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Práctica 2 PowerBI

For use: <https://learn.microsoft.com/es-es/powerquery-m/>

For advance practice: <https://learn.microsoft.com/es-es/power-query/custom-function>

Practice 1:

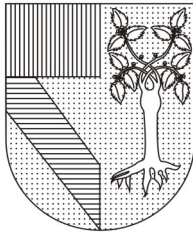
1. Nueva Consulta, Transform→ New Source→Blank Query
2. Advanced Editor
3. let
4. Source = "First Query on M",
5. x=1+1,
6. y=x+1,
7. z=x*2
- 8.
9. in
10. x+y+z

Nueva Consulta, Transform→ New Source→Blank Query

Build a query using M language, that results TRUE or FALSE if a string is contained in other one

Practice 2:

1. Using the file: Reporte Ventas.pbix
2. Use de Model icon
3. Click on, Manage relationships
4. Go, New
5. Select Ventas5 and Territorio4
6. Select the Fields to build the relationship, for this case TerritoriosDeVentasClave & TerritorioClave
7. Create new relationship
8. Select table: Categoría and subcategoría, fields:ProductCategoryKey, ProductoCategoríaClave
9. Create new relationship
10. Select table: Calendario1 and Ventas5, fields: fecha , fechaDeOrden
11. Eliminar en propiedades cada número final del nombre de las tablas.

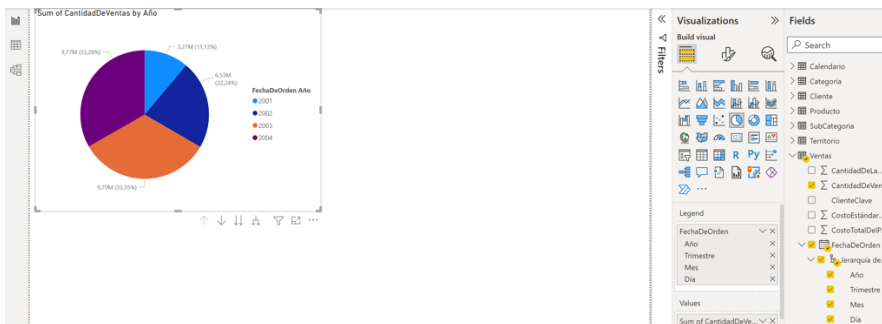


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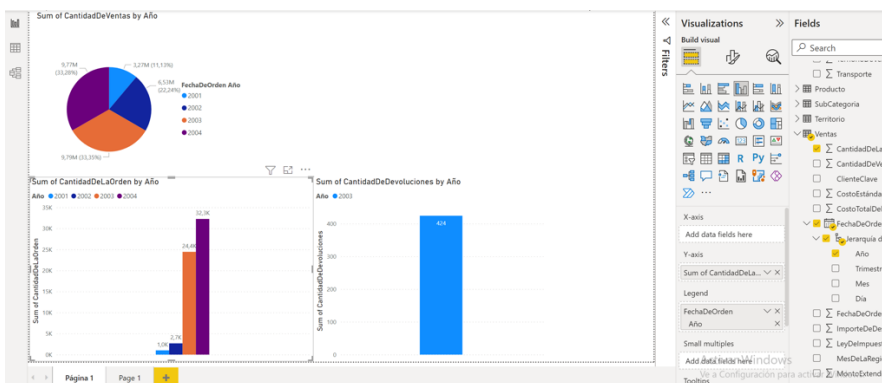
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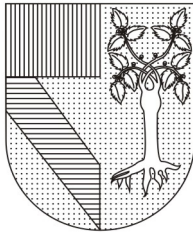
Go to: Reports section

1. Select :Pie chart
2. Drag and drop from Ventas, the field CantidadDeVentas and FechaDeOrden
3. Back to Model section, and delete the relationship between Ventas and Calendario
4. Go to Reports Renew the PieChart and you can see the Calendario and dates segmentation by Jerarquía de Fechas.



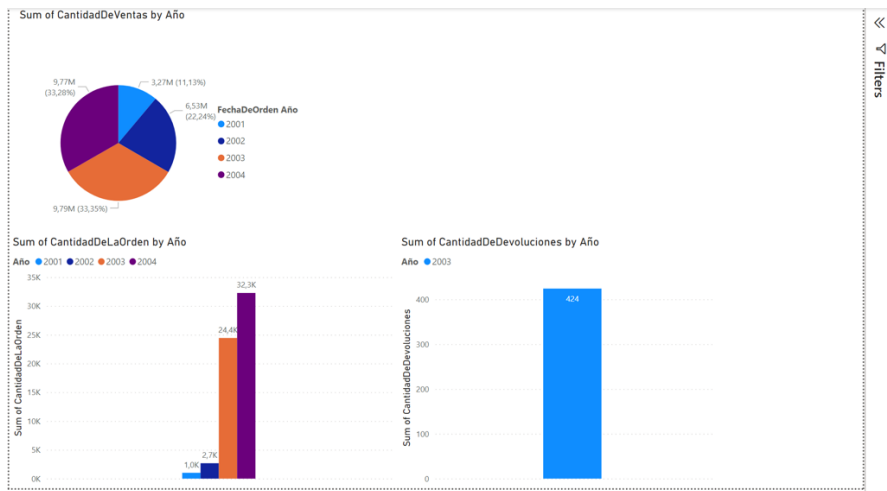
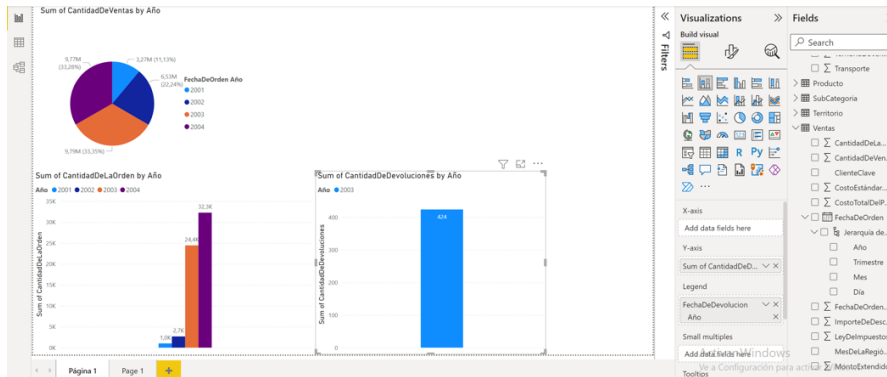
5. Open Dataset (1).xlsx and create a copy of Ventas table to new table named: Devoluciones
6. Go back to PowerBI, Home section, click on Excel Workload, select the Dataset(1).xlsx file and Devoluciones table.
7. Click on: load button
8. Delete the Relationships (2) created with the new table.
9. Add new: Clustered columna chart
10. In Y-axis: Sum of Cantidad de Ventas, Legend: Fecha de orden by year

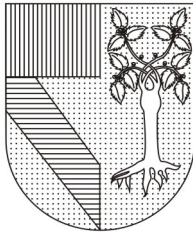




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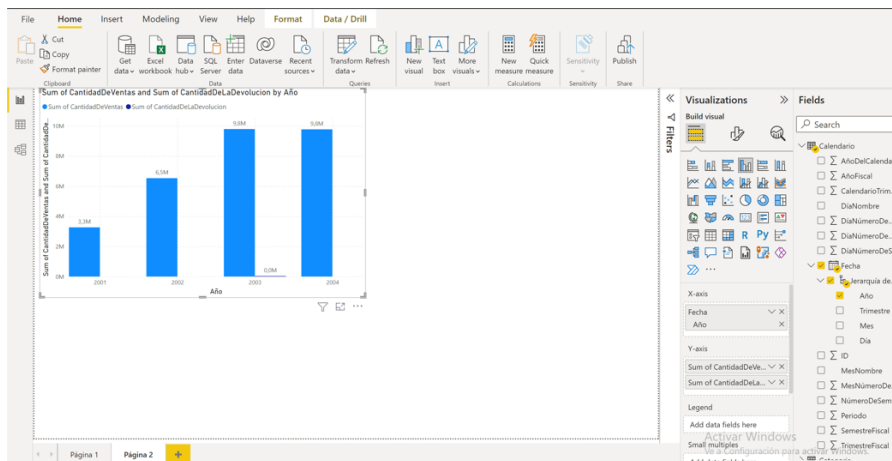


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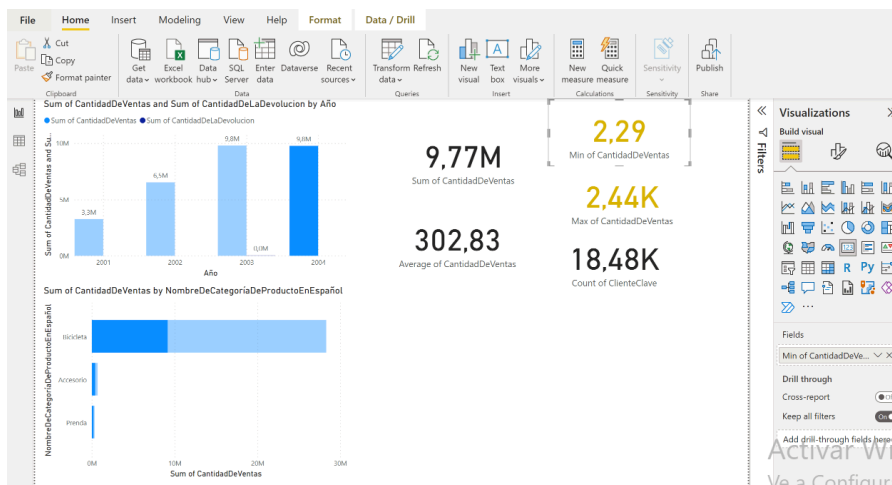
Part II. Making the same exercise using Relationships

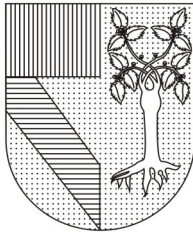
1. In a new Page
2. Add new: Clustered column chart
3. In Y-axis: Sum of Cantidad de Ventas and Sum Cantidad de Devoluciones, Legend: Fecha de orden by year
4. Go to Data model and built the relationships between Ventas, Devoluciones and Calendar
 - a. Select Fecha de Devolucion and drop it on Calendario table, attribute: fecha
 - b. Select Fecha de Venta and drop it on Calendario table, attribute: fecha
5. Finally, in X-axis: Select fecha from Calendar



Test:

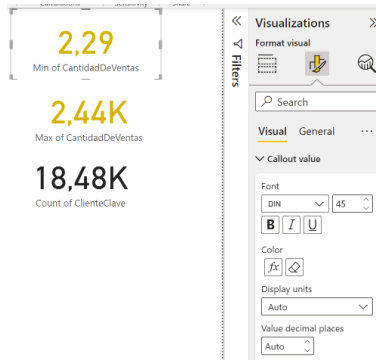
1. Make by your self a chart that presents the total sales by Product Category.
2. Personalize specific information using Card.





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Color - Callout value

Format style: Rules

What field should we base this on? Min of CantidadDeVentas

Summarization: Minimum

Rules:

- If value >= 0 Number and < 3000 Number then Yellow
- If value >= 3001 Number and < 8000 Number then Purple

Learn more about conditional formatting

Activar... OK Cancel

Part III. Using DAX

Reference: <https://learn.microsoft.com/es-mx/dax/>

Agrupación de funciones de DAX

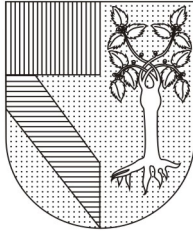
- 1 Funciones de agregación
- 2 Funciones de recuento
- 3 Funciones lógicas
- 4 Funciones de información
- 5 Funciones de texto
- 6 Funciones de fecha
- 7 Funciones de filtro
- 8 Funciones de inteligencia de tiempo

1 2 3 4 5 6 7 8

Funciones más comunes

Valores en blanco	Conteos	Tiempo y fecha
BLANK	COUNT	DATE
ISBLANK	COUNTBLANK	DATEVALUE
	COUNTROWS	DAY
Lógicas	DISTINCTCOUNT	WEEKDAY
IFERROR ISERROR	Información	WEEKNUM
IF SWITCH	HASONVALUE	YEARFRAC
	ISLOGICAL	DATEADD
Agregación	ISTEXT	
SUM AVERAGE	Texto	Relaciones
MIN MAX	CONCATENATE	RELATED
VAR STDEV	FIND	RELATEDTABLE
	FORMAT	
	REPLACE	
	EXAT	
	FIXED	
	FORMAT	
	VALUE	

*Algunas funciones tienen variaciones Tabulares

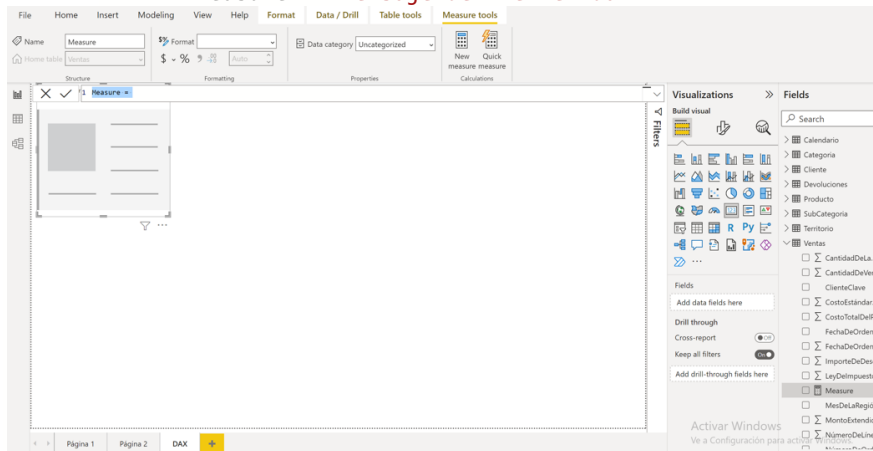


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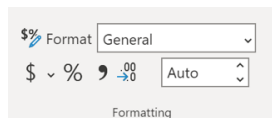
1. Right click on any table
2. Select, New measure

Measure = "Mensaje de Bienvenida"



3. Configure data inside of the card with the new Measure
4. You will see the measure value, showed in the card
5. Copy the card
6. Generate a new Measure over Ventas table

Venta Total = $\text{SUM}(\text{Ventas}[\text{CantidadDeVentas}])$



You can use format section to improve data understanding

7. Feed the card with new Measure
8. Done