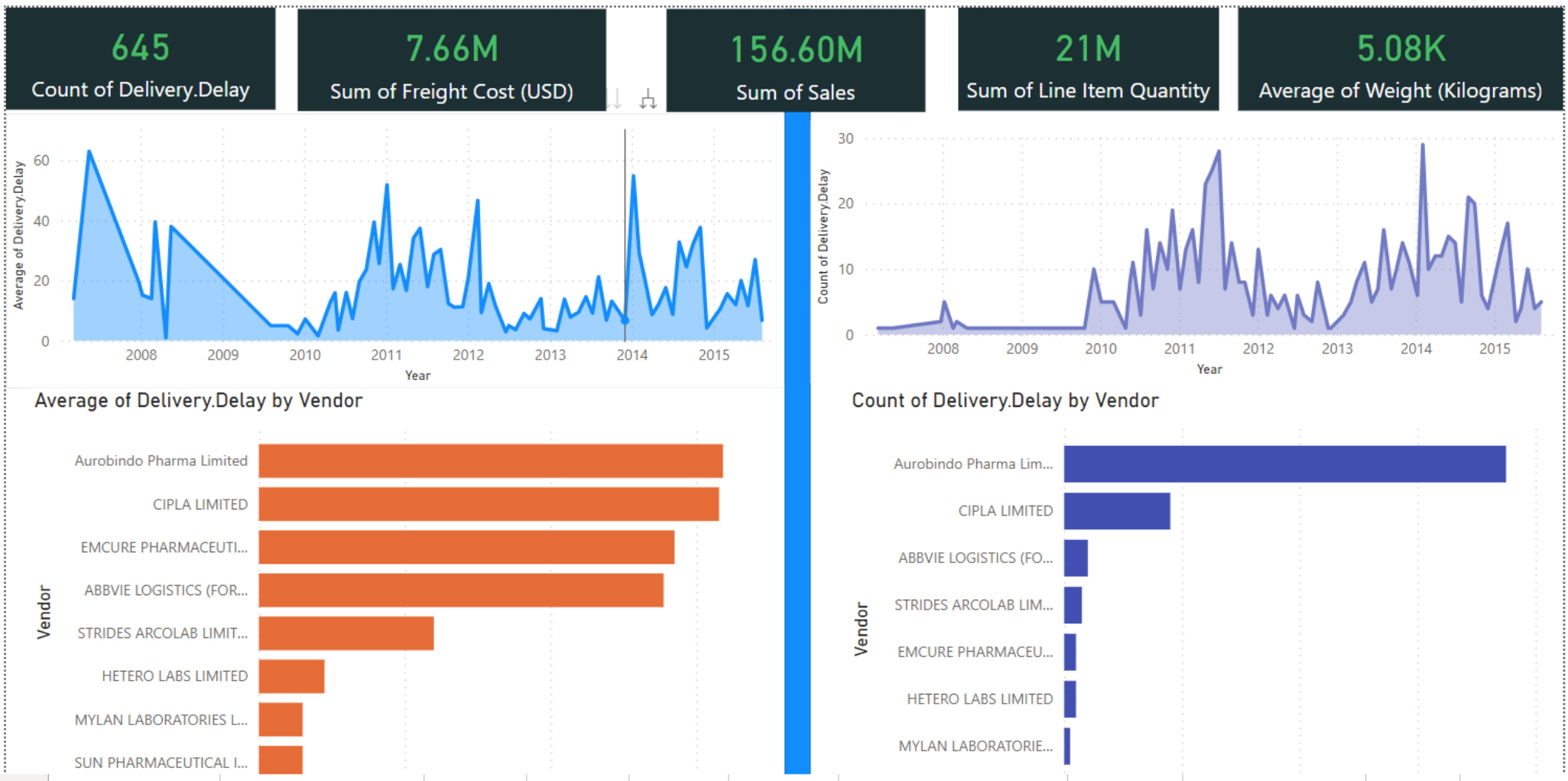
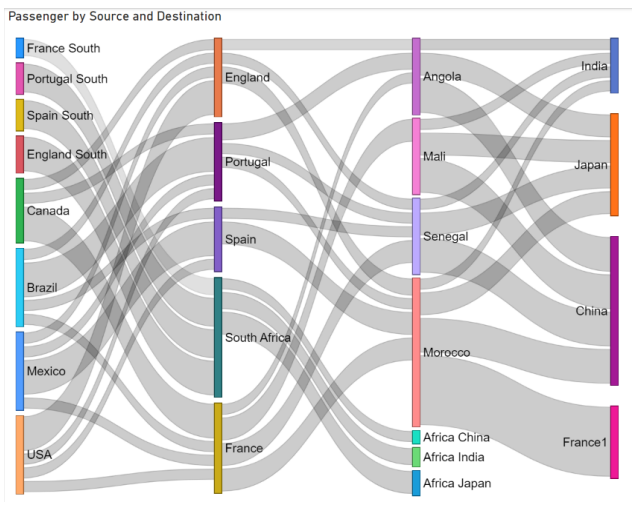
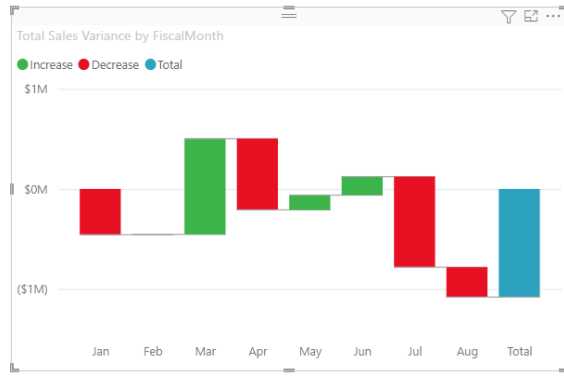
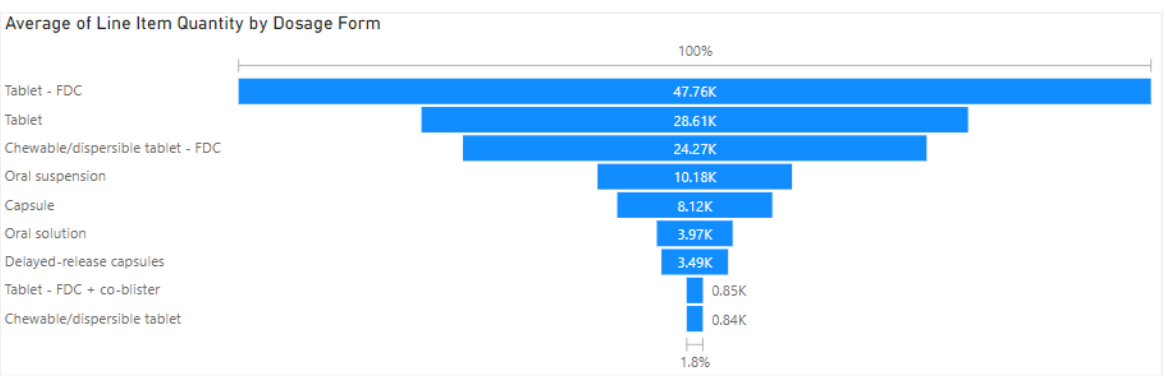
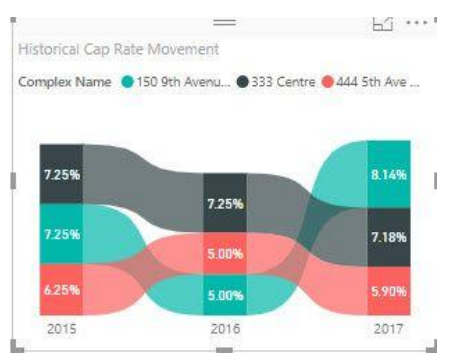
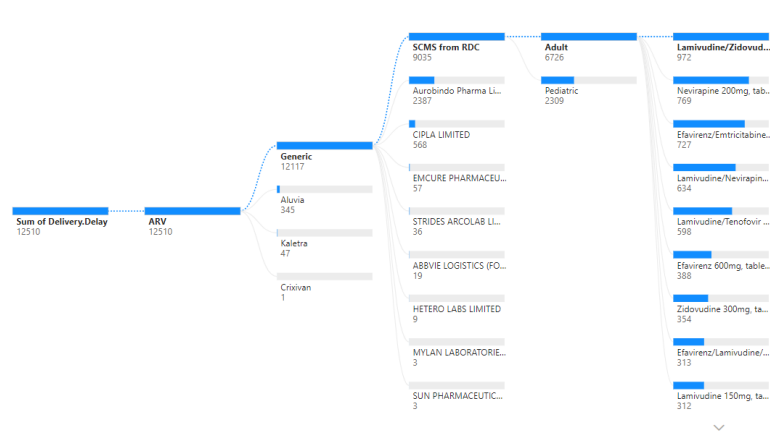
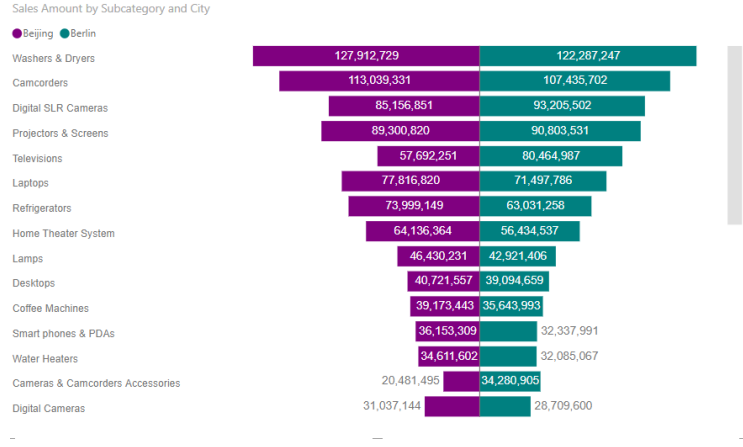
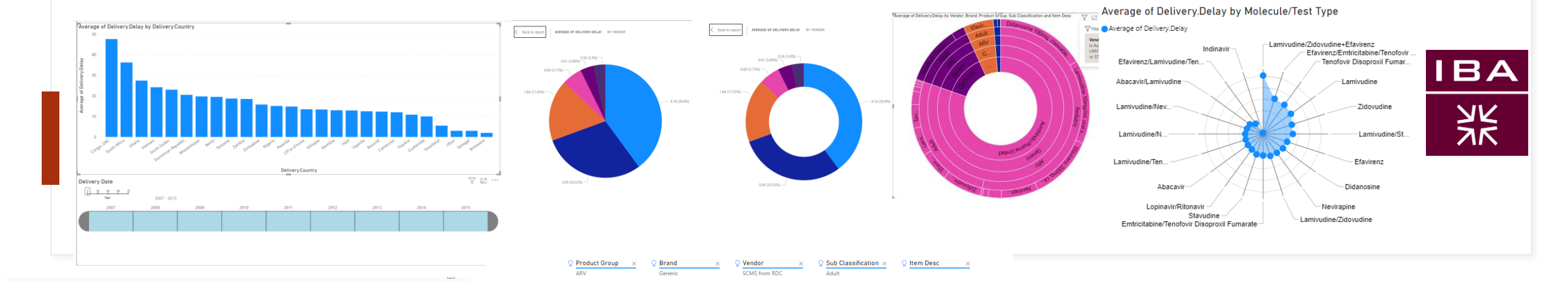


# PowerBI

CS 459 Business Intelligence

# Simple charts

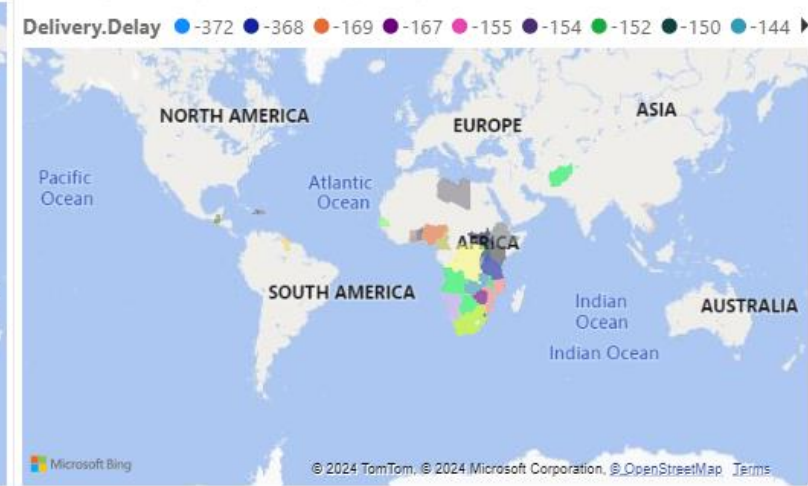




Sum of Delivery.Delay by Delivery.Country



Delivery.Country and Delivery.Delay



Delivery.Country and Delivery.Delay



# The Art of Story Telling

- Tell the data narrative page by page → takes shape of a report
- Text helps to show interpretation – keep in mind your client.

# Dashboard Vs Report

	Dashboard	Report
<b>Purpose</b>	Used for high-level monitoring, often in real-time or near-real-time, providing a consolidated view of business performance	Used for in-depth analysis and exploration of data to answer complex business questions.
<b>Interactivity and Structure</b>	Limited interactivity - single page view at a glance.	Greater interactivity - detailed multi-page analysis.
<b>Updates</b>	Designed for real-time or near real-time updates making monitoring of live data easy.	Focused on historical data and may require periodic updates enabled through PowerBI scheduled refresh capabilities.
<b>Use case</b>	Quick sharing of insights across organization	More suited for detailed analysis allowing for specific aspects of the data.

# Dashboard

Monitoring e-Commerce Sales

A quick review of all KPIs.

A well-designed dashboard enable spotting problems quickly.



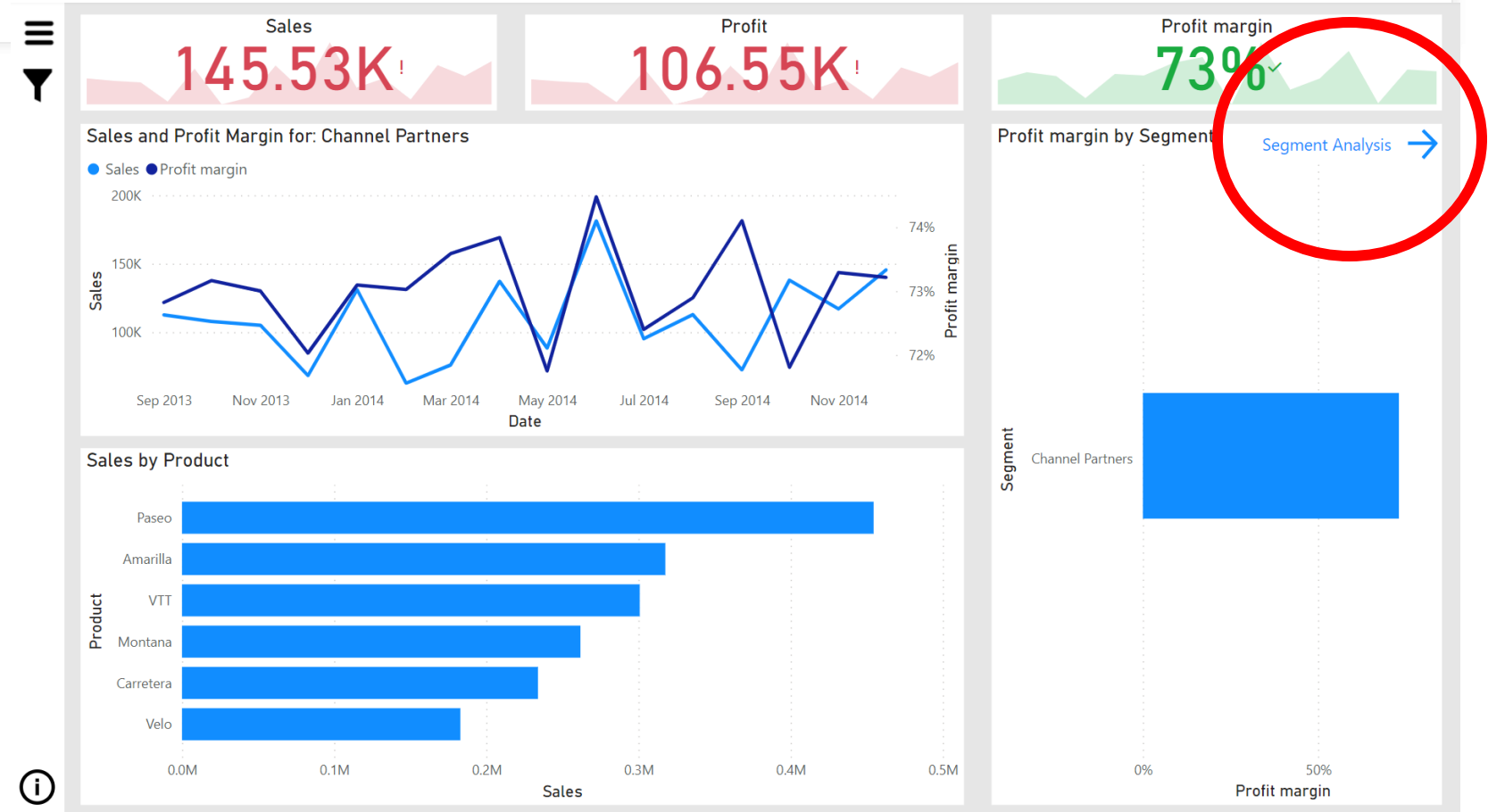
Source: DataCamp

# Report



Analyze impact of a recent promotional campaign on sales.

Review the sales by different dimensions.





# Data Story Telling

- Data storytelling is the concept of building a compelling narrative based on complex data and analytics that help tell your story and influence and inform a particular audience.



# A good story is...

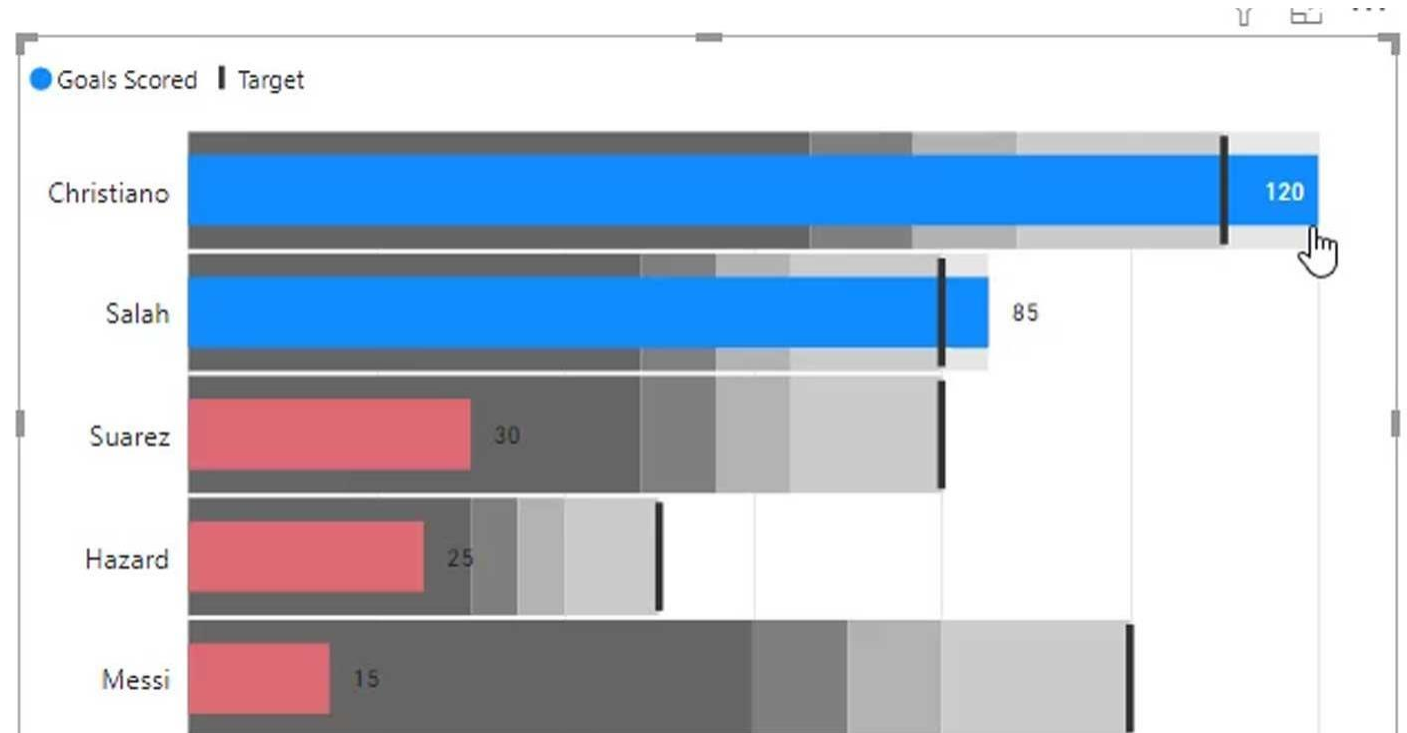
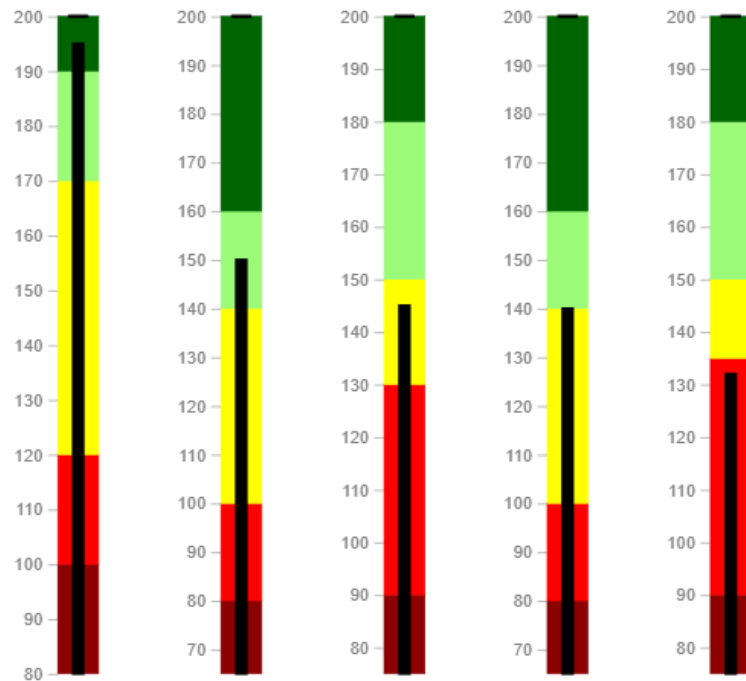
- **Relevant** to the audience , the business domain and specific problem being solved.
- Uses **good data** – collected from reputable sources that convey the true story.
- Forms a **clear narrative** – introduce the topic before diving in.
- Uses **Smart visuals** (charts/images/etc)– convey the intended purpose. Well labelled, legible, not misleading

# Bullet Chart



# Bullet chart

- A Power BI bullet chart is a more advanced type of bar chart and great for plotting data comparisons. Each bar is shown against multiple qualitative ranges and a target, making it easy to monitor progress. For example, you could use the chart to show how exam results are graded.



# Adding some targets

- Let's first understand what DAX is...

A short, vertical orange bar is positioned to the left of the text.

# **DAX Data Analysis Expression**



# What is DAX in Power BI?

- Data Analysis Expressions (DAX) is a programming language that is used throughout Microsoft Power BI for creating calculated columns, measures, and custom tables.
- It is a collection of functions, operators, and constants that can be used in a formula, or expression, to calculate and return one or more values.
- You can use DAX to solve a number of calculations and data analysis problems, which can help you create new information from data that is already in your model.

# Calculated Columns vs Measures

## Calculated Column

- Similar to other regular columns, calculated columns are the ones that come out as a result of **computations within two columns** of different data sets. They are ideal for row-wise calculations;
- In the calculated column type, the calculation takes place at the **row level** within a given table.

## Calculated Measure

- Calculated measure are ideal for dynamic calculations as they do not acquire any physical space. **These are used when data in rows are grouped together for computations.**
- In the calculated measure type, the calculation is done at the **cell level in the entire report or the query.**



## > Math & statistical functions

- **SUM(<column>)** Adds all the numbers in a column.
- **SUMX(<table>, <expression>)** Returns the sum of an expression evaluated for each row in a table.
- **AVERAGE(<column>)** Returns the average (arithmetic mean) of all the numbers in a column.
- **AVERAGEX(<table>, <expression>)** Calculates the average (arithmetic mean) of a set of expressions evaluated over a table.
- **MEDIAN(<column>)** Returns the median of a column.
- **MEDIANX(<table>, <expression>)** Calculates the median of a set of expressions evaluated over a table.
- **GEOMEAN(<column>)** Calculates the geometric mean of a column.
- **GEOMEANX(<table>, <expression>)** Calculates the geometric mean of a set of expressions evaluated over a table.
- **COUNT(<column>)** Returns the number of cells in a column that contain non-blank values.
- **COUNTX(<table>, <expression>)** Counts the number of rows from an expression that evaluates to a non-blank value.
- **DIVIDE(<numerator>, <denominator> [, <alternateresult>])** Performs division and returns alternate result or BLANK() on division by 0.
- **MIN(<column>)** Returns a minimum value of a column.
- **MAX(<column>)** Returns a maximum value of a column.
- **COUNTROWS([<table>])** Counts the number of rows in a table.
- **DISTINCTCOUNT(<column>)** Counts the number of distinct values in a column.
- **RANKX(<table>, <expression>[, <value>[, <order>[, <ties>]]])** Returns the ranking of a number in a list of numbers for each row in the table argument.



# Filter functions

- **FILTER**(`<table>`, `<filter>`) Returns a table that is a subset of another table or expression.
- **CALCULATE**(`<expression>`[, `<filter1>` [, `<filter2>` [, ...]]) Evaluates an expression in a filter context.
- **HASONEVALUE**(`<columnName>`) Returns TRUE when the context for columnName has been filtered down to one distinct value only. Otherwise it is FALSE.
- **ALLNOBLANKROW**(`<table>` | `<column>`[, `<column>`[, `<column>`[,...]]) Returns a table that is a subset of another table or expression.
- **ALL**([`<table>` | `<column>`[, `<column>`[, `<column>`[,...]]) Returns all the rows in a table, or all the values in a column, ignoring any filters that might have been applied.
- **ALLEXCEPT**(`<table>`, `<column>`[, `<column>`[, ..]]) Returns all the rows in a table except for those rows that are affected by the specified column filters.
- **REMOVEFILTERS**([`<table>` | `<column>`][, `<column>`[, `<column>`[,...]]) Clear all filters from designated tables or columns.



# Logical functions

- **IF(<logical\_test>, <value\_if\_true>[, <value\_if\_false>])** Checks a condition, and returns a certain value depending on whether it is true or false.
- **AND(<logical 1>, <logical 2>)** Checks whether both arguments are TRUE, and returns TRUE if both arguments are TRUE. Otherwise, it returns FALSE.
- **OR(<logical 1>, <logical 2>)** Checks whether one of the arguments is TRUE to return TRUE. The function returns FALSE if both arguments are FALSE.
- **NOT(<logical>)** Changes TRUE to FALSE and vice versa.
- **SWITCH(<expression>, <value>, <result>[, <value>, <result>]...[, <else>])** Evaluates an expression against a list of values and returns one of possible results
- **IFERROR(<value>, <value\_if\_error>)** Returns value\_if\_error if the first expression is an error and the value of the expression itself otherwise.

## > Date & time functions

- `CALENDAR(<start_date>, <end_date>)` Returns a table with a single column named "Date" that contains a contiguous set of dates.
- `DATE(<year>, <month>, <day>)` Returns the specified date in datetime format.
- `DATEDIFF(<date_1>, <date_2>, <interval>)` Returns the number of units between two dates as defined in <interval>.
- `DATEVALUE(<date_text>)` Converts a date in text to a date in datetime format.
- `DAY(<date>)` Returns a number from 1 to 31 representing the day of the month.
- `WEEKNUM(<date>)` Returns weeknumber in the year.
- `MONTH(<date>)` Returns a number from 1 to 12 representing a month.
- `QUARTER(<date>)` Returns a number from 1 to 4 representing a quarter.

## > Time intelligence functions

- `DATEADD(<dates>, <number_of_intervals>, <interval>)` Moves a date by a specific interval.
- `DATESBETWEEN(<dates>, <date_1>, <date_2>)` Returns the dates between specified dates.
- `TOTALYTD(<expression>, <dates>[, <filter>][, <year_end_date>])` Evaluates the year-to-date value of the expression in the current context.
- `SAMEPERIODLASTYEAR(<dates>)` Returns a table that contains a column of dates shifted one year back in time.
- `STARTOFMONTH(<dates>) // ENDOFMONTH(<dates>)` Returns the start // end of the month.
- `STARTOFQUARTER(<dates>) // ENDOFQUARTER(<dates>)` Returns the start // end of the quarter.
- `STARTOFYEAR(<dates>) // ENDOFYEAR(<dates>)` Returns the start // end of the quarter.

## > Relationship functions

- **CROSSFILTER**(<left\_column>, <right\_column>, <crossfiltertype>) Specifies the cross-filtering direction to be used in a calculation.
- **RELATED**(<column>) Returns a related value from another table.

## > Table manipulation functions

- **SUMMARIZE**(<table>, <groupBy\_columnName>[, <groupBy\_columnName>]...[, <name>, <expression>]...) Returns a summary table for the requested totals over a set of groups.
- **DISTINCT**(<table>) Returns a table by removing duplicate rows from another table or expression.
- **ADDCOLUMNS**(<table>, <name>, <expression>[, <name>, <expression>]...) Adds calculated columns to the given table or table expression.
- **SELECTCOLUMNS**(<table>, <name>, <expression>[, <name>, <expression>]...) Selects calculated columns from the given table or table expression.
- **GROUPBY**(<table> [, <groupBy\_columnName>[, [<column\_name>] [<expression>]]...) Create a summary of the input table grouped by specific columns.
- **INTERSECT**(<left\_table>, <right\_table>) Returns the rows of the left-side table that appear in the right-side table.
- **NATURALINNERJOIN**(<left\_table>, <right\_table>) Joins two tables using an inner join.
- **NATURALLEFTOUTERJOIN**(<left\_table>, <right\_table>) Joins two tables using a left outer join.
- **UNION**(<table>, <table>[, <table> [,...]]) Returns the union of tables with matching columns.



# Text functions

- `EXACT(<text_1>, <text_2>)` Checks if two strings are identical (`EXACT()` is case sensitive).
- `FIND(<text_to_find>, <in_text>)` Returns the starting position a text within another text (`FIND()` is case sensitive).
- `FORMAT(<value>, <format>)` Converts a value to a text in the specified number format.
- `LEFT(<text>, <num_chars>)` Returns the number of characters from the start of a string.
- `RIGHT(<text>, <num_chars>)` Returns the number of characters from the end of a string.
- `LEN(<text>)` Returns the number of characters in a string of text.
- `LOWER(<text>)` Converts all letters in a string to lowercase.
- `UPPER(<text>)` Converts all letters in a string to uppercase.
- `TRIM(<text>)` Remove all spaces from a text string.
- `CONCATENATE(<text_1>, <text_2>)` Joins two strings together into one string.
- `SUBSTITUTE(<text>, <old_text>, <new_text>, <instance_num>)` Replaces existing text with new text in a string.
- `REPLACE(<old_text>, <start_posotion>, <num_chars>, <new_text>)` Replaces part of a string with a new string.





# Information functions

- **COLUMNSTATISTICS()** Returns statistics regarding every column in every table. This function has no arguments.
- **NAMEOF(<value>)** Returns the column or measure name of a value.
- **ISBLANK(<value>) // ISERROR(<value>)** Returns whether the value is blank // an error.
- **ISLOGICAL(<value>)** Checks whether a value is logical or not.
- **ISNUMBER(<value>)** Checks whether a value is a number or not.
- **ISFILTERED(<table> | <column>)** Returns true when there are direct filters on a column.
- **ISCROSSFILTERED(<table> | <column>)** Returns true when there are crossfilters on a column.
- **USERPRINCIPALNAME()** Returns the user principal name or email address. This function has no arguments.

# Advanced DAX



## DAX statements

- `VAR(<name> = <expression>)` Stores the result of an expression as a named variable. To return the variable, use `RETURN` after the variable is defined.
- `COLUMN(<table>[<column>] = <expression>)` Stores the result of an expression as a column in a table.
- `ORDER BY(<table>[<column>])` Defines the sort order of a column. Every column can be sorted in ascending (`ASC`) or descending (`DESC`) way.



## > DAX Operators

Comparison operators	Meaning
=	Equal to
= =	Strict equal to
>	Greater than
<	Smaller than
> =	Greater than or equal to
= <	Smaller than or equal to
< >	Not equal to

Text operator	Meaning	Example
&	Concatenates text values	Concatenates text values   [City]& " "& [State]

Logical operator	Meaning	Example
&&	AND condition	([City] = "Bru") && ([Return] = "Yes")
	OR condition	([City] = "Bru")    ([Return] = "Yes")
IN {}	OR condition for each row	Product[Color] IN {"Red", "Blue", "Gold"}

# Applying DAX



# Insert New Columns by Calculations

- Compute Delay in Power BI using DAX
- DATEDIFF: returns the difference between 2 dates (both as column references in date formats) in days, months, quarters, years, etc.
- Delay = Delivery Date - Scheduled Date in DAYS
- Delay.DAX =  
`DATEDIFF('Table 1 (SC dataset - Power BI)'[Scheduled Delivery Date], 'Table 1 (SC dataset - Power BI)'[Delivery Date],DAY)`

# Insert New Columns by IF

- Compute Delay Category using DAX
- Use the IF Function to output 3 categories → On-time, Delayed, Early
- `Delay.Cat = IF('Table 1 (SC dataset - Power BI)'[Delay.DAX]=0,"On-time",IF('Table 1 (SC dataset - Power BI)'[Delay.DAX]>0,"Delayed","Early"))`

# MAX Delay

## Column

- `Max.Delay.DAX = MAX('Table 1 (SC dataset - Power BI)'[Delivery.Delay])`

## Measure

`Max.Measure.Delay.DAX = MAX('Table 1 (SC dataset - Power BI)'[Delivery.Delay])`

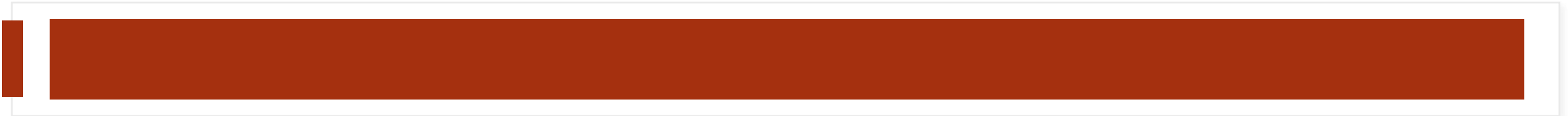
# Create Tables for each with Manufacturing Country

Delivery.Country	Max.Delay.DAX
Benin	165
Botswana	165
Burundi	165
Côte d'Ivoire	165
Cameroon	165
Congo, DRC	165
Dominican Republic	165
Ethiopia	165
Ghana	165
Guatemala	165
Guyana	165
Haiti	165
Libya	165
Mozambique	165
Namibia	165
Nigeria	165
Rwanda	165
Senegal	165
South Africa	165
South Sudan	165
Swaziland	165
Tanzania	165
Uganda	165
Vietnam	165
Zambia	165
Zimbabwe	165

Max.Measure.Delay.DAX	Delivery.Country
22	Benin
2	Botswana
48	Burundi
76	Côte d'Ivoire
22	Cameroon
165	Congo, DRC
27	Dominican Republic
34	Ethiopia
120	Ghana
10	Guatemala
35	Guyana
37	Haiti
3	Libya
68	Mozambique
13	Namibia
105	Nigeria
68	Rwanda
3	Senegal
150	South Africa
59	South Sudan
6	Swaziland
78	Tanzania
53	Uganda
63	Vietnam
113	Zambia
75	Zimbabwe

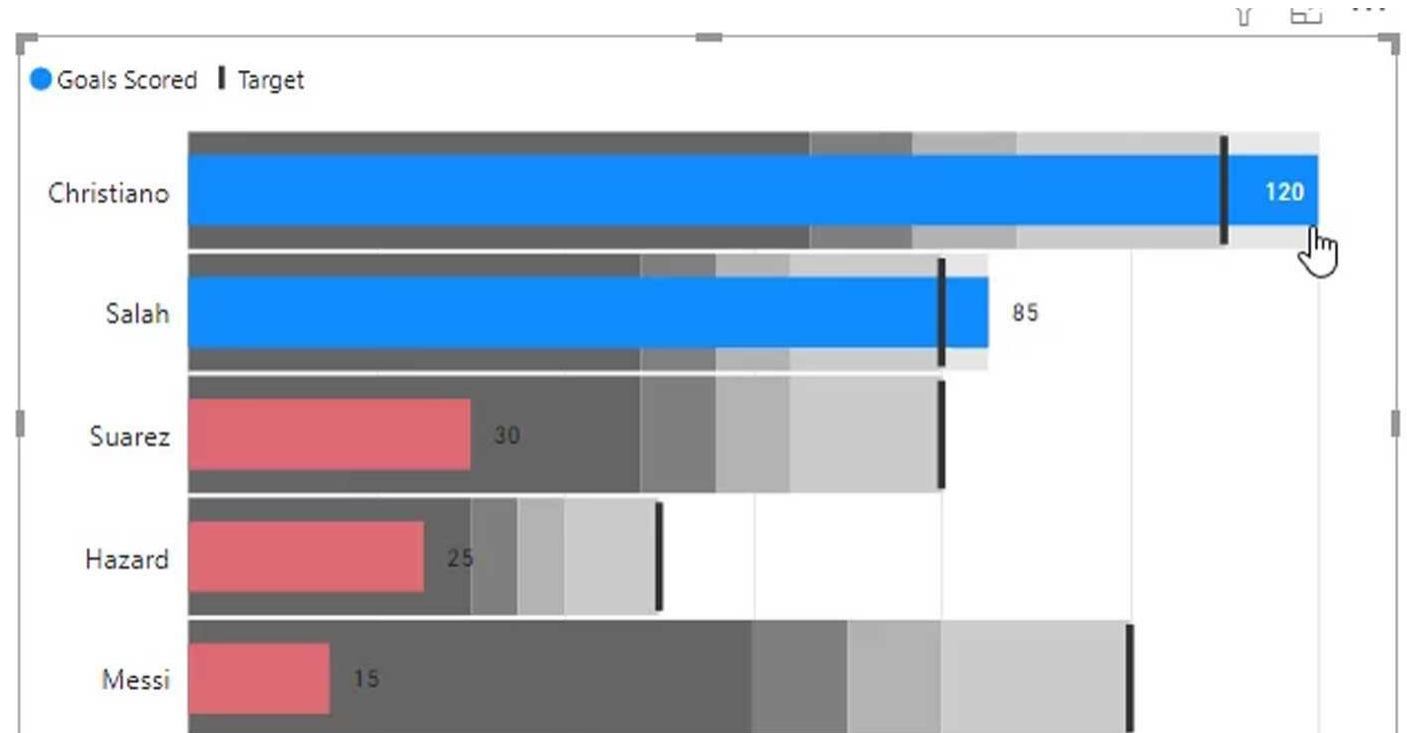
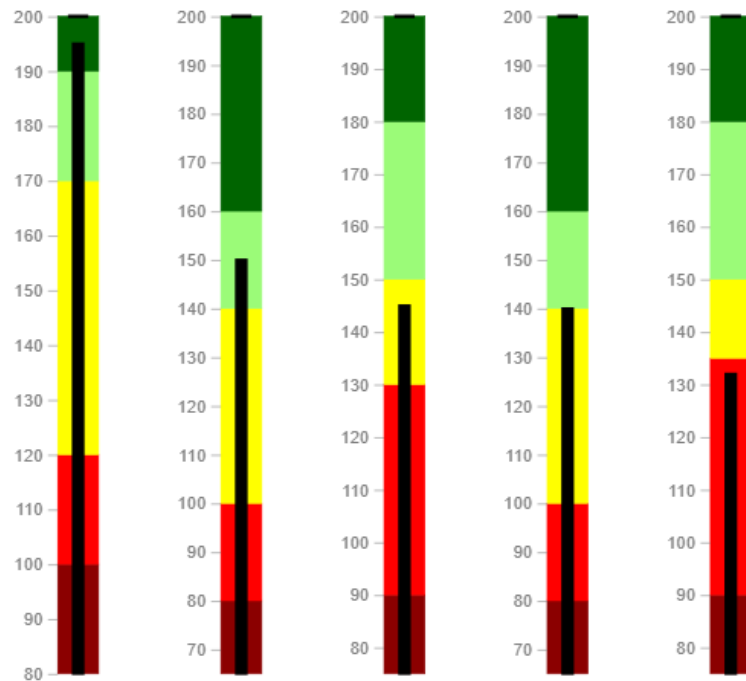
165

# Let's get back to creating a Bullet Chart



# Bullet chart

- A Power BI bullet chart is a more advanced type of bar chart and great for plotting data comparisons. Each bar is shown against multiple qualitative ranges and a target, making it easy to monitor progress. For example, you could use the chart to show how exam results are graded.





# Bullet Chart - Example

Category

Vendor

Value

Sum of Sales

Target Value

Target\_Sales

Target\_Sales is a measure computed by  $1.2 * \text{Sum (Sales)}$

Minimum

Add data fields here

Needs Improvement

Add data fields here

Satisfactory

Add data fields here

Good

Add data fields here

Very Good

Add data fields here

Maximum

Add data fields here

# Create Measures

Visualization	Measure Name	Value
Minimum		Min of Sales
Needs Improvement	Sales.NI	10% of Max Sales
Satisfactory	Sales.Satis	40% of Max Sales
Good	Sales.Good	60% of Max Sales
Very Good	Sales.VGood	90% of Max Sales
Maximum		Max of Sales

Note: We have set this as our own thresholds for comparison.  
 Instead of a percentage of Sales, if we have values for thresholds, we may directly use that.

# Create Bullet Chart

[Back to report](#)

SUM OF SALES, TARGET\_SALES, MIN OF SALES, SALES\_NI, SALES\_SATIS, SALES\_GOOD, SA... BY VENDOR



# Another example for your practice

Create a new table with new data



Create Table



**i** The first row of data that you pasted has been promoted to column headers. Undo Headers ×

	Product	Sales	Target	+
1	Paper	3000	5000	
2	Pen	2500	3500	
3	Erasers	1000	700	
4	Sharpener	500	350	
5	Rulers	800	800	
+				

Name:

Product	Sales	Target
Paper	3000	5000
Pen	2500	3500
Erasers	1000	700
Sharpener	500	350
Rulers	800	800

Load

Edit

Cancel

# Create Columns

Visualization	Column Name	Value
Minimum		10% of Target
Needs Improvement	B.NI	20% of Target
Satisfactory	B.Satis	40% of Target
Good	B.Good	60% of Target
Very Good	B.VGood	80% of Target
Maximum		Max of Sales

- Try as practice. Set your own thresholds.
- You may also try out random values for new columns.

Sum of Sales, Sum of Target, Sum of Min, Sum of NI, Sum of Sat, Sum of Good, Sum of VGood and Max of Sales by Product



Paper



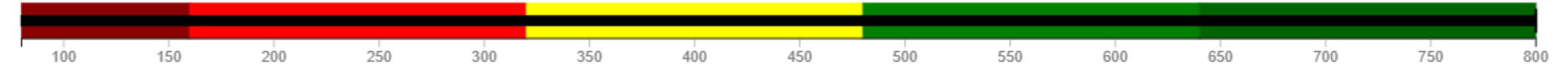
Pen



Erasers



Rulers



Sharpener



# Tips for BI

## Visualizations

- Don't over-complicate - Keep it simple for the business users
- If 2 charts are showing the same insights - think again, do they both need to be on the dashboard?
- Not everything has to be part of a hierarchy - need to be a logical one.
- Overly **colorful** VS Too **Bland** → Strike a balance. *Be Aesthetic.*

# Tips for BI

## Visualizations

- Relevant chart title → Communicate better information to the user.
- Smart choice of charts.
- A large chart may be broken into 2 simpler charts. Don't overload information.
- Practice the tool - explore different charts.



# Tips for BI

## Interactivity:

- Charts acting as slicers
- Give control to the user → Slicers (Categorical, Timeline, Numerical) as needed.
- Assume that your user doesn't know anything about Power BI → Give easy access and make it user friendly.

## Problem solving:

- Don't lose track of the problem you are solving.

# Drilling through reports

Navigate  
between different  
pages of a report

# Create a details page

- Multi-row card at top

Fields

Vendor




Count of Item Desc

Sum of Sales

Average of Delivery.Delay

Latest Delivery Date

- Add a filled map for Delivery Country
- Add a table for item description with sum of sales and sum of delivery delays.

 Aurobindo Pharma Limited	11	
Vendor	Count of Item Desc	
CIPLA LIMITED	15	  ...

### Delivery.Country



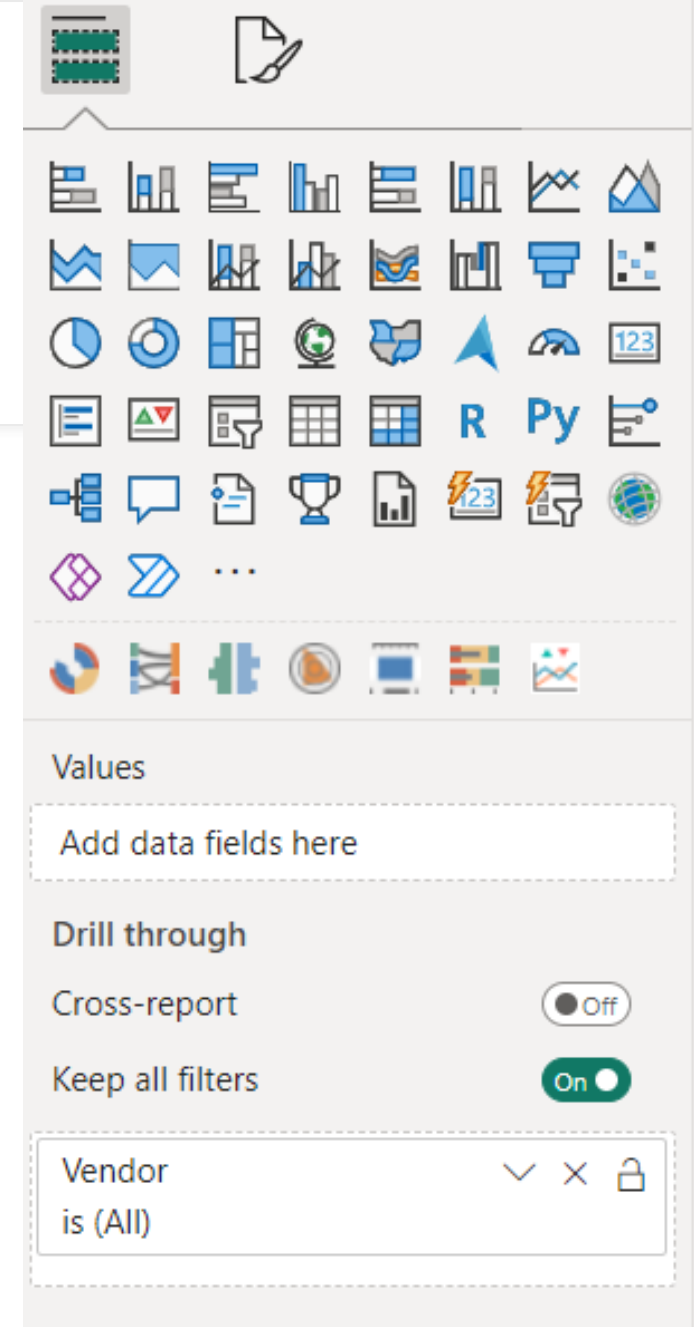
Microsoft Bing© 2024 TomTom, © 2024 Microsoft Corporation, © OpenStreetMap, Terms

4,806,275.97	34.36	Friday, October 14, 2011
Sum of Sales	Average of Delivery.Delay	Latest Delivery Date
5,174,963.65	32.67	Thursday, May 05, 2011

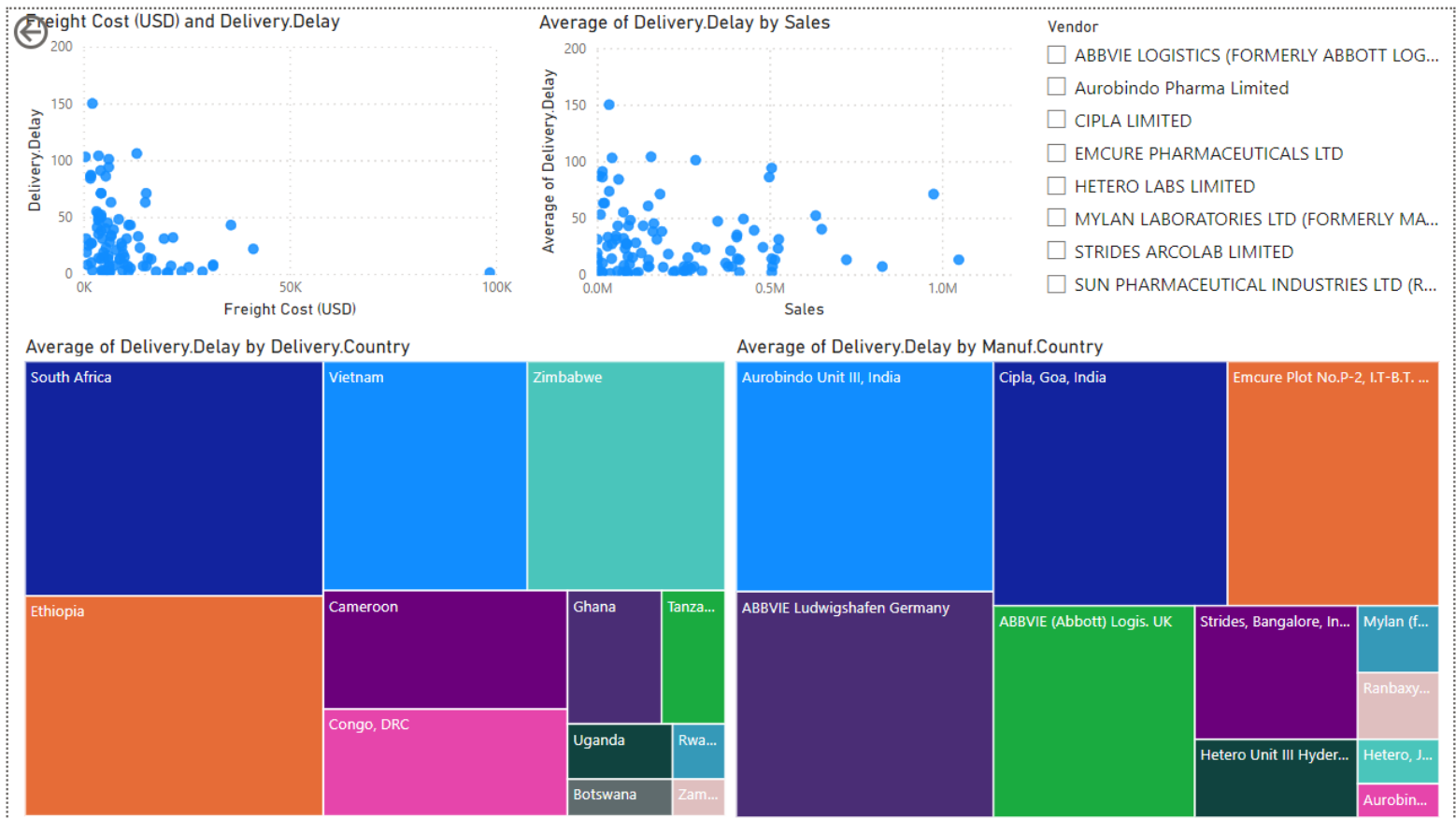
Item Desc	Sum of Delivery.Delay	Sum of Sales
Abacavir 20mg/ml, oral solution w/syringe, Bottle, 240 ml	59	82,063.
Abacavir 20mg/ml, oral solution, Bottle, 240 ml	24	28,254.
Abacavir 300mg, tablets, 60 Tabs	286	1,834,414.
Abacavir/Lamivudine 60/30mg, dispersible tablets, 60 Tabs	4	697.
Abacavir/Lamivudine 60/30mg, tablets, 60 Tabs	158	711,718.
Abacavir/Lamivudine 600/300mg, scored tablets, 30 Tabs	32	101,529.
Abacavir/Lamivudine 600/300mg, tablets, 30 Tabs	35	152,451.
Didanosine 100mg, chewable/dispersible tablets, 60 Tabs	63	17,850.
Didanosine 125mg, delayed-release capsules, 30 Caps	46	892.
Didanosine 200mg, chewable/dispersible tablets, 60 Tabs	24	44,131.
Didanosine 250mg, delayed-release capsules, 30 Caps	8	89,336.
Efavirenz 200mg, capsule, 90 Caps	422	270,241.
Efavirenz 200mg, scored tablets, 90 Tabs	135	524,723.
Efavirenz 50mg, capsule, 30 Caps	76	218,019.
Efavirenz 600mg, tablets, 30 Tabs	964	10,877,026.
Efavirenz/Emtricitabine/Tenofovir Disoproxil Fumarate 600/200/300mg, tablets, 30 Tabs	729	16,339,616.
Efavirenz/Lamivudine/Tenofovir Disoproxil Fumarate 600/300/300mg, tablets, 30 Tabs	323	30,837,878.
Emtricitabine/Tenofovir Disoproxil Fumarate 200/300mg, tablets, 30 Tabs	301	5,013,013.
Indinavir 400mg [Crixivan], capsules, 180 Caps	1	22,500.
Lamivudine 10mg/ml, oral solution w/syringe, Bottle, 240 ml	461	114,993.
Lamivudine 10mg/ml, oral solution, Bottle, 240 ml	8	10,136.
Lamivudine 150mg, tablets, 60 Tabs	573	1,596,936.
Lamivudine/Nevirapine/Stavudine 150/200/30mg, tablets, 60 Tabs	195	2,729,857.
Lamivudine/Nevirapine/Stavudine 30/50/6mg, dispersible tablets, 60 Tabs	39	35,440.
<b>Total</b>	<b>12510</b>	<b>156,602,629.</b>

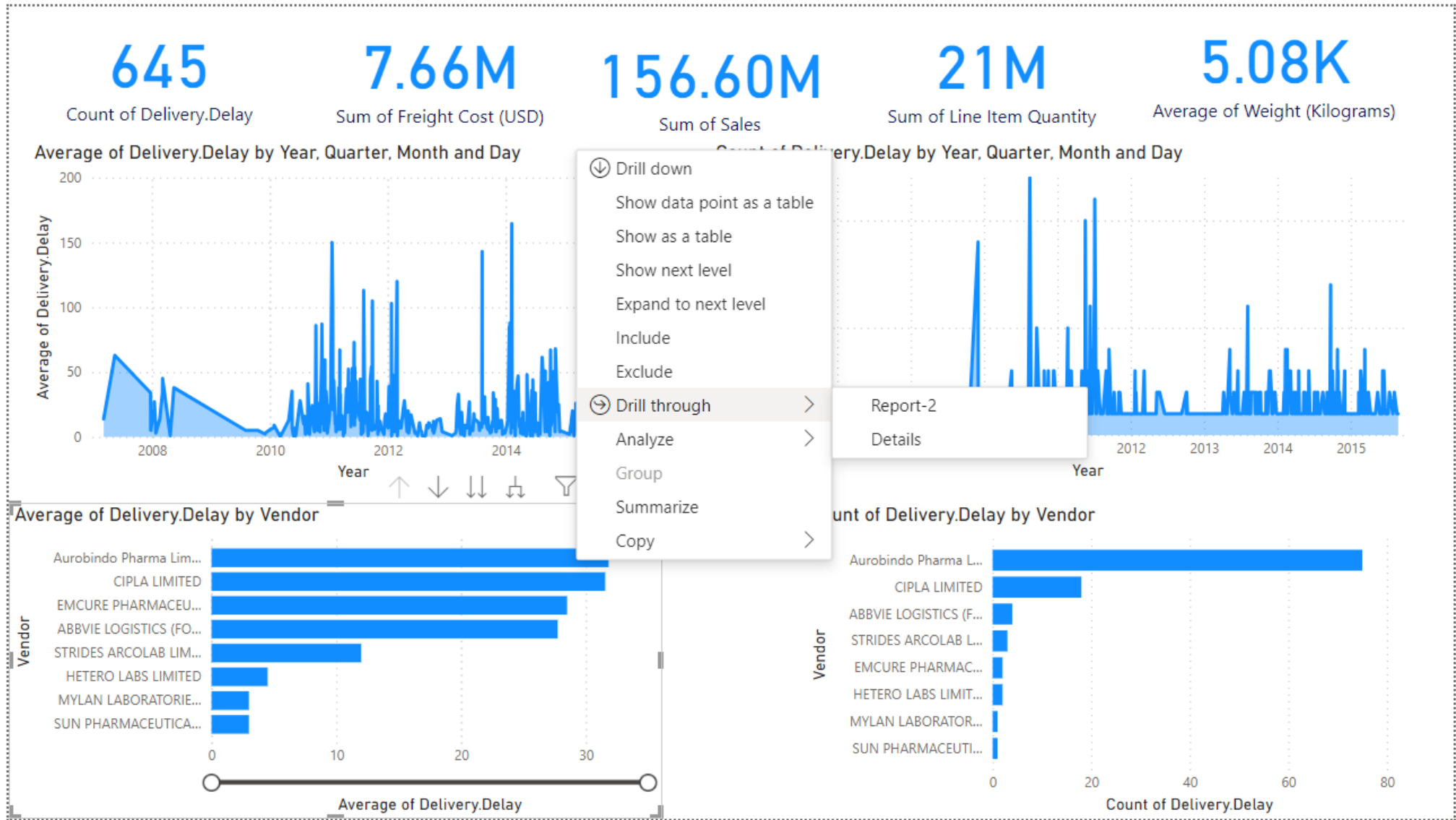
# Drill through

- Add VENDOR to Drill through section on the details page




# Add the same to report page 2





# Click on drill through to take you to the details page filtered as per the selected Vendor

e.g Aurobindo

 Aurobindo Pharma Limited	75	14,913,224.50	31.83	Monday, July 21, 2014
Vendor	Count of Item Desc	Sum of Sales	Average of Delivery.Delay	Latest Delivery Date

Delivery.Country



Item Desc	Sum of Delivery.Delay	Sum of Sales
Didanosine 100mg, chewable/dispersible tablets, 60 Tabs	63	17,850.00
Efavirenz 200mg, capsule, 90 Caps	122	188,342.56
Efavirenz 50mg, capsule, 30 Caps	75	210,305.12
Efavirenz 600mg, tablets, 30 Tabs	506	5,567,593.49
Lamivudine 10mg/ml, oral solution w/syringe, Bottle, 240 ml	297	104,724.00
Lamivudine 150mg, tablets, 60 Tabs	238	363,961.61
Lamivudine/Nevirapine/Zidovudine 150/200/300mg, tablets, 60 Tabs	25	372,110.10
Lamivudine/Tenofovir Disoproxil Fumarate 300/300mg, tablets, 30 Tabs	3	481,104.10
Lamivudine/Zidovudine 150/300mg, tablets, 60 Tabs	14	660,738.65
Lopinavir/Ritonavir 200/50mg, tablets, 120 Tabs	5	272,314.50
Nevirapine 10mg/ml, oral suspension w/syringe, Bottle, 100 ml	4	29,049.80
Nevirapine 10mg/ml, oral suspension w/syringe, Bottle, 240 ml	245	142,011.72
Nevirapine 200mg, tablets, 60 Tabs	43	671,254.19
Nevirapine 50mg, dispersible tablets (tablets for oral suspension), 30 Tabs	8	615.00
Stavudine 30mg, capsules, 60 Caps	34	54,350.75
Tenofovir Disoproxil Fumarate 300mg, tablets, 30 Tabs	378	4,806,275.97
Zidovudine 300mg, tablets, 60 Tabs	327	970,622.94
<b>Total</b>	<b>2387</b>	<b>14,913,224.50</b>

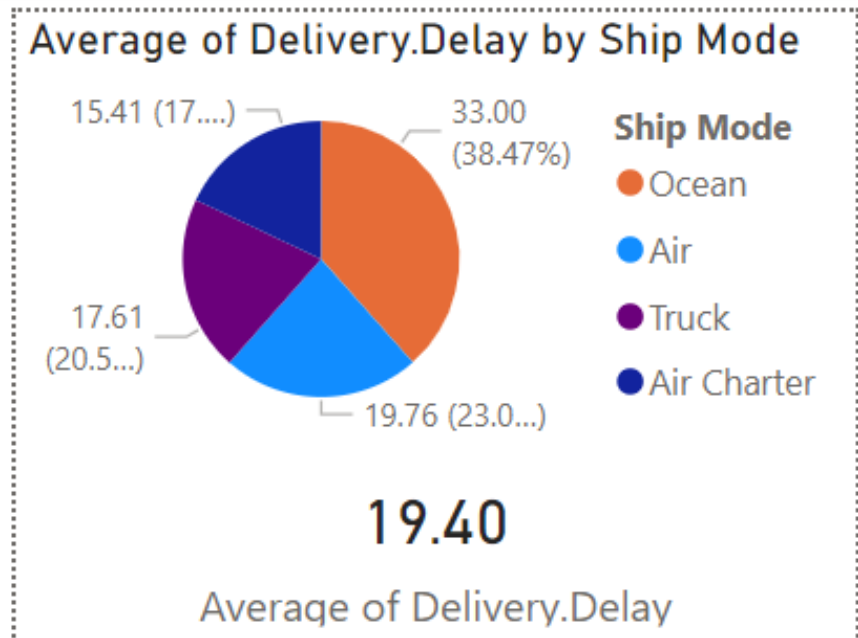


# Format Visuals



# Tool Tips

- Create a new page, set the canvas settings as shown and design what you wish to see on the tooltip in the small canvas.
- An example is below:



**Visualizations** >>

Format page

Search

> Page information

✓ Canvas settings

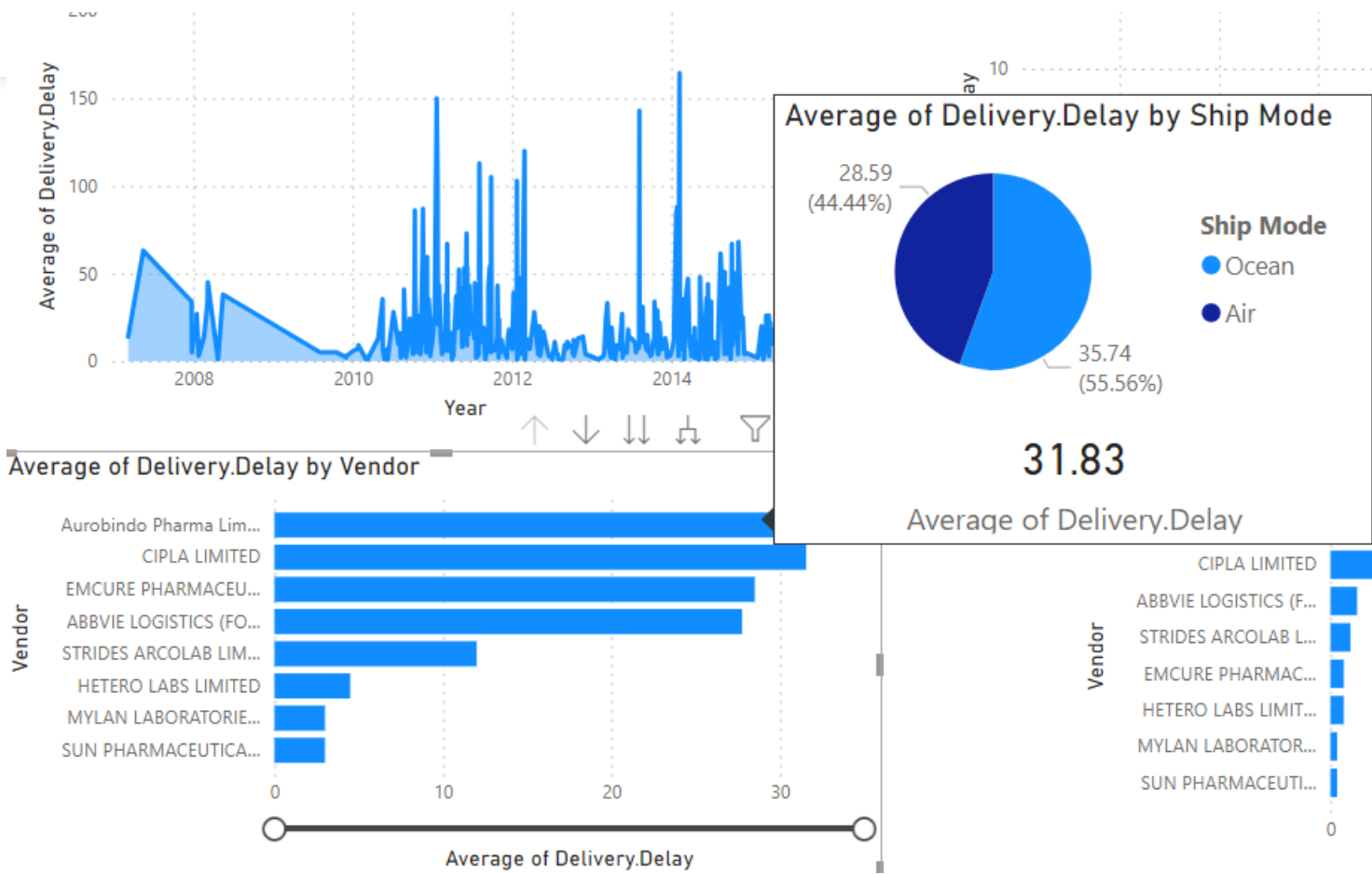
Type  
Tooltip

Height  
240 px

Width  
320 px




Vertical alignment  
Top

# Link the Tooltip to the desired chart. Hover on a bar to see the tooltip



Visualizations >>

Format visual



Visual General ...

> Properties

> Title ☒

> Effects

> Header icons ☒

> Tooltips ☒

> Options

Type

Report page

Page

Mytooltip

# Zoom Slider

Zoom slider

On

X-axis

On

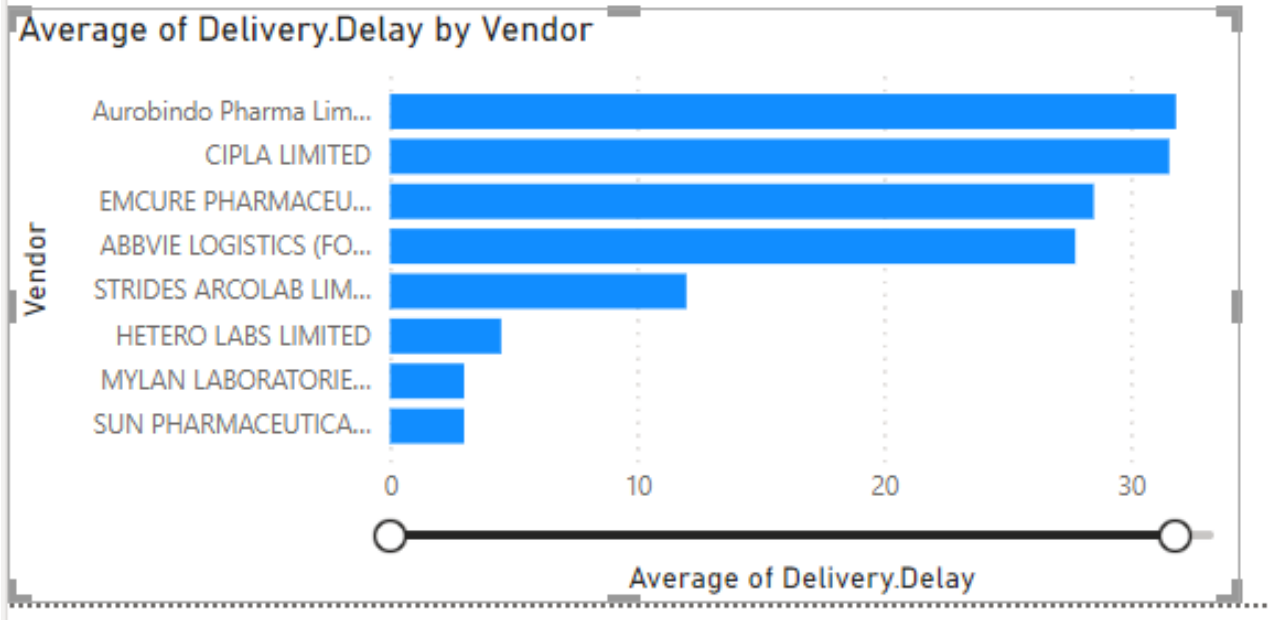
Slider labels

Off

Slider tooltips

Off

Reset to default



# Next week

- Monday: Setup Tableau and be ready for a in-class graded activity  $\leq 2$  members
- Team Up! Maximum 4 students on a team for project. Details to be shared.
- Power BI Report Assignment Due.