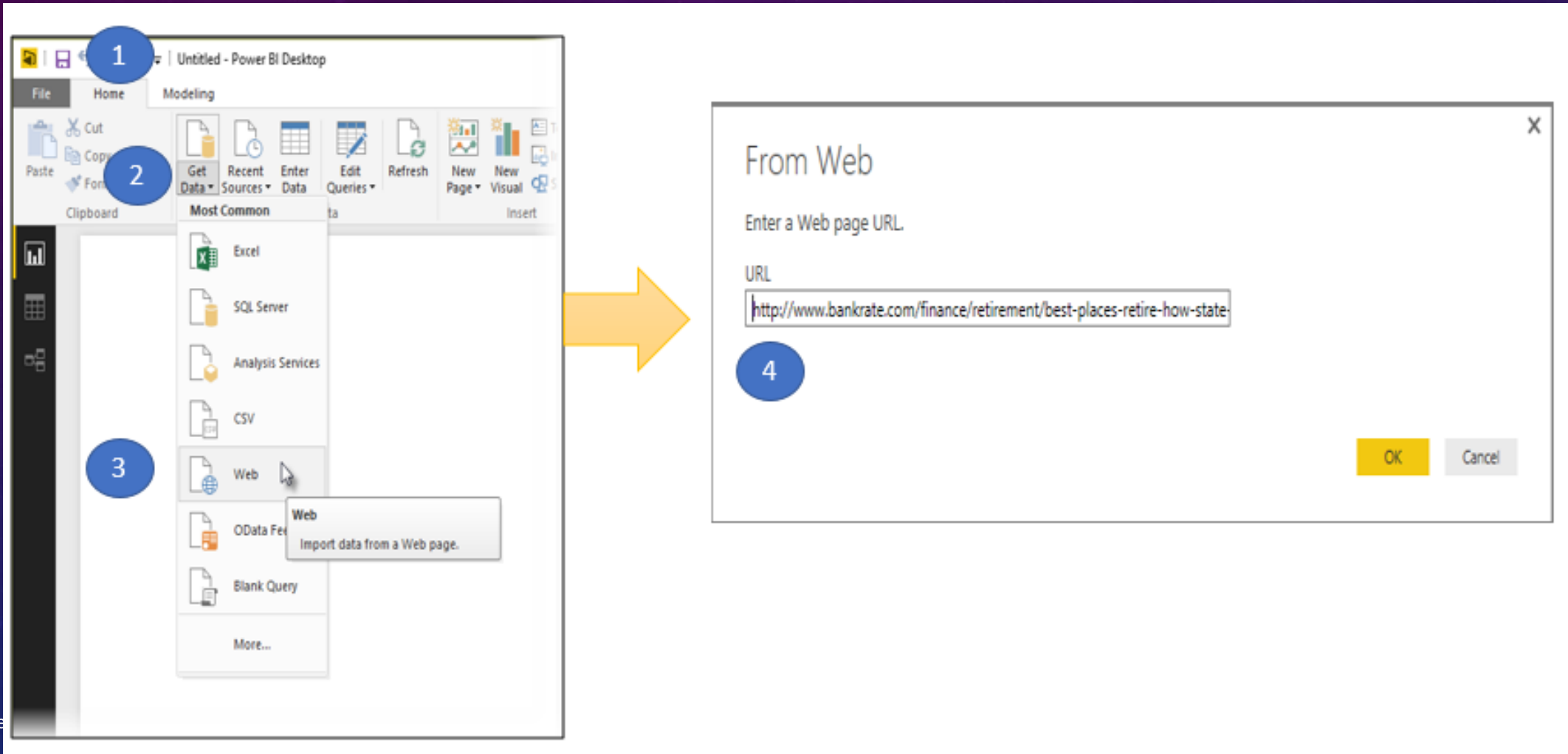
## CONNECT TO SQL SERVER (CONT.)



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

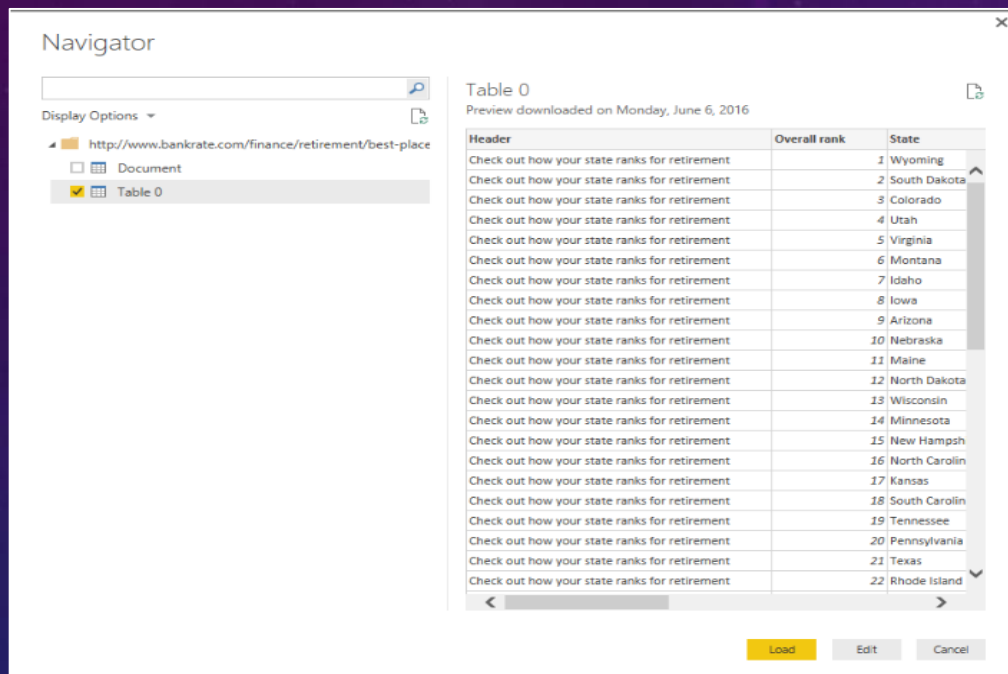
# CONNECT TO A WEB PAGE

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

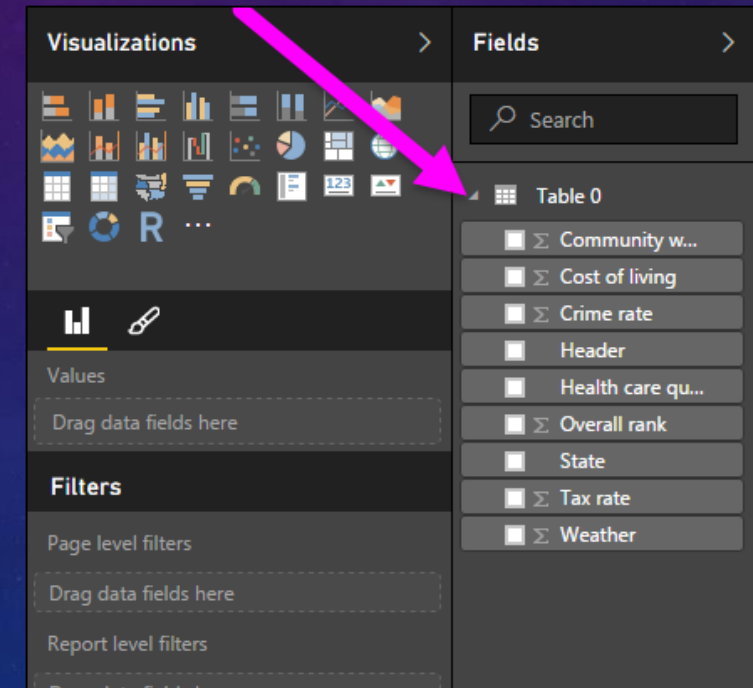


## CONNECT TO A WEB PAGE (CONT.)

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 makes them visible inside the Fields Tab.

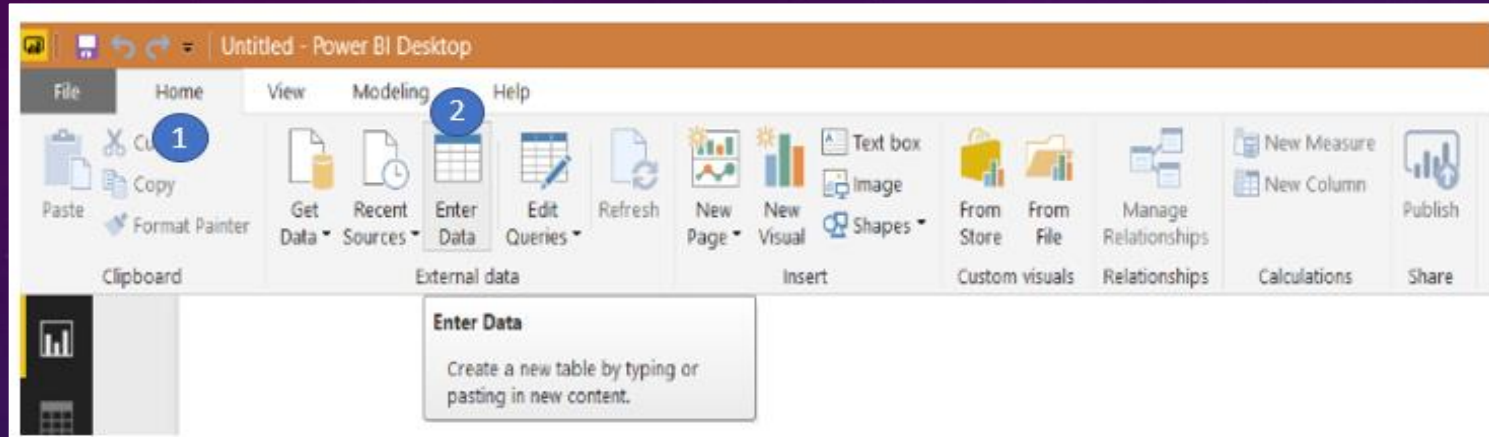


Click Load

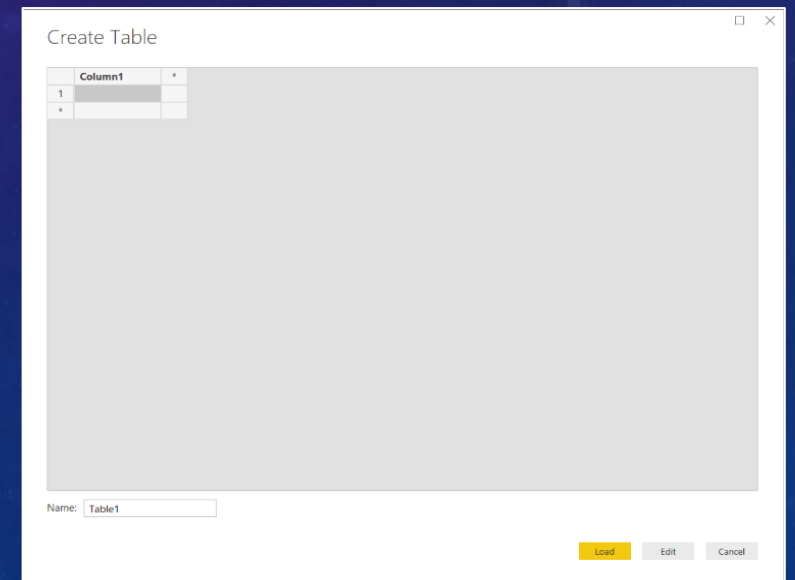


# ENTER DATA DIRECTLY

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

The screenshot shows the 'Create Table' dialog box in Power BI. It features a table with columns 'Name' and 'Age', and a fourth column with an asterisk (\*) for adding new columns. A fifth row with an asterisk (\*) is for adding new rows. Annotations include: 'Enter Column' pointing to the asterisk in the fourth column; 'Enter Row' pointing to the asterisk in the fifth row; 'Enter Table Name' pointing to the 'Name: Customer Data' field; and 'Click load to load data in PBI' pointing to the 'Load' button. The 'Load' button is highlighted in yellow.

	Name	Age	*
1	Any	34	
2	Jack	31	
3	Jhon	20	
4	lynch	25	
*			

Name:

# ENTER DATA DIRECTLY (CONT.)

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

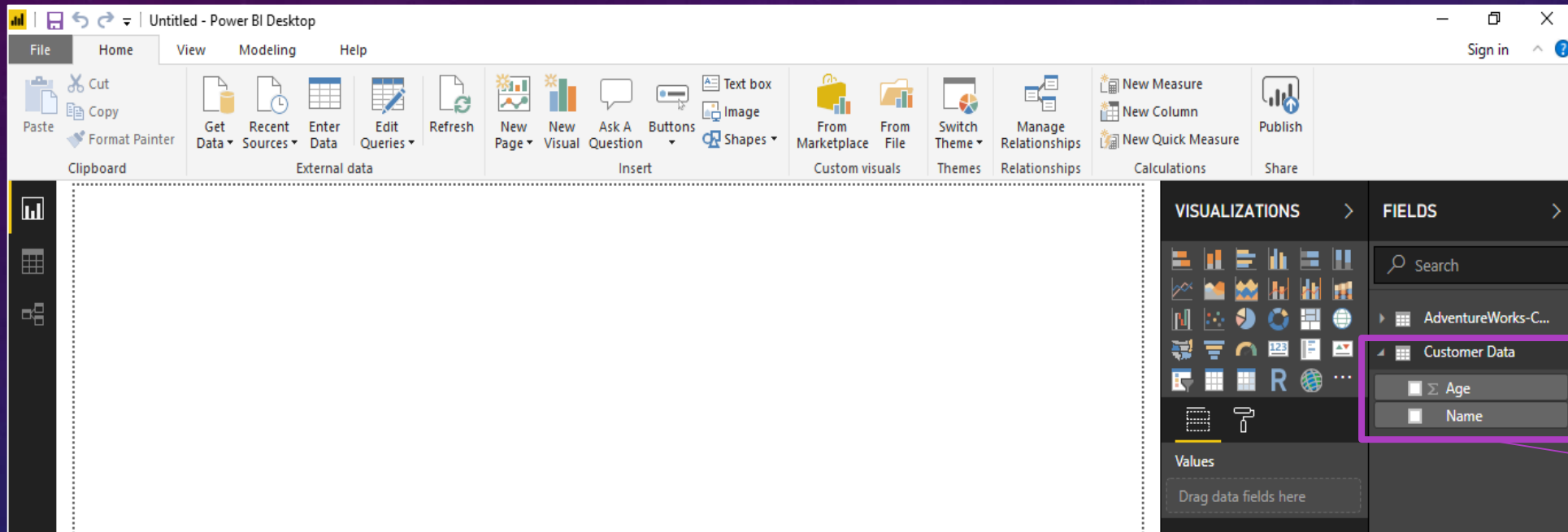


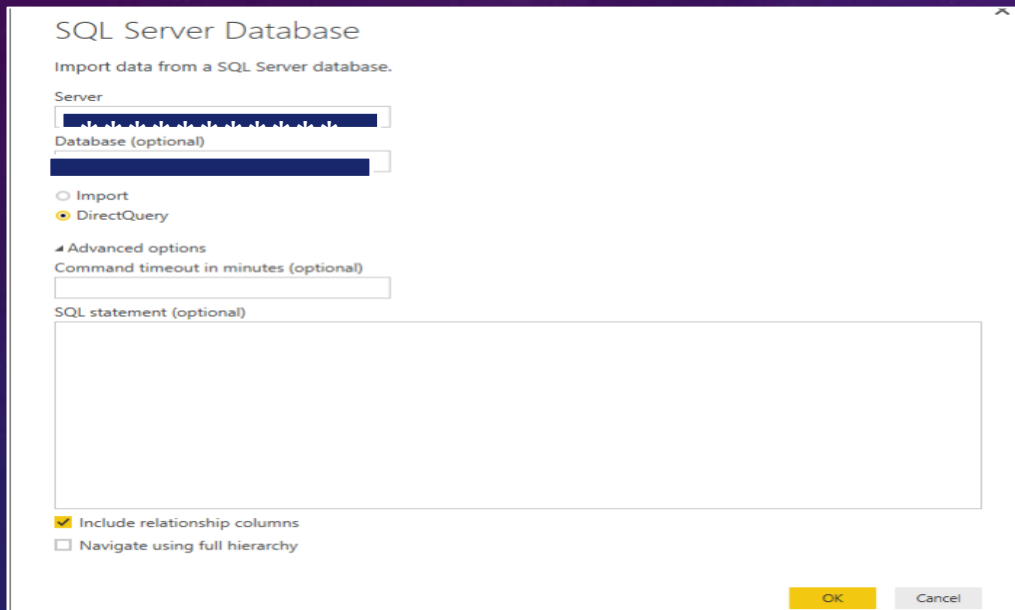
Table & Fields

# 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”.*



SQL Server Database

Import data from a SQL Server database.

Server  
[Redacted]

Database (optional)  
[Redacted]

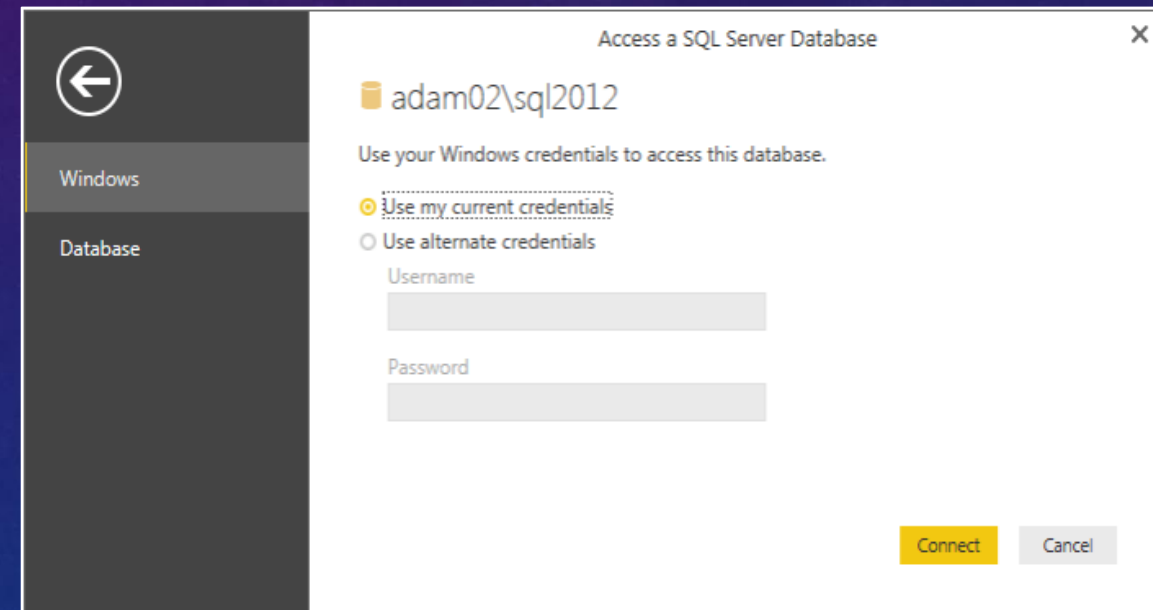
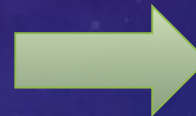
☐ Import  
☒ DirectQuery

Advanced options  
Command timeout in minutes (optional)  
[Redacted]

SQL statement (optional)  
[Redacted]

☒ Include relationship columns  
☐ Navigate using full hierarchy

OK Cancel



Access a SQL Server Database

adam02\sql2012

Use your Windows credentials to access this database.

☒ Use my current credentials  
☐ Use alternate credentials

Username  
[Redacted]

Password  
[Redacted]

Connect Cancel

# 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.

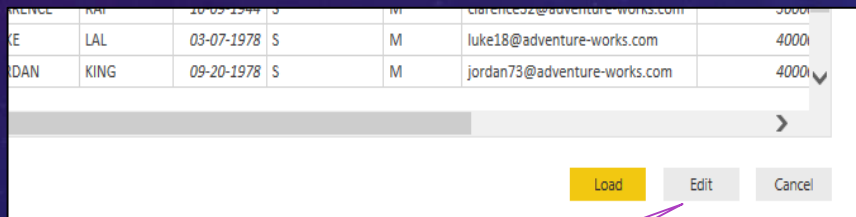
It also facilitates an “Applied Steps” feature, where whatever we do, will get recorded as steps and upon updating the source data, all those steps will get applied to them automatically and this way the creator of the report needs not to repeat the steps.

# 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”

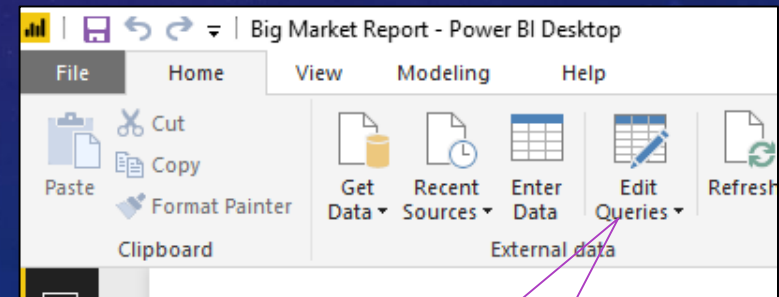
①



Click “Edit”

Power BI (in-depth Understanding)

②



Click “Edit Queries”

# POWER QUERY EDITOR INTERFACE

Tabs

Formula Bar

Close & Apply

Queries Pane

Table Name

Applied Steps

The screenshot displays the Power Query Editor interface. At the top is a ribbon with tabs: File, Home, Transform, Add Column, View, and Help. The Home tab is active, showing various data manipulation options. Below the ribbon is the formula bar, which contains the M code: `= Table.TransformColumnTypes(#"Expanded Table Column1",{{"transaction_date", type date}, {"stock_date",`. To the left of the main data area is the Queries pane, which lists several queries, including 'Transactions'. The main area shows a table with 6 columns and 24 rows of data. To the right is the Query Settings pane, which includes a 'Table Name' field set to 'Transactions' and a list of 'Applied Steps' such as 'Source', 'Removed Other Columns', 'Filtered Hidden Files1', 'Invoke Custom Function1', 'Removed Other Columns1', 'Expanded Table Column1', and 'Changed Type'.

	transaction_date	stock_date	product_id	customer_id	store_id	quantity
1	01-01-1997	12/31/1996	869	3449	6	5
2	01-01-1997	12/31/1996	1472	3449	6	3
3	01-01-1997	12/28/1996	76	3449	6	4
4	01-01-1997	12/26/1996	320	3449	6	3
5	01-01-1997	12/25/1996	4	3449	6	4
6	01-01-1997	12/30/1996	952	3449	6	4
7	01-01-1997	12/31/1996	1222	3449	6	4
8	01-01-1997	12/30/1996	517	7859	6	4
9	01-01-1997	12/27/1996	1359	7859	6	4
10	01-01-1997	12/31/1996	357	106	6	4
11	01-01-1997	12/27/1996	1426	106	6	5
12	01-01-1997	12/26/1996	190	106	6	4
13	01-01-1997	12/28/1996	367	106	6	4
14	01-01-1997	12/29/1996	250	106	6	5
15	01-01-1997	12/26/1996	600	106	6	4
16	01-01-1997	12/29/1996	702	8248	6	5
17	01-01-1997	12/27/1996	786	8248	6	3
18	01-01-1997	12/30/1996	536	8248	6	4
19	01-01-1997	12/27/1996	1285	8248	6	4
20	01-01-1997	12/29/1996	596	8248	6	3
21	01-01-1997	12/27/1996	846	1906	6	2
22	01-01-1997	12/31/1996	769	1906	6	4
23	01-01-1997	12/26/1996	586	1906	6	3
24	01-01-1997	12/28/1996	1135	1906	6	3

6 COLUMNS, 999+ ROWS

PREVIEW DOWNLOADED AT 18:03



## POWER QUERY EDITOR INTERFACE (CONT.)

---

- 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.)

---

- **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 Desktop interface with the 'Transform' ribbon selected. The ribbon includes options like 'Close & Apply', 'New Source', 'Recent Sources', 'Enter Data', 'Data source settings', 'Manage Parameters', 'Refresh Preview', 'Properties', 'Advanced Editor', 'Manage', 'Choose Columns', 'Remove Columns', 'Keep Rows', 'Remove Rows', 'Sort', 'Split Column', and 'Group By'. The 'Data Type' dropdown menu is open, showing options: Decimal Number, Fixed decimal number, Whole Number, Percentage, Date/Time, Date, Time, Date/Time/Timezone, Duration, Text, True/False, and Binary. The data table below shows columns: CustomerKey, Prefix, FirstName, LastName, BirthDate, and Ma. The 'Queries [1]' pane on the left shows 'AdventureWorks-Customers'. The 'QUERY SETTINGS' pane on the right shows 'PROPERTIES' and 'APPLIED STEPS'.

	CustomerKey	Prefix	FirstName	LastName	BirthDate	Ma
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	S
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.

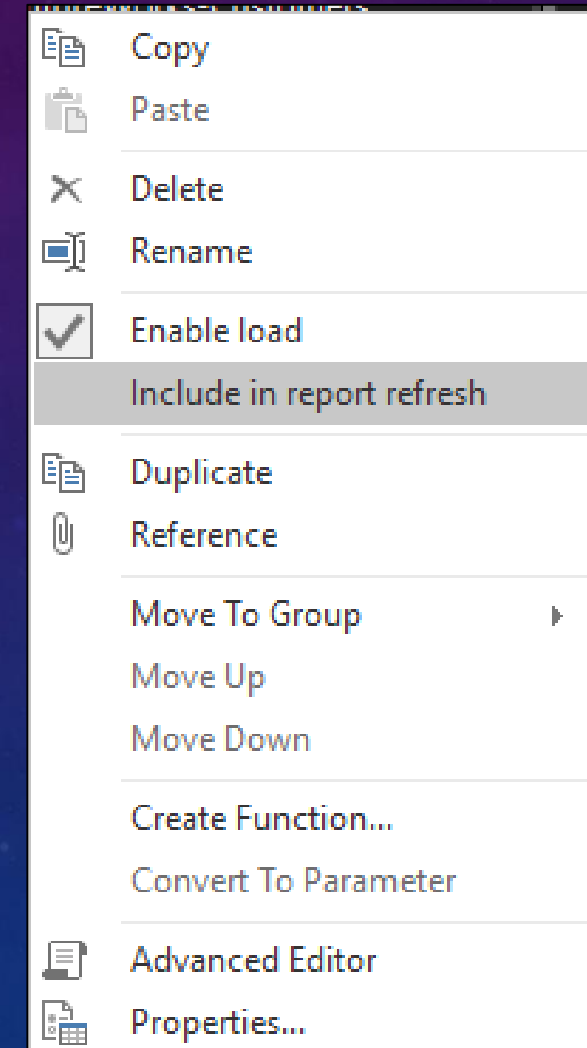
## Append Queries

- 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

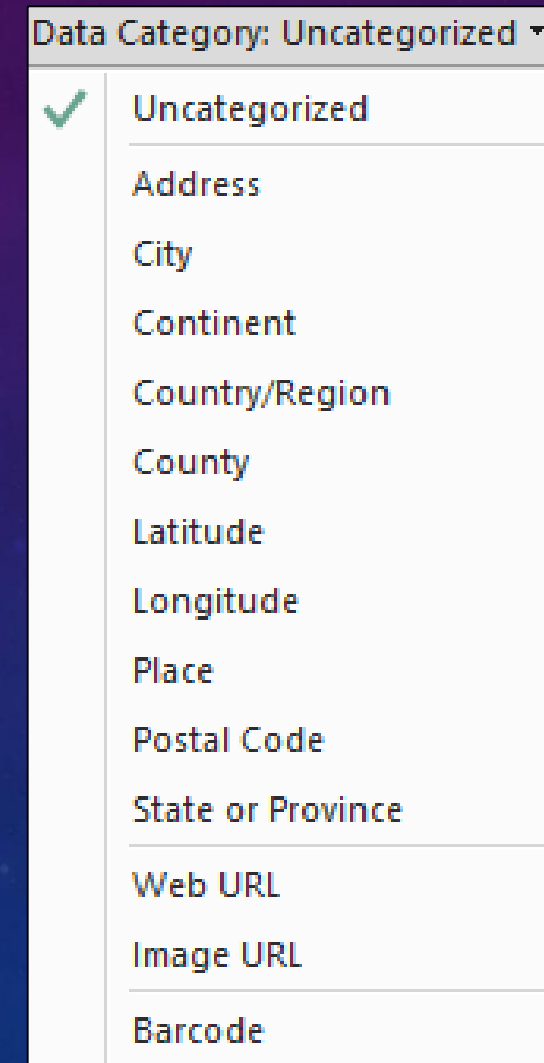
- Once we click the “Refresh” command from the home tab in Power BI desktop window, it will refresh all the queries present in Query editor. But queries which won’t change often like lookup table (e.g. Product table, Territory Table etc.), we can set it to exclude from refresh by right clicking on the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



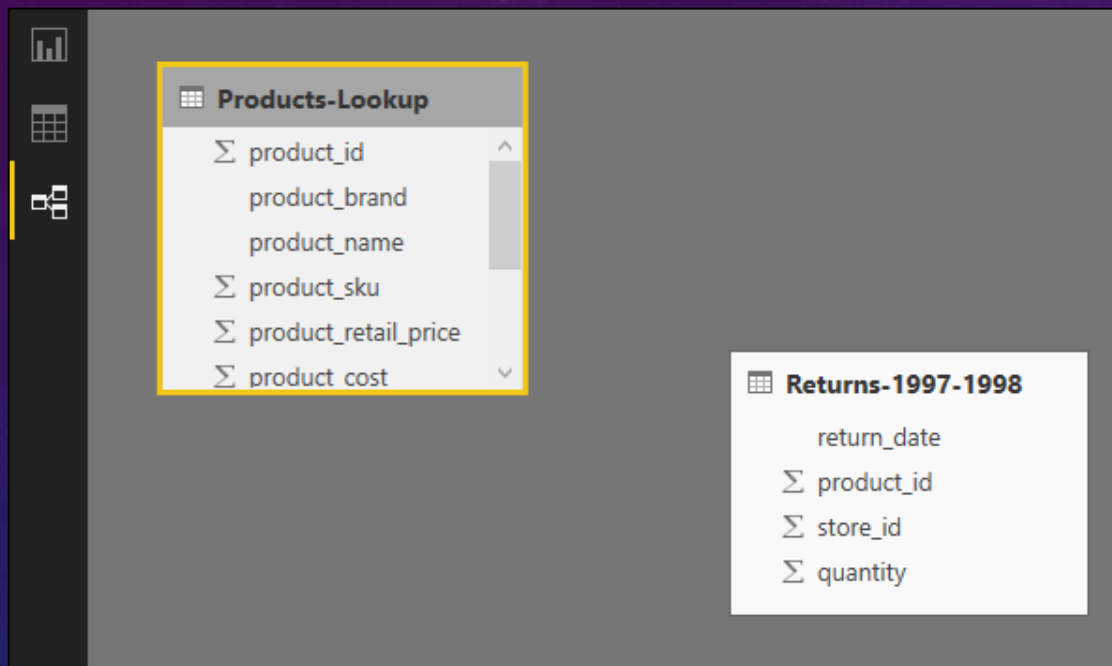


# DATA MODEL

- 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.

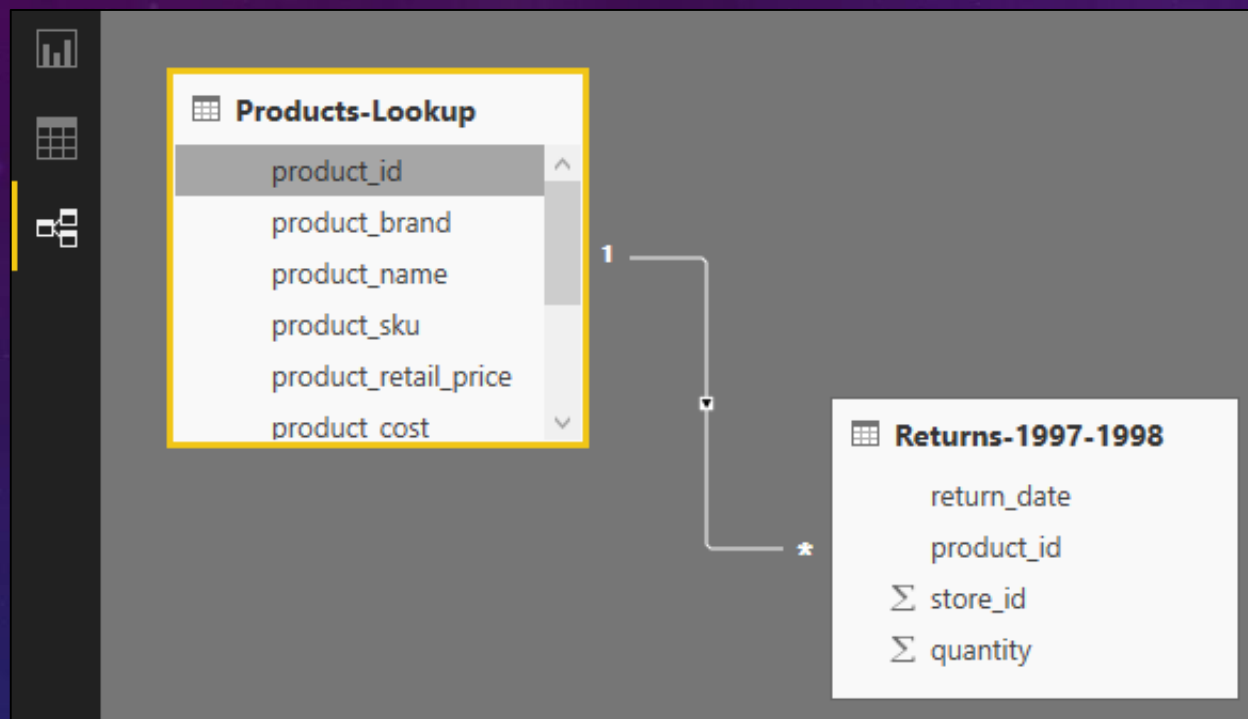


The screenshot shows a report view with a table containing two columns: product\_id and quantity. The table lists 13 rows of data, each with a product\_id and a quantity of 8289. A 'Total' row at the bottom also shows a quantity of 8289.

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 interface with a table displaying the following data:

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
<b>Total</b>	<b>8289</b>

# BUILDING RELATIONSHIPS

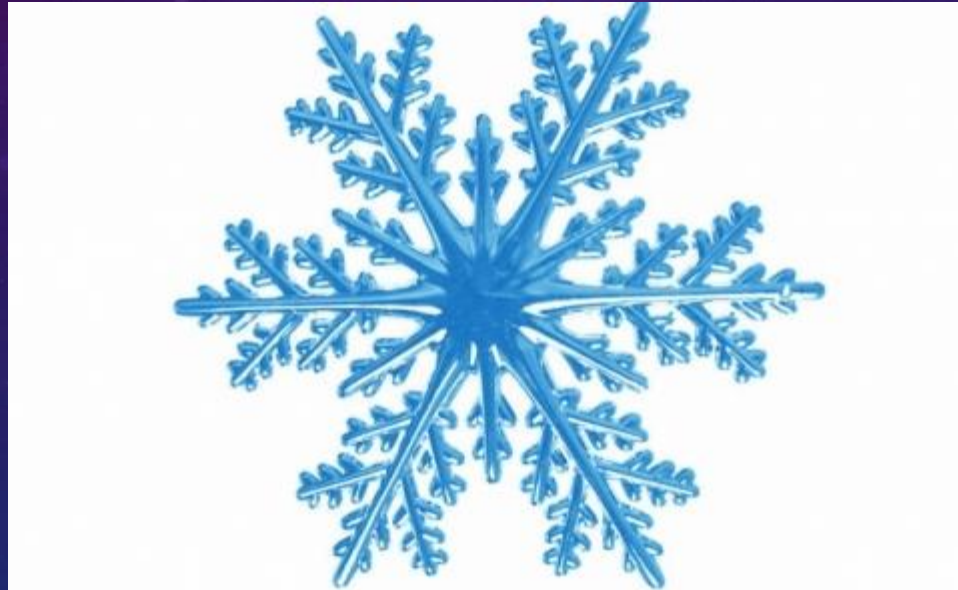
- This can be done by either picking up common keys and dropping them on related table or by using “Manage Relationship” option.



# 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.

×

Edit relationship

Select tables and columns that are related.

Returns-1997-1998

return_date	product_id	store_id	quantity
01-07-1997	310	13	1
01-07-1997	418	13	1
01-07-1997	599	13	1

Products-Lookup

product_id	product_brand	product_name	product_sku	product_retail_price	product_cost	prod
4	Washington	Washington Cream Soda	64412155747	3.64	1.64	
5	Washington	Washington Diet Soda	85561191439	2.19	0.77	
7	Washington	Washington Diet Cola	20191444754	2.61	0.91	

Cardinality

Many to one (\*:1)

Cross filter direction

Single

☒ Make this relationship active

☐ Assume referential integrity

☐ Apply security filter in both directions

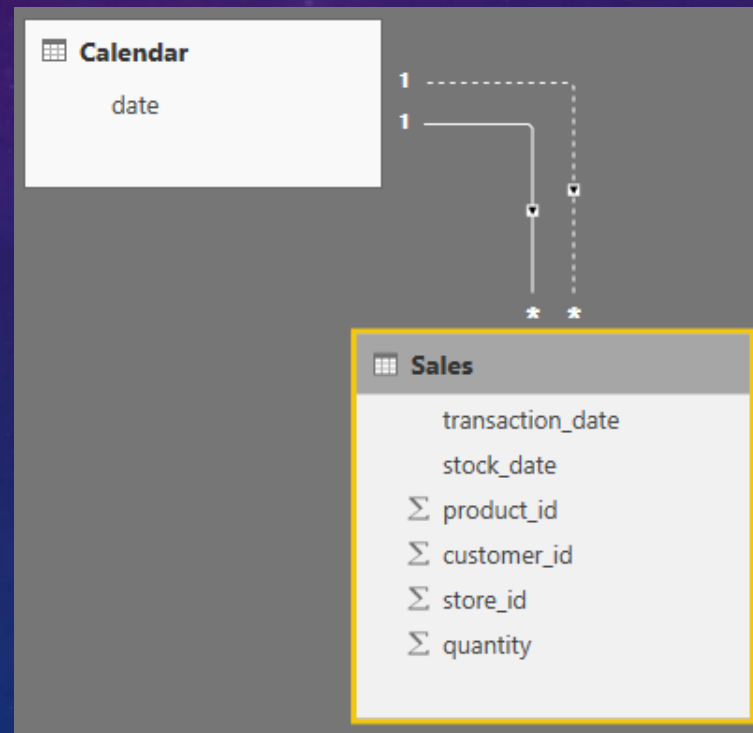
OK

Cancel

# 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

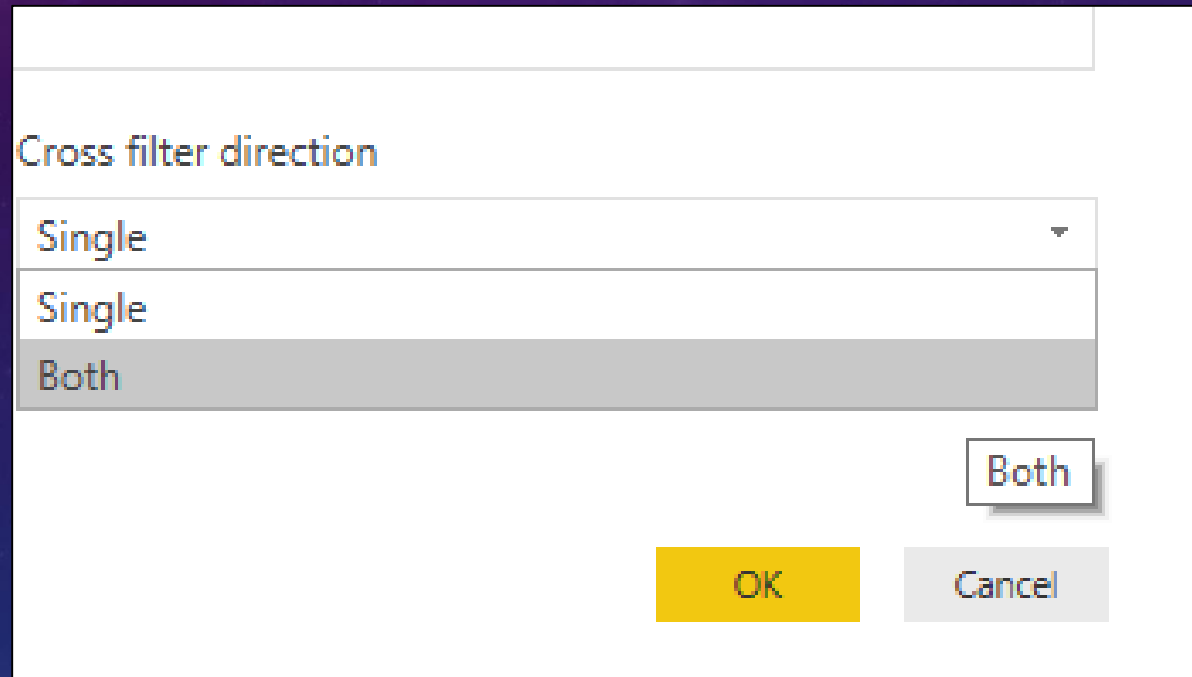
- Filter flow passes downstream from lookup tables to data tables

## 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.

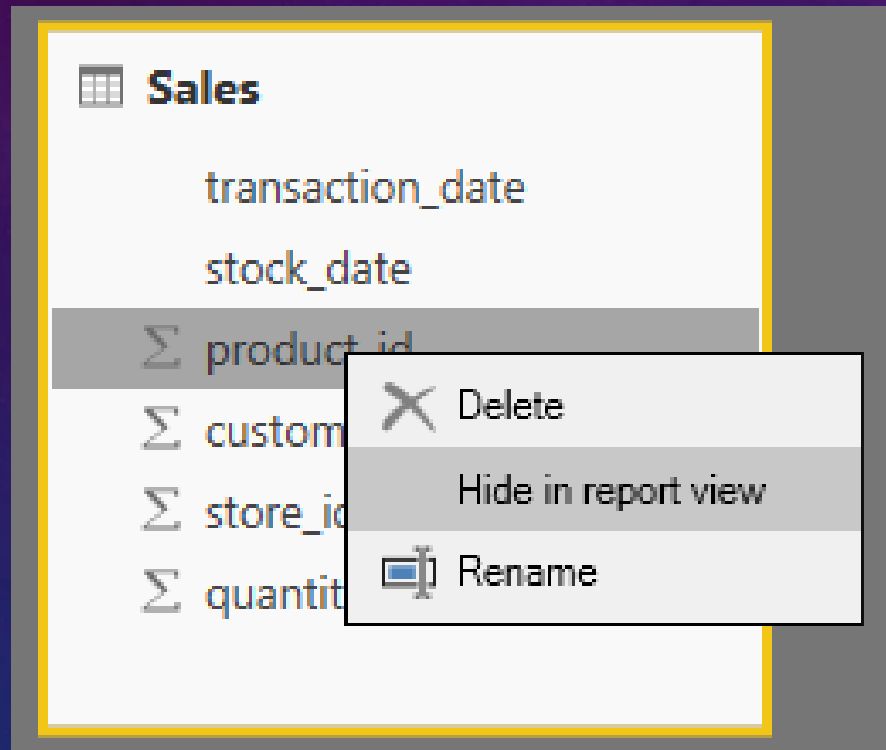
Note: This can be dangerous to have both way filter when we have more then one Data table in the model.



# HIDING FOREIGN KEYS

---

Its 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 create 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 has 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
+	Addition
-	Subtraction or sign
*	Multiplication
/	Division
^	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
- ENDOFMONTH
- 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
- ISNONTTEXT
- 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
- AVERAGEX
- 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.EXC
- ▶ PERCENTILEX.INC
- ▶ PERMUT
- ▶ POISSON.DIST
- ▶ RANK.EQ
- ▶ RANKX
- ▶ ROW
- ▶ SAMPLE
- ▶ SELECTCOLUMNS
- ▶ 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**

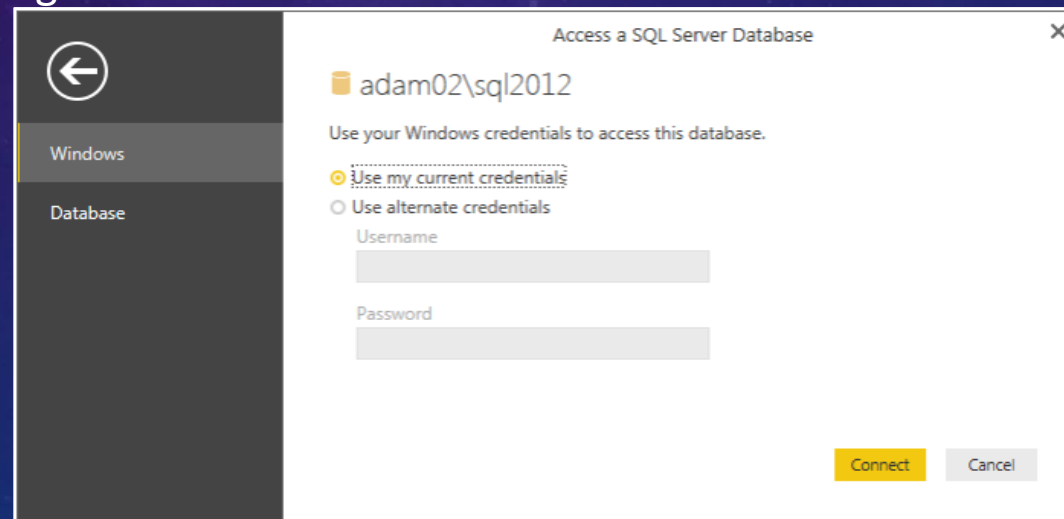
**Rename a report page in Power**



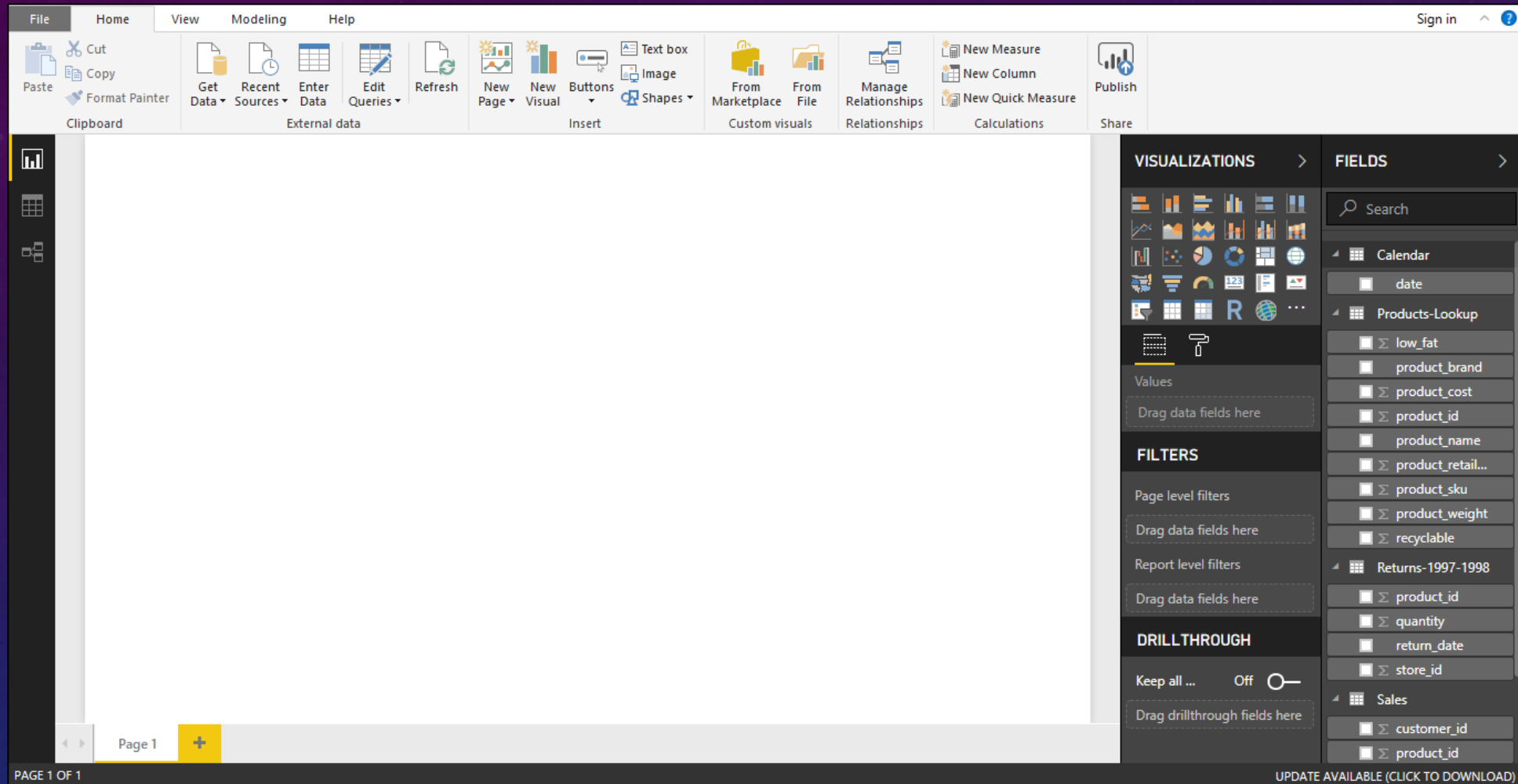
# CONNECT TO DIRECT SQL QUERY IN DESKTOP

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.



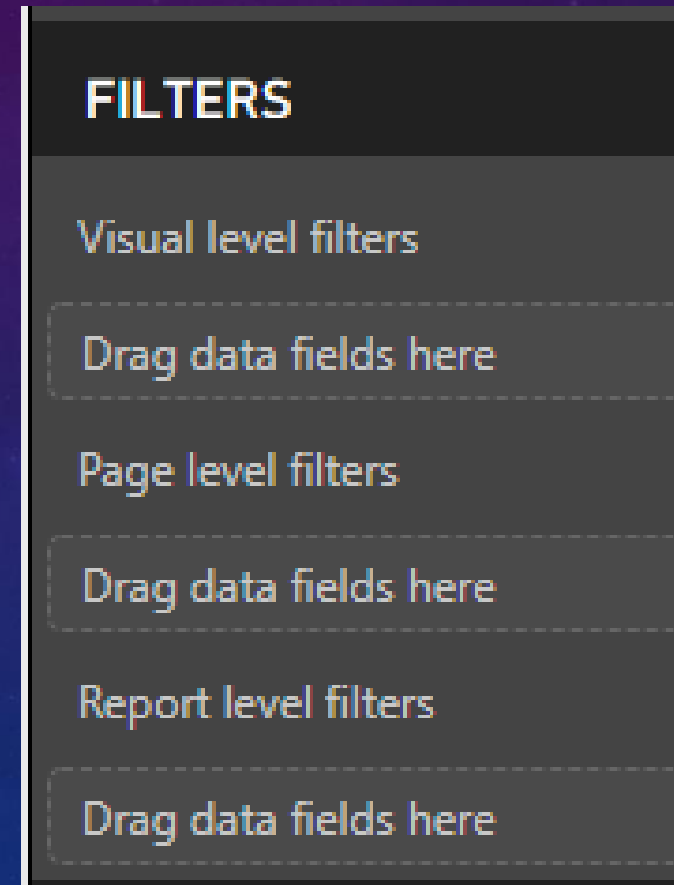
# REPORT VIEW (INTERFACE)



# POWER BI DESKTOP FILTERS

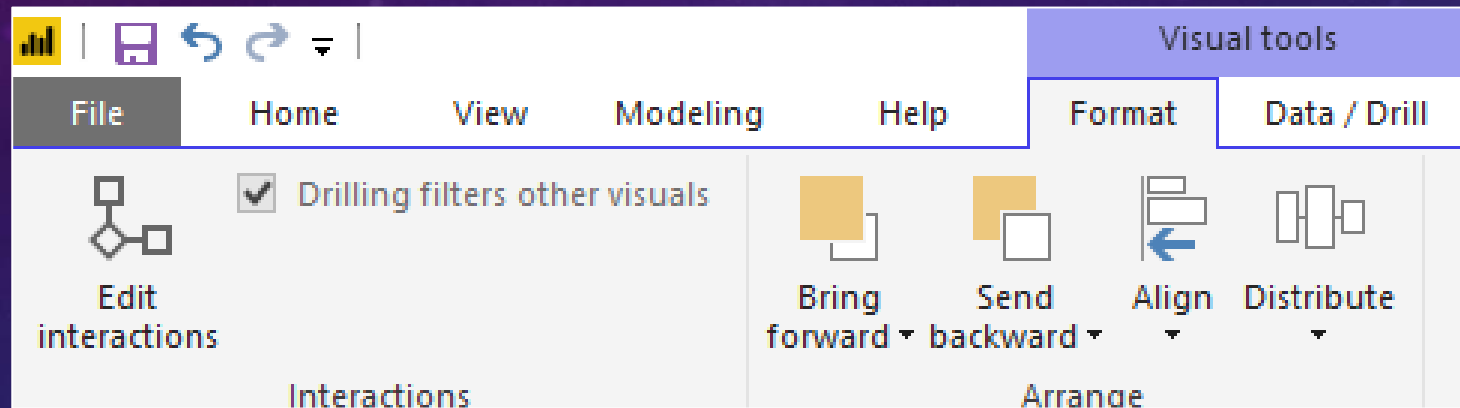
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- Visual Level Filter: This gets applied to only to the active visual.
- Page Level Filter: This gets applied to all the visuals in the existing page.
- Report Level Filter: This gets applied to all the visuals in all the existing pages in the report.



# 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**

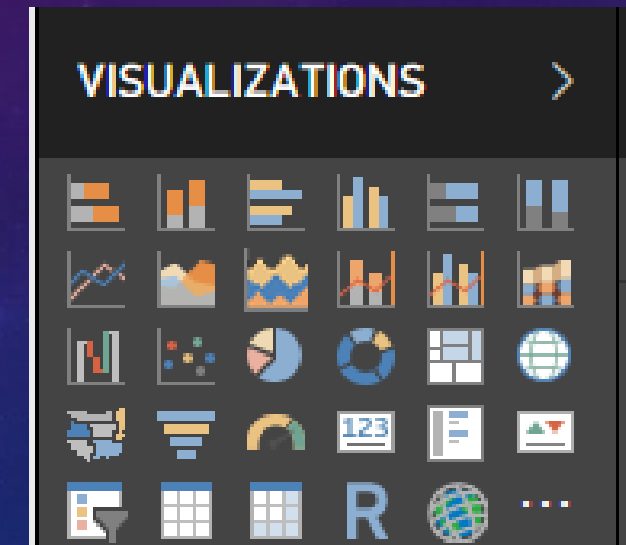
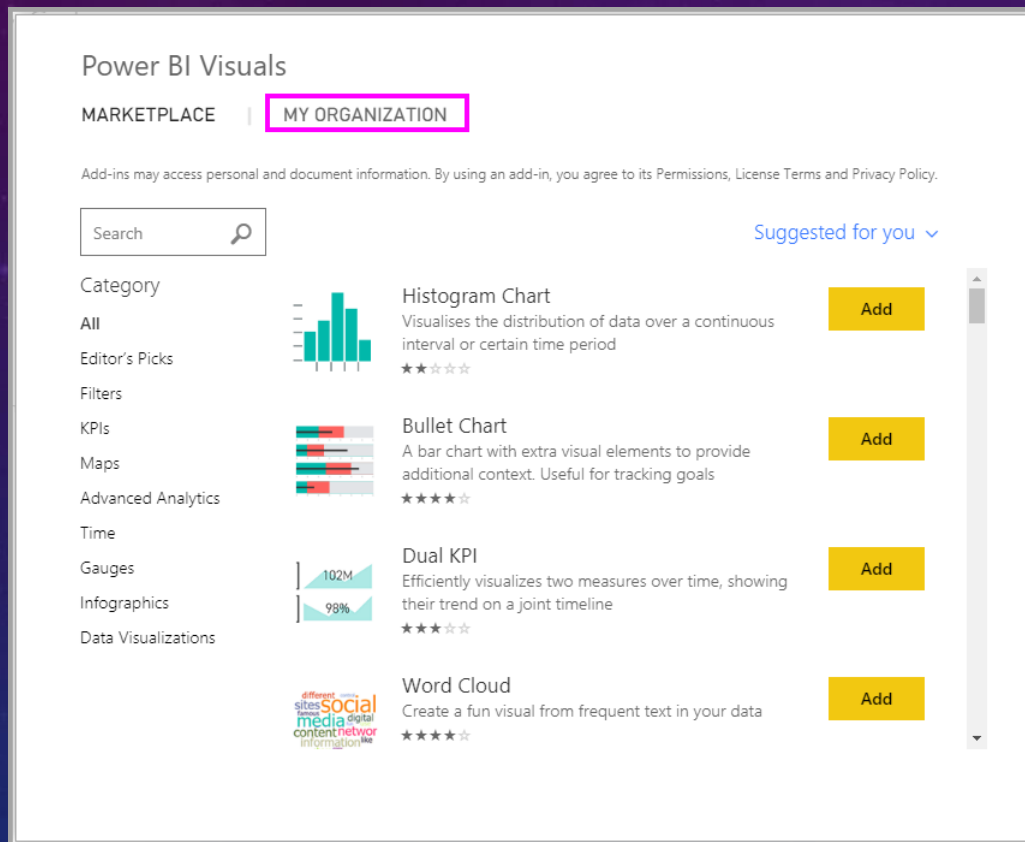
**Drill down in a visualization in Power BI**

# 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.

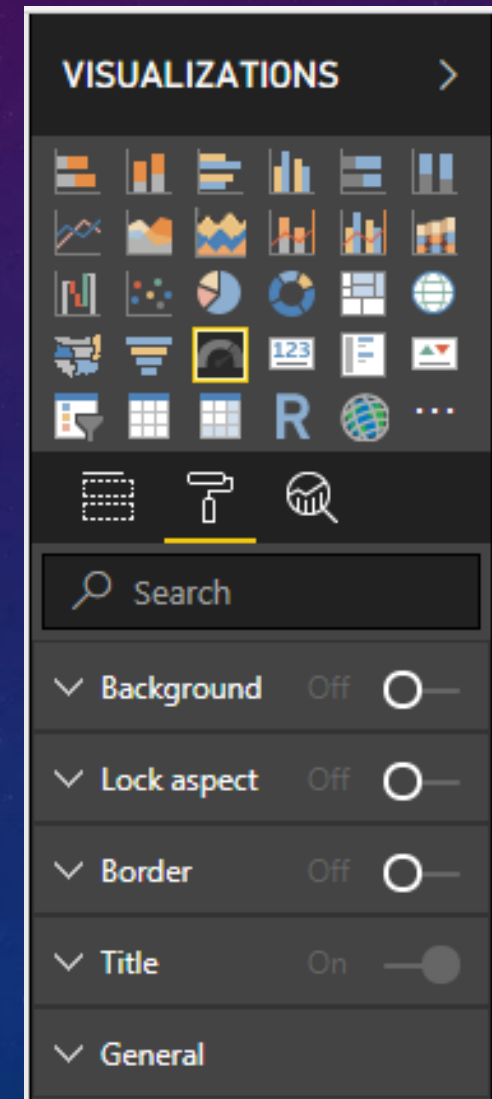


Power BI (in-depth Understanding)



# VISUALIZATION SETTINGS

These settings are different for each visualization.



## VISUALIZATION DRILL DOWN OPTION

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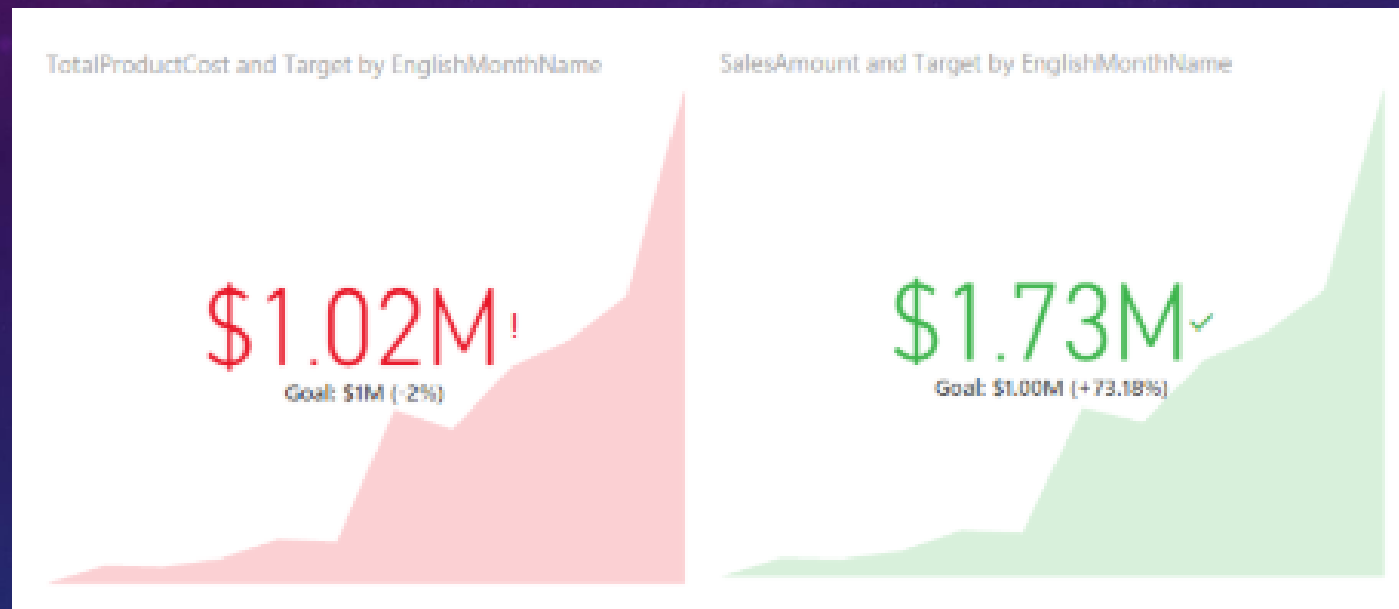
When a visual has a hierarchy, it supports drill down/up feature e.g. putting “Product Category, Sub-Category and Product” into a matrix will automatically enable drill down/up feature.



# KPI VISUAL

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



# DRILLTHROUGH FILTERS

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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 is 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

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## 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

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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.



### **Pinned to Dashboard**



The visualization has been pinned to your dashboard.

# PIN AN ENTIRE REPORT PAGE TO PBI DASHBOARD

- If the requirement is to pin more than one visualization in the dashboard then it's 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 laid 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

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