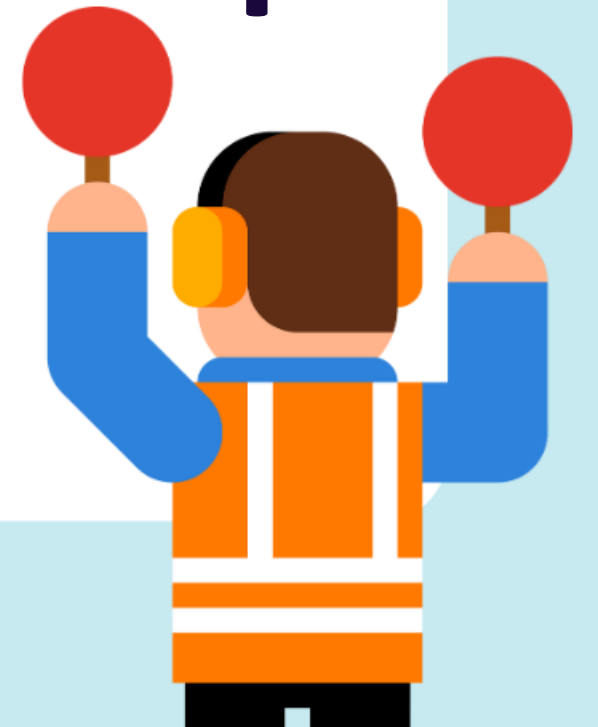




# Introduction to Calculation Groups in Power BI Desktop

Pedro Reis





# About the speaker

- Microsoft Data Platform MVP / MCT
- Expert Leader Data & AI
- Leader of Fabric PBI Portugal Group
- [www.fabricbi.net](http://www.fabricbi.net) (training / consulting)



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# Session Plan

- What are calculation groups and why to use them
- How to create them
- Use cases
- Resources & Contacts





# What are calculation groups

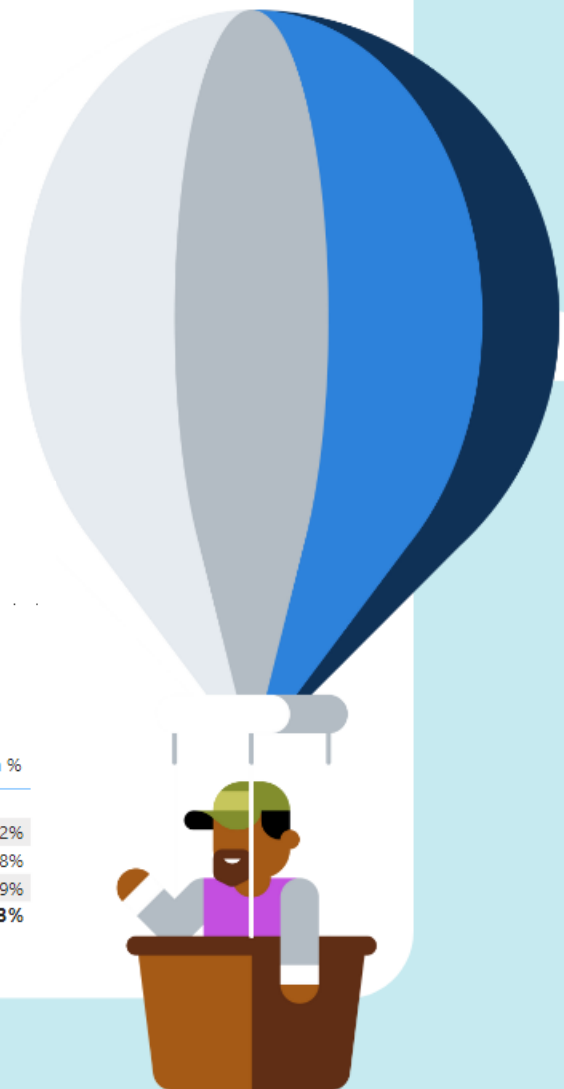
- Technique to modify context of existing measures and greatly simplify the application of common repeated calculations
- Possible create in Power BI via Tabular Editor since July 2020
- Can be created directly in Power BI Desktop since Oct 2023

Select Measures to display

☒ Total Sales  
☒ COGS  
☐ Total Quantity  
☐ Margin  
☒ Margin %

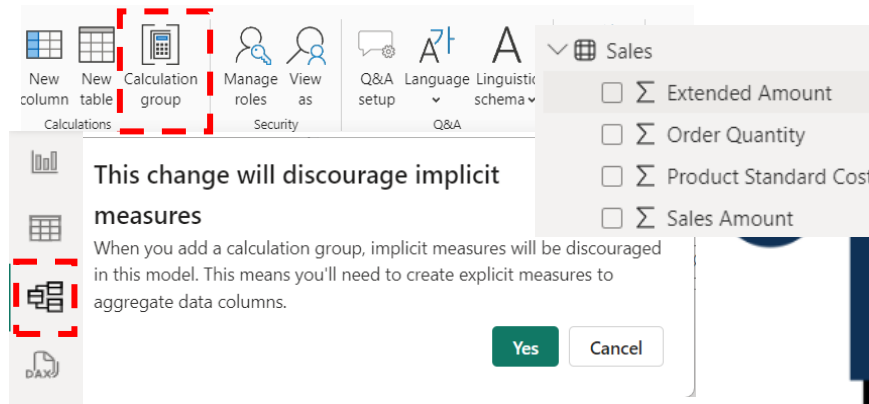
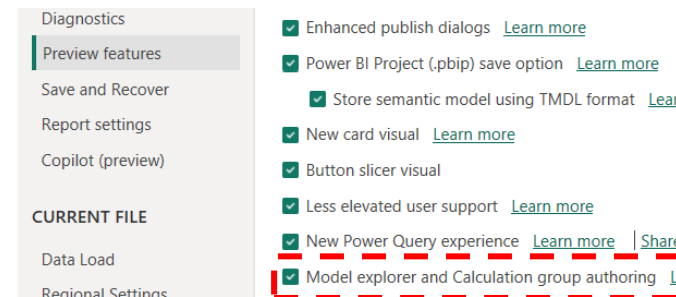
Select Calculations to Apply

☒ CY  
☒ PY  
☐ YTD



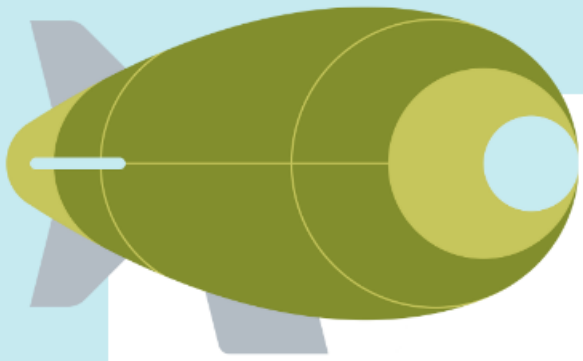
# How to create Calculation Groups

- If still on Preview, activate it under the preview options
- Restart PBI Desktop
- On the Model View, Home Tab, click on “Calculation Group” to create a new one
- A popup will appear, and upon clicking yes, all implicit measures will be deactivated (all measures with E sign by default available in the model according to the data type), and from that point on you need to create explicit measures (defining the formula with DAX)



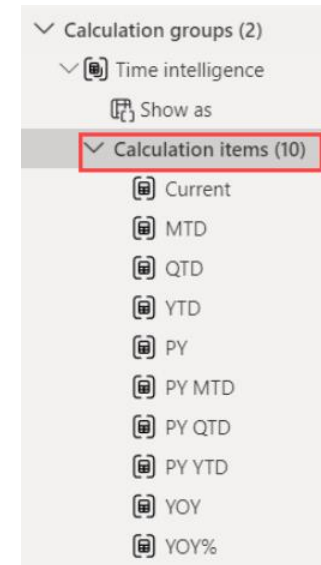
# Demo

Creating your first Calculation Group



# Use cases

- Time Intelligence (PY, YTD, YOY, YOY %,...)
- Scenarios (vs Budget, vs Last Year)
- Activate a Relationship (Order Date vs Ship Date vs Delivery Date)
- Rate Conversion, Forecast
- Statistics (Min, Max, Avg, Percentile)



# Demo

## Other Applications of Calculation Groups





# Resources

- [Create calculation groups in Power BI \(preview\) - Power BI | Microsoft Learn](#)
- [Deep dive into the Model Explorer with calculation group authoring and creating relationships in the properties pane | Microsoft Power BI Blog | Microsoft Power BI](#)
- Sample Dataset: [powerbi-desktop-samples/AdventureWorks Sales Sample at main · microsoft/powerbi-desktop-samples \(github.com\)](https://github.com/microsoft/powerbi-desktop-samples)

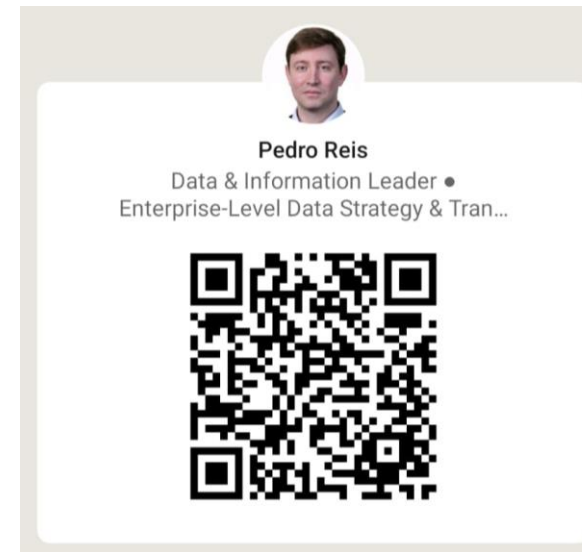


# Feedback



<https://sqlb.it/?12657>

# Let's connect!



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