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Part of the Power BI Bootcamp Series

Microsoft Power Bl Bootcamp

Introduction to Business Intelligence & PBI

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Course Agenda



- Week 1: Introduction to Business Intelligence, Power BI and Power Query.
- Week 2: Advanced and Interactive Visuals.
- Week 3: Calculated measures, columns & custom tables with Power BI Programming Language (DAX).
- Week 4: Ways to collaborate and share in Power BI.



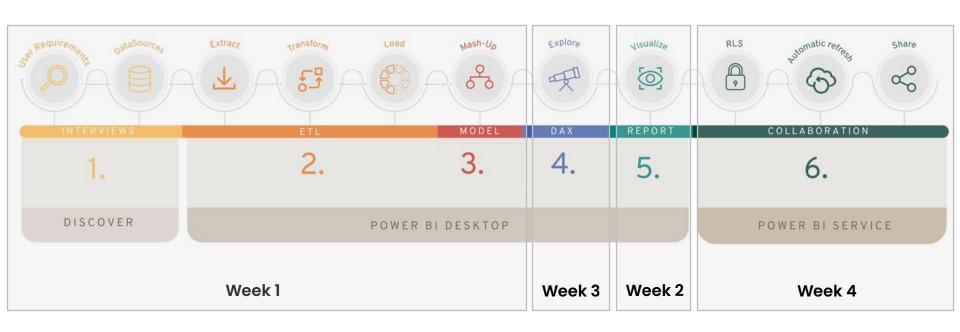
Our Method: Flow of Report Development







Our Method: Flow of Report Development



Instructors



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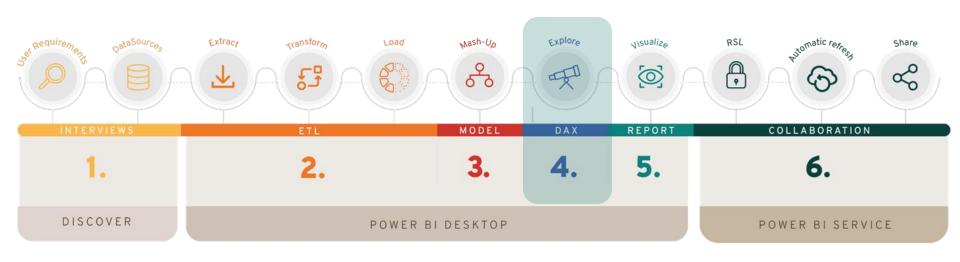
Week 3: Calculated measures, columns & custom tables with Power BI Programming Language (DAX).

- How to solve several basic calculation and data analysis problems by introducing Data Analysis Expressions (DAX).
- How to enhance data models with calculations. It begins by describing the structure of the Power BI Desktop model and how it can be enhanced with DAX calculations.
- Filter context and row context.
- How DAX formulas can be written and the different types of model calculations, including calculated tables, columns, and measures.
- How to write DAX expressions using temporal intelligence functions and iterator functions.





Our Method: Flow of Report Development









Simple calculated COLUMNS → 3.1



Simple calculated MEASURES → 3.2



More complex calculated COLUMNS \rightarrow 3.3



More complex calculated MEASURES → 3.4



Time Intelligence MEASURES → 3.5

Introduction to filter context and row context

- Review of Week 2 and Exercise 2.4.
- Presentation: Introduction and examples related to DAX.





What if you need to analyze:

- Percentage growth of sales between periods of time
- Margin percentage for different:
 - Product categories
 - Customers
 - Date ranges
- Year-over-year growth compared to market trends

Data Analysis Expressions (DAX) is a library of functions and operators that can be combined to build formulas and expressions in Power BI, Analysis Services, and Power Pivot in Excel data models.





Calculated columns, Measures and calculated tables use DAX expressions.







Predefined formulas that perform calculations using specific values called arguments, in a particular order or structure. Can be group in:

- ✓ Filters
- ✓ Information
- ✓ Logical
- ✓ Text
- ✓ Math and Trig

Create a calculate column and use it in a report

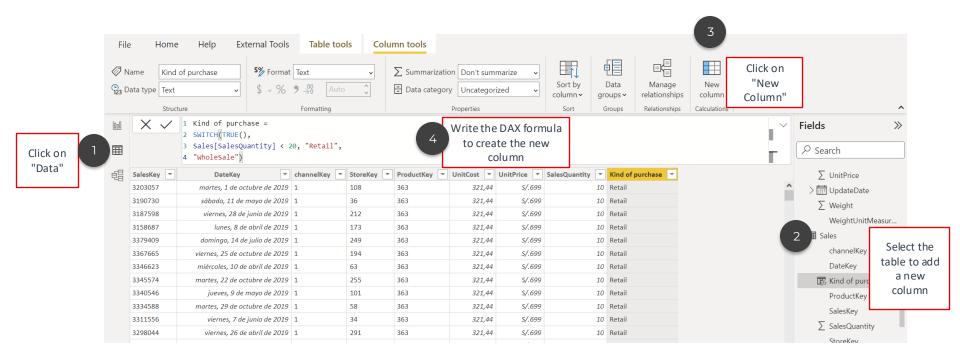
- Demo Case 3.1
- ➤ A couple of columns are created to see the functionality of the columns.
- Use them in different visuals.
- Exercise Case 3.1
- > Q&A

Demo 3.1













- A calculated column is a new column that is created by defining a calculation that transforms or combines two or more existing data elements.
- DAX expression defined for a calculated column operates in the context of the current row of the table it belongs to.
- The results are stored in the model like any other column.
- They can be used to define a relationship.
- Calculated columns are calculated during database processing and then stored in the model, so they take up in-memory space.



Let's start with the formulas like Excel

FILTER CONTEXT: The formula is evaluated row by row

- SUM: TableName[ColumnNameA] + TableName[ColumnNameB]
- □ SUBTRACTION: TableName[ColumnNameA] TableName[ColumnNameB]
- MULTIPLICATION: TableName[ColumnNameA] * TableName[ColumnNameB]
- □ DIVISION: TableName[ColumnNameA] / TableName[ColumnNameB]
- □ CONDITIONAL: IF (TableName[ColumnNameA] > 0; "xx", "yy")
- ☐ BLANK: Blank()
- TODAY: Today()
- ☐ FIRST 2 LETTERS: LEFT (TableName[ColumnNameA], 2)
- ☐ **CONDITIONS**: && (and) || (or)

Exercise 3.1



Exercise 3.1: Create new columns in your model. Open the file *Exercise3.1.pbix*

In the **Date table**, create a calculated column for the Day using the **FORMAT** function.

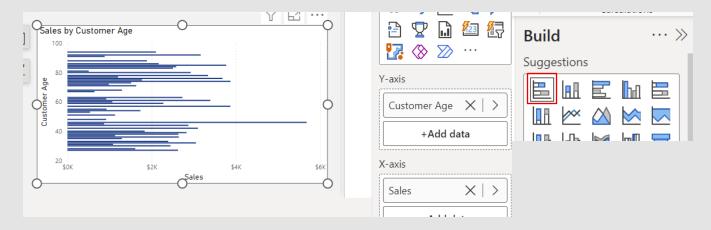
```
Day = FORMAT('Date'[Date],"dd")
```



In **Customer Table** create a new column to calculate the customer's age. Use the **DATEDIFF** function.

Customer Age = DATEDIFF(Customer[Date of birth], TODAY(), YEAR)

3 Go to Customer page and create a bar chart that displays sales segmented by customer age groups.



Creating basic measures (SUM and AVERAGE)

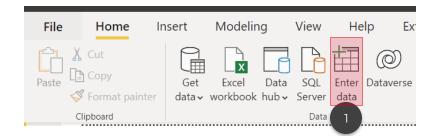
- Demo Case 3.2: Create some basic measures (SUM and AVERAGE) and use them in the report.
- > See the difference with power BI's native aggregated domain functions.
- Exercise Case 3.2
- > Q&A

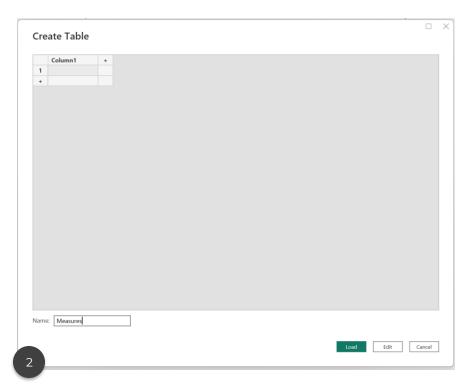
Demo 3.2





Create Measure table





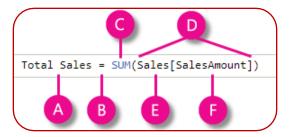


Calculated Measures

- Some of the most powerful data analysis solutions can be created through the use of measures.
- They are another way to add values from many rows in a table.
- They are found in Power BI as "New Measure", unlike Excel 2013/2016 where they are also known as "Calculated Fields".
- How do measurements help us? By performing calculations with our data as we interact with our reports, with the possibility of reusing them.

Syntax





- A. The name of the measure
- B. The operator (=) indicates the beginning of the formula
- C. SUM function with DAX
- D. Parentheses () surround an expression containing one or more arguments
- E. Referenced table
- F. The column it references [Sales Amount] in the sales table



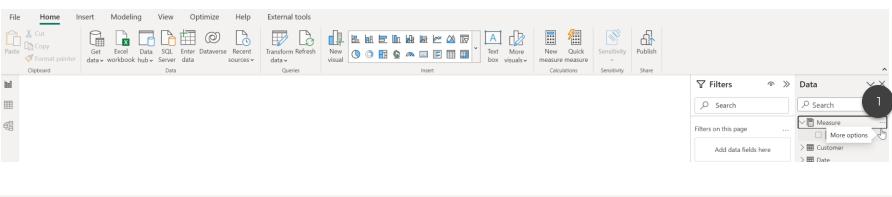
Calculated Measures

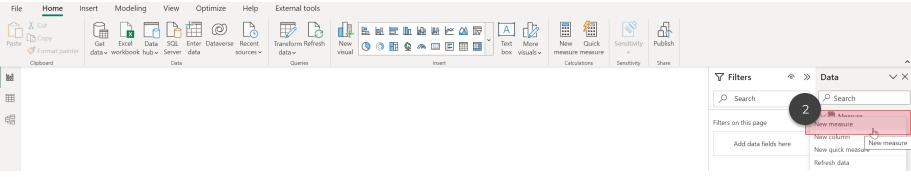
- Calculated measures results are always changing in response to your interaction with your reports, enabling fast and dynamic exploration of ad-hoc data.
- A measure operates on aggregations of data defined by the current context, which depends on the filter applied to the report, such as slicers, rows, and column selection in a matrix, or axis and filters applied to a chart.

```
1 Sales = sum(Sales[Total Sales])
```



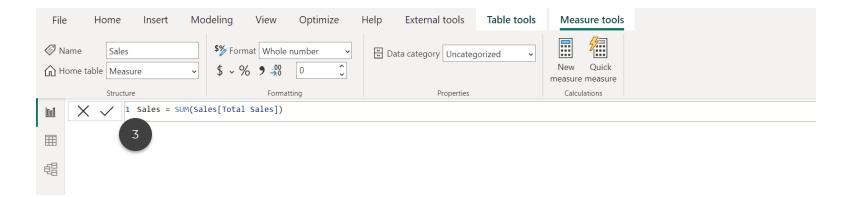
Measures







Measures



Exercise 3.2



Exercise 3.2: Create basic measures: Open the file Exercise3.2.pbix

Create a measure that displays the average age of the customers.



For testing purposes: Add the Average Age measure in a card visual (Customer's Page).





Context in DAX Formulas

Context enables you to perform dynamic analysis, in which the results of a formula can change to reflect the current row and any related data.

Understanding context and using context effectively are very important for building highperforming formulas, dynamic analyses, and for troubleshooting problems in formulas.

This course covers Row and Filter context.

Context in DAX Formulas



Calculated column - Row Context

- When you need the row by row value, to use that field to filter or as row/column/axis in charts.
- Calculated during database processing and then stored in the model, so they take up inmemory space.
- If you have created a calculated column, the row context consists of the values in each individual row and values in columns that are related to the current row.

Measures – Filter Context

- A measure operates on aggregations of data defined by the current context, which depends on the filter applied to the report, such as slicers, rows, and column selection in a pivot table, or axis and filters applied to a chart.
- Evaluated at query time. Not consume memory and disk space.



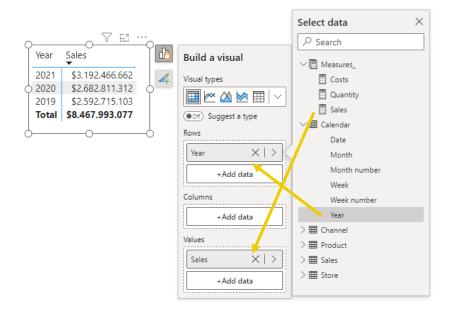
Measures or Calculated Column

Calculated Columns are created to use:

- in a slicer
- in **rows or columns in a pivot table** (as opposed to the values area)
- in axes of a chart
- as a filter condition in a DAX query

Define a measure whenever you want to:

- Display resulting calculation values that reflect user selections and see them in the **values area** of a pivot table or in the plot area of a chart.



Example: Measures in Values Columns in Rows and Columns (Pivot Table)

What if...



We need to <u>filter</u> the report with the category of a shop based on its size (large, medium, small shop) we would create a <u>column</u> or a calculated <u>measure</u>?

Storesize

Big Store

Medium Store

Small Store



Poll



If we need to <u>filter</u> the report with the category of a shop based on its size (large, medium, small shop) we would create a <u>column</u> or a calculated <u>measure</u>?

Calculated column

Calculated measure



Adding others calculated columns

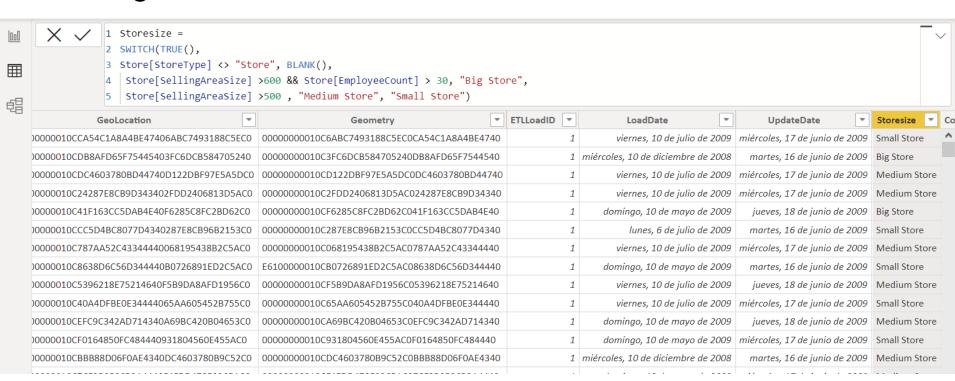
- Demo Case 3.3: Calculated columns using SWITCH, &&, ||
- > Exercise Case 3.3
- > Q&A

Demo 3.3





Adding others calculated columns



Exercise 3.3



Exercise 3.3: Add others calculated columns. Open the file *Exercise3.3.pbix*

In **Customer table** use the SWITCH function to create a new calculated column for **Customer Age Groups** with the following conditions:

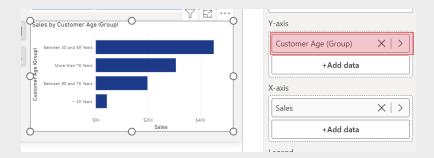
- Age < 30
- Age between 30 and 59
- Age between 60 and 75
- Age > 75

```
Customer Age (Group) =

SWITCH(TRUE(),
Customer[Customer Age] < 30 , "< 30 Years",
Customer[Customer Age] < 60, "Between 30 and 59 Years",
Customer[Customer Age] <= 75, "Between 60 and 75 Years",
"More than 75 Years")</pre>
```



Replace the **Customer Age** column with the new calculated **Customer Age** (**Group**) column in the sales by customer age bar chart.







We have to calculate the sales margin for our products or channels, would we use a **column** or a calculated **measure**?

% margin	ProductCategoryName
135,35 %	Audio
151,23 %	Cameras and camcorders
126,58 %	Cell phones
132,88 %	Computers
156,82 %	Music, Movies and Audio Books
121,48 %	TV and Video
135,98 %	

% margin	BrandName
138,47 %	Adventure Works
129,73 %	Contoso
135,98 %	

% margin	ChannelName
136,30 %	Catalog
135,97 %	Online
136,14 %	Reseller
135,90 %	Store
135,98 %	



Poll



If we have to calculate the sales margin for our products or channels, would we use a **column** or a calculated **measure**?

- Calculated column
- Calculated measure





Creating more complex measures using DIVIDE

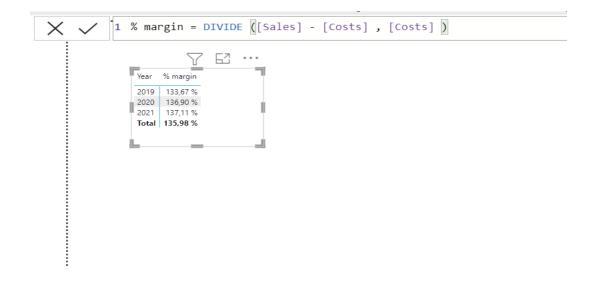
➤ Demo Case 3.4: delving deeper into the dax language by creating a measure.

Change the data type to view as a percentage

- > Exercise Case 3.4
- > Q&A



Creating more complex measures using DIVIDE



Demo 3.4

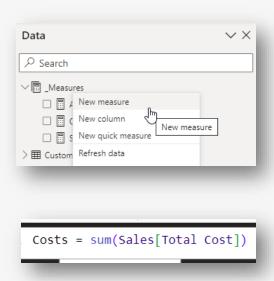


Exercise 3.4



Exercise 3.4: Create advanced measures: DIVIDE. Open the file Exercise3.4.pbix

In the **report view**, navigate to the **measures table** and create a new measure named **Costs**:



2 Create the following calculated measures:

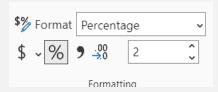
 Margin as the subtraction between Sales measure and Costs measure.

```
Margin = [Sales] - [Costs]
```

2. Margin % as the division of the Margin measure (2.1 step) over Sales measure. To do so, use DIVIDE function.

```
Margin % = DIVIDE([Margin],[Sales])
```

3. To this last measure change the format to percentage.



Introduction to CALCULATE and TIME INTELLIGENCE

- Demo Case 3.5: presentation of the calculate function, as orchestrator of other functions and modifier of context filters.
- > Exercise Case 3.5

Demo 3.5







It is the only function in DAX that can change the filter context.

The syntax of calculate extremely simple. You invoke calculate with an expression as its first argument, and a set of filters starting from the second parameter onwards.

For example, the following measure computes the sales amount of Red products, avoiding any filter of the report in the column 'Product'[Color]

```
Red Sales :=

CALCULATE (

[Sales Amount],

'Product'[Color] = "Red"

Function

Measure

Filter
```





Time intelligence functions support calculations to compare and aggregate data over time periods, supporting days, months, quarters, and years.

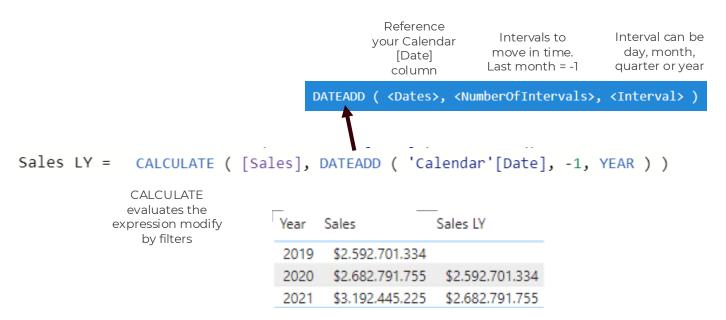
In order to use any time intelligence calculation, you need a well-formed date table in your model.

https://dax.guide/functions/time-intelligence/



Time Intelligence DateAdd

Moves the given set of dates by a specified interval.





Time Intelligence TOTALYTD - TOTALMTD

Evaluates the specified expression over the interval which begins on the first day of the year and ends with the last date in the specified date column after applying specified filters.

1 Importe YTD = TOTALYTD([Importe], Calendario[Date])

Year	Month	Sales	Sales YTD
2019	Jan	\$187.605.616	\$187.605.616
2019	Feb	\$184.194.371	\$371.799.987
2019	Mar	\$184.284.916	\$556.084.903
2019	Apr	\$213.802.001	\$769.886.904
2019	May	\$235.344.044	\$1.005.230.948
2019	Jun	\$228.848.412	\$1.234.079.360
2019	Jul	\$229.632.802	\$1.463.712.162
2019	Aug	\$224.810.067	\$1.688.522.229
2019	Sep	\$217.612.628	\$1.906.134.857
2019	Oct	\$223.452.206	\$2.129.587.064
2019	Nov	\$228.114.444	\$2.357.701.508
2019	Dec	\$234.999.826	\$2.592.701.334
2020	Jan	\$187.719.290	\$187.719.290
2020	Feb	\$194.404.066	\$382.123.357
2020	Mar	\$186.556.385	\$568.679.742
2020	Apr	\$226.013.480	\$794.693.221
2020	May	\$221.368.197	\$1.016.061.418



Time Intelligence Advanced funcitions

- Accumulated Month: =DATESMTD(Date[Date]))
- Accumulated Year: =DATESYTD(Date[Date]))
- Yesterday Sales: =PREVIOUSDAY(Date[Date]))
- ✓ Same Day Previous Year: =SAMEPERIODLASTYEAR(Date[Date]))
- Same Month Previous Year: =ParallelPeriod(Date[Date];-12;Month))
- Full Month: =DatesBetween(Date[Date];StartOfMonth(Date[Date]);EndOfMonth(Date[Date])))
- Previous Period: =PREVIOUSMONTH(Date[Date]))
- Last 30 Days: =DATESINPERIOD(Date[Date];FIRSTDATE(Date[Date]);-30;Day))

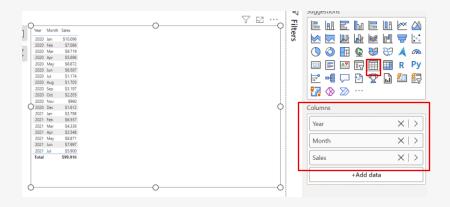
Exercise 3.5



Exercise 3.5 Understand basic time intelligence functions. Open the file Exercise3.5.pbix

To test measures created and Time Intelligence functions create a new sheet and add the following:

 A table with the year and month as rows. Add the Sales as values



2 (

Create 2 new measures:

Last month sales, using DATEADD function.

```
Last Month Sales = CALCULATE([Sales],DATEADD('Date'[Date],-1,MONTH))
```

• Year to date sales, using **TOTALYTD** function.

```
Year to date Sales = TOTALYTD([Sales], 'Date'[Date])
```

 Add both to the table and change the format to currency.





Poll



True or False, removing a measure in Power BI also removes the related source data from the report?

True

False





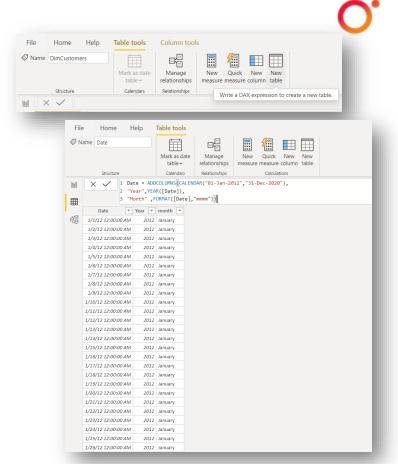
Introduction to CALCULATED TABLES

Demo Case 3.6: presentation of Calculated Tables.

Calculated Tables

- With calculated tables, a new table can be added to the model.
- It is defined by a Dax formula.
- They are generally better for intermediate calculations and the data is stored as part of the model rather than being calculated on the fly or as part of a query.

```
Calendar =
ADDCOLUMNS(
CALENDARAUTO(),
"Year",year([Date]),
"Month num", Month([Date]),
"Month",FORMAT([Date],"mmm"),
"Day",FORMAT([Date],"dd"))
```









Advanced Learning Path:

1) Power BI Bootcamp: Building the Foundations for Power BI

This Bootcamp

- 2) Power Query: Data Connections and Transformations
- 3) Data Modeling for optimal structure & DAX for calculations



4) Visualizations for impactful reporting & Power BI Service





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