MICROSOFT POWER-BI

SERIES 3

DATA TRANSFORMATION IN POWER QUERY

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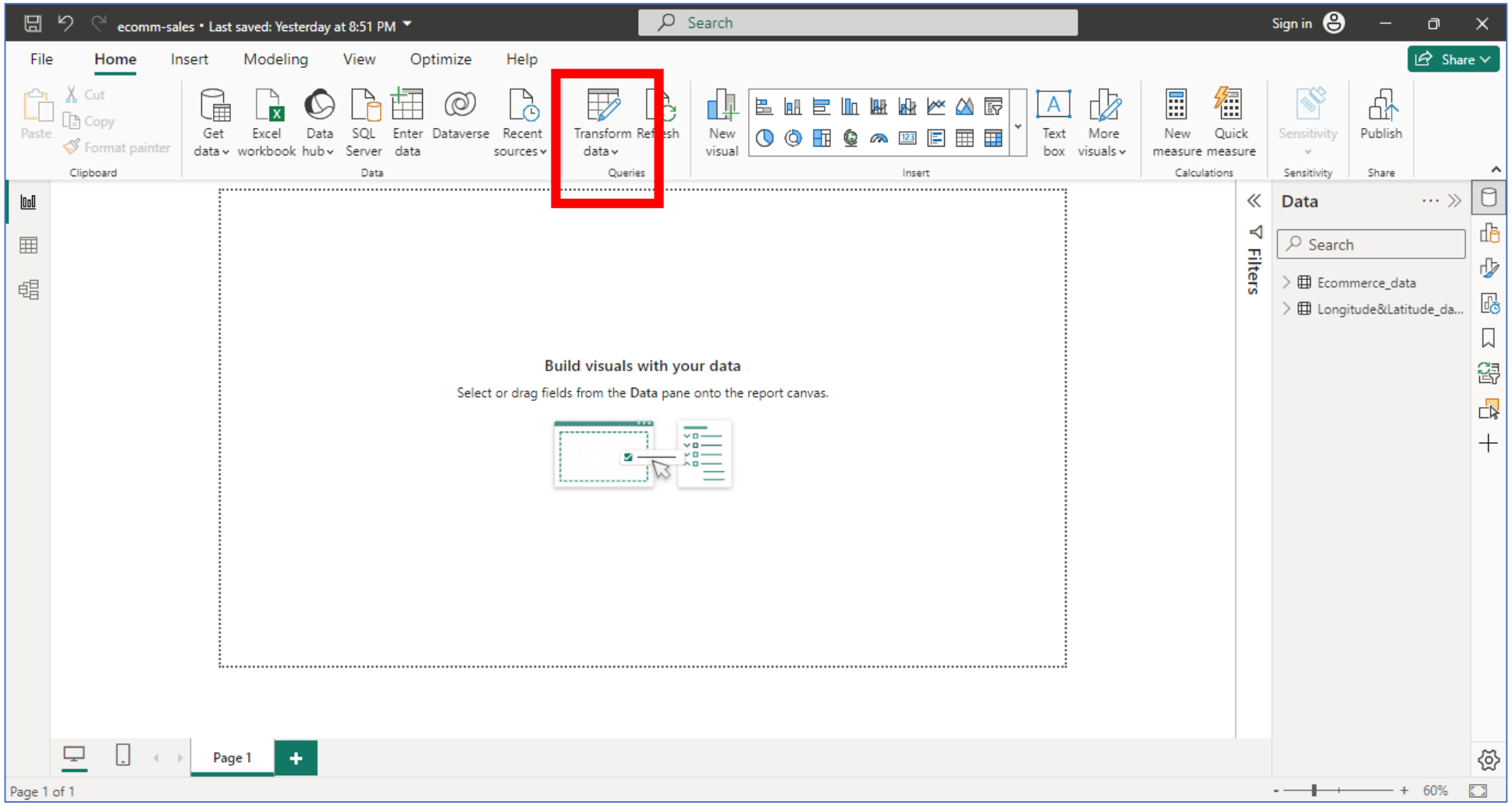
Once you've connected to your data source in Power BI, the next step is to transform the data into a format that can be easily analyzed and visualized. This process is often known as ETL (extract, transform, load).

The Power Query Editor provides a user-friendly interface that allows users to perform a series of data transformations through a set of tabs.

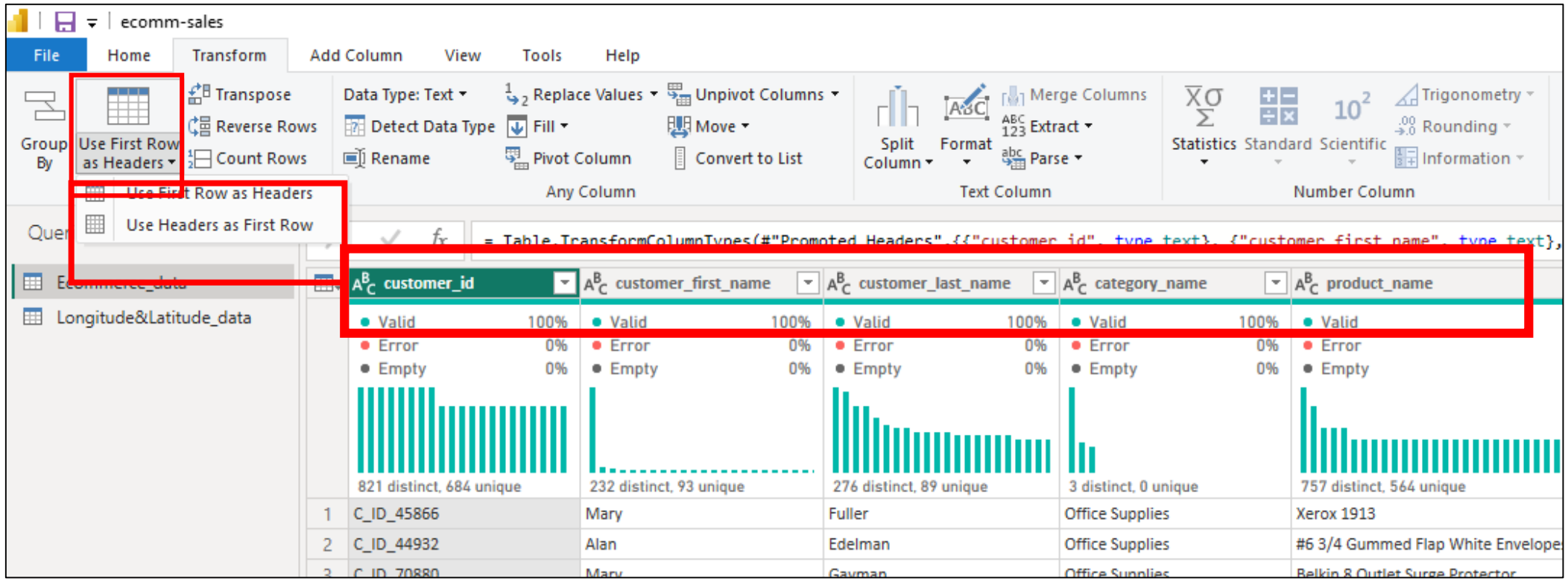
Lets go through some basic data transformation steps in Power Query Editor---

To open Power Query Editor, click on “Transform data” under Home tab.



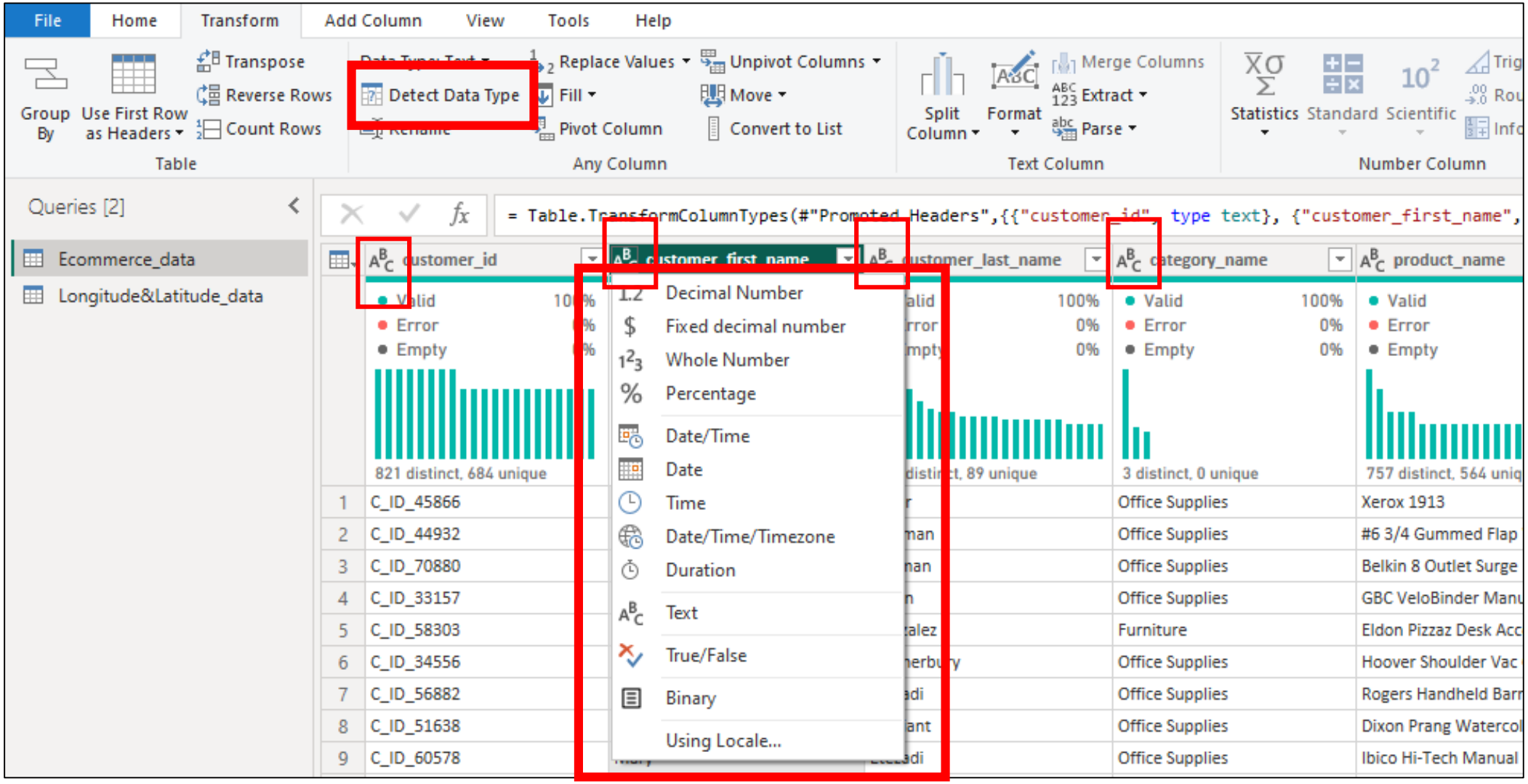
1. FORMAT TABLE HEADER

Sometimes, power query include headers in data as a first row so to set that first row as header click on “Use First Row as Headers” under Transform tab.



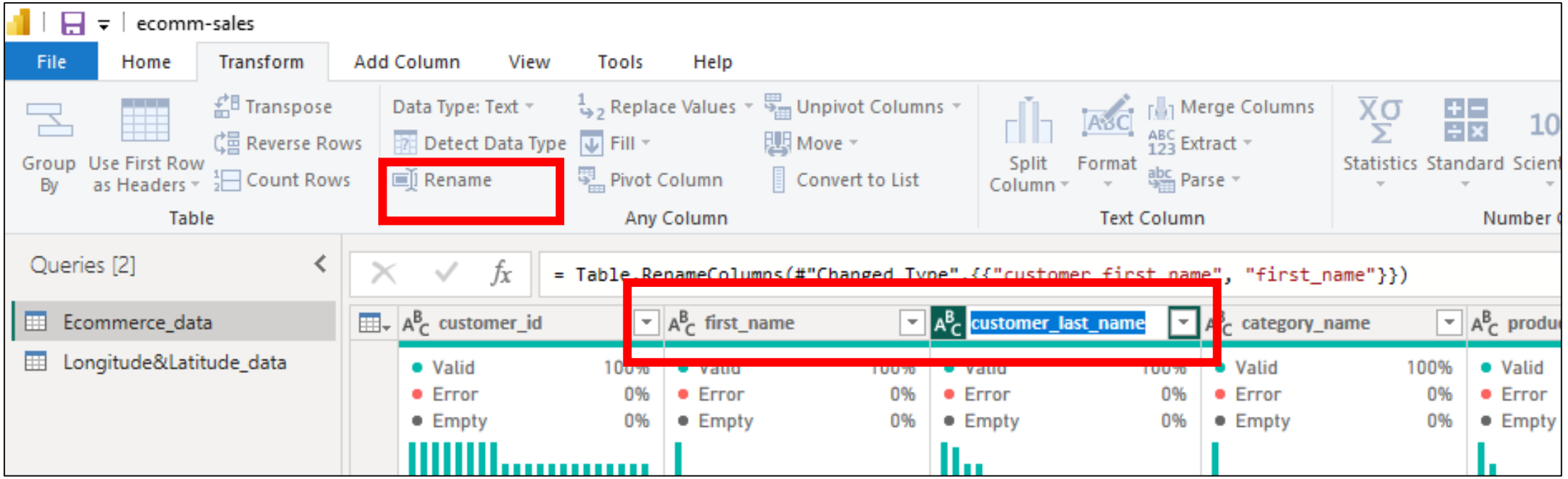
2. CHANGING DATA TYPE OF COLUMN

Check the data type of column shown beside column name. If found any wrong data type select particular column, click on “Detect Data Type” under Transform tab to automatically set data type OR click on data type beside column name and select respected type.



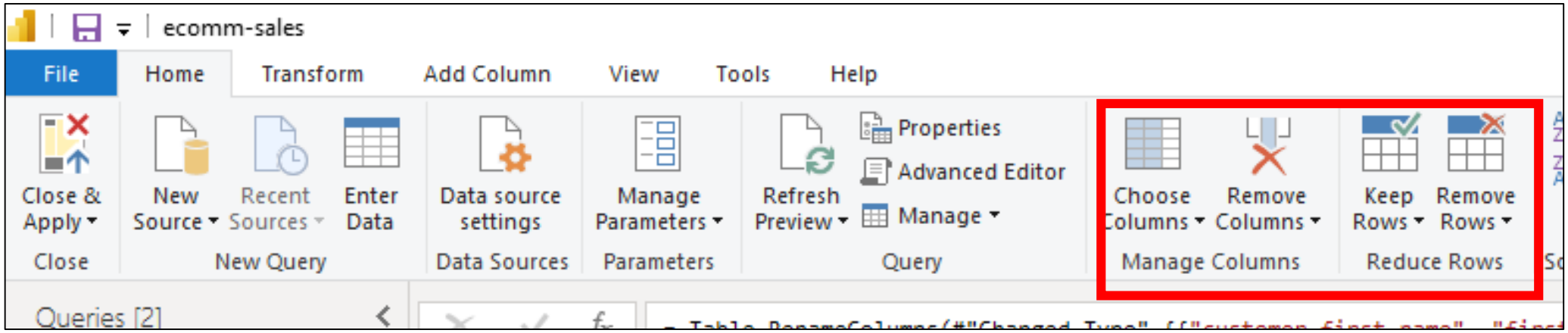
3. RENAMING COLUMN NAME

Columns from raw data can be difficult to read or meaningless. Renaming the columns in your query to a meaningful name will make it easier for you to understand your data.
Either double-click on column name and rename it OR simply select the column and click on “Rename” under Transform tab.



4. REMOVE COLUMNS/ROWS

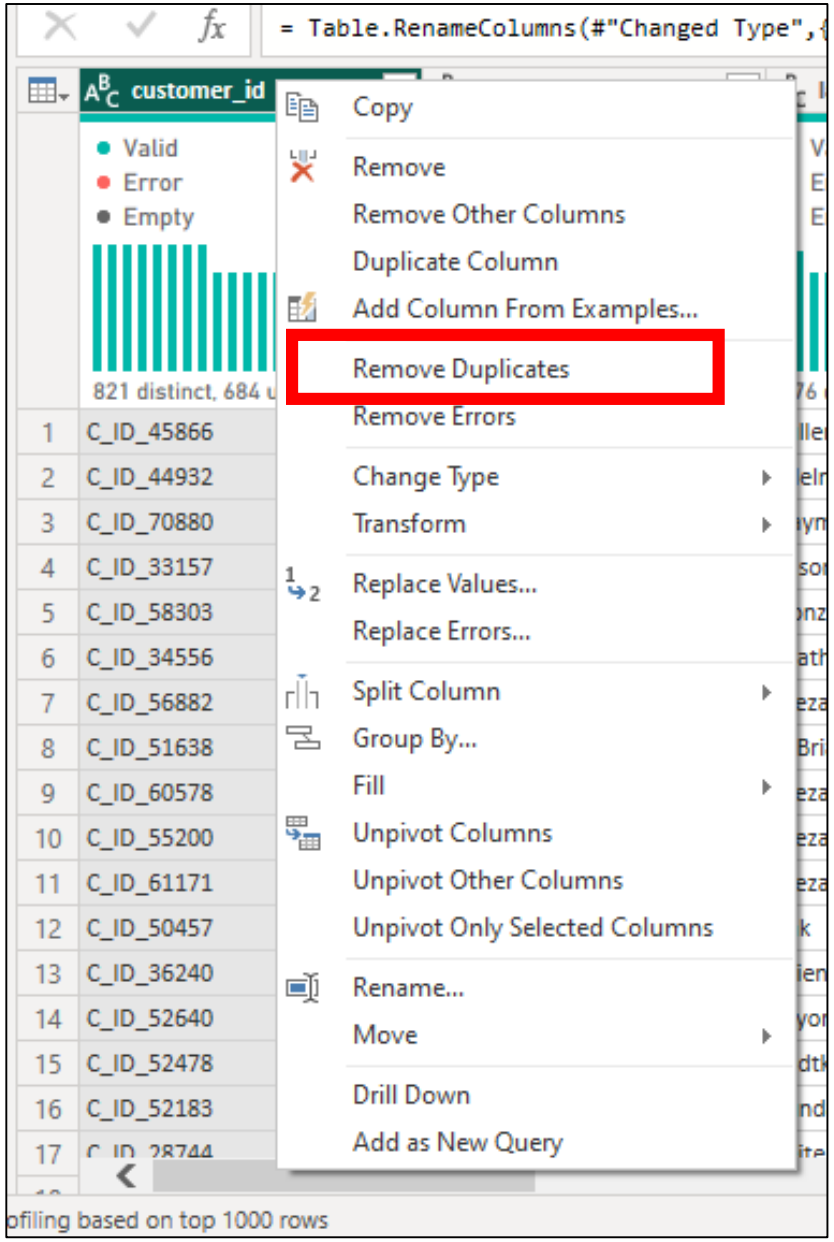
Use this transformation to clean up your dataset by removing unnecessary or redundant columns, which can improve query and report performance.
Simply select the column OR row and click on “Remove column” or “Remove row” under Home tab.



5. REMOVE DUPLICATES

It allows you to eliminate duplicate rows from your dataset based on the values in one or more columns. It helps you maintain data integrity by keeping only unique Records.

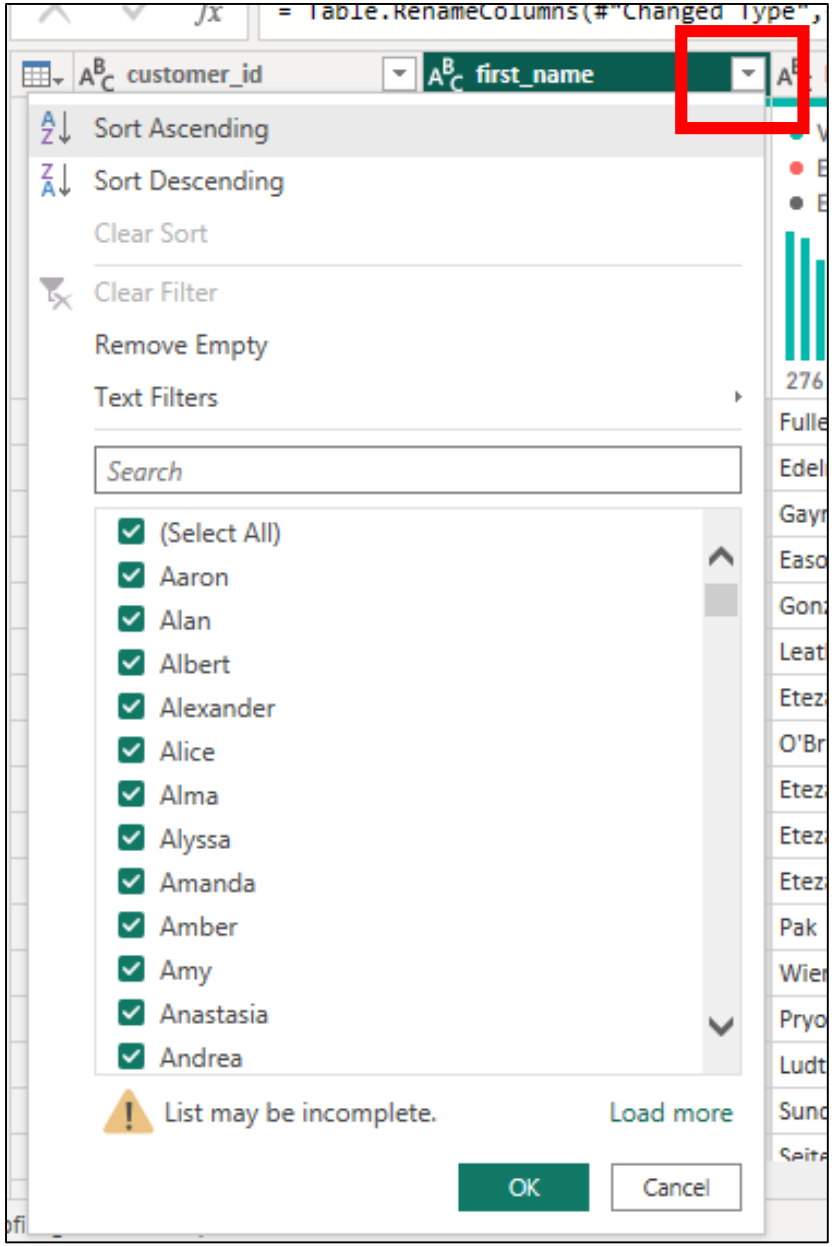
Simply right-click on the column and click on “Remove duplicates”.



6. FILTER ROWS

It enables you to include or exclude rows from your dataset based on specific criteria or conditions.

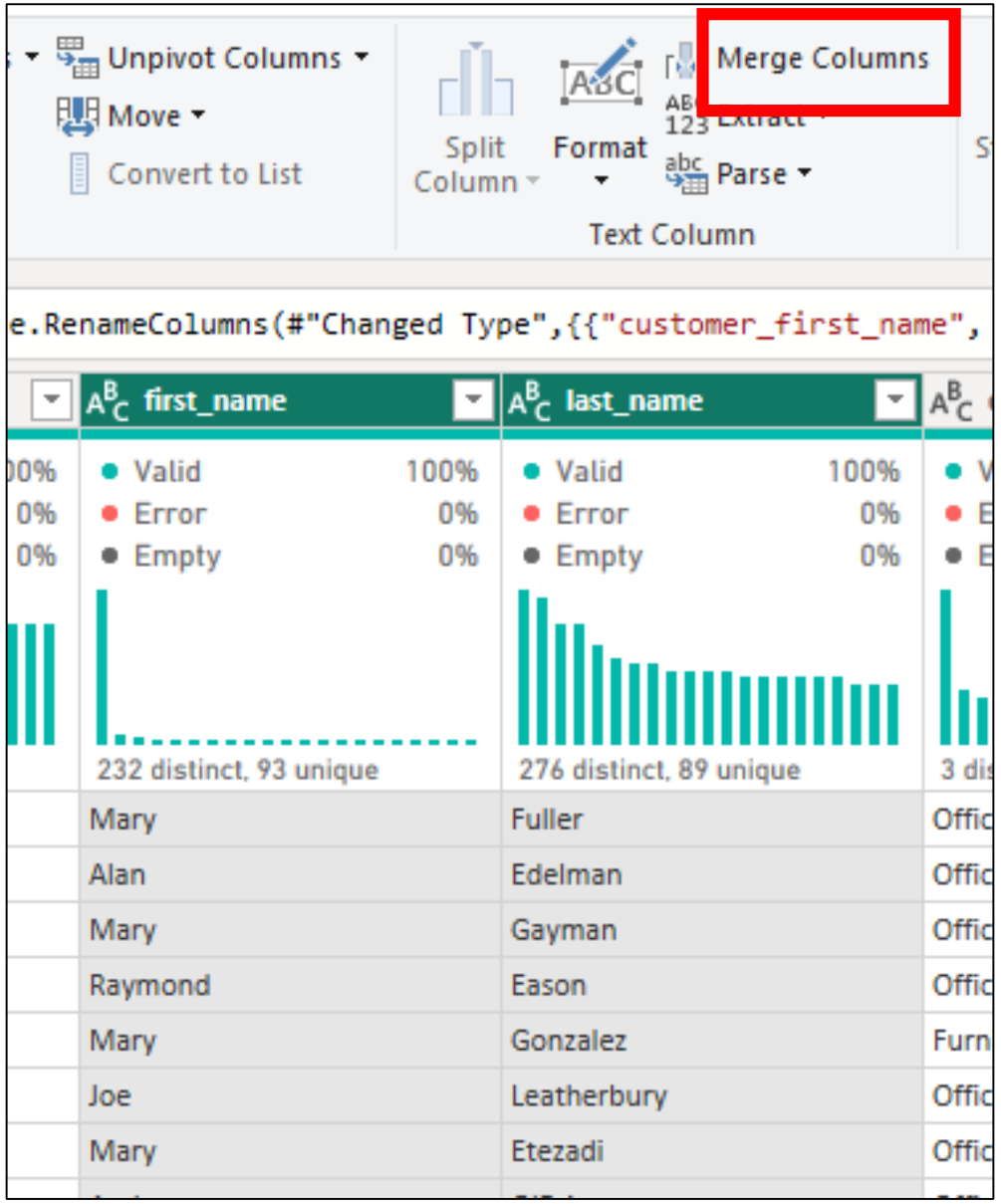
Click on the filter arrow besides column name and check the distinct values- if there are any misspell words, formats, missing values, etc



7. MERGE COLUMN

It lets you combine the values from multiple columns into a single new column. You can choose the delimiter or separator to use between merged values.

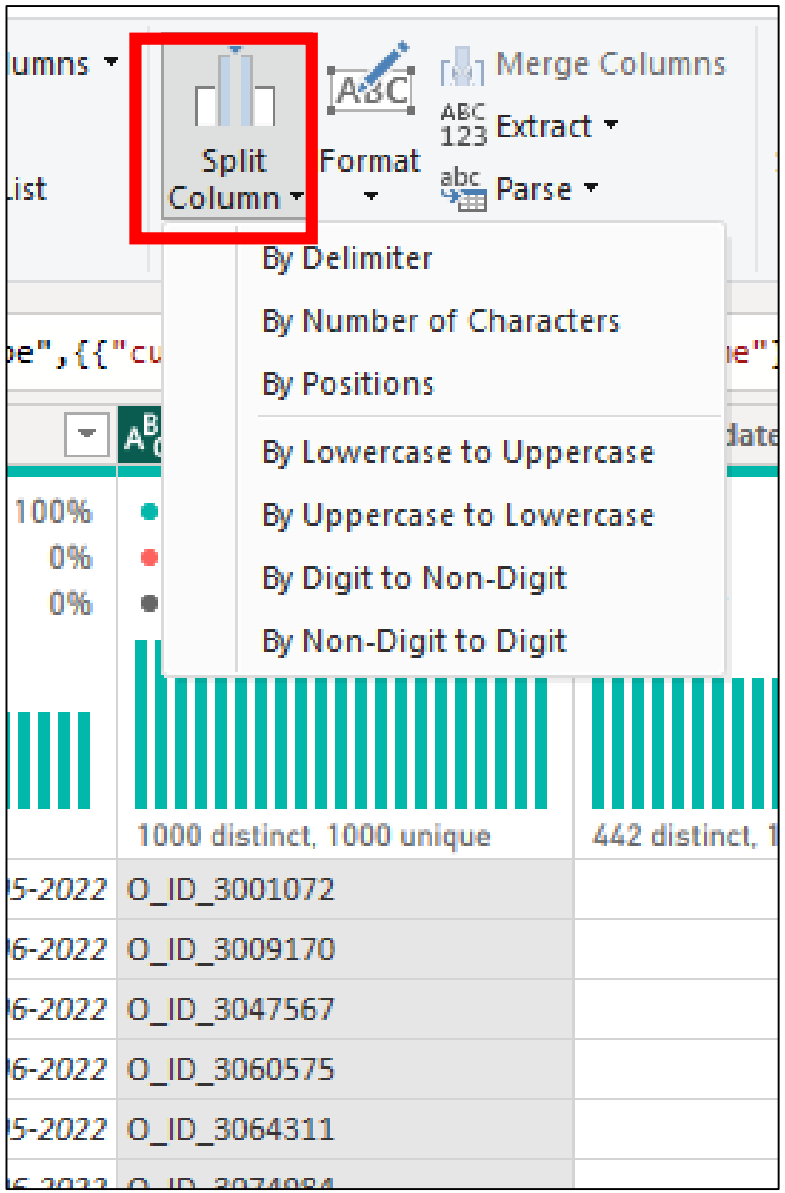
Select 2 columns that you need to concatenate and click on “Merge columns” under Transform tab.



8. SPLIT COLUMN

It allows you to divide a single column into multiple columns based on a specified delimiter or pattern.

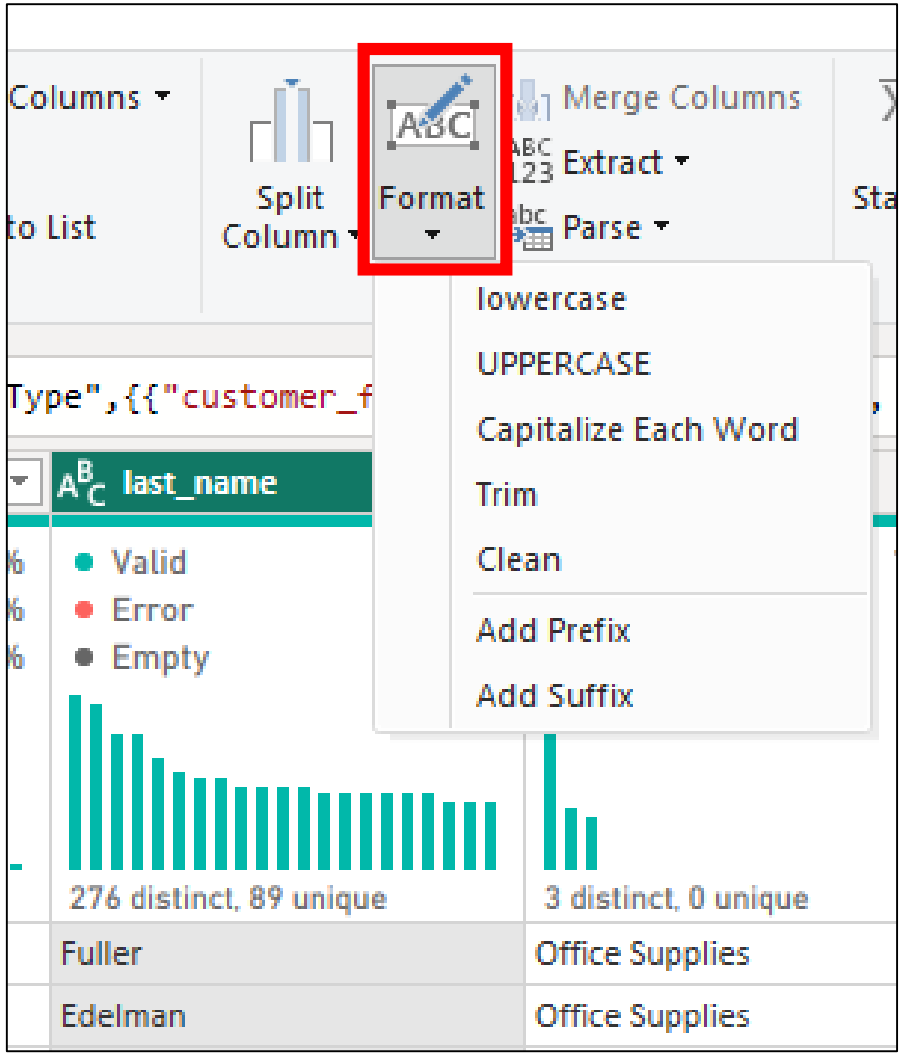
Select the column and click on “split column” and select the respective option as per selected column.



9. FORMAT COLUMN

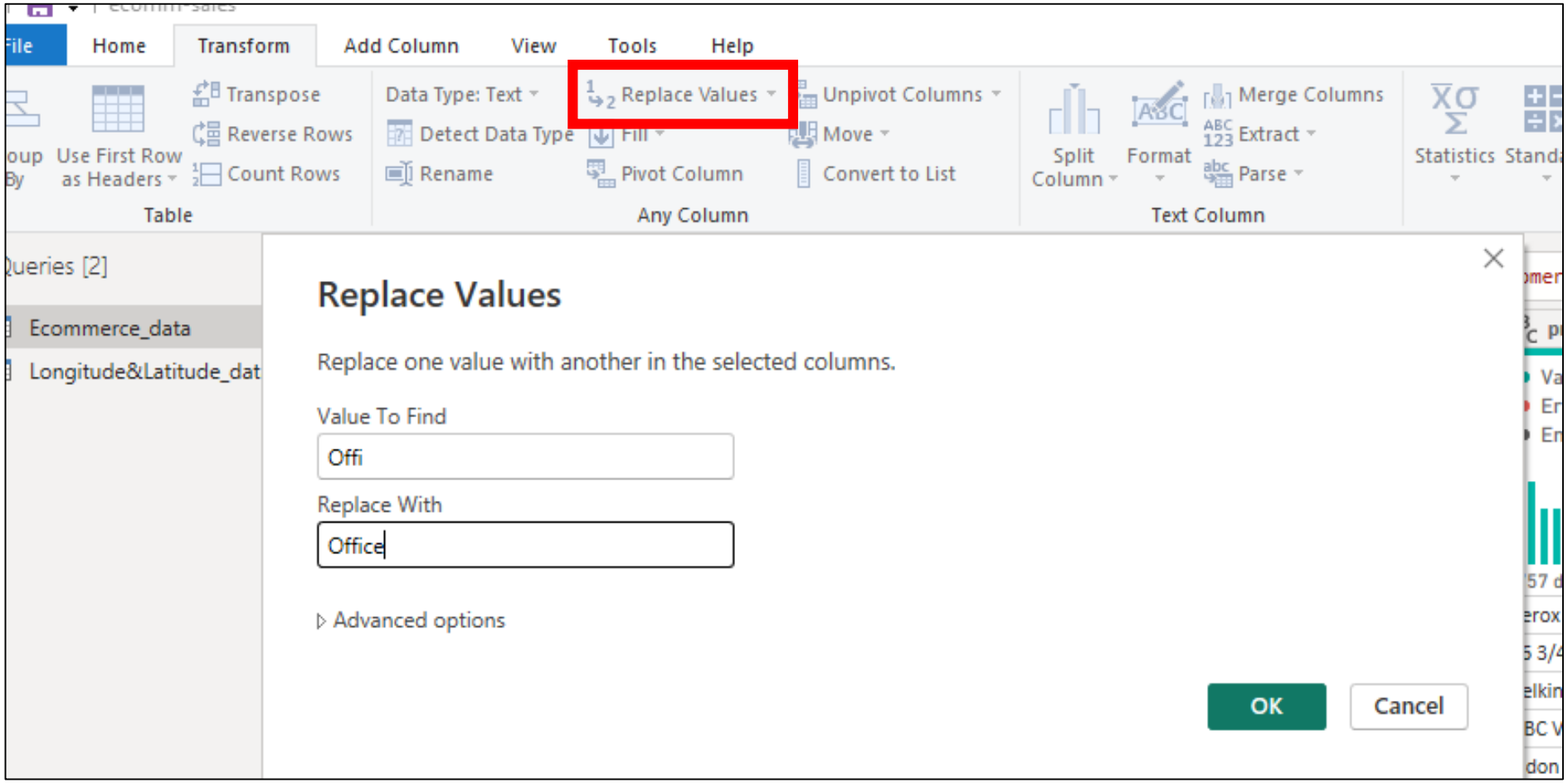
It enables you to standardized the data like trim, lowercase, uppercase, etc

Select the column and click on “format” and select respected option.



10. REPLACE VALUES

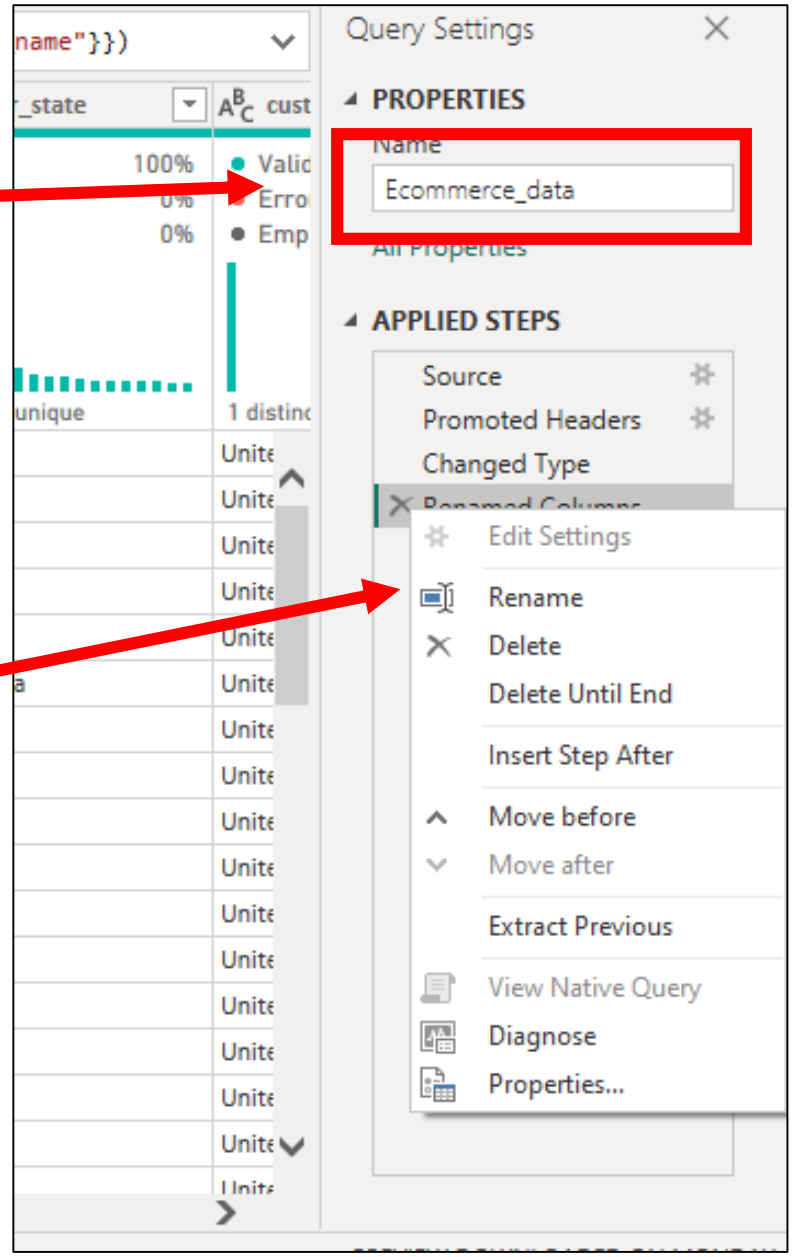
It enables you to format misspell words.
Click on “Replace values” under Transform tab and specify the required words.



11. EDIT TABLE NAME AND RENAME APPLIED STEPS

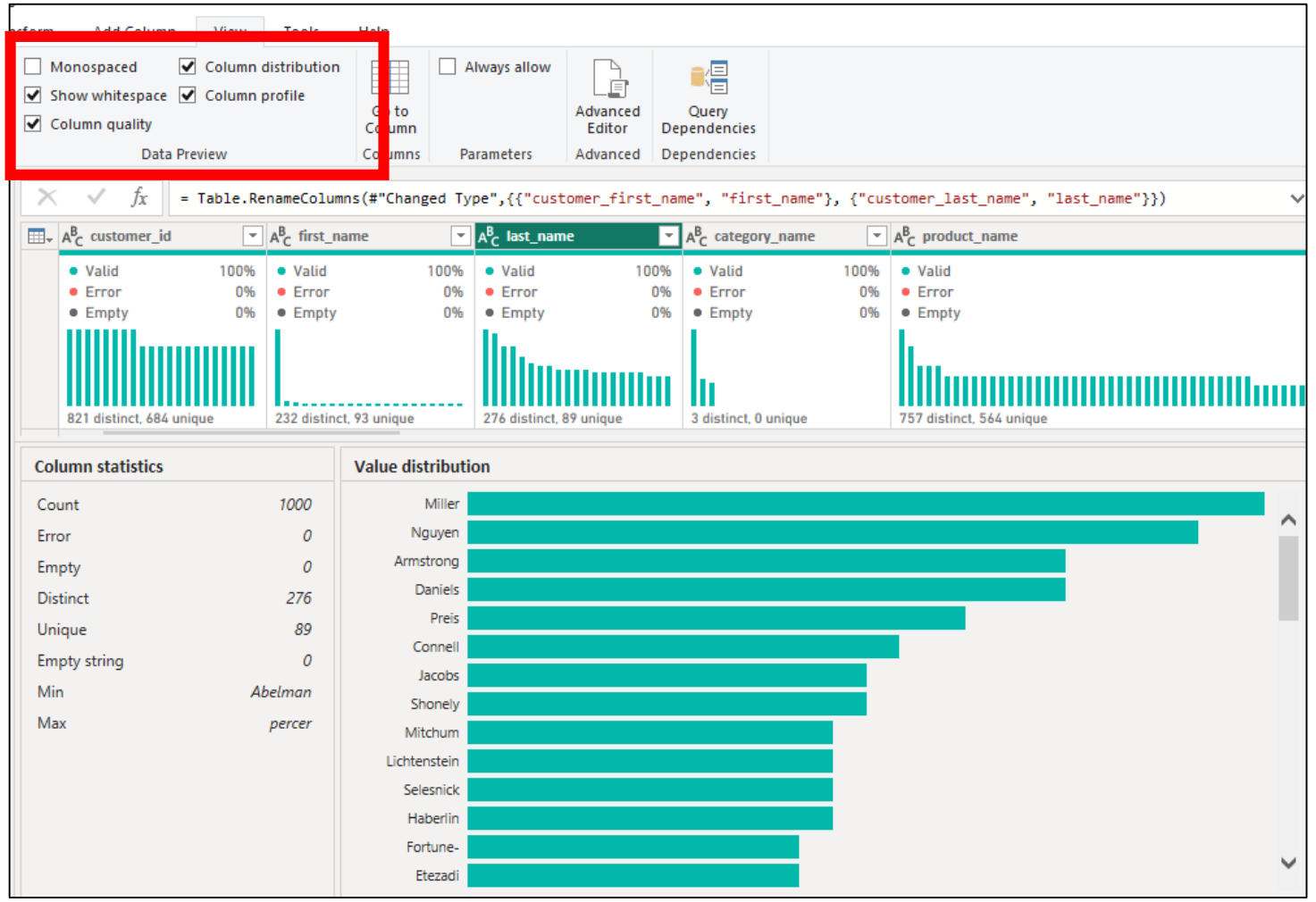
You can edit your table name here.

Rename the steps that you performed while transforming the data so that when you revisit the project after days you know what steps were performed.
Right-click on particular step and select rename.



12. DATA PREVIEW

While working on large datasets, it is necessary to get an basic idea of the data in a seconds, for that turn ON following options under View tab – Column distribution, Column profile, Column quality.



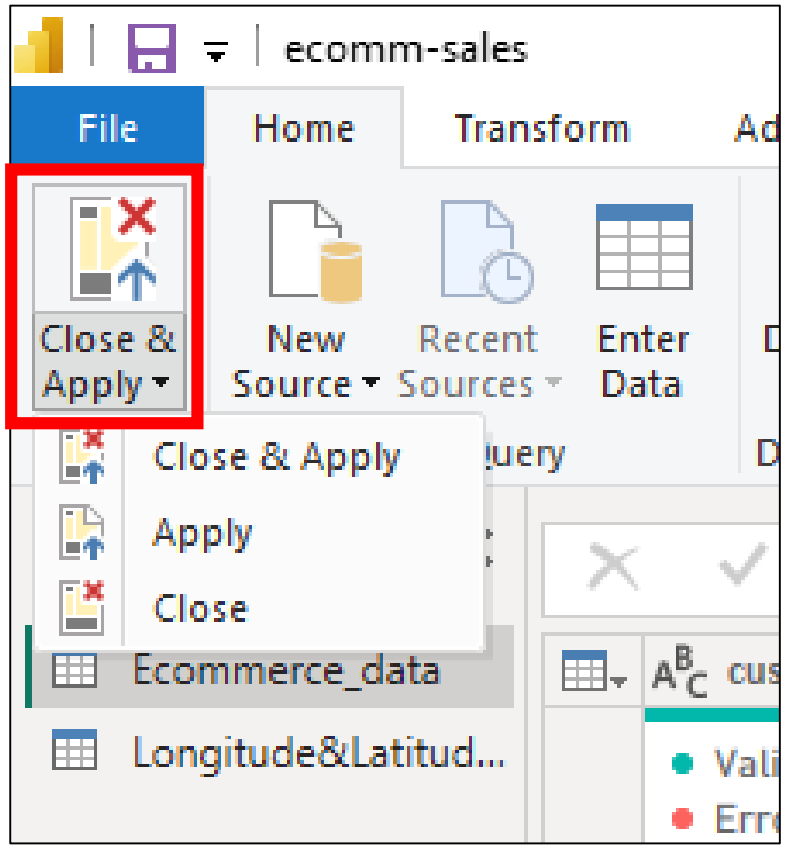
LOADING DATA TO POWER-BI DESKTOP FROM POWER QUERY EDITOR

After transforming your data in Power Query, you can load it into Power BI Desktop to create your reports and visualizations.

Under home tab Click on “close & Apply” to save changes and close power query.

Selecting “Apply ” will just save the changes.

Selecting “close” will close the power query without saving the changes.



THANK YOU

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