Power BI

DAX: The language of data in power BI

Data Analysis Expressions (DAX) is a programming language that is used in Power BI to create calculated columns, measures, and custom tables.

It is a **collection** of **functions**, **operators**, and **constants** that can be used in formulas to perform advanced calculations and data analysis.

It allows us to write custom calculations using the **formula bar** and **return one or more values**.



How to input DAX in Power BI

We **input** DAX code by selecting the **Modeling** tab in **Report view** or the **Table tools** tab in **Table view** and choosing the appropriate option:



A **formula bar** pops up where we can type our DAX code:



Composing formulas in DAX

Every **DAX formula** is a combination of **functions**, **operators**, and **constants**. Understanding how these **work together** is key to mastering DAX.

Functions

Predefined formulas that **perform specific calculations** using the data in our tables, such as adding up numbers or finding an average.

Operators

Symbols or **keywords** that specify the **type of calculation** to perform between elements in a formula, like adding with "+" or multiplying with "*".

Constants

Fixed values that we directly enter into our formulas, such as a number, a text string, or a date.

Using DAX with data

We will use a subset of the **Gender_parity_2022** dataset to illustrate how we use DAX.

Country	Percent_literacy_women	Percent_literacy_men	GDP_per_capita_USD	Population_size
Egypt	67.38999939	78.77999878	4,295.40	110,990,103
Ethiopia	44.42338181	59.24145889	1,027.60	123,379,924
Ghana	76.19000244	84.48999786	2,175.90	33,475,870
Kenya	79.84999847	85.48000336	2,099.30	54,027,487
Morocco	67.37999725	84.80999756	3,527.90	37,457,971
Rwanda	73.30000305	78.69999695	966.3	13,776,698
Nigeria	52.65647888	71.25570679	2,184.40	218,541,212
South Africa	94.53317261	95.54537201	6,776.50	59,893,885

Referencing model objects

In DAX, we can **reference entire tables**, specific **columns** within tables, or **measures** that we've already created. This allows for a **modular approach** where measures can build on each other and on calculated columns.

Table references

Refers to the **entire table** within the data model. Used in functions that need to consider **the entire** dataset.

Column references

Refers to **specific columns** within a table. Used when we need to perform operations on **particular fields**, such as creating calculated columns or defining criteria in filters.

Syntax:

'Table_name' [Column_name]

Measure references

Refers to measures that have been defined in the model. Allows the reuse of measures within other DAX formulas, maintaining consistency and reducing redundancy in calculations.

Syntax:

[Measure_name]

Syntax:

'Table_name'

Calculated column

A calculated column is a **new column** that we add to a table that is **computed from other columns**.

Unlike a regular column, a calculated column **uses a DAX formula** that **defines its values**. These are **stored** in the model and can be used in reports just like any other column.

This isn't just about displaying new information, it's about **creating** it from what we **already have**.

To understand the balance between female and male literacy rates, we could create a **calculated column** that **stores** the **difference** between these values.



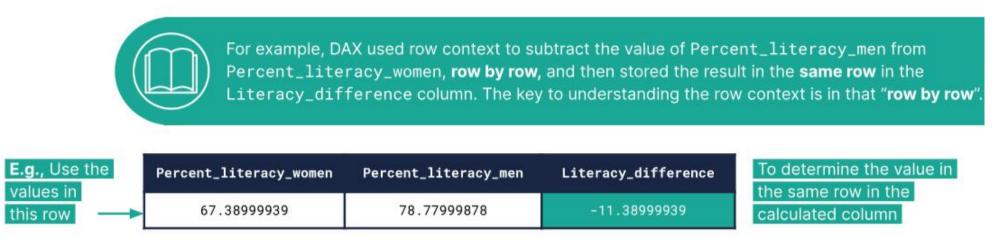
DAX: Literacy_difference = 'Gender_parity_2022'[Percent_literacy_women]'Gender_parity_2022'[Percent_literacy_men]

	Literacy_difference
	-11.38999939
	-14.81807708
	-8.29999542
	-5.63000489
е	-17.43000031
	-5.3999939
	-18.59922791
	-1.0121994

How are values in the calculated columns are determined?

Row context tells DAX which row to use when **determining the values** for the calculated column.

We can think of the row context as the **current row** under calculation in a table. It's like having a magnifying glass that looks at each row one by one during the calculation.



Other places we can use DAX

In addition to calculated columns, DAX also empowers us to create **measures** and **tables**, to further analyse and summarise our data.

Measure



- Measures are calculations created using DAX that are computed dynamically based on the current report context.
- They are often used to perform summarisation operations like sum, average, or count, that work across the entire table or within the filters set by users, not just row by row.
- Unlike calculated columns, measures do not store their results in the database – they're re-calculated whenever needed.

Table



- Custom tables can be created using DAX to organise data in new ways or summarise it for specific views.
- They allow us to combine data from multiple sources and store it within the Power BI model.
- These tables can include calculated columns for specific analysis needs, and measures can be used alongside these tables to provide dynamic summaries.

Choosing between calculated column and measure

Calculated column Used to add new data to an existing table, Purpose expanding its detail. Created using row context and is computed during **Evaluation** data refresh, becoming a permanent part of the table. Becomes part of the table's storage (in import **Storage** mode) and can influence report size and performance. Can be used like any other column to sort, filter, and Visual use group data in reports.

Measure

Used to **aggregate data**, providing **high-level summaries** and insights.

Evaluated when a query is made based on the current **filters** we have set, allowing **dynamic** calculation based on the **current view**.

Doesn't store data – it calculates **on demand** and is typically more efficient for **summarisation**.

Typically used in visuals to **present aggregated data**, such as totals or averages.

DAX functions

DAX functions

Functions are **prewritten formulas** that we can use to **perform operations on data**. They can be as simple as adding two numbers or as complex as filtering a table based on multiple conditions.

In DAX, these functions are enhanced by the ability to **reference various model objects** like tables, columns, and measures, enabling refined and powerful data calculations within our Power BI reports.

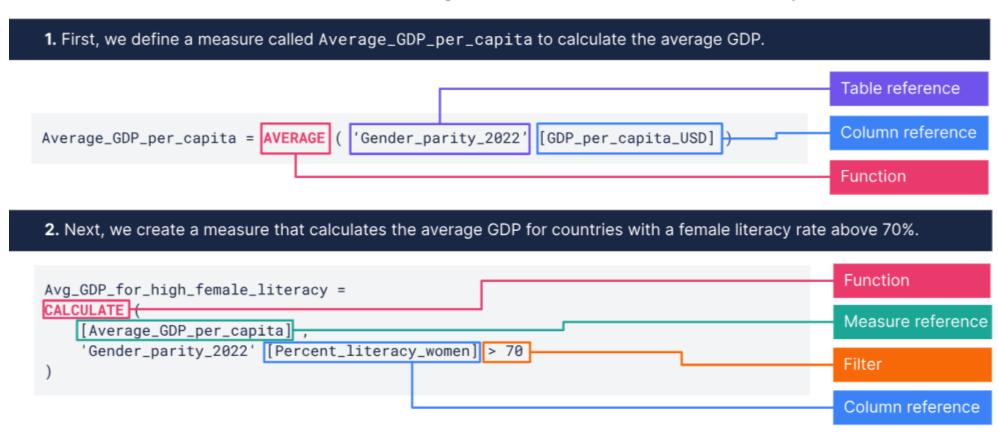
For example, to analyse literacy rate trends by gender, we could use the AVERAGE function on Percent_literacy_women and Percent_literacy_men.



```
Average_women_literacy_rate = AVERAGE('Gender_parity_2022'[Percent_literacy_women])
Average_men_literacy_rate = AVERAGE('Gender_parity_2022'[Percent_literacy_men])
```

Bringing all together

Let's create a measure that calculates the average GDP for countries with a female literacy rate above 70%.



DAX data types, operators and variables

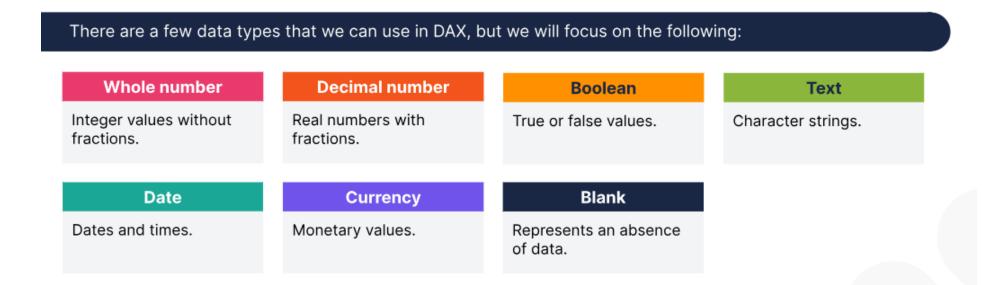
In DAX, we work with various data types, each tailored to specific kinds of data, such as numbers, text, and dates. It determines how data can be manipulated in calculations.

Operators in DAX, like arithmetic, comparison, string, and logical operators, allow us to **perform calculations** and **evaluate expressions**, shaping how we analyse and derive insights.

DAX variables enable us to store intermediate results, simplify complex expressions, and enhance formula readability and performance.

DAX data types

Data types in DAX define the **kind of data** that can be stored in a column or used in expressions and calculations.



Using DAX with data

We will use the following Country_stats dataset to illustrate how we use DAX.

Country_ID	Region	Is_landlocked	GDP_per_capita _USD	Population_size	Area_km2	Survey_date
EGY	Northern Africa	FALSE	4,295.40	110,990,103	1,010,408.45	2019-07-16
ETH	Eastern Africa	TRUE	1,027.60	123,379,924	1,112,000.71	2022-07-28
GHA	Western Africa	FALSE	2,175.90	33,475,870	239,535.52	BLANK
KEN	Eastern Africa	FALSE	2,099.30	54,027,487	580,367.59	2022-02-01
MAR	Northern Africa	FALSE	3,527.90	37,457,971	446,300.34	2021-06-21
RWA	Eastern Africa	TRUE	966.3	13,776,698	26,338.50	2022-04-12
NGA	Western Africa	FALSE	2,184.40	218,541,212	923,769.19	2020-12-11
ZAF	Southern Africa	FALSE	6,776.50	59,893,885	1,221,037.55	2019-07-19

Operators in DAX

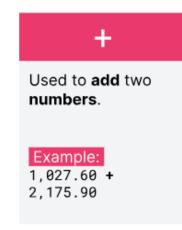
Operators in DAX are **symbols** or **keywords** that are used to create expressions that compare values, perform arithmetic calculations, or work with strings.

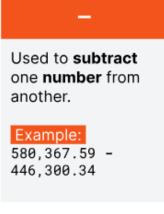
Each operator type has a **specific function**, like arithmetic operators for mathematical calculations, comparison operators for filtering and sorting data, etc. Understanding operators is **crucial for building expressions** and **formulas**.

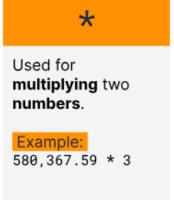


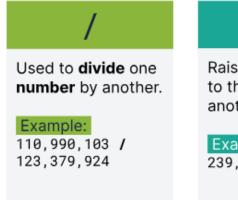
Arithmetic operators

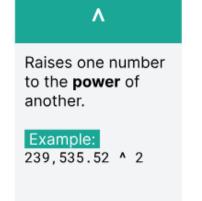
Arithmetic operators perform **mathematical calculations** and **produce numeric results**. They allow us to create calculated columns or measures that involve summation, subtraction, or other mathematical transformations of data.





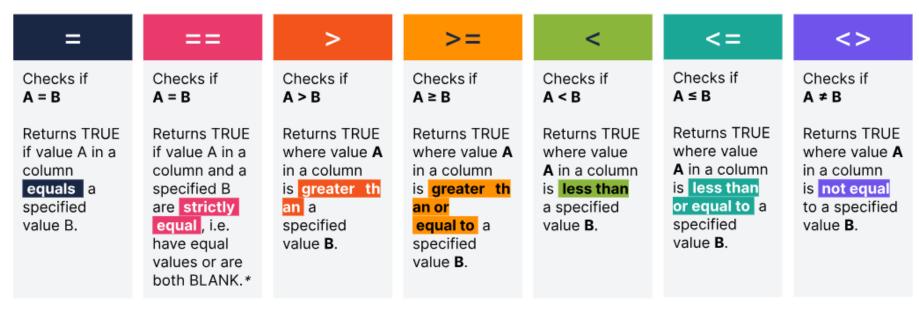






Comparison operators

Comparison operators in DAX are used to **compare values**. When two values are compared by using these operators, the **result** is a logical value, either **TRUE** or **FALSE**.



^{* =} and == differ in handling BLANK: = returns TRUE when BLANK is compared to 0, an empty string, or FALSE; == returns TRUE only when BLANK is compared to BLANK.

String operators

The primary string operator in DAX is the **concatenation** operator (&), which **joins** two or more text strings into a **single string**.

This operator is especially useful in **creating calculated columns** where data from different text columns need to be combined for enhanced insights.



We could create a new column in our dataset that combines the country's Country_ID and Region into a single string, with a dash (-) between them.

DAX: Country_region = [Country_ID] & " - " & [Region]

Country_region

EGY - Northern Africa

ETH - Eastern Africa

GHA - Western Africa

KEN - Eastern Africa

MAR - Northern Africa

RWA - Eastern Africa

NGA - Western Africa

ZAF - Southern Africa

Logical operators

Logical operator	Description	Example		
&& (AND)	Returns TRUE if both conditions are TRUE; otherwise it returns FALSE.	Check if a country is landlocked and has a population over 100 million: [Is_landlocked] && [Population_size] > 100000000		
(OR)	Returns TRUE if at least one of the expressions is TRUE; it's only FALSE if both expressions are FALSE.	Check if a country is in either Eastern Africa or Northern Africa: [Region] = "Eastern Africa" [Region] = "Northern Africa"		
IN	Checks if a value exists within a specified list or table , returning TRUE if a match is found or FALSE otherwise.	Check if the country's region is in Northern Africa: [Region] IN {"Northern Africa"}		
NOT	Reverses the logical value of an expression, returning TRUE if the expression is FALSE, and vice versa. It is a unary operator, i.e. it operates on only one operand.	Check if a country is not landlocked: NOT([Is_landlocked])		

Operators precedence





Order of operators

If we combine several operators in a single formula, the operations are **ordered** according to the table. If the operators have equal precedence value, they are ordered from **left** to **right**.

To change the order of evaluation, we can enclose the part of the formula that must be calculated first in parentheses.

Variables in DAX

Variables are used to **store** the **result** of an expression as a **named** value. Defining a variable involves **assigning** an expression to a **name**, which can then be **used** throughout a DAX formula.

The need for variables in DAX

Variables are essential for **storing** and **reusing intermediate** results within expressions, eliminating the need for repeated calculations of the same expression within a formula.

Variables allow for a more **organised** and **efficient** way of handling complex calculations, thereby **simplifying** our DAX expressions and improving **performance**.

Defining variables

VAR and RETURN

To **define** a variable in DAX, we use the "VAR" keyword, followed by the **variable name** and the **expression** we want to assign to it. The syntax is: VAR VariableName = Expression

Once variables are defined, we use "**RETURN**" to **output** the formula's result, incorporating the defined variables.

Define a variable Max_population to store the maximum value from the Population_size column, and then return this value.



VAR Max_population = MAX([Population_size])
RETURN
Max_population

Advantages of using variables

Readability and clarity

Variables make DAX formulas easier to read and understand, especially when dealing with lengthy and complex expressions.

Optimise performance

By storing intermediate results, variables can reduce the number of calculations required, thus optimising the performance of the DAX expression.

Code reusability

Once defined, a variable can be **reused** multiple times within a formula, which helps in keeping the code **concise** and **manageable**.

Easier debugging

Variables **simplify** the debugging process, as they allow us to **isolate** and **inspect** parts of the formula, making it easier to **identify** and fix errors

Diving deeper into DAX functions

There are roughly **250 different functions** within Power BI, but the most popular ones can be grouped into the following **broad categories**.

Aggregation	These functions are used for summarising or aggregating data in columns or tables into a single value . They correspond closely to spreadsheet functions.
Count	Count functions are used for returning the number of rows/values in a column or table. Columns are the only accepted input for count functions.
Logical	Logical functions return values or sets based on whether an expression is true or false (i.e. whether a condition has been met or not).
Information	These functions are useful when examining data quality or types. A cell/row of data is provided as input and the function returns whether the cell/row value matches the expected type.

Diving deeper into DAX functions

Text

These functions are similar to string functions found in spreadsheets, with the ability to be applied to columns and tables.

Used when doing calculations based on dates and time. These functions use a datetime data type and can use values from a column as input.

Filter

Filter functions in Power BI allow us to manipulate data context, resulting in dynamic calculations.

Power BI documentation contains detailed information on mathematical, financial, statistical, and many other categories of functions that could be of use.

Aggregation functions

These functions perform **calculations** on a set of values to produce a **single**, **summarising value**, often used in measures.

Syntax

```
Measure = FUNCTION(Table_name[column_name])
Measure_with_expression = FUNCTIONX(Table_name, Expression)
```

Common aggregation functions

SUM() Aggregates the values in a column.

SUMX() Aggregates the values in an expression.

MIN()/MAX() Returns the min/max value in a column.

MINX()/MAXX() Returns the min/max value of an expression.

AVERAGE() Returns the arithmetic mean of a column.

AVERAGEX() Returns the arithmetic mean of an expression.

Power BI has extensive documentation explaining syntax for all the DAX functions.



X for expression

The **X** at the end of these aggregation functions refers to **expression** and it means that we can add any expression which will then be used as the **'input column'**.

Aggregation functions

In this example, we are interested in the **number of males living in rural areas** in the different countries in our Gender_parity_2022 table. By multiplying the **population size** with the **proportion** of **rural male population**, we can easily see this metric.

```
Total_pop = SUM(Gender_parity_2022[Population
size])
```

Rural_male_pop = SUMX(Gender_parity_2022,
Gender_parity_2022[Population size] *
Gender_parity_2022[Rural population, male (% of total)])

Country	Sum of Population size	Sum of Rural population, male (% of total)	Rural_male_pop
Egypt	110990103	28.85	3,201,844,210.58
Ethiopia	123379924	40.38	4,981,485,318.49
Ghana	33475870	23.18	775,831,354.42
Kenya	54027487	36.85	1,990,681,006.19
Morocco	37457971	19.89	744,989,333.09
Nigeria	218541212	25.97	5,676,327,071.01
Rwanda	13776698	33.10	456,008,814.70
South Africa	59893885	16.55	991,028,146.42
Total	651543150	224.75	18,818,195,254.91

Count functions

We use **count functions** to count certain elements in a table or column. These functions follow the same format as the common aggregation functions.

Syntax

```
Count_of_something = FUNCTION(Table_name[column_name])
Count_of_some_expression = FUNCTIONX(Table_name, Expression)
```

Common count functions

COUNT() Returns the number of non-blank values in a column. Supports strings, integers, or dates.

COUNTX() Returns the number of non-blank values as the result of an expression. Uses table as input.

COUNTROWS() Counts the number of rows in a table. Uses table as input.

DISTINCTCOUNT() Counts the number of distinct values in a column, including the BLANK value.

COUNTBLANK() Counts the number of BLANK cells in a column.

COUNTA() Counts the number of non-blank cells in a column. In contrast to COUNT(), it also supports Boolean values.

Count functions

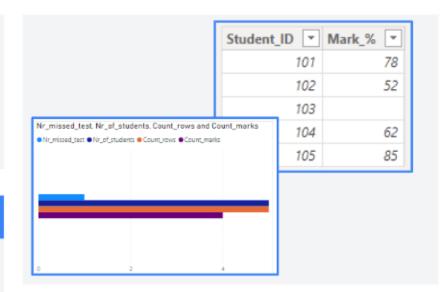
In the dataset below, we have a very small class with 5 students and a test mark per student. We want to know **how many** students didn't write the test (with a valid excuse).

```
Total_blanks = COUNTBLANK(Test_data[Mark_%])
Total_students = COUNT(Test_data[Student_ID])
Count_rows = COUNTROWS(Test_data)
Count_marks = COUNT(Test_data[Mark_%])
```



Why care about BLANKS?

Missing values might influence our dashboard's reliability. If a large proportion of data points are missing, the **summary** might present a **skewed view.**



Logical and conditional functions

These functions enable us to make use of conditional logic when creating new columns.

Common logical functions

AND() Returns TRUE if both arguments are TRUE.

OR() Returns TRUE if one of the arguments is TRUE.

NOT() Returns TRUE if the condition is not met.

IF() Evaluates a condition, if TRUE, it returns one value, otherwise it returns the second value.

IFERROR() Evaluates an expression and returns an alternative pre-specified value if the expression results in an error.

SWITCH() Evaluates an expression (or column) against a list of values and returns one of the pre-specified results. By using Boolean values in the expression, we can also use this instead of nested **IF()** statements.



Important

Logical functions can only be used on **columns**.

If/ Switch example

Using our Demographic_info dataset, we're interested in creating a column that would categorise countries as small or large, based on the Area_km2 column. The second code block shows a **nested** version of **IF()**, based on three categories for the country sizes.

```
Small_or_large = IF(Demographic_info[Area_km2] > 100000,
"Large country", "Small country")
                                                                                         Country ID Area km2 Small or large
Small_Med_Large = IF(Demographic_info[Area_km2] > 500000,
"Large country", IF(Demographic_info[Area_km2] > 100000,
                                                                                                239535 Large countr
"Medium country", "Small country"))
                                                                                                1221037 Large country
This exact statement can also be written with a SWITCH() function:
                                                                                     Country_ID Area_km2 Small_Med_Large
Small_Med_Large = SWITCH(TRUE,
                                                                                            1010408 Large country
                                                                                            1112000 Large country
Demographic_info[Area_km2] > 500000, "Large country",
                                                                                            239535 Medium country
                                                                                             580367 Large country
Demographic_info[Area_km2] > 100000, "Medium country",
                                                                                             446300 Medium country
Demographic_info[Area_km2] > 0, "Small country")
                                                                                             26338 Small country
                                                                                            1221037 Large country
```

Information functions

These functions operate on a cell/row level and evaluate whether the input argument is what is expected. If it is, the function returns **TRUE**, otherwise **FALSE**. They are often used to perform calculations wrapped within an **IF()** statement, to prevent errors in the results.

Common information functions

ISBLANK() Checks whether a value/expression is BLANK.

ISNUMBER() Checks whether a value/expression is numeric.

ISTEXT() Checks whether a value is of type text.

ISNONTEXT() Checks whether a value is non-text.

ISERROR() Checks whether value/expression results in error.

CONSTAINSSTRING() Checks if the specified text is found in a string.



Case sensitive?

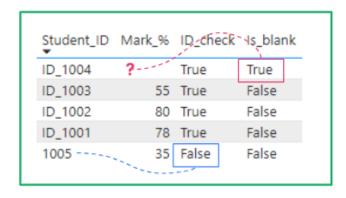
Certain functions are not case sensitive, such as CONTAINSSTRING(). If we are trying to find a case sensitive string, we'd use CONTAINSSTRINGEXACT() instead.

Information functions

Example

We need to determine whether all the **Student_IDs** in our data are in the **right format** (contains "ID_" as a prefix), and also whether the **marks** are **populated**. We can use two information functions to solve this issue.

```
ID_check = CONTAINSSTRING(Test_data2[Student_ID], "ID")
Is_blank = ISBLANK(Test_data2[Mark_%])
```





Power BI BLANK functions

BLANK cells in Power BI can display different behaviours depending on column types. It is good practice to check that ISBLANK() and COUNTBLANK() functions behave in the way assumed, especially if used for quality checks.

Text functions

Text columns frequently need to be **manipulated** in some way in order to be used in **visualisations**. Power BI functions can help us create columns in a **specific format**, with the benefit that they correspond closely to string functions found in spreadsheets and SQL.

Common text functions

SUBSTITUTE() Replaces existing text with new text in a text string. Text to be replaced is explicitly stated.

REPLACE() Replaces part of a string with new text, based on the number of characters and position specified.

SEARCH() Returns the number of the character at which a specific string/character first occurs in text, from left to right. Can specify starting position for the search.

FIXED() Rounds a number to specified decimals, then converts to string.

CONCATENATE() Joins two text strings together into one.

UPPER/LOWER() Converts the case of a text string to all uppercase or all lowercase.

LEFT() Returns the specified number of characters from the start of a text string.

RIGHT() Returns the last character or characters in a text string, based on the number of characters specified.

String manipulation example

Our Country column in our dataset accidentally includes the first two letters of the Country_ID column, as **something went wrong** during the data processing phase. We need to **clean the data** by making use of some **text manipulation functions**.



Temporal functions

By using temporal functions in Power BI, we can do **time-based analysis** on columns. It is useful for productivity measures, comparisons over different periods, and determining person-level indicators such as age.

Common date functions

DATE() Returns a specified date in datetime format.

HOUR() Returns the hour as a number from 0 to 23, based on 24-hour time notation (00:00 - 23:59).

WEEKDAY() Returns the day of the week as a number (1-7).

NOW() Returns the current date and time in a datetime format.

EOMONTH() Returns the date in datetime format of the last day of the month, before or after a specified number of months.

DATEDIFF() Counts the number of intervals between two dates. Intervals can be seconds up to years.

Date and time example

We have a small dataset (Grants), but the day, month, and year have been captured in **separate columns**. Convert these columns to a **single date field**, showing the **actual day** of the week, and then calculate **how many months** have gone by between the end and start date.

```
Start_date = DATE(Grants[Start_year], Grants[Start_month], Grants[Start_day])
Weekday_nr = WEEKDAY(Grants[Start_date], 1)
Weekday_format = FORMAT(Grants[Weekday_nr], "DDD")
Diff_months = DATEDIFF(Grants[Start_date], Grants[End Date], MONTH)
```

Start_day	Start_month	Start_year	Start_date	Weekday_nr	Weekday_format	End Date	Diff_months
1	6	2022	6/1/2022 12:00:00 AM	4	Wed	Saturday, December 31, 2022	6
1	7	2023	7/1/2023 12:00:00 AM	7	Sat	Friday, December 01, 2023	5
3	8	2022	8/3/2022 12:00:00 AM	4	Wed	Thursday, December 01, 2022	4
4	6	2023	6/4/2023 12:00:00 AM	1	Sun	Friday, December 01, 2023	6
7	7	2020	7/7/2020 12:00:00 AM	3	Tue	Friday, January 01, 2021	6

Filter and relationships function

Filter functions in DAX enable us to manipulate the data context to create dynamic calculations, whereas **relationship functions** help to manage and utilise relationships between tables.

Common filter functions

ALL() Returns all rows in a table, ignoring any filters that may have been applied.

CALCULATE() Evaluates an expression in a modified filter context.

CALCULATETABLE() Evaluates a table expression in a modified filter context.

FILTER() Returns a table that is a subset of another table or expression.

LOOKUPVALUE() Returns a row based on criteria specified in a search condition. There can be multiple search conditions.

USERELATIONSHIP() The function specifies a relationship to be used in a specific calculation.

RELATED() Returns a related value from another table.

Filter Example

We are interested in creating a table (E_Africa) that contains a **subset** of the data in our original table. We also want to add the Country name, a column from another table. The linking columns have already been identified and relationships are set up.

