

How Regexes in Power BI using Python and R Can Save Your Life in Extreme Cases

Luca Zavarella

The logo for Data Saturdays. It features the word "DATA" in a large, bold, white sans-serif font. To the left of the "D" is a blue icon consisting of three horizontal bars of increasing length, resembling a stylized "D" or a data bar chart. Below "DATA", the word "SATURDAYS" is written in a smaller, white, spaced-out sans-serif font.



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About me

Luca Zavarella

Working in Business Intelligence with SQL Server since 2007

Microsoft MVP for Artificial Intelligence & Data Platform

Microsoft Certified: Azure Data Scientist Associate

Author of the book *"Extending Power BI with Python and R"* published by Packt

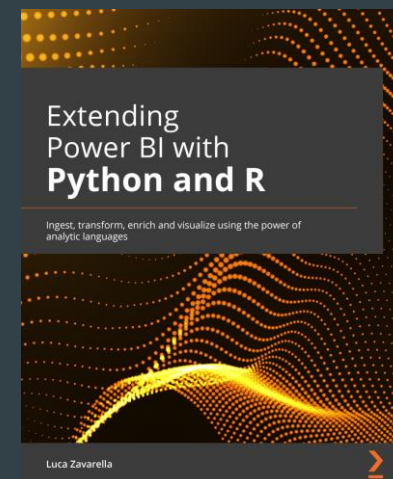
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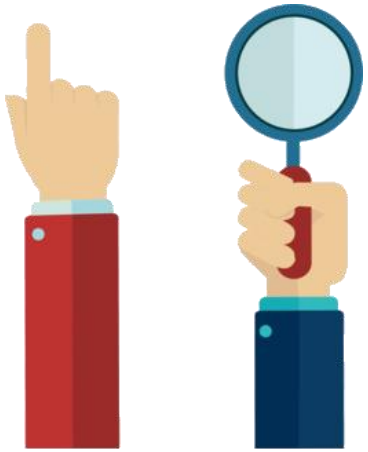
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- What is a Regex
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How many of you are familiar with [regular expressions \(regex\)](#)?

How many of you know [Python](#) and/or [R](#)?

How many of you read my book *"Extending Power BI with Python and R"*?

What Is a Regex

Not only a bunch of characters at random

Definition of Regex

A **regular expression** (or simply **regex**) is a generalized way to match patterns with sequences of characters
(abstract search pattern)

Regular expressions are a *mathematical technique* originated in 1951 by experts in **formal language** and **theoretical computer science**

Regex in Practice

Find & Replace Specific Strings

Extract substrings of a text that follows a specific pattern, and eventually replace them

Data Validation

Email, dates, phone numbers, credit card validations

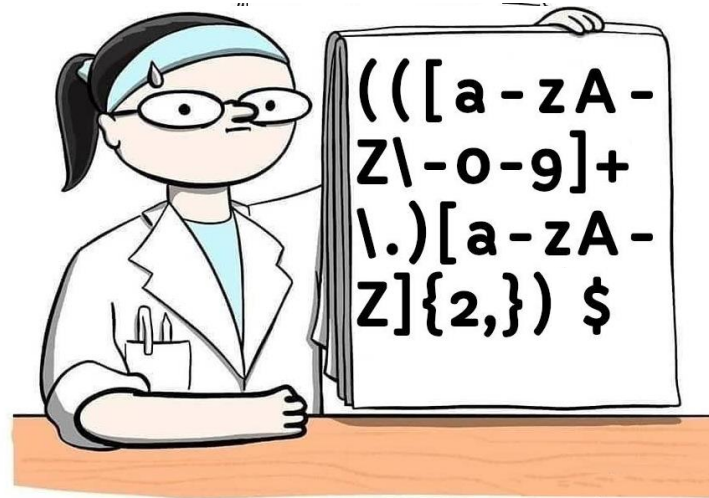
Password Pattern Matching

“Passwords must have at least 8 characters and contain at least two of the following: uppercase letters, lowercase letters, numbers, and symbols”

Syntax Highlighting

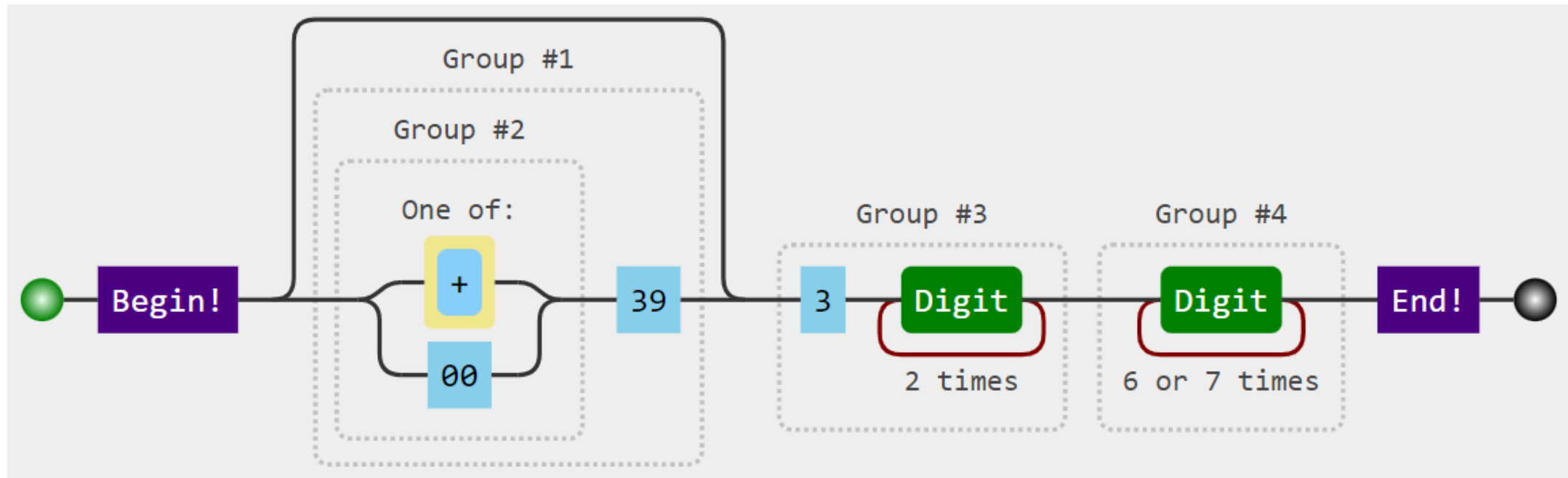
Emacs's syntax highlighting and indentation are implemented almost exclusively with regexes

How a Regex Looks Like



A Simple Example of Regex

```
/^(([+]|00)39)?(3\d{2})(\d{6,7})$/g
```



<https://jex.im/regex>

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Basics of Regex

Let's get in touch with the core concepts

Character and Sets

Character and Sets		
\w	Word	[a-zA-Z0-9_]
\W	Non-word	[^a-zA-Z0-9_]
\d	Digit	[0-9]
\D	Non-digit	
\s	Whitespace (Form-feed, tab, vertical-tab, new line, carriage return and space)	[\f\t\x0b\n\r]
\S	Non-whitespace	
\x	Hexadecimal digit	\x00=null; \x0d=\r; [\x61-\x7a]=[a-z]
\O	Octal digit	
.	Any character (except new line \n)	

Special Characters and Quantifiers

Special Characters	
\n	New line
\r	Carriage return
\t	Tab
\v	Vertical tab
\f	Form feed

Quantifiers	
*	Zero or more
+	One or more
?	Zero or One (i.e. optional)
{n}	Exactly 'n' (any number)
{n,}	Minimum ('n' or more)
{n,m}	Range ('n' or more, but less or equal to 'm')

Greedy and Lazy Quantifiers 1/2

By default, quantifiers are *greedy*!

Regex: `\d+` → 12345abc678-def (2 matches)

The question mark `?` makes quantifiers *lazy*

Regex: `\d+?` → 12345abc678-def (8 matches)

Greedy and Lazy Quantifiers 2/2

Another example of **greedy** versus **lazy** quantifiers:

Regex: `3.*\d`  123EEE2345 (1 matches)

The question mark `?` makes quantifiers **lazy**

Regex: `3.*?\d`  123EEE2 345 (2 matches)

Groups and Lookarounds

Groups

(...)	Capture group – captures a set of characters for a later expression
(?:...)	Non-capture group – groups an expression but does not capture. e.g. /((?:foo fu)bar)/ matches "foobar" or "fubar" without "foo" or "fu" appearing as a captured subpattern
(?=...)	Lookahead – match on the characters following. e.g. /ab(?=c)/ match "ab" only when followed by "c"
(?!...)	Negative lookahead – match on characters that aren't following. e.g. /ab(?!c)/ match "ab" only when NOT followed by "c"
(?<=...)	Positive look-behind assertion. e.g. /(?<=foo)bar/ matches "bar" when preceded by "foo"
(?<!=...)	Negative look-behind assertion. e.g. /(?<!=foo)bar/ – matches "bar" when not preceded by "foo"
(?#...)	Comment e.g. (?# This comment is ignored entirely)

Don't Underestimate Those Who Knows Regex



Power BI And Regular Expressions



Unfortunately, Power BI **doesn't**
handle regex out-of-the-box

For this reason, we will resort to
Python and **R** in Power BI!

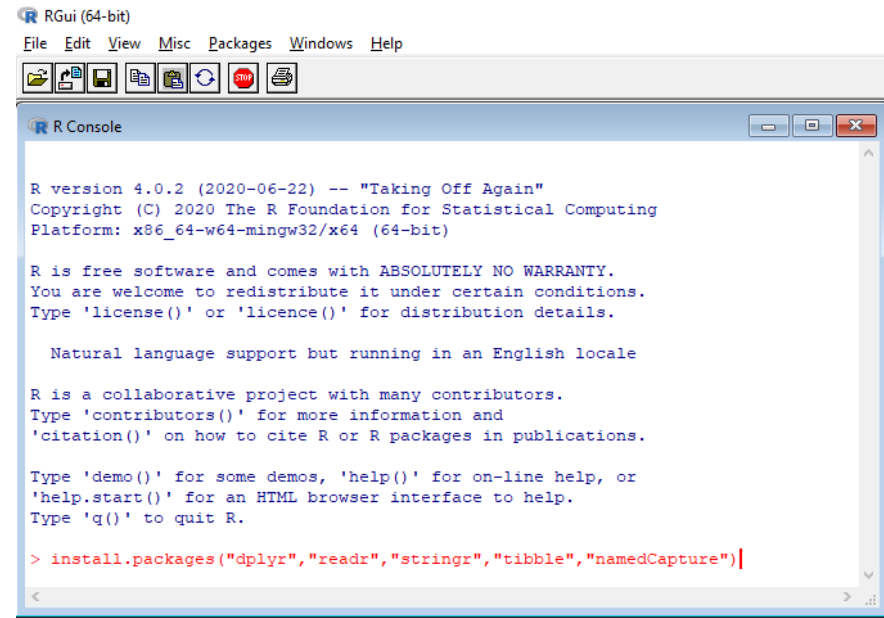


How To Configure Python and R in Power BI

Let's oil the engine before setting off at full speed

Let's Configure R...

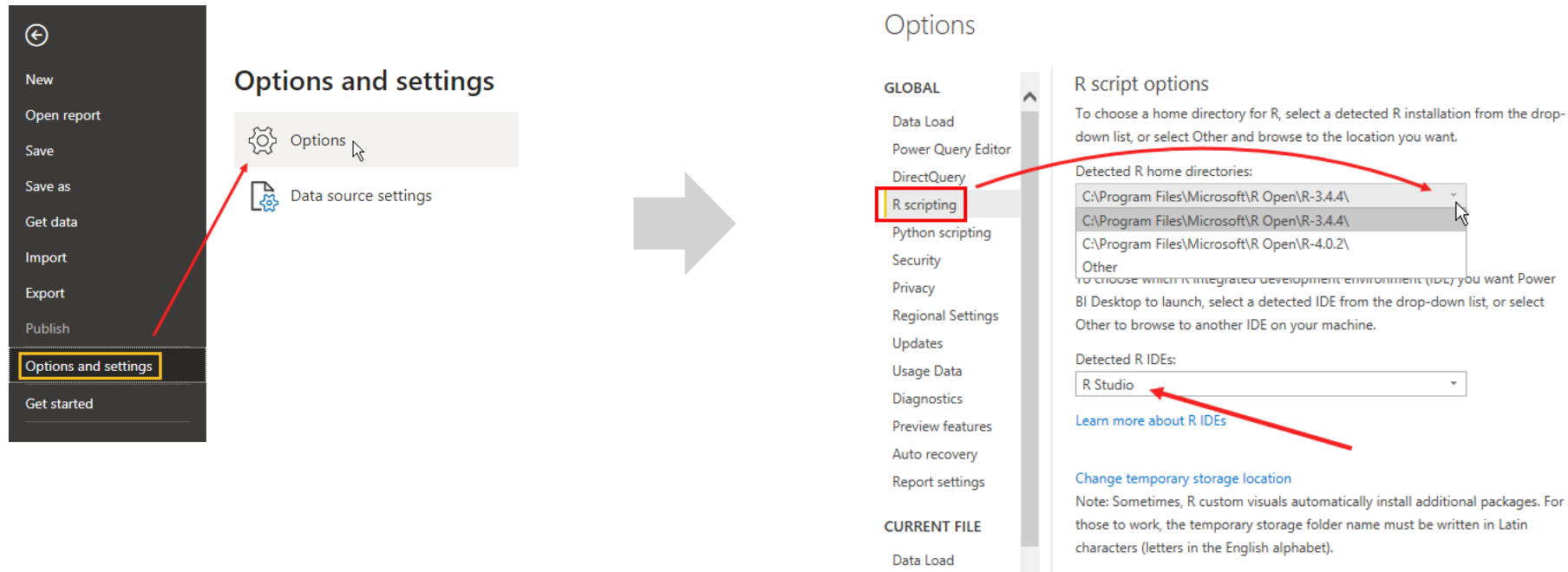
1. Download and install [CRAN R](https://cran.r-project.org/)
 - <https://cran.r-project.org/>
2. Install the required packages (*dplyr, readr, stringr, tibble, namedCapture, readxl*):



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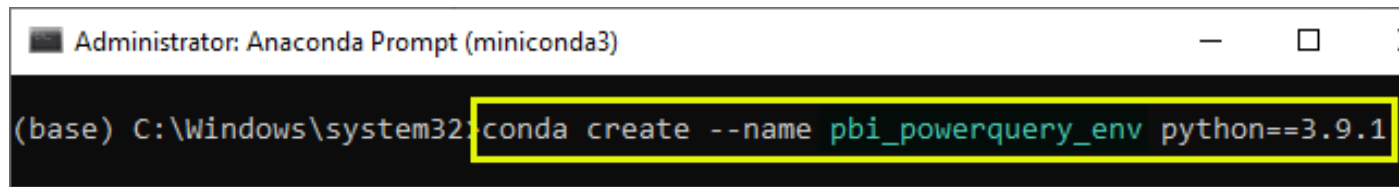
...Then Configure R With Power BI

1. Configure Power BI Desktop to work with R



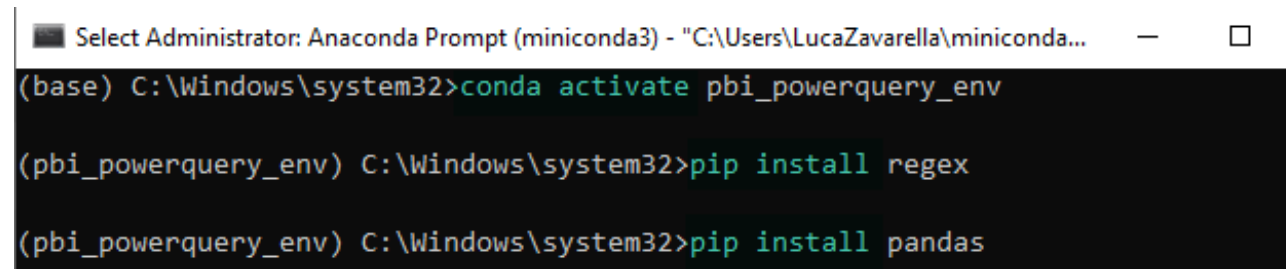
Let's Configure Python...

1. Download and install [MiniConda](https://docs.conda.io/en/latest/miniconda.html) (<https://docs.conda.io/en/latest/miniconda.html>)
2. Use the [Anaconda Prompt](#) to create a dedicated [Conda Environment](#) with the chosen Python version:



```
Administrator: Anaconda Prompt (miniconda3)
(base) C:\Windows\system32>conda create --name pbi_powerquery_env python==3.9.1
```

3. Install the required packages (*regex*, *pandas*, *openpyxl*):

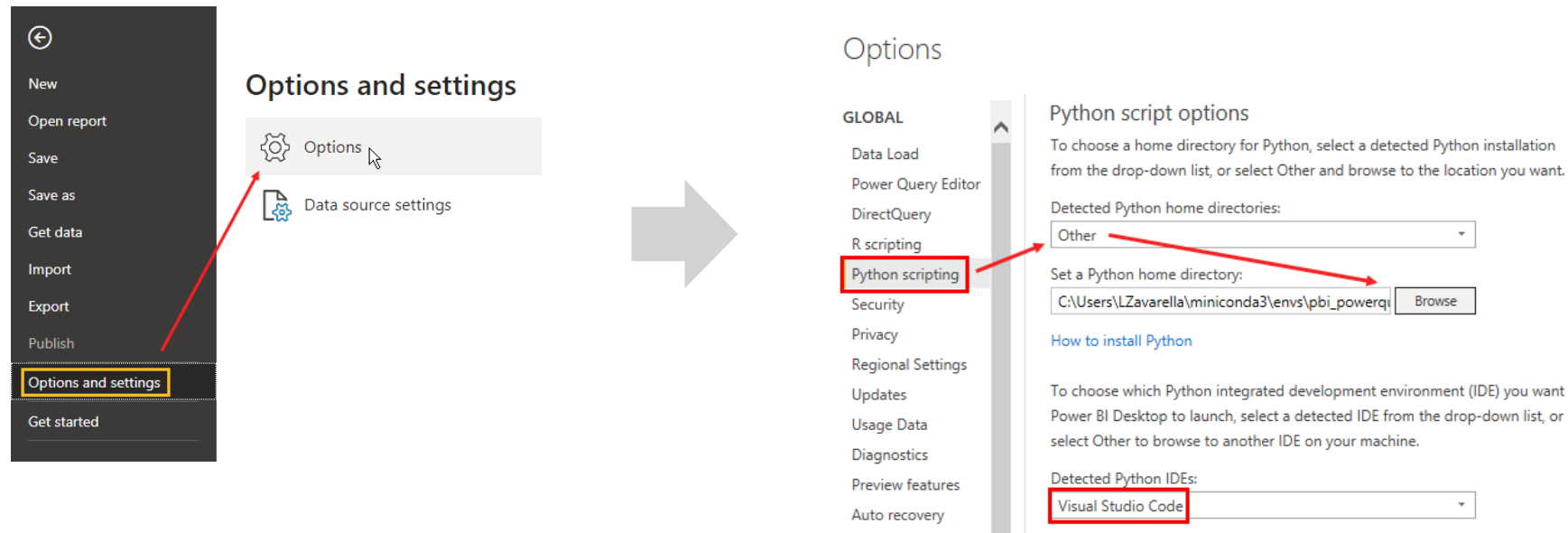


```
Select Administrator: Anaconda Prompt (miniconda3) - "C:\Users\LucaZavarella\miniconda...
(base) C:\Windows\system32>conda activate pbi_powerquery_env
(pbi_powerquery_env) C:\Windows\system32>pip install regex
(pbi_powerquery_env) C:\Windows\system32>pip install pandas
```

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Configure Python with Power BI

1. Configure Power BI Desktop to work with your Python Environment



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CASE 1: Validating Emails and Dates

How to bring attention to a possible human error

Case 1 Description

- In a **retail company**, a team is dedicated to **identifying fraudulent customers**
- The team fills out an **Excel spreadsheet**, in which the "*Email*" and "*BannedDate*" information of the fraudster is included

Goal

Select from other data sources **only the fraudsters' information** to analyze their purchases in Power BI

What Happens During Excel Completion

Unfortunately, sometimes **typos** can happen during the data entry...

	A	B	C	D	E
1	UserId	Email	BannedDate	IsEmailValidByDefinition	IsDateValidByDefinition
2	1	_____@example.com	05/29/2018	1	1
3	2	example1@example.com/example2@example.com	06/07/2019	0	1
4	3	example33@example.com.	02/05/2018	0	1
5	4	firstname-lastname@example.com	06/07/2019	1	1
6	5	example@example.com --> check	02/29/18	0	0
7	6	email@example-one.com	11/06/2017	1	1
8	7	email@example.com	012/05/2018	1	0

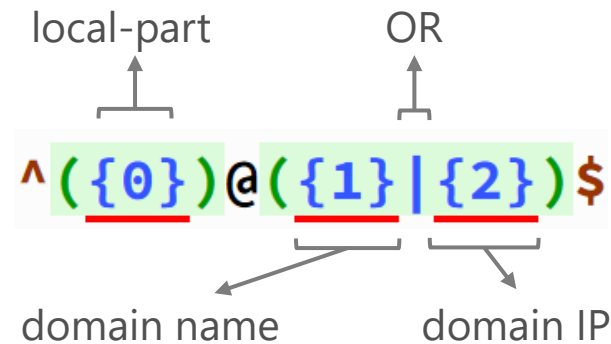
We need to **identify any errors** and highlighting them, allowing the fraud team to be able to correct them

Format of an Email Address

Generic format of an email address:

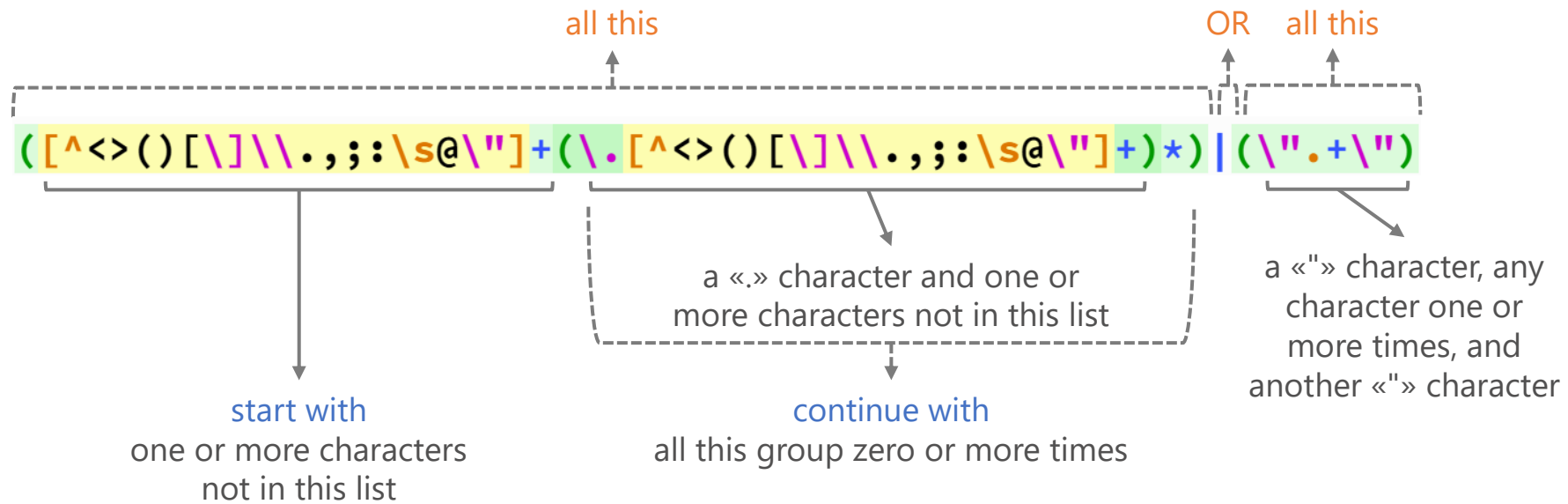
local-part@domain

where “domain” can be a domain name or a domain IP. In a “regex point of view”:



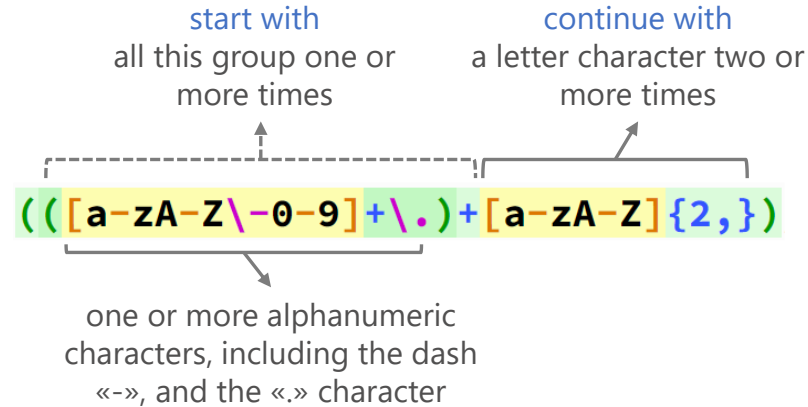
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Validating the Local Part of Email

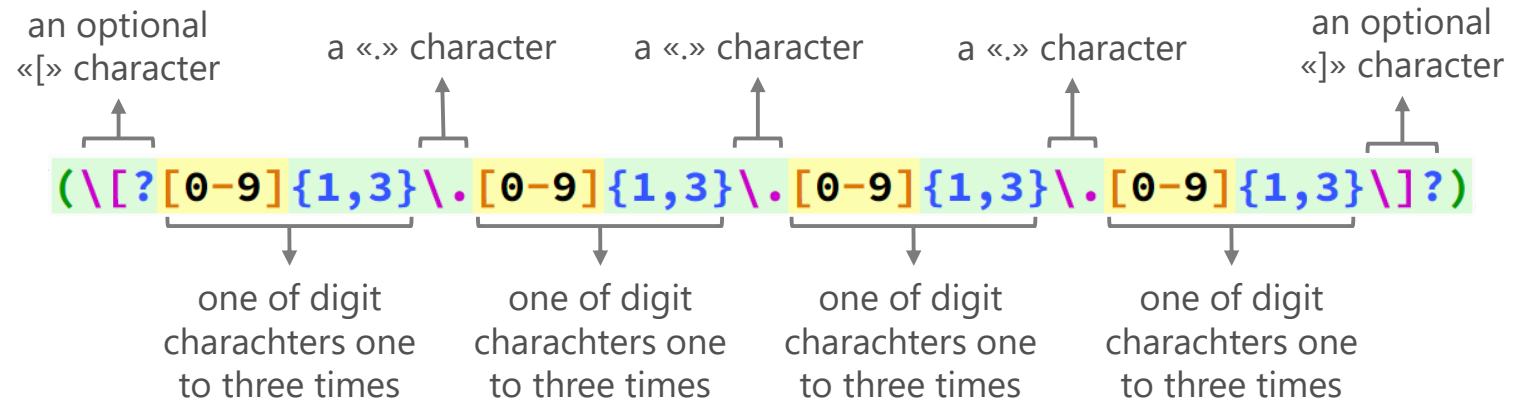


Validating the Domain of an Email

Domain name:



Domain IP:



With the support of:

Final Regex for Email Validation

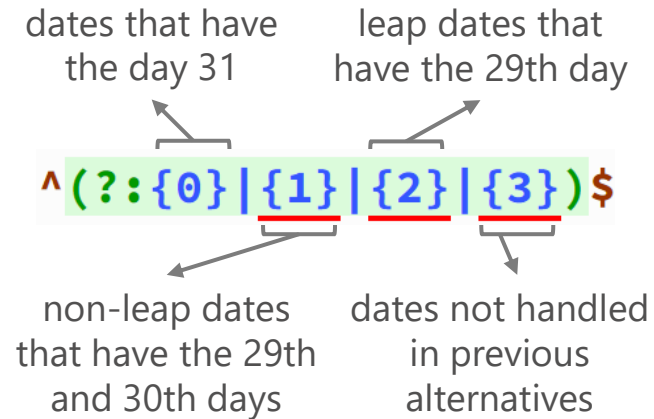
```
^((([^\<>()[\]\.\,;:\s@\\""]+)(\.[^\<>()[\]\.\,;:\s@\\""]+)*)|(\\"".+\\""))(
@((([a-zA-Z\-\0-9]+\.)+[a-zA-Z]{2,})|(\[?[0-9]{1,3}\.[0-9]{1,3}\.[0-9]
[0-9]{1,3}\.[0-9]{1,3}\]?)))$
```

With the support of:

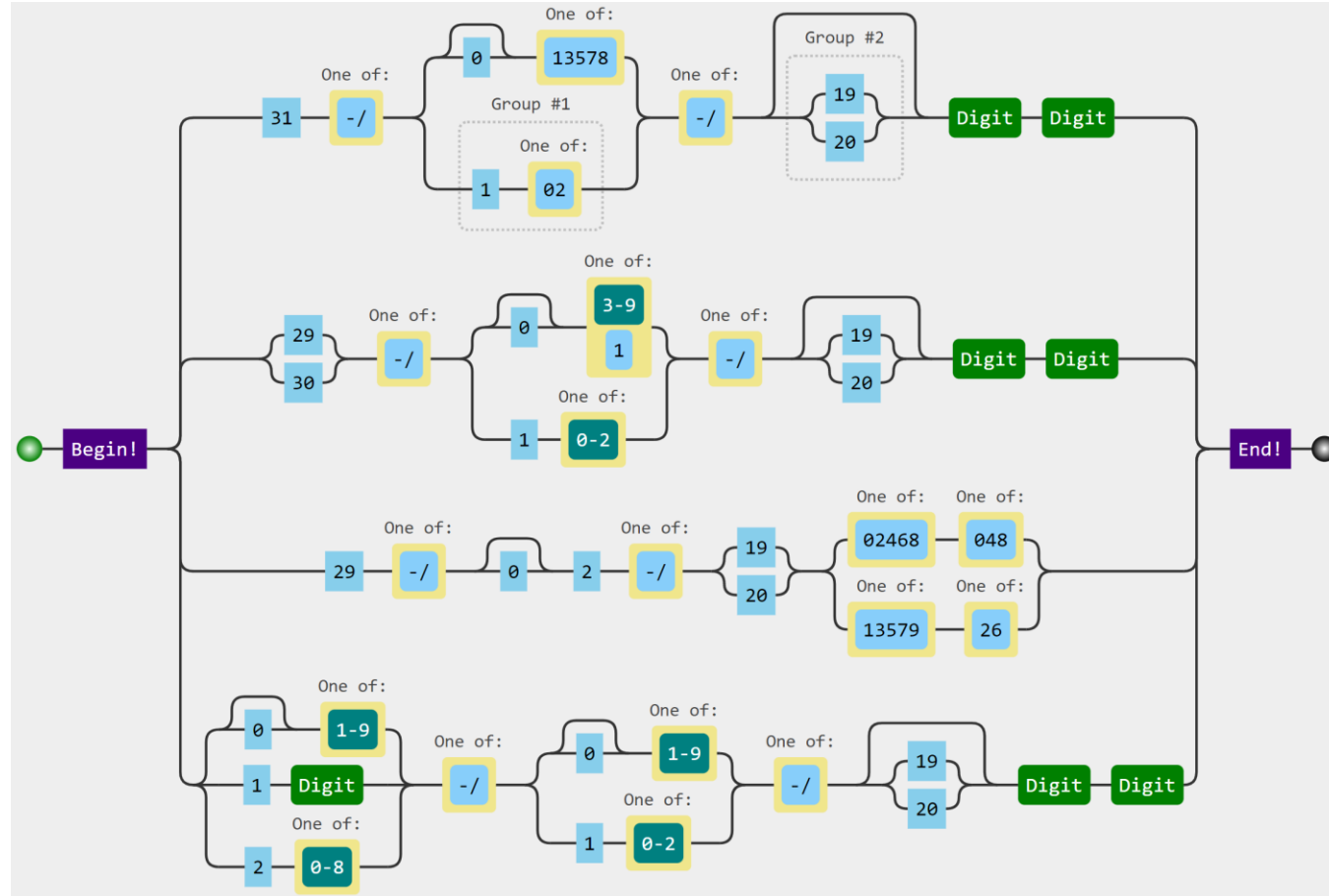
Format of a Date

Dates can be partitioned as following to validate them also “**semantically**”:

- Dates having the day 31
- Non-leap dates having the 29th and 30th days
- Leap dates having the 29th day
- Dates not handled in previous cases



Validating a Date



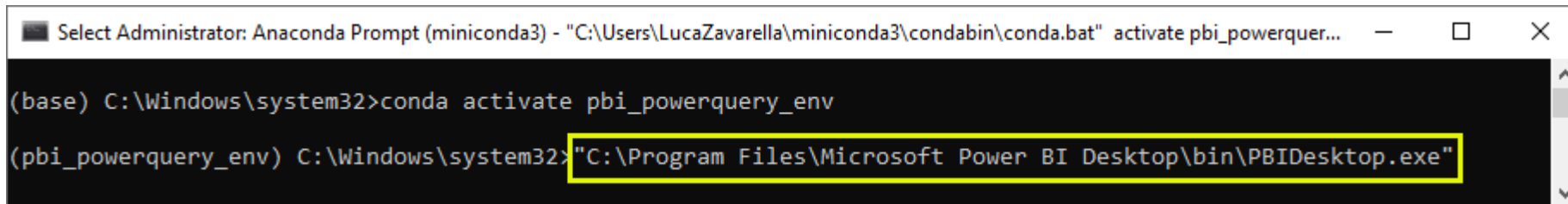
DEMO 1

Validating Emails and Dates in Power BI

How to properly validate information entered by users

Be Aware To the ADO.NET Python Script Error

- Executing a [Python script](#) in Power BI you may run into the “*ADO.NET Python error*” (not the real error!)
- In my case the error is “*Unable to import required dependencies: numpy*”
- [Anaconda](#) requires the [environment to be activated](#)
- Power BI Desktop will directly invoke `python.exe` which doesn't have an initialized environment out of the box
- The solution is launching the Power BI Desktop executable from the [Anaconda Prompt](#) after activating the proper environment



```

Select Administrator: Anaconda Prompt (miniconda3) - "C:\Users\LucaZavarella\miniconda3\condabin\conda.bat" activate pbi_powerquer...
(base) C:\Windows\system32>conda activate pbi_powerquery_env
(pbi_powerquery_env) C:\Windows\system32>"C:\Program Files\Microsoft Power BI Desktop\bin\PBIDesktop.exe"
  
```

With the support of:

CASE 2: Parsing Free Text Notes

When the human's imagination exceeds all expectations

“We have incredibly valuable datasets”

The dataset...

```
['St. Albans',  
'St.Albans',  
'St Albans',  
'St.Ablans',  
'St.albans',  
'St. Alans',  
'S.Albans',  
'St..Albans',  
'S.Albnas',  
'St.Albnas',  
'St.Al bans',  
'St.Algans',  
'Sl.Albans',  
'St. Allbans',  
'St, Albans',  
'St. Alban',  
'St. Alban']
```

The Nightmare of Analysts: Free Text Notes

Sometimes a **fraudster** manages to steal goods addressed to a customer and therefore the customer asks to be refunded by the company

The **defrauded customer** contacts Customer Care to **request a refund**

The **management system** provided to the Customer Care operator **doesn't allow** to **enter and validate** the information of the refund in a structured way

The operator have to resort to the only possible method: the entry of a **free text note** for the order!

	A	B
1	OrderNumber	Notes
2	ORD000001	EUR 5.00 Theft in delivery inserted in wire transfer 11/02/2021
3	ORD000002	EUR 29.00 Refund for theft in delivery 04/06/2020
4	ORD000003	53.00€ Refund for theft in delivery 24/09/2020
5	ORD000004	45.00 EUR 29/10/2020 Refund for theft in delivery
6	ORD000005	EUR 522.00 PA for theft in delivery 20/08/2020
7	ORD000006	€ 266.00 - Theft in delivery inserted in wire transfer 10/12/2020
8	ORD000007	EUR68.50 - Refund for theft in delivery 02/07/2020
9	ORD000008	EUR 50.00 - Refund for theft in delivery - 30/07/2020
10	ORD000009	30/07/2020 209.00 € - Refund for theft in delivery

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It Will Definitely Arrive That Day...

Your Boss



... you

*I want the total
amount of refunds!!!*

... always you



	A	B
1	OrderNumber	Notes
2	ORD000001	EUR 5.00 Theft in delivery inserted in wire transfer 11/02/2021
3	ORD000002	EUR 29.00 Refund for theft in delivery 04/06/2020
4	ORD000003	53.00€ Refund for theft in delivery 24/09/2020
5	ORD000004	45.00 EUR 29/10/2020 Refund for theft in delivery
6	ORD000005	EUR 522.00 PA for theft in delivery 20/08/2020
7	ORD000006	€ 266.00 - Theft in delivery inserted in wire transfer 10/12/2020
8	ORD000007	EUR68.50 - Refund for theft in delivery 02/07/2020
9	ORD000008	EUR 50.00 - Refund for theft in delivery - 30/07/2020
10	ORD000009	30/07/2020 209.00 € - Refund for theft in delivery

Entities to Extract From Free Text

Refund amount

Refund amount made by *currency* and *amount*

Entered as: "EURxx.yy", "EURxx.yy", "xx.yyEUR",
"€xx.yy", "xx.yy€", "xx.yy€", etc.

"Separator" between all the information can be made
by one or more *white spaces* or by a *dash* surrounded
by one or more spaces

Refund date is always in the *dd/mm/yyyy* format
(you are lucky here! 😊)

Refund reason could contain any text

Refund reason

Refund date

Currency: `(?:EUR|€)`

Amount: `\d{1,}\.?\d{0,2}`

Separator: `(?:\s+)?-(?:\s+)`

Date: `\d{2}[\-\/]\d{2}[\-\/]\d{4}`

Reason: `.*`

One Regex to Rule Them All

```
^(?:  
( {currency} {separator} {amount} {separator} {reason} {separator} {date} )  
OR  
( {amount} {separator} {currency} {separator} {reason} {separator} {date} )  
OR  
( {date} {separator} {currency} {separator} {amount} {separator} {reason} )  
OR  
( {date} {separator} {amount} {separator} {currency} {separator} {reason} )  
)$
```

DEMO 2

Parsing Free Text Notes in Power BI

How to get useful information from
free text notes

1. [Fixing ADO.NET error trying to run Python Script in Power BI | by Luca Zavarella | Microsoft Azure | Medium](#)
2. [<https://www.amazon.it/Extending-Power-Python-transform-analytical/dp/1801078203>](#)

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