

# Grouping & Aggregating <Doc 000041X-Day 00006Y BI>

Monday, July 31, 2023 4:24 PM

## 07.22.2023

In the Power Query Editor Box Inside the Transform Option Inside the Table Section Click the Group By Option

★ **Group By allows you to aggregate data at a different level or "grain" (like changing daily records into monthly records)**

The Group By Box Pops Up

We might do something like Sum for our Operation Field, this gives us the total number of Orders by something like a Product Key

If you Select the Advanced Radio in the Group By Box you can group by multiple columns instead of just one column

## Grouping Table Around ProductKey

Click the ProductKey Column Header

In the Power Query Editor Box Inside the Transform Option Inside the Table Section Click the Group By Option

The Group By Box Pops Up

Click the Basic Radio so that it is Currently Filled

First Field/Drop Down: ProductKey Value

New column name Field: Total Quantity Value

Operation Field: Sum Value

Column Field: OrderQuantity Value

Click the Green Rectangular Ok Button

Now there is a Table that has the Total Quantity Field aggregated by the associated ProductKey

Remove the Applied Steps we just generated

Click the ProductKey Column Header

In the Power Query Editor Box Inside the Transform Option Inside the Table Section Click the Group By Option

The Group By Box Pops Up

Click the Advanced Radio so that it is Currently Filled

1st Drop Down: ProductKey Value

Click the White Rectangular Add grouping Button

2nd Drop Down: CustomerKey Value

New column name Field: Total Quantity Value

Operation Field: Sum Value

Column Field: Order Quantity Value

Click the Green Rectangular Ok Button

## You Return to the Power Query Editor

Now there is a Table that has the ProductKey aggregated by the associated CustomerKey

Inside Power Query's Applied Steps Section the Sorted Rows1 Step will be added

Remove the Applied Steps we just generated