



# How regexes in Power BI using Python and R can save your life in extreme cases

Luca Zavarella



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UNIVERSITÀ DEGLI STUDI DI PARMA



**DATA SKILLS**  
UNDERSTANDING THE WORLD



# Who I Am

## 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

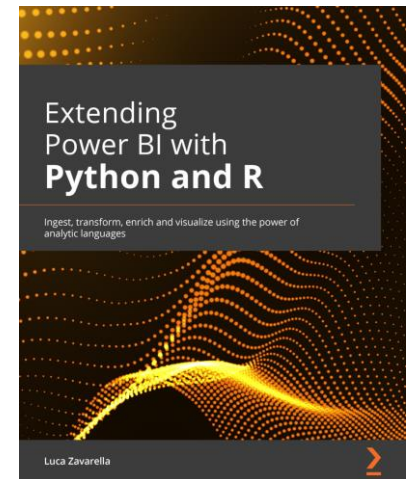
Head of Data & AI @ 

Email: [luca.zavarella@icubed.it](mailto:luca.zavarella@icubed.it)

Twitter: [@lucazav](https://twitter.com/lucazav)

LinkedIn: <https://it.linkedin.com/in/lucazavarella>

Blog: <https://lucazavarella.medium.com>



# Agenda

- What is a Regex
- Basics of Regex
- How To Configure Python and R in Power BI
- Case 1: Validating Emails and Dates in Power BI
  - Validating Emails and Dates with Regex
  - Demo 1
- Case 2: Parsing Free Text Notes in Power BI
  - Parsing Free Text Notes with Regex
  - Demo 2

# Survey

How many of you are familiar with **regular expressions (regex)**?



How many of you know **Python** and/or **R**?

How many of you attended the **Leon's session**?

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

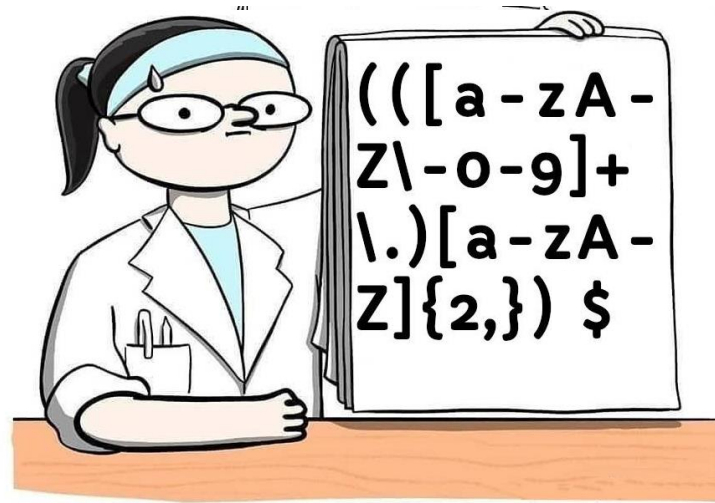
“Passwords must have at least 8 characters and contain at least two of the following: uppercase letters, lowercase letters, numbers, and symbols”

## Syntax Highlighting

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

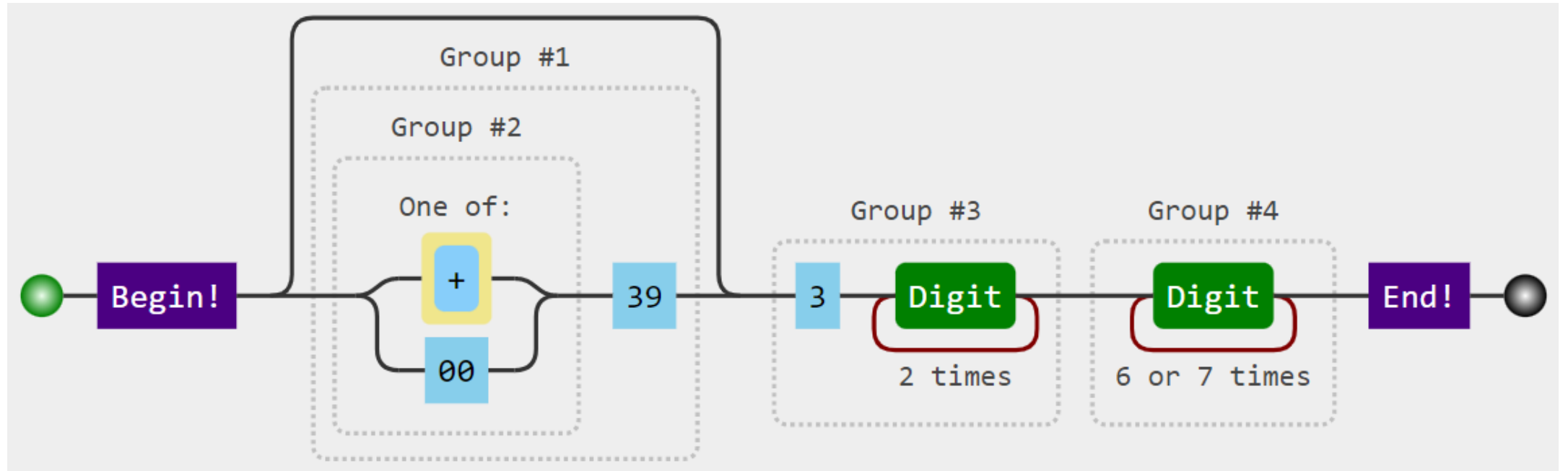


# How a Regex Looks Like



# A Simple Example of Regex

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



# 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+`  **12345**abc**678**-def (2 matches)

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

Regex: `\d+?`  **1****2****3****4****5**abc**6****7****8**-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. <code>/((?:foo fu)bar)/</code> matches "foobar" or "fubar" without "foo" or "fu" appearing as a captured subpattern
(?=...)	Lookahead – match on the characters following. e.g. <code>/ab(?=c)/</code> match "ab" only when followed by "c"
(?!...)	Negative lookahead – match on characters that aren't following. e.g. <code>/ab(?!c)/</code> match "ab" only when NOT followed by "c"
(?<=...)	Positive look-behind assertion. e.g. <code>/(?&lt;=foo)bar/</code> matches "bar" when preceded by "foo"
(?<!=...)	Negative look-behind assertion. e.g. <code>/(?&lt;!=foo)bar/</code> – matches "bar" when not preceded by "foo"
(?#...)	Comment e.g. <code>(?# This comment is ignored entirely)</code>



# 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!

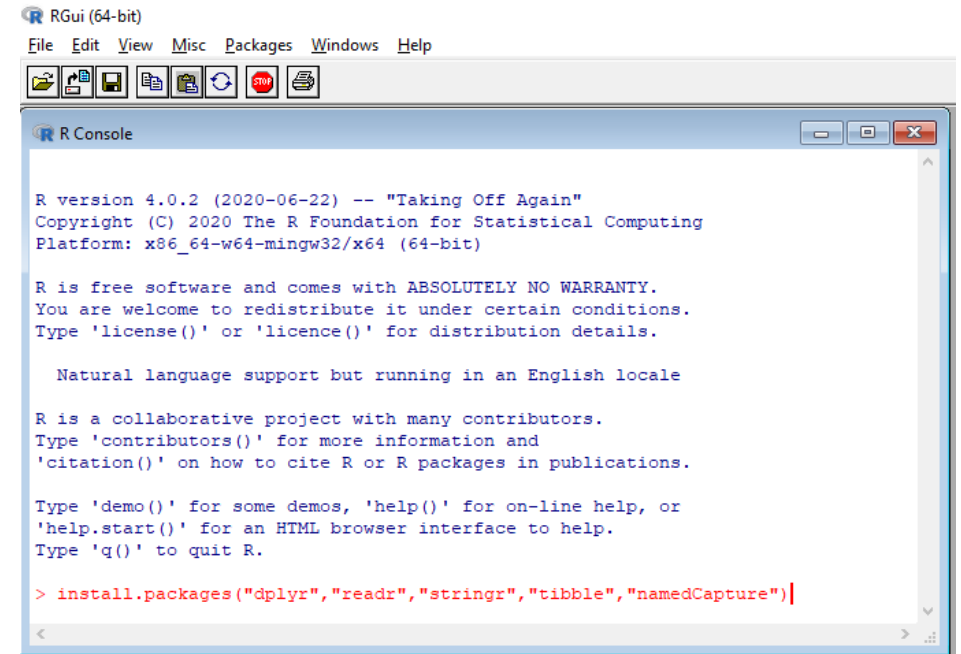


# How To Configure Python and R in Power BI

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

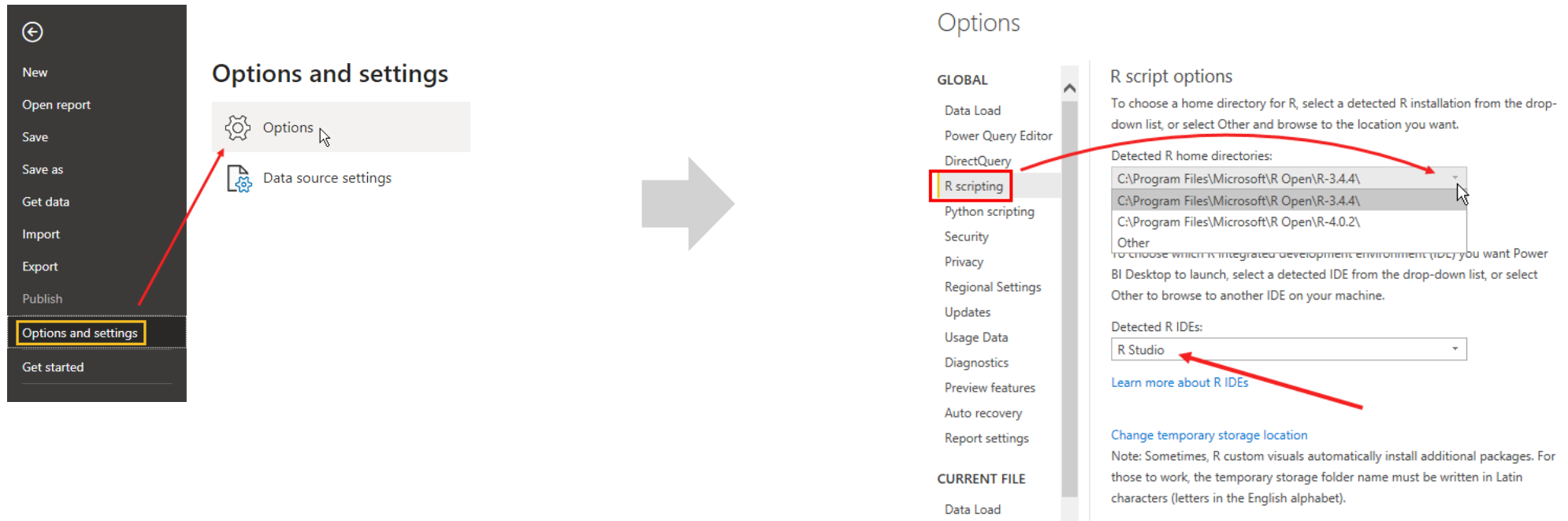
# Let's Configure R...

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



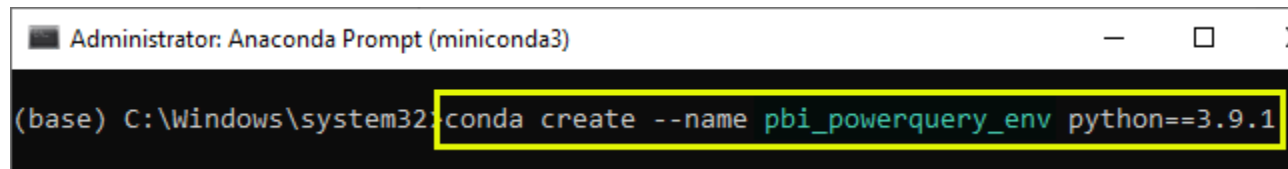
# ... Then Configure R With Power BI

## 1. Configure Power BI Desktop to work with R



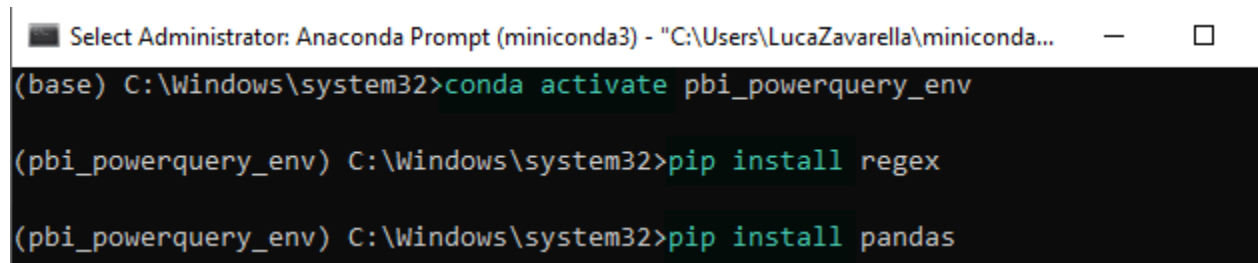
# Let's Configure Python...

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*):



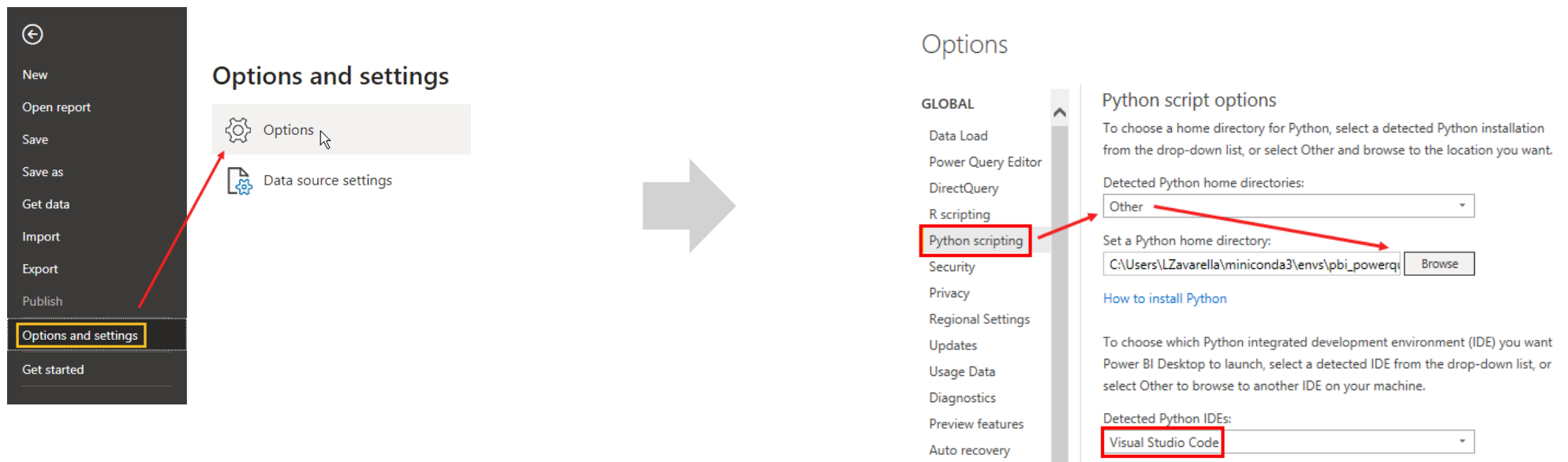
```
Select Administrator: Anaconda Prompt (miniconda3) - "C:\Users\LucaZavarella\miniconda...
(base) C:\Windows\system32>conda activate pbi_powerquery_env

(pbi_powerquery_env) C:\Windows\system32>pip install regex

(pbi_powerquery_env) C:\Windows\system32>pip install pandas
```

# ... Then Configure Python with Power BI

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



# 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 Happen When Filling Out the Excel

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	<a href="#">example1@example.com/example2@example.com</a>	06/07/2019	0	1
4	3	<a href="#">example33@example.com.</a>	02/05/2018	0	1
5	4	firstname-lastname@example.com	06/07/2019	1	1
6	5	<a href="#">example@example.com --&gt; check</a>	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

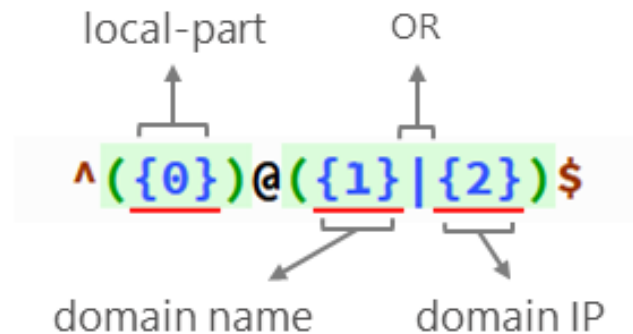
We need to **identify any errors** and highlighting them, allowing the fraud team to be able to correct them

# Format of an Email Address

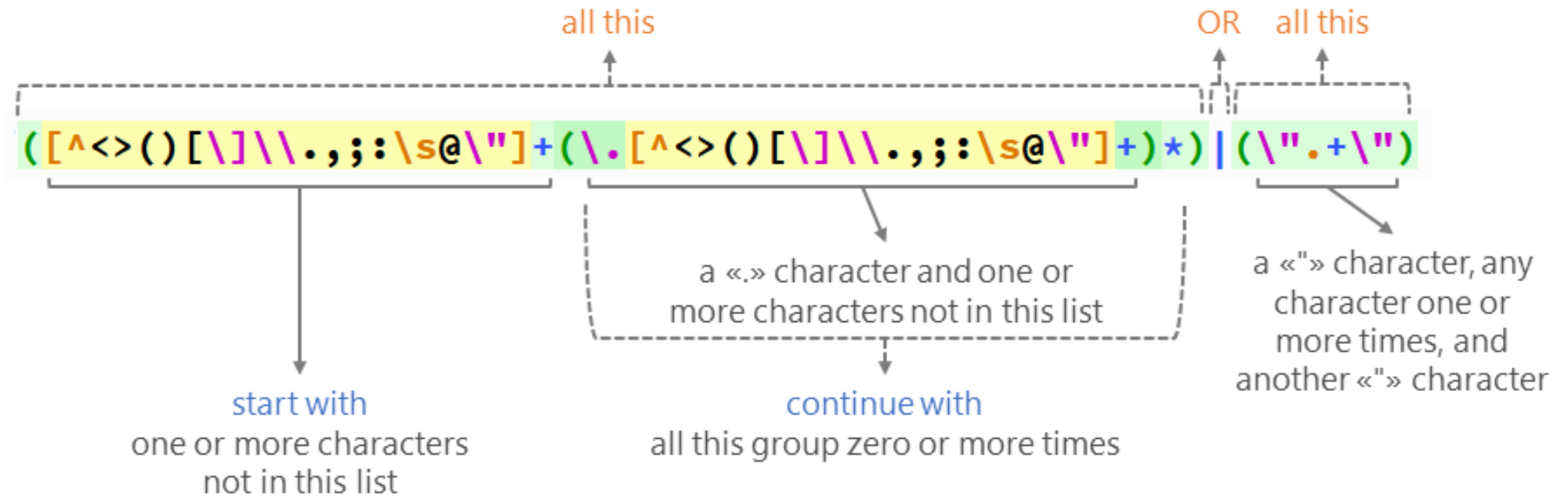
Generic format of an email address:

local-part@domain

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

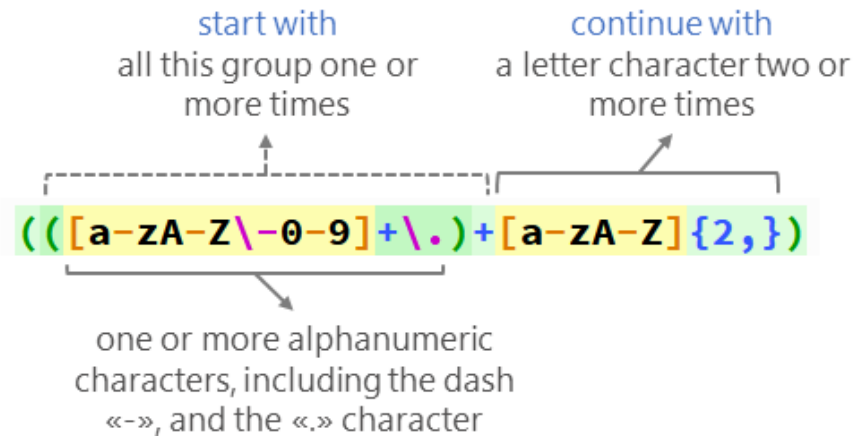


# Validating the Local Part of an Email Address

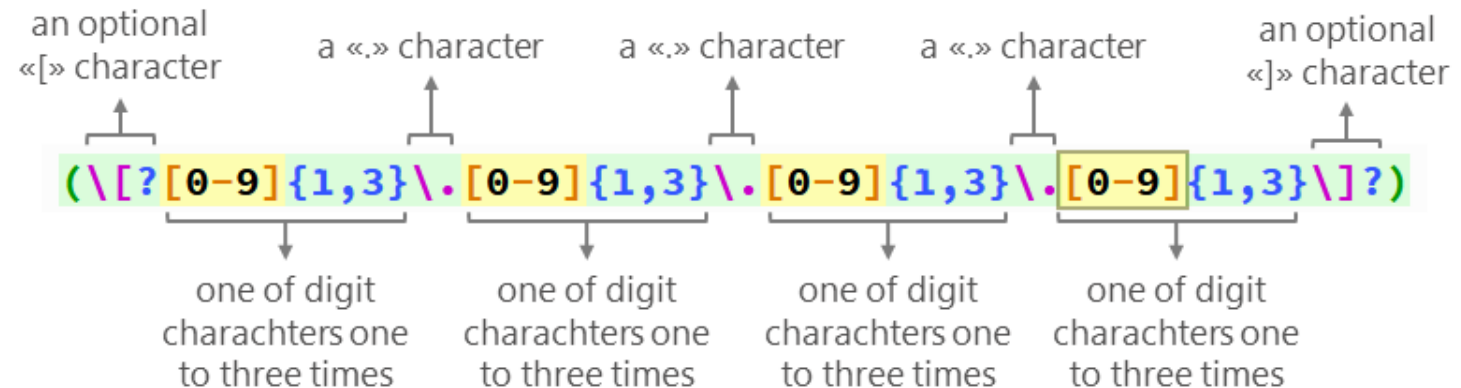


# Validating the Domain of an Email Address

Domain name:



Domain IP:



# Final Regex for Email Validation

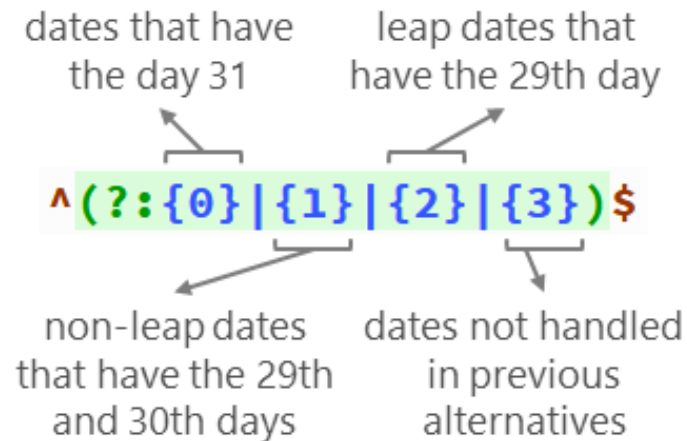
```
^((( [^<>() [ \] \\. , ; : \s @ \"]+ (\. [^<>() [ \] \\. , ; : \s @ \"]+ )*) | (\"\".+\"\")) (
@((( [a-zA-Z \- 0-9]+ \. )+ [a-zA-Z]{2,}) | ( \[? [0-9]{1,3} \. [0-9]{1,3} \. [0-9]
[0-9]{1,3} \. [0-9]{1,3} \] ? ) ) ) $
```

# How It Should Be According to RFC822

# Format of a Date

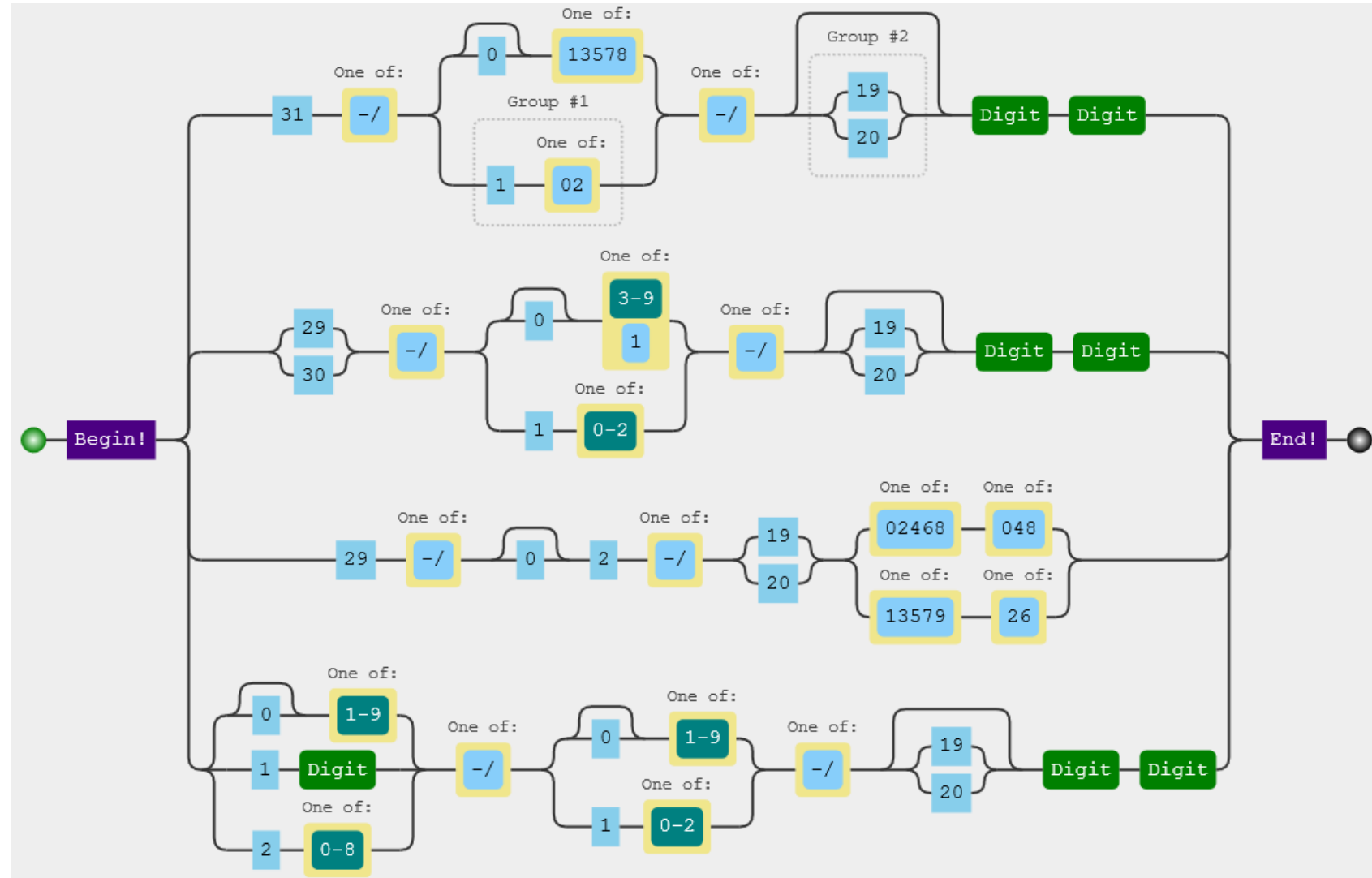
Dates can be partitioned as following to validate them also “**semantically**”:

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





# Validating a Date

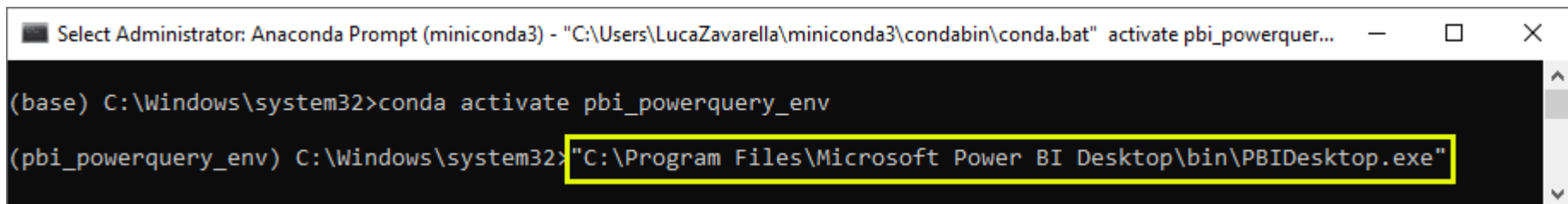


# DEMO 1: Validating Emails and Dates in Power BI

How to get useful information from at first glance messy log files

# 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"
```

# CASE 2: Parsing Free Text Notes

When the human's imagination exceeds all expectations

Them: “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 must resort to the only possible method: the entry of a **free text note** associated with the order

	A	B
1	<b>OrderNumber</b>	<b>Notes</b>
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

# It Will Definitely Arrive That Day...

Your Boss



... you

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

... always you

	A	B
1	<b>OrderNumber</b>	<b>Notes</b>
2	ORD000001	EUR 5.00 Theft in delivery inserted in wire transfer 11/02
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 reason

Refund date

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

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

When the human's imagination exceeds all expectations

# References

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>](#)

Would You Like to Work with Us?





GRAZIE !!

