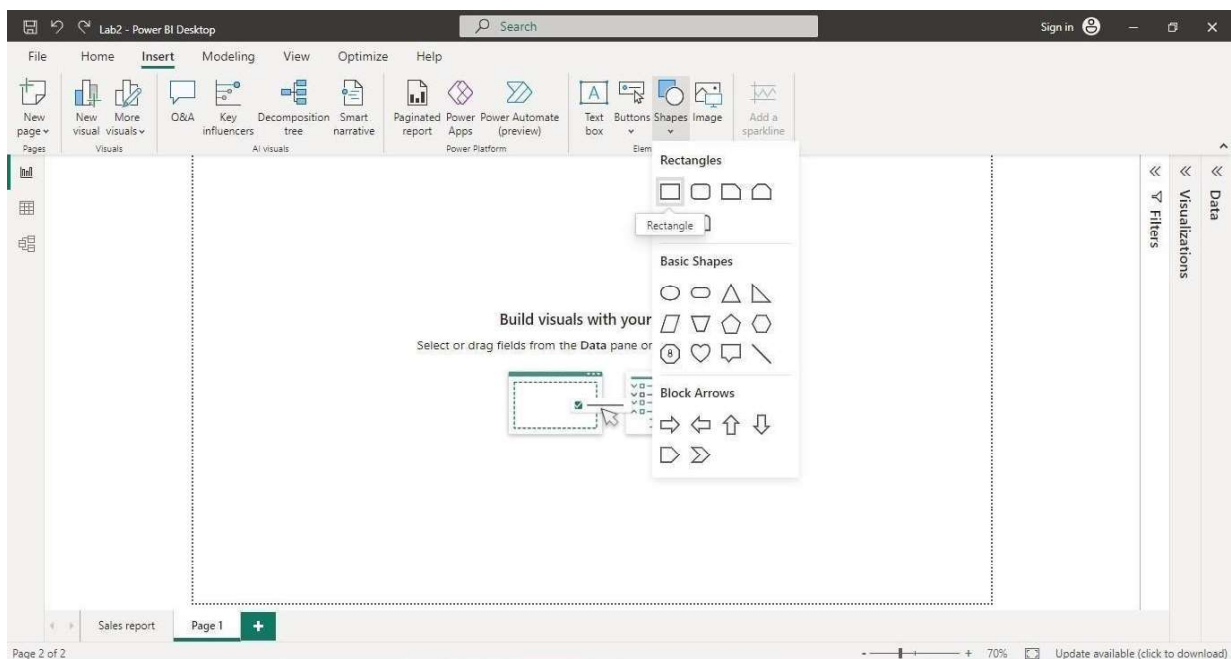**Experiment Number:** 08

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:**

o Click on "Format tab" on right side and perform changes on visual.
o Shape > Style > #E66C37
o 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	25		255
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
2023	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 2	April	160	160	429
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	150.55	2,513.31
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	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:

Table 1

Year	Quarter	Month	Day	Sum of Quantity	Mtd item qty
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
2020	Qtr 1	February	7	11	55
Total				**38654**	**1820**

Table 2

Year	Quarter	Month	Sum of Quantity	qtd item qt
	Qtr 1	January	306	30
	Qtr 1	February	159	46
	Qtr 1	March	597	106
	Qtr 2	April	536	53
	Qtr 2	May	504	104
	Qtr 2	June	524	156
	Qtr 3	July	550	55
	Qtr 3	August	624	117
	Qtr 3	September	1015	218
	Qtr 4	October	605	60
	Qtr 4	November	1235	184
	Qtr 4	December	1158	299
Total			**38654**	**482**

Table 3

Year	Quarter	Month	Total Mtd Orders	Total qtd Orders	Total Ytd Orders
2020	Qtr 3	August	150	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 2	April	160	160	429
2021	Qtr 2	May	150	310	579
2021	Qtr 2	June	138	448	717
2021	Qtr 3	July	140	140	857
2021	Qtr 3	August	162	302	1019
Total			**482**	**1251**	**3379**

Table 4

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
2023	Qtr 1	1898	1898
2023	Qtr 2	2571	4469
Total		**38654**	**12737**

Table 5

Quarter	Month	Day	Sum of Profit	MTDprofit
Qtr 1	January	18	6.49	1,954.07
Qtr 1	January	19	-288.00	1,666.07
Qtr 1	January	20	584.37	2,250.44
Qtr 1	January	21	93.30	2,343.75
Qtr 1	January	22		2,343.75
Qtr 1	January	23	19.24	2,362.99
Qtr 1	January	24		2,362.99
Qtr 1	January	25		2,362.99
Qtr 1	January	26	150.33	2,513.31
Qtr 1	January	27	9.68	2,523.00
Qtr 1	January	28	1.33	2,524.32
Qtr 1	January	29		2,524.32
Qtr 1	January	30	11.65	2,535.97
Qtr 1	January	31	3.42	2,539.39
Qtr 1	February	1	206.32	206.32
			2,92,296.81	**8,655.83**

Table 6

Year	Quarter	Month	Sum of Profit	QTDprofit
2020	Qtr 1	January	2,539.39	2,539.39
2020	Qtr 1	February	862.31	3,401.70
2020	Qtr 1	March	693.45	4,095.15
2020	Qtr 2	April	3,488.84	3,488.84
2020	Qtr 2	May	3,196.39	6,685.23
2020	Qtr 2	June	4,999.76	11,684.99
2020	Qtr 3	July	-841.48	-841.48
2020	Qtr 3	August	5,765.23	4,923.74
2020	Qtr 3	September	8,593.63	13,517.37
2020	Qtr 4	October	3,469.17	3,469.17
2020	Qtr 4	November	9,362.96	12,832.13
2020	Qtr 4	December	9,554.66	22,386.79
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
Total			**2,92,296.81**	**29,018.46**

Table 7

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
Total		**2,92,296.81**	**29,018.46**

Page 1

Page 1 of 1

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