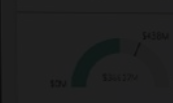


Add a question about the data on this dashboard

Actual vs. target revenue (\$)



Opportunity value by pipeline phase



Actual margin



Target margin



Discount by category



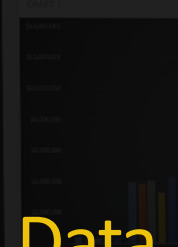
Average sales (\$)



Average quota (\$)



Sales Spreadsheet Summary



Variance to target sales



Opportunity value by product category



Revenue by month (current year vs. last year)



# Data Exploration with Power BI

Slides cedidos pela Microsoft Portugal para uso nas aulas do ISEG

# Microsoft Power BI

Slides cedidos pela Microsoft Portugal para uso nas aulas do ISEG

Jan Tielens

Tech. Evangelist at Microsoft Belux

# Presentation outline

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01: Microsoft Power BI overview

02: Working with the Power BI service

03: Connecting to Power BI data sources

04: Creating Power BI Desktop solutions

06: Summary

# A new generation of BI

Today, BI extends to everyone

3rd wave  
End user BI



Everyone

2nd wave  
Self-service BI



Analyst to end user

1st wave  
Technical BI



IT to end user

# A new generation of BI

---

Turning data into business insights is challenging

Common BI challenges include...



End-to-end view

Data often resides in disparate locations, making it difficult to see a complete picture of your business



Multiple data sources

Data residing in SaaS solutions, and other external locations, is difficult to access and refresh securely



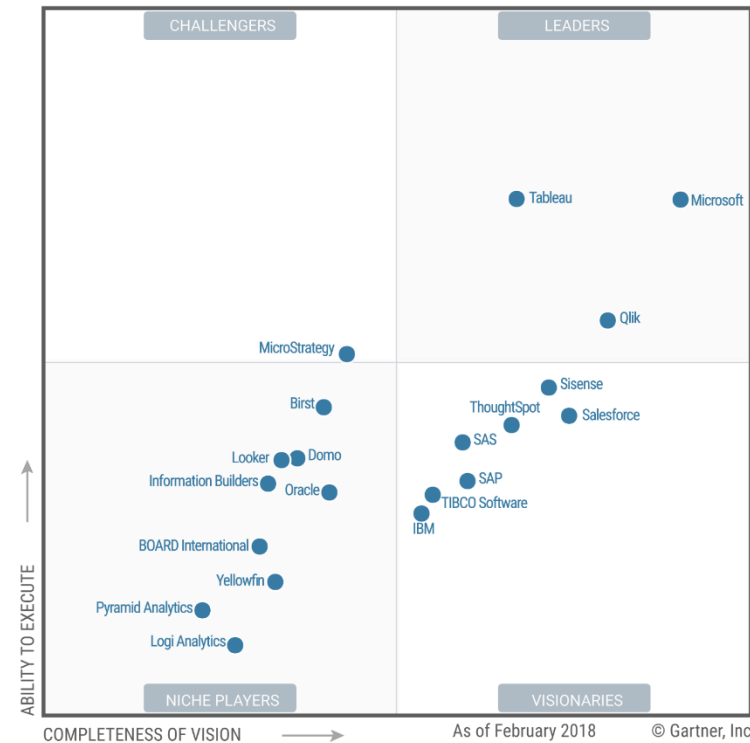
Right data for the right users at the right time

Different roles have different needs, and business users need the latest operational data

# Gartner®

**FEBRUARY 2018**

## A Leader in the Magic Quadrant for BI & Analytics\*



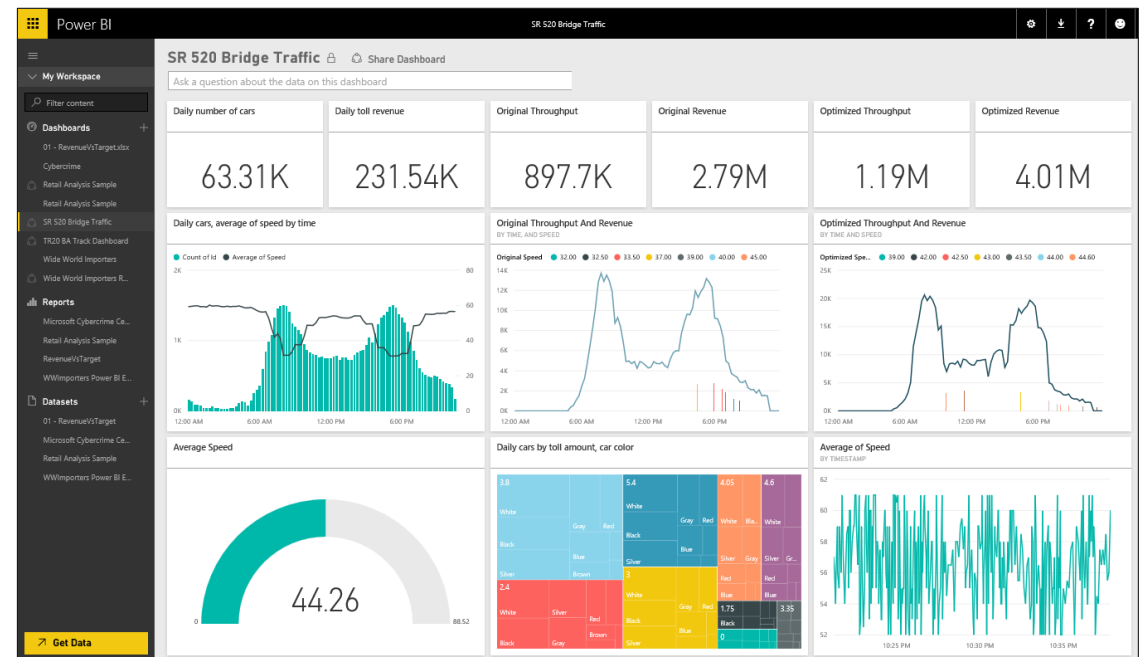
\*Gartner "Magic Quadrant for Business Intelligence and Analytics Platforms," by Cindi Howson, Rita L. Sallam, James Laurence Richardson, Joao Tapadinhas, Carlie J. Idoine, Alys Woodward, February 26, 2018. This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available upon request from Microsoft. Gartner does not endorse any vendor, product or service depicted in its research publications, and does not advise technology users to select only those vendors with the highest ratings or other designation. Gartner research publications consist of the opinions of Gartner's research organization and should not be construed as statements of fact. Gartner disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

# Introducing Microsoft Power BI

Experience your data. Any data, any way, anywhere.

Power BI is a cloud-based business analytics service that enables:

- Fast and easy access to data
- A live 360° view of the business
- Data discovery and exploration
- Insights from any device
- Collaboration across the organization
- Anyone to visualize and analyze data



# Introducing Microsoft Power BI

## Key benefits and differentiators



Pre-built content packs, consisting of dashboards and reports, for popular SaaS solutions



Real-time dashboard updates



Secure, live connection to your data sources, on-premises and in the cloud



Intuitive data exploration by using natural language query



Integration with familiar Microsoft products, and commitment for scale and availability in Azure



Fast deployment, hybrid configuration, secure, and integrated with existing IT systems





# Power BI overview

## Data sources



SaaS solutions  
*E.g. Marketo, Salesforce, GitHub, Google analytics*



On-premises data  
*E.g. Analysis Services*



Organizational content packs  
*Corporate data sources, or external data services*



Azure services  
*E.g. Azure SQL, Stream Analytics*



Excel files  
*Workbook data or data models*



Power BI Desktop files  
*Related data from files, databases, Azure, and other sources*

## Power BI service



Content packs



Natural language query



Sharing & collaboration



Live dashboards



Visualizations



Reports

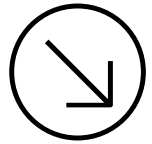


Datasets



Data refresh





# Key takeaways

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- Power BI is a cloud-based business analytics service, delivering end user BI
- Power BI delivers numerous benefits and differentiators
  - Pre-built content packs
  - Real-time dashboard updates
  - Live connections to on-premises and cloud data sources
  - Intuitive data exploration by using natural language query
  - Integration with familiar Microsoft products and services
  - Fast deployment, hybrid configuration, secure, and integrated with existing IT systems
- Microsoft is placed furthest in vision within the **BI and Analytics Platform Leaders** quadrant

# Power BI benefits by role

---

Whatever the role, Power BI brings all data together

## Business user

- Import data from SaaS sources, and work with dashboards and reports

## Business analyst

- Import, reshape and model data
- Create compelling reports and visualizations
- Create content packs to share insights

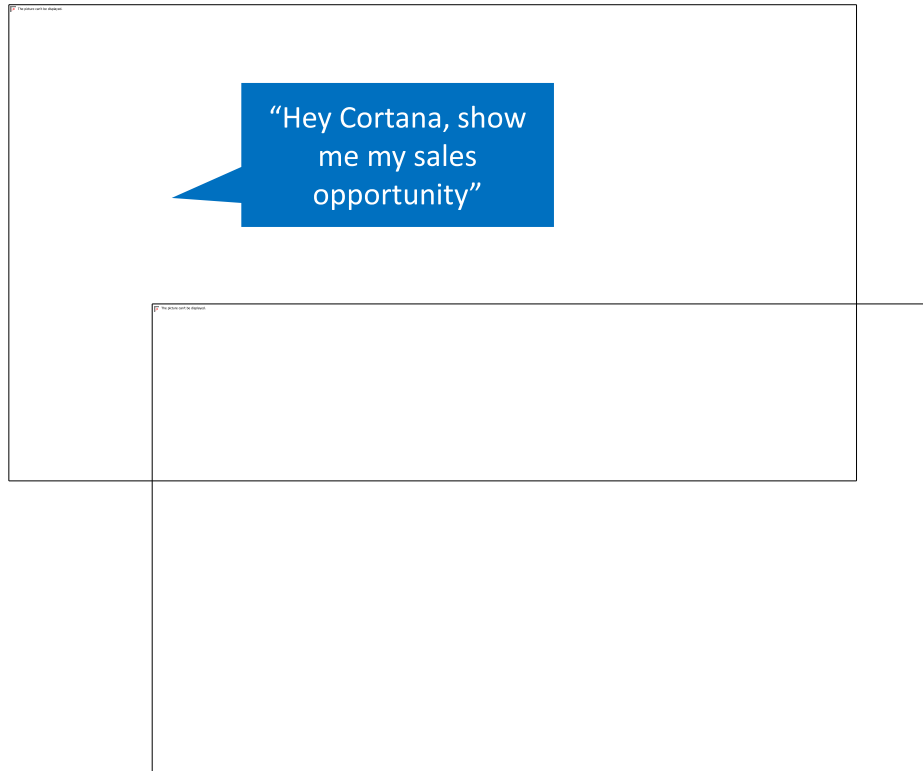
## BI professional

- Connect to live Azure data services
- Connect to on-premises Analysis Services databases
- Empower colleagues to create their own reports

## Developer

- Integrate applications with Power BI
- Create real-time dashboards
- Develop custom visuals

# Experience your data in new ways



## → Natural language query—ask questions of your data more naturally

Type questions in plain language – Power BI Q&A will provide the answers

Q&A will provide suggested questions, terms and visuals for your dataset

Q&A intelligently filters, sorts, aggregates, groups, and displays data based on the question

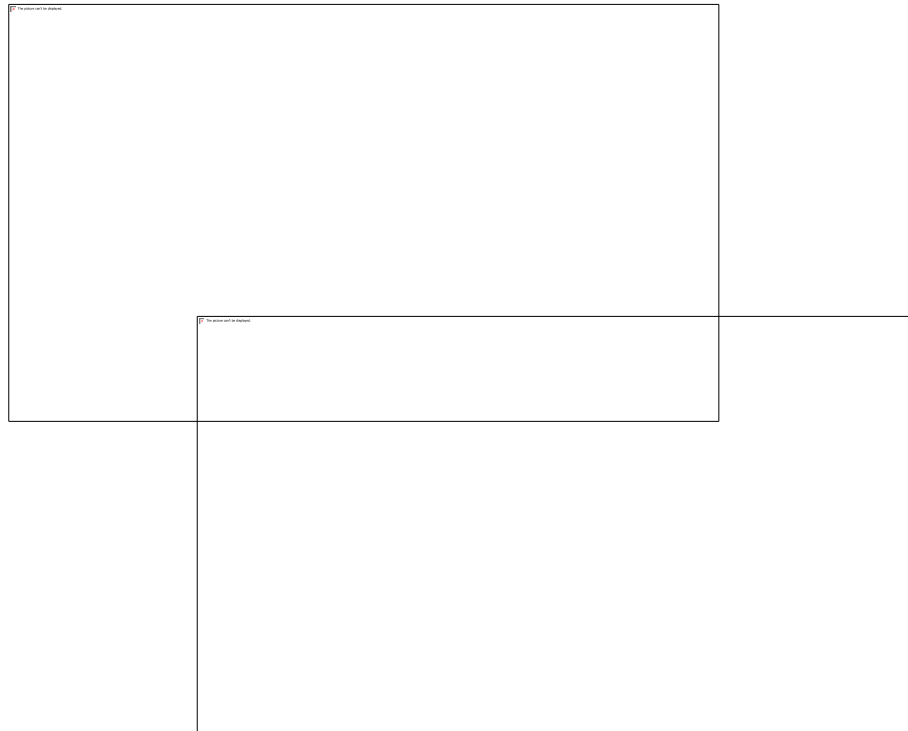
Pin the answers to your dashboard

Add your own suggested questions to dataset, e.g. frequently asked questions

## → Cortana integration—allows you to access your data from Windows 10

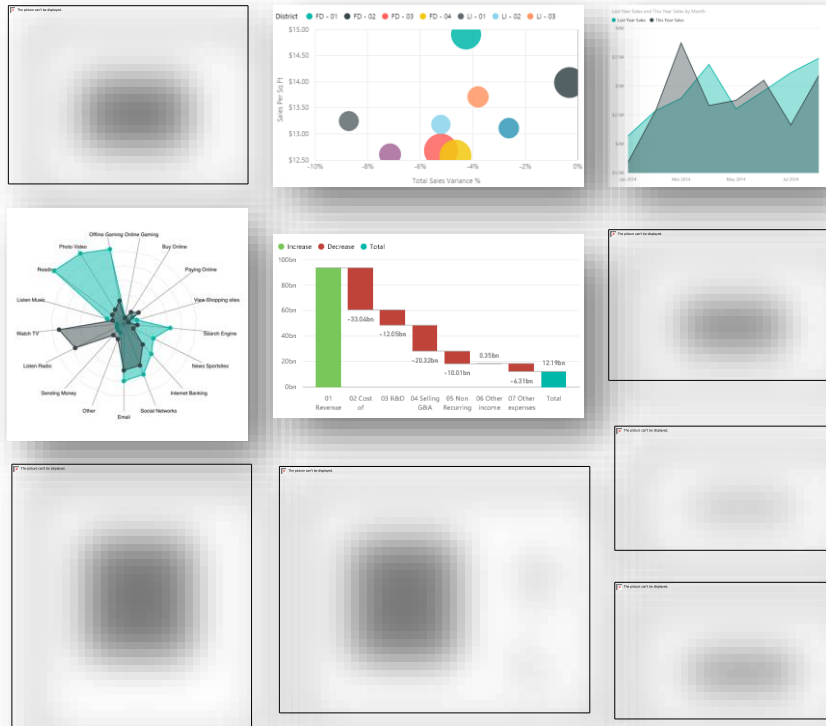
## → Quick insights—auto discover patterns and insights in your data

# Seamless integration with Office 365



- Team collaboration through support for Office 365 Groups
- Seamless navigation to other workloads in Office 365
- Use Excel data and pin live charts to your Power BI dashboards
- View Excel spreadsheets through support for Excel Online

# See your data the way you want it



→ Visualize data in a variety of ways

→ Growing number of visualization types

Donuts, basic area, waterfall, filled maps, tree maps, funnel, gauges combo charts and more

Custom visuals available from Power BI Visuals Gallery ([visuals.powerbi.com](https://visuals.powerbi.com))

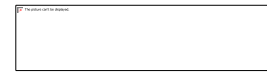
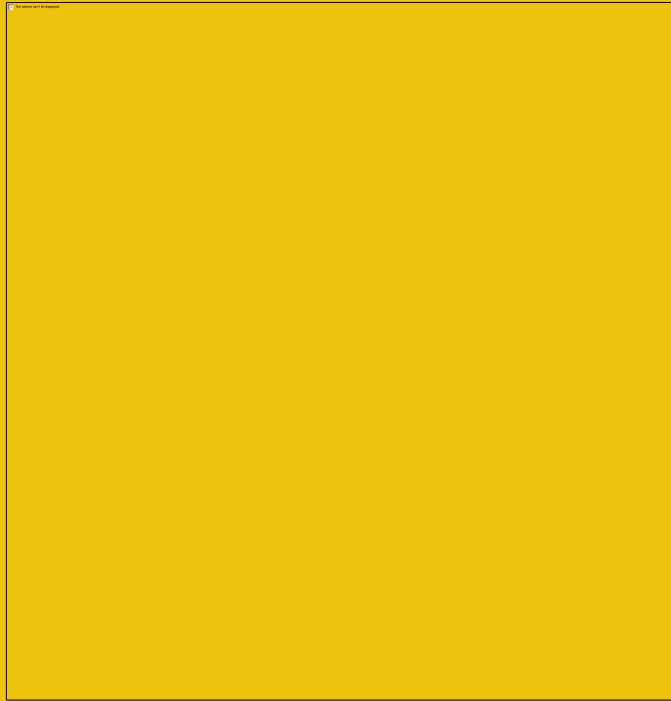
Tools to develop, test, package new custom visuals

→ Visualizations on report page are connected – select value in one visualization to change other visualizations

→ Full screen pop out mode for report visuals to show additional details

# Get started quickly

Pre-built solutions include dashboards, reports, and data models available out-of-the-box for SaaS services or built by your organization



Dynamics Marketing



Adobe Analytics



Azure Audit Logs



Microsoft Dynamics NAV



Azure Mobile Engagement

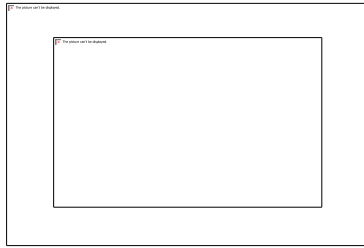


Application Insights

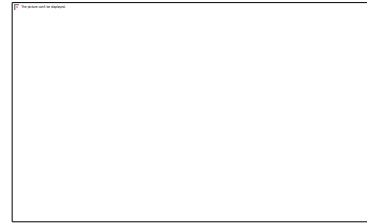


SQL Database Auditing

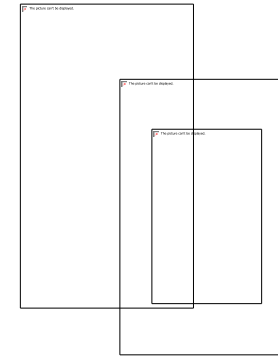
# Power BI Components



Power BI Desktop is a **free companion authoring and ad-hoc data exploration tool** for data analysts and developers



Power BI Service to **share and collaborate** through the organization



Power BI Native apps for **iPad, iPhone, Android and Windows** devices





Seamless integration across the Microsoft Data Platform provides quicker and more cost effective deployment for any data project

Data Warehouse



Internet of Things



Big Data



Advanced Analytics





# Resources

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Power BI site

- <http://powerbi.microsoft.com>

Power BI documentation

- <http://support.powerbi.com/>

Power BI community

- <http://community.powerbi.com/>

Power BI blog

- <http://blogs.msdn.com/b/powerbi/>

Tip: Power BI is evolving at a rapid rate. One of the best ways to keep pace with updates is to subscribe to the Power BI blog.

# Introducing the Power BI online service

---

The Power BI online service offers a simple, intuitive experience for interacting with data

The service and features have been designed to:

- Simplify engaging with data from heterogeneous sources
- Fuel faster, more insightful business decisions
- Deliver a rich, consolidated view of key information, no matter where the underlying data is stored
- Share data insights

# Introducing the Power BI online service

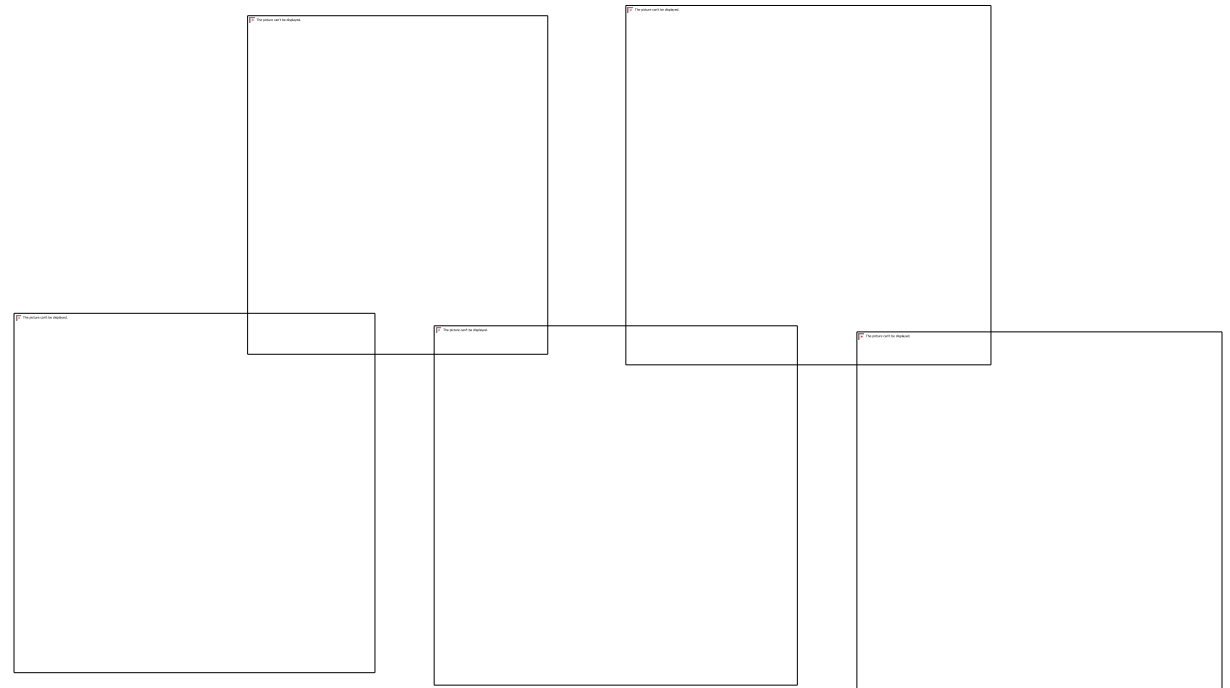
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Continued

Users engage with the service by using a supported web browser, or mobile application

- Microsoft Edge
- Internet Explorer, 10 or 11
- Chrome desktop, latest version
- Safari Mac, latest version
- Firefox desktop, latest version

Note: Mobile applications will be covered later in this module



# Introducing the Power BI online service

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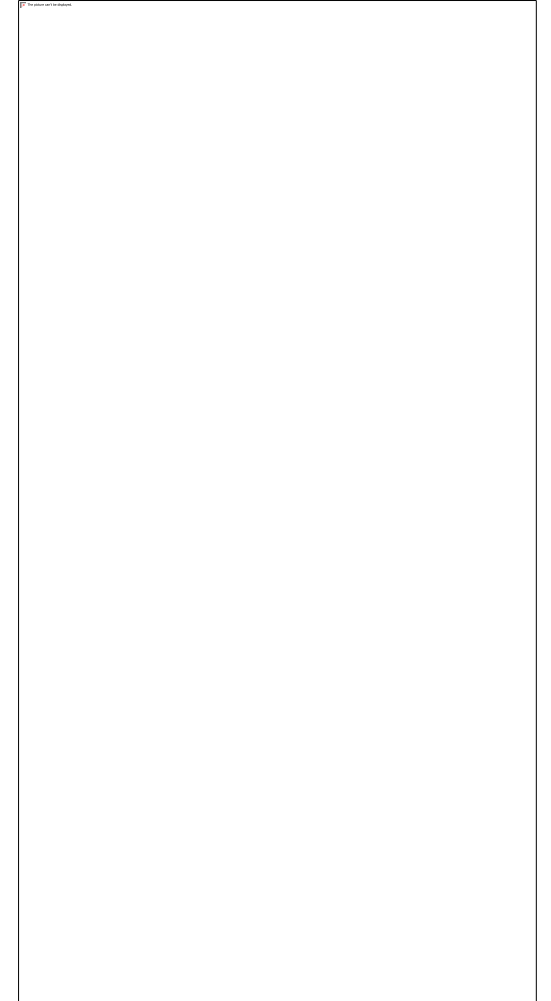
Continued

Users typically work with Power BI “building blocks”:

- Datasets
- Reports
- Dashboards

Use the **Navigation Pane** to create, or select items of interest

Note: Creating and managing datasets will be covered in the next module



# Creating and exploring reports

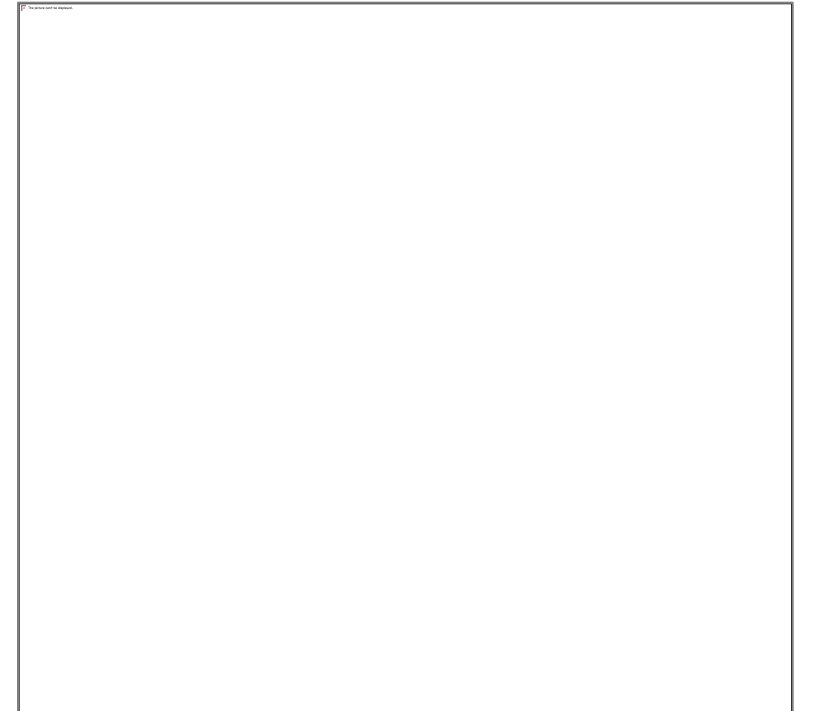
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## Creating reports

Use reports to layout visualizations across one or more pages

Rich, interactive reports can be created, updated and explored in the web browser experience

- A report is based on a single dataset
- Reports consist of one or more pages
- Each page can be named, and consists of visualizations and shapes



# Creating and exploring reports

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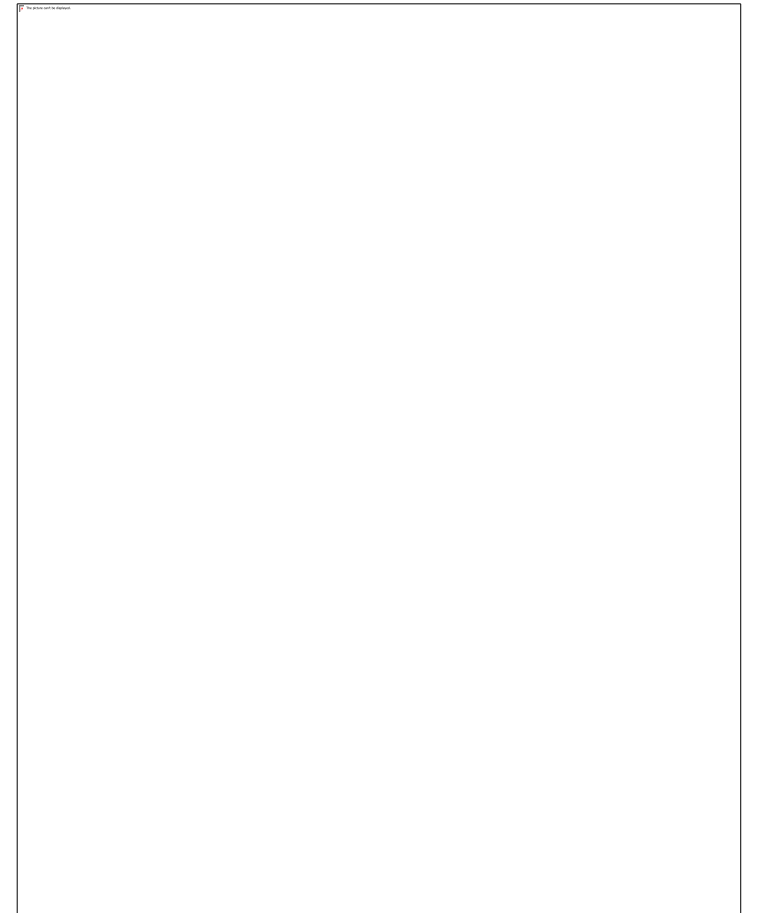
## Creating reports

Dataset fields are used to layout a visualization

- Visualization type and format can be adjusted to suit

Filtering can be applied at report, page or visualization level

Sorting can be set at visualization level





# Creating and exploring reports

---

Creating reports: Visualization types

Choose from numerous modern visualization types:

- Filter data:
  - Slicer
- Display numeric values:
  - Card, Multi Row Card, Table, Matrix, KPI
- Graphically visualize data:
  - Bar, Column, Line, Combo, Scatter, Waterfall, Pie, Donut, Funnel, Treemap, Gauge, R Script
- Spatially visualize data:
  - Map, Filled map, Shape map (preview)

## Import custom visuals

Custom visuals are covered later in this training course



Tip: Hover the cursor of each icon to reveal a tooltip description of the visualization type

# Creating and exploring reports

---

## Exploring reports

Reports are either in **Reading View** or **Editing View**

- In both views, report pages can be opened in **Full Screen Mode**, or individual visualizations can be popped out/in to see them zoomed in/out

In Reading View:

- Users cannot change the report definition
- Users can interact by changing filters or sorting
- Users can highlight values in one visualization to filter other page visualizations
- Shared reports can only be opened in Reading View

In Editing View:

- Users can interact, as in Reading View
- Users can also update the report (add/remove/reorder pages or visualizations)

# Assembling dashboards

---

Dashboards display tiles in a single canvas

- A tile is sourced by “pinning” either a report, report visualization, or a Q&A response
- A dashboard can be based on one or more datasets
- Tiles can be resized and repositioned, and their titles/subtitles can be updated
  - Tiles can be sized to 1-5 units wide/high



# Assembling dashboards

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Continued

Dashboards enable interactivity

- By default, clicking on a tile will drill through to its source
- However, a custom link (URL) can be set to override this default behavior

Dashboard tiles can reflect live, real-time data

- For non real-time datasets, tile thumbnails are automatically cached every 15 minutes

Dashboards can be displayed in **Full Screen Mode**

- Additionally, all tiles can be displayed by using Fit to Screen

Note: Live dashboards can be achieved with Azure Stream Analytics integration or the Power BI REST API. Both topics are covered later in this course.

# Connecting to Power BI data sources

---



Connecting to data through Power BI is easy, and can be achieved with a variety of data source formats:

- Content packs:
  - My Organization
  - Services
- Files, including:
  - Power BI Desktop files
  - Excel workbooks
- Databases and data services—cloud and on-premises

Note: Organizational content packs were introduced in the previous module

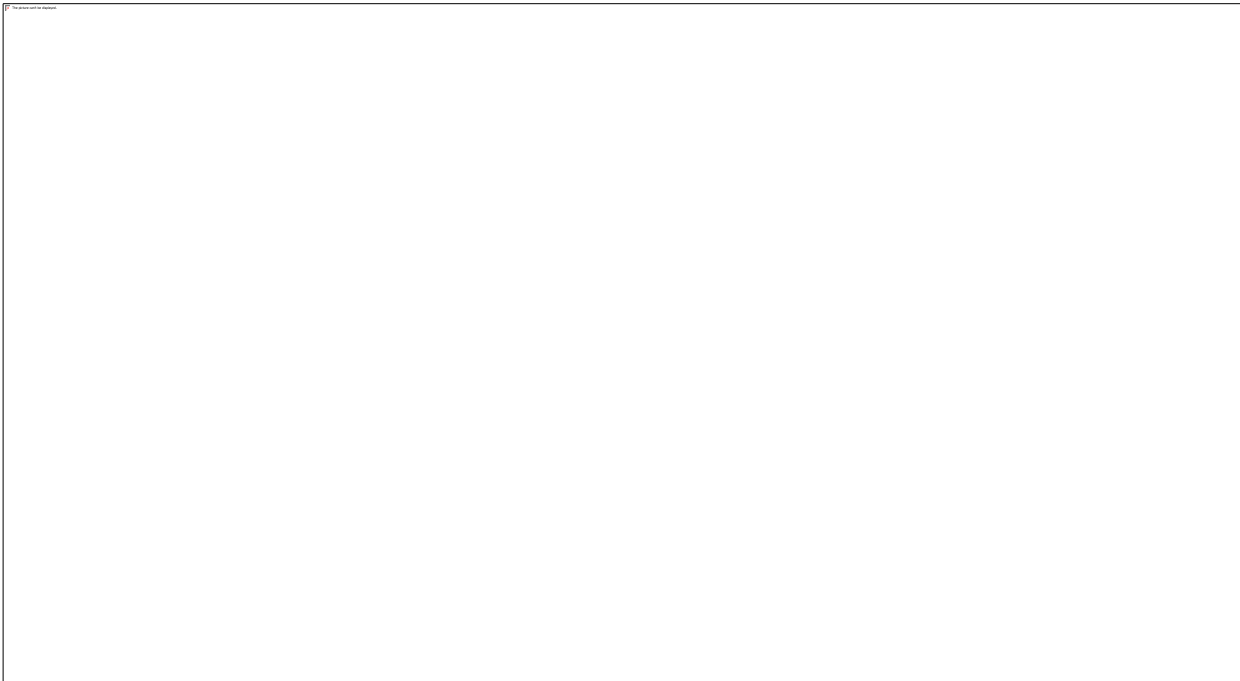
# Connecting to Power BI data sources

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Formats: Content packs: SaaS applications

Power BI enables connections to SaaS applications

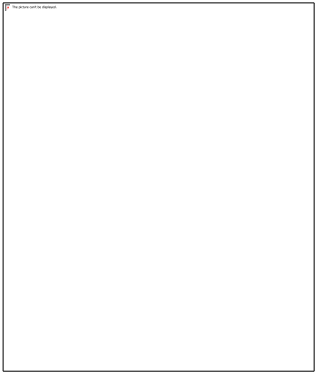
- Connections require an existing subscription
- Each content pack provides pre-built dashboards and reports



# Connecting to Power BI data sources

---

Formats: Files



Files can be uploaded, or connected to on OneDrive for Business, OneDrive Personal or SharePoint Online

- Updates to OneDrive files will appear automatically in dashboards and reports

Supported file types:

- Power BI Desktop files
- Excel workbooks
- CSV files

Note: Power BI Desktop files will be covered in the next module

Maximum size for uploaded files: 250MB

# Connecting to Power BI data sources

---

Formats: Files: Excel 2016

Excel 2016 supports direct publication to the Power BI service

- Publication must be made to OneDrive for Business
- Updates made from Excel 2016 will be reflected automatically in Power BI datasets





# Connecting to Power BI data sources

---

Formats: Files: Transposition to Power BI

## Power BI Desktop files:

- File ► Power BI dataset
- Report ► Power BI report
- An empty dashboard is automatically created, with a token tile to connect to the dataset (drills through to the report)

## Excel workbooks:

- Data model content takes precedence over worksheet content
- Workbook data model ► Power BI dataset
- Power View sheets ► Pages of a Power BI report
- PivotTables, PivotCharts and custom fields are not recognized

# Keeping data current in Power BI

---

Power BI enables online and on-premises data refresh for datasets uploaded from:

- Power BI Desktop files
- Excel workbooks, where Power Query or Power Pivot is used to query data

Data refresh can be on-demand, or scheduled

- Minimum schedule frequency is hourly

Achieved via a gateway

- Personal
- On-Premises Data Gateway



Note: Gateway access requires the **Power BI Pro** license

# Keeping data current in Power BI

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## Authentication

In order for Power BI to refresh a dataset, credentials must be provided for the data sources included in the dataset

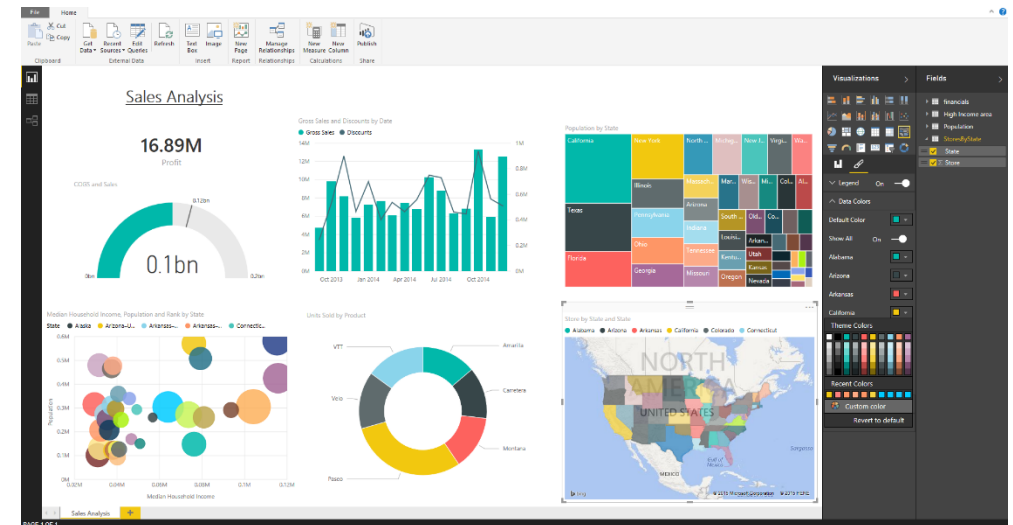
Credentials are securely stored so Power BI can connect to the data source on behalf of the user

- Once specified, the credentials are retained, and may be updated

# Introducing Power BI Desktop

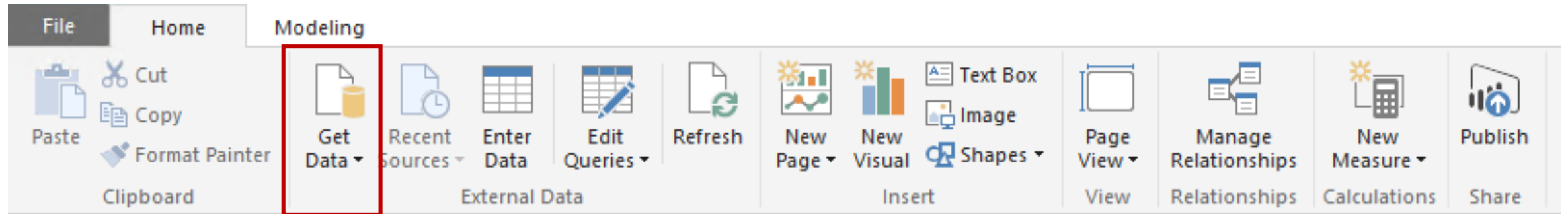
Power BI Desktop is a visual data exploration and reporting tool

- A freely downloadable 32- or 64-bit desktop application optimized for use with the Power BI service
- Integrates proven Microsoft technologies
  - Excel add-ins: Power Query, Power Pivot and Power View
- Enables multiple ways to transform schema and data
- Updated (at least) on a monthly basis



# Introducing Power BI Desktop

User experience: Getting data



A query is defined by “getting data”

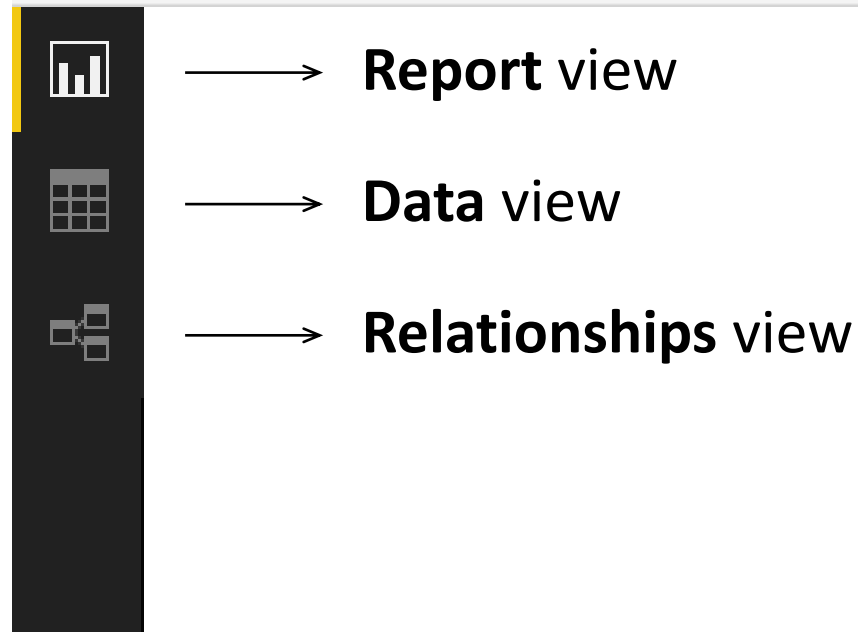
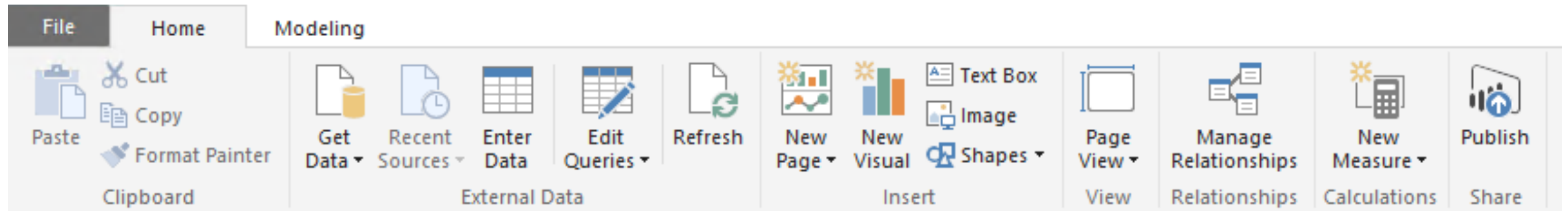
- Source types include File, Database, Azure, Online Services and Other

Data can be simply and quickly loaded “as is”

- Typically: Select type ► Define connection ► Authenticate ► Load
- Optionally, the **Query Editor** can be used to transform queries

# Introducing Power BI Desktop

User experience: Three views



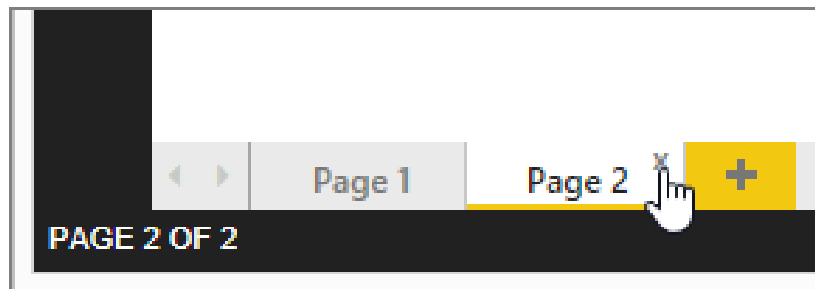
# Introducing Power BI Desktop

---

User experience: Report view

Work in **Report View** to create any number of report pages with visualizations

- It provides almost the same design experience as the report Editing View in the Power BI service
- A report will have at least one blank page to start, and any number of pages can be added
- Pages appear, and can be managed, in the navigator pane



# Introducing Power BI Desktop

---

User experience: Report view: Continued

The intent of the application is to land the user on the report canvas as quickly as possible

- Built-in intelligence will often infer relationships, and detect data types and categories
- Evidence suggests that most schemas are relatively simple, and so the optimized path is: Load data ► Visualize

Many model transformations can be applied while working in Report View

- Change data types, formats, calculation formulas
- Rename fields
- Sort columns
- Manage relationships

Note: The versatility of Report View, and the immediate visualization of model transformations, is a strong competitive advantage over many other data analysis and reporting products

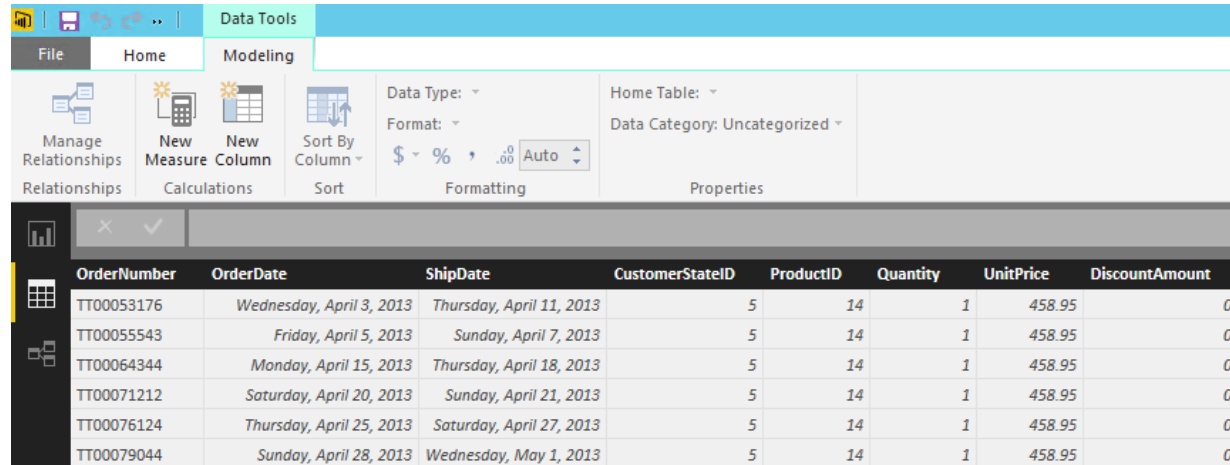


# Introducing Power BI Desktop

User experience: Data view

Work in **Data View** to inspect, explore, and understand data in the model

- It is a different experience from how you can view tables, columns, and data in **Query Editor**
- This is a view of the data after it has been loaded into the model



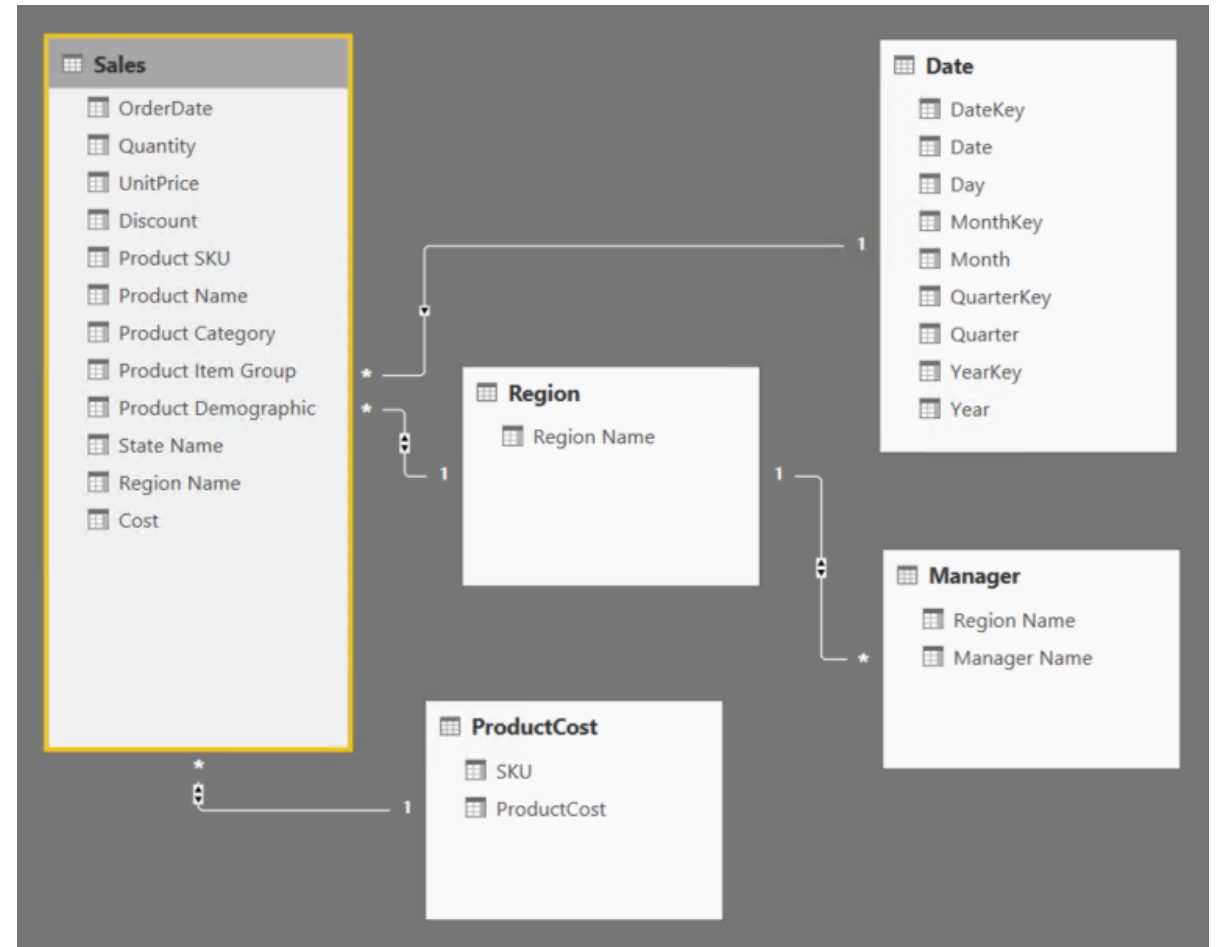
The screenshot shows the Power BI Desktop interface. The top ribbon is 'Data Tools', with sub-ribbons 'File', 'Home', and 'Modeling'. The 'Modeling' ribbon is active, showing options for 'Manage Relationships', 'New Measure', 'New Column', and 'Sort By Column'. Below the ribbon is a table with the following data:

OrderNumber	OrderDate	ShipDate	CustomerStateID	ProductID	Quantity	UnitPrice	DiscountAmount
TT00053176	Wednesday, April 3, 2013	Thursday, April 11, 2013	5	14	1	458.95	0
TT00055543	Friday, April 5, 2013	Sunday, April 7, 2013	5	14	1	458.95	0
TT00064344	Monday, April 15, 2013	Thursday, April 18, 2013	5	14	1	458.95	0
TT00071212	Saturday, April 20, 2013	Sunday, April 21, 2013	5	14	1	458.95	0
TT00076124	Thursday, April 25, 2013	Saturday, April 27, 2013	5	14	1	458.95	0
TT00079044	Sunday, April 28, 2013	Wednesday, May 1, 2013	5	14	1	458.95	0

# Introducing Power BI Desktop

User experience: Relationships view

Work in **Relationships View** to view all tables, columns, measures and relationships in the model



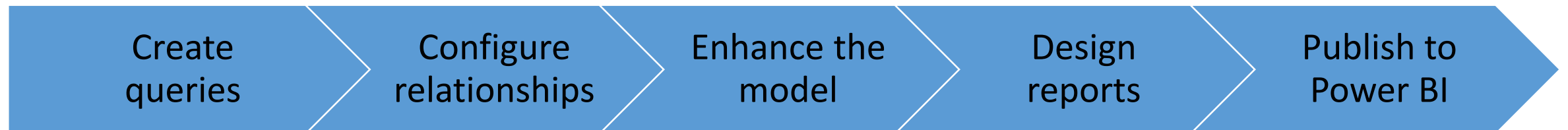
# Introducing Power BI Desktop

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Complex schemas: Development methodology

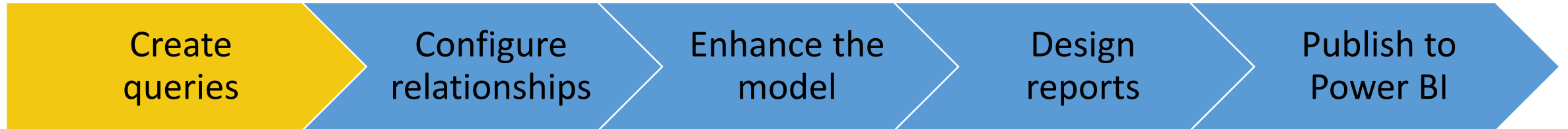
In contrast to the simple and quick “get then visualize” approach, more complex schemas may follow this methodology:

1. Create queries and use the **Query Editor** to filter, cleanse and reshape data
2. Configure/refine relationships to establish the foundations of a model
3. Enrich the model with calculation logic and formatting
4. Design interactive reports with a broad range of modern data visualizations
5. Publish solutions directly to the Power BI service



# Creating queries

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Queries can be edited before loading into the model

Once created, each query:

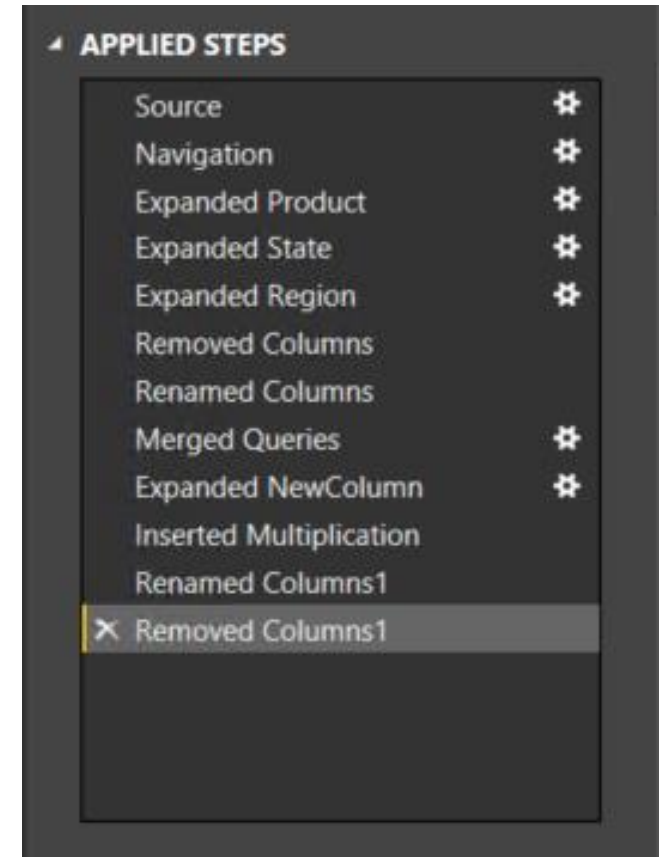
- Is referenced by a unique name
- Defines query steps by using the language “M”
  - Most query step logic does not require writing formulas
  - Advanced logic can be written, and even exposed as functions
- Is used to load data into a model table

# Creating queries

## Defining query steps

The **Query Editor** can be used to filter, cleanse and reshape data into the desired result

- Steps can easily be produced by applying column filters, and by using the commands available from the ribbon, or the query and column context menus
- It is possible to select a step and preview the data at that step
- Steps can be removed – but take care not to remove a step that downstream steps depend on
- Step formulas can be viewed or edited in the formula bar



# Creating queries

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Defining query steps: Commands

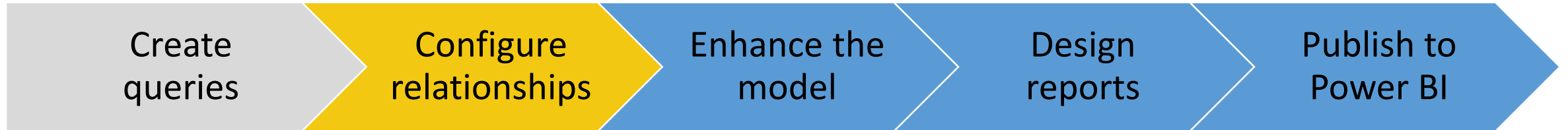
Numerous commands are available on the **Query Editor** ribbons and context menus to:

- Manage columns
- Reduce rows, including removing errors
- Transform
- Split
- Add columns, by using formulas

As the editor experience is WYSIWYG, users can easily experiment and rollback changes

# Configuring relationships

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Relationships enable filters on one table to appropriately propagate filter to other tables

- Note: Relationships are not foreign key (integrity) constraints

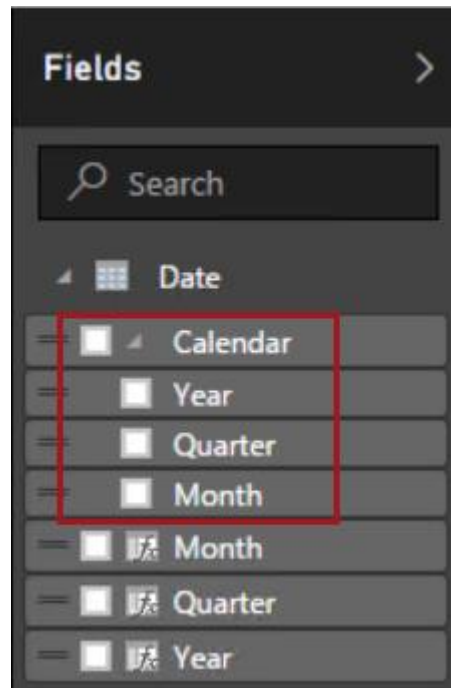
They can be defined between any two tables, regardless of their data connection or source type

- However, they must be based on single columns with matching data types
- There is no support for self-referencing relationships

# Enhancing the model

## Hierarchies

Hierarchies can be added to a table, enabling navigation between columns (in the one-to-many direction)



Year	Quarter	Month
CY2013	CY2013 Q1	CY2013 Jan
CY2013	CY2013 Q1	CY2013 Feb
CY2013	CY2013 Q1	CY2013 Mar
CY2013	CY2013 Q2	CY2013 Apr
CY2013	CY2013 Q2	CY2013 May
CY2013	CY2013 Q2	CY2013 Jun
CY2013	CY2013 Q3	CY2013 Jul
CY2013	CY2013 Q3	CY2013 Aug
CY2013	CY2013 Q3	CY2013 Sep
CY2013	CY2013 Q4	CY2013 Oct
CY2013	CY2013 Q4	CY2013 Nov
CY2013	CY2013 Q4	CY2013 Dec
CY2014	CY2014 Q1	CY2014 Jan
CY2014	CY2014 Q1	CY2014 Feb
CY2014	CY2014 Q1	CY2014 Mar
CY2014	CY2014 Q2	CY2014 Apr



# Enhancing the model

---

## Calculations

There are three different types of calculations, and each are defined by using DAX:

- Calculated columns
- Calculated tables
- Measures

DAX = Data Analysis Expressions (DAX), consisting of:

- Excel functions (~80 functions)
- Table functions
- Aggregate functions
- Relationship navigation functions
- Context modification functions
- Time Intelligence functions

Note: DAX theory is not covered in this training course

# Enhancing the model

---

Calculations: Calculated columns

Define **Calculated Columns** to add new columns to tables

Column values for each row are materialized and stored in the model

- If possible, to reduce the model size, avoid creating them

Column values are recalculated when:

- The table is refreshed
- Formula dependencies are refreshed

# Enhancing the model

---

Calculations: Measures

Define **Measures** to add aggregation logic to the model

Values are not materialized in the model

- Formulas are evaluated at query time

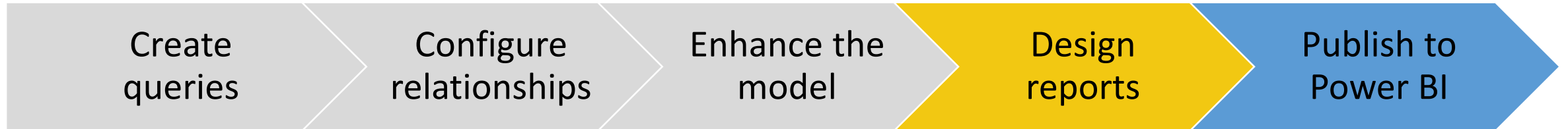
Common aggregate functions:

- SUM
- COUNT, DISTINCTCOUNT
- AVERAGE
- MIN, MAX

Note: Summarizable columns are aggregated by reports—so defining measures is not necessary for simple aggregation requirements

# Designing reports

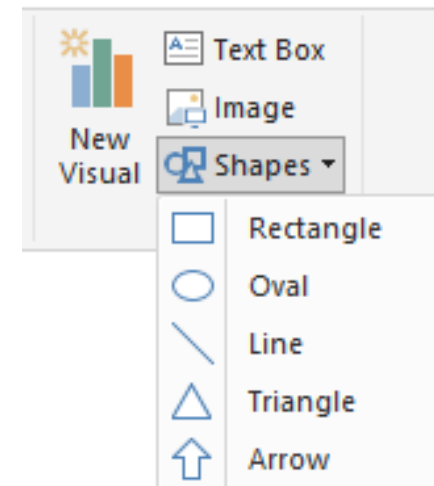
---



Reports can be designed based on the visible model interface

The design experience is almost the same as is available in the Power BI online service

- Text boxes, images and shapes can be added
- Text boxes can contain hyperlinks



# Designing reports

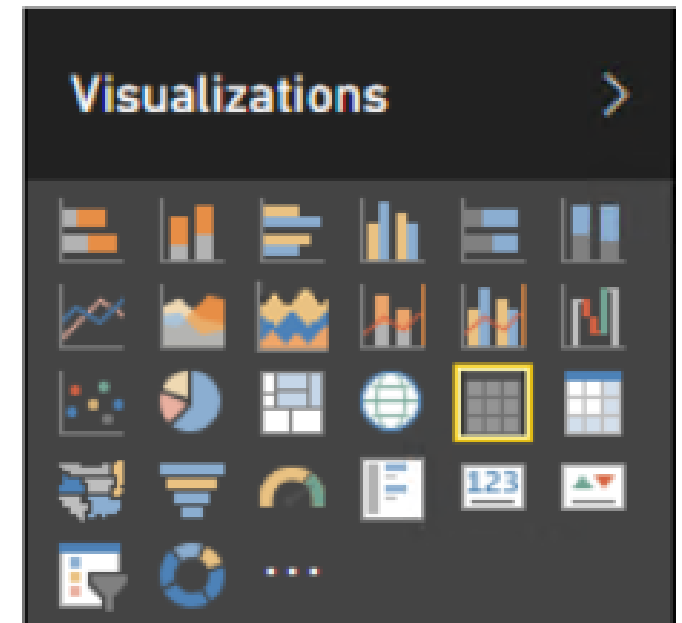
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## Custom visuals

Custom visuals can be imported to extend beyond the out-of-the-box visualizations

- A gallery of visuals created by the Power BI community is available at <https://app.powerbi.com/visuals>
- Browse through the visuals or submit one of your own for others to use
- The list of available visuals is growing each month
- Custom visuals will render in the Power BI service

Note: The topic of custom visual development is covered later in this training course



# Designing reports

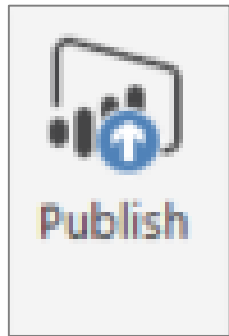
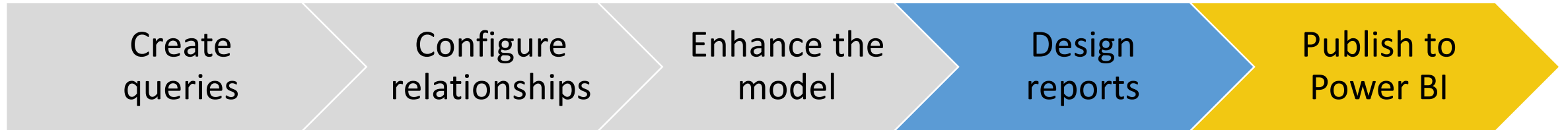
## Custom visuals: Gallery (subset)



\* And the list is growing!

# Publishing to Power BI

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The Power BI Desktop file can be uploaded to the Power BI service, or published directly

- Publish directly to your workspace or a group

Note, if overwriting an existing dataset:

- If there are two or more datasets with the same name, remove one, or rename the Power BI Desktop file
- Renaming columns or measures can break existing reports or dashboard tiles

Lab



# Lab - Questions

Management questions to be answered with a dashboard

- How are the sales at my company by months in addition to years?
- How is my company compared to other manufactures?
- How is the sales of units by various states along with the sales by years/ months?
- In which years the sales were higher (analyze the revenue by year and % of revenue for each year)?
- Compare the revenue by competitors over time

# DAX

DAX (**Data Analysis Expressions**) 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. Stated more simply, DAX helps you create new information from data already in your model.

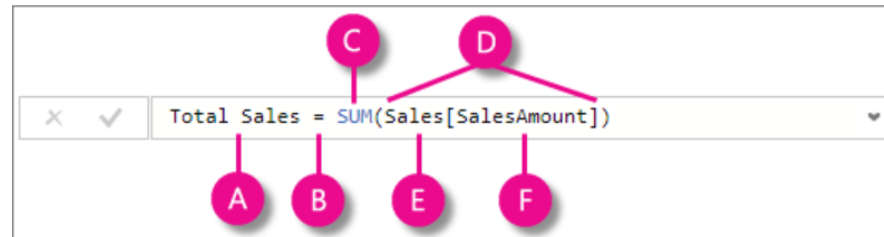
**DAX** stands for **Data Analysis Expressions**, and it is the formula language used throughout:

- Power BI
- Excel
- SQL SSAS Tabular Model

# DAX

## DAX Components

This formula includes the following syntax elements:



- A.** The measure name **Total Sales**.
- B.** The equals sign operator (=) indicates the beginning of the formula. When calculated, it will return a result.
- C.** The DAX function **SUM** adds up all of the numbers in the **Sales[SalesAmount]** column.
- D.** Parenthesis ( ) surround an expression containing one or more arguments. All functions require at least one argument. An argument passes a value to a function.
- E.** The referenced table **Sales**.
- F.** The referenced column **[SalesAmount]** in the Sales table. With this argument, the SUM function knows on which column to aggregate a SUM.

# DAX

## Functions

DAX is a functional language.

Functions are predefined formulas that perform calculations by using specific values, called arguments, in a particular order or structure. Arguments can be other functions, another formula, expression, column references, numbers, text, logical values such as TRUE or FALSE, or constants.

DAX includes the following categories of functions:

- Date and Time,
- Time Intelligence,
- Information,
- Logical,
- Mathematical,
- Statistical,
- Text,
- Parent/Child
- and Other functions.

<https://msdn.microsoft.com/en-us/library/ee634396.aspx>

# DAX

## **Calculated Columns**

- Can be used to add columns to tables
- Can be used to calculate other columns or for visualizations
- It affects all the rows
- Have a single formula for each column
- Operate row by row
- Only refresh on data load
- More columns = more space

## **Measures**

- Only used on value sections
- Always filtered and evaluated on the visual is rendered
- Calculated “on the fly”
- Used in simple or complex formulas

## DEMO

### Calculated Column

SalesAmount = Sales[Quantity] \* Sales[Unit Price]

GrossMargin = Sales[Net Price] - Sales[Unit Cost]

GrossMarginPct = Sales[GrossMargin] / Sales[SalesAmount]

### Measures

GrossMarginPct = sum(Sales[GrossMargin]) / sum(Sales[SalesAmount])

# DAX

## Aggregation

*Aggregations* are a way of collapsing, summarizing, or grouping data. When you start with raw data from tables or other data sources, the data is often flat, meaning there is lots of detail but it has not been organized or grouped in any way. This lack of summaries or structure might make it difficult to discover patterns in the data. Therefore, an important part of the analyst's job is to define aggregations that simplify, abstract, or summarize patterns in answer to a specific business question.

Works only in numeric columns

Agregate only one column

Total Sales = SUM (Sales[SalesAmount])

SUM (Sales[Net Price] \* Sales[Quantity] )

Function	Use
<a href="#">AVERAGE</a>	Returns the average (arithmetic mean) of all the numbers in a column.
<a href="#">AVERAGEA</a>	Returns the average (arithmetic mean) of all the values in a column. Handles text and non-numeric values.
<a href="#">COUNT</a>	Counts the number of numeric values in a column.
<a href="#">COUNTA</a>	Counts the number of values in a column that are not empty.
<a href="#">MAX</a>	Returns the largest numeric value in a column.
<a href="#">MAXX</a>	Returns the largest value from a set of expressions evaluated over a table.
<a href="#">MIN</a>	Returns the smallest numeric value in a column.
<a href="#">MINX</a>	Returns the smallest value from a set of expressions evaluated over a table.
<a href="#">SUM</a>	Adds all the numbers in a column.

# DAX

## The X Aggregators

SUMX

AVERAGEX

MINX

MAXX

Iterate over the table and evaluate the expression for each row – row by row

Always receive two parameter (table and expression)

Total Sales = SUM (Sales[SalesAmount])

Total Sales = SUMX ( Sales; Sales[Net Price] \* Sales[Quantity] )



# DAX

## Counting Values

COUNT – only for numeric columns

COUNTA – count anything but not blanks

COUNTBLANK – count blanks

COUNTROWS – rows in a table

DISTINCTCOUNT – count distinct values

## **Exercise - Counting Functions**

1. Calculate the number of Sales Rows

## Exercise - Counting Functions

1. Calculate the number of Sales Rows

Sales Rows = COUNTROWS ( Sales )

# DAX

## DATE Functions

---

DATE(<year>, <month>, <day>)

Returns the specified date in datetime format.

DATEVALUE(date\_text)

Converts a date in the form of text to a date in datetime format.

DAY(<date>)

Returns the day of the month, a number from 1 to 31.

MONTH(<datetime>)

Returns the month as a number from 1 (January) to 12 (December).

NOW()

Returns the current date and time in datetime format.

TIME(hour, minute, second)

Converts hours, minutes, and seconds given as numbers to a time in datetime format.

TIMEVALUE(time\_text)

Converts a time in text format to a time in datetime format.

WEEKDAY(<date>, <return\_type>)

Returns a number from 1 to 7 identifying the day of the week of a date. By default the day ranges from 1 (Sunday) to 7 (Saturday).

DATEDIFF(<start\_date>, <end\_date>, <interval>) Returns the count of interval boundaries crossed between two date

...

---

Time intelligence use a diferente approach, with a data table

## **Exercise - DATE Functions**

1. Calculate the number of days between Order Date and Delivery Date

## Exercise - DATE Functions - SOLUTION

1. Calculate the number of days between Order Date and Delivery Date

```
= DATEDIFF(DATEVALUE(Sales[Order Date]);DATEVALUE(Sales[Delivery Date]);DAY)
```

# DAX

## EXERCISE

Calculate the % of sales / total sales

# DAX

## EXERCISE

Calculate the % of sales / total sales

```
= DIVIDE (  
    SUMX (Sales, Sales [Quantity] * Sales [Unit Price]),  
  
    SUMX (ALL(Sales), Sales [Quantity] * Sales [Unit Price]),  
)
```



# DAX

## Solves the most common business challenges

There are five distinct groups of Quick measure calculation types, each with a collection of calculations. Those groups and calculations are the following:

### Aggregate within a category

- Average within category
- Variance within category
- Max within category
- Min within category
- Weighted average per category

### Filters and baselines

- Filtered measure
- Difference from baseline
- Percentage difference from baseline
- Totals from new categories

### Text

- Star rating
- Concatenated list of values

### Time intelligence

- Year-to-date total
- Quarter-to-date total
- Month-to-date total
- Year over year change
- Quarter over quarter change
- Month-over-month change
- Rolling average

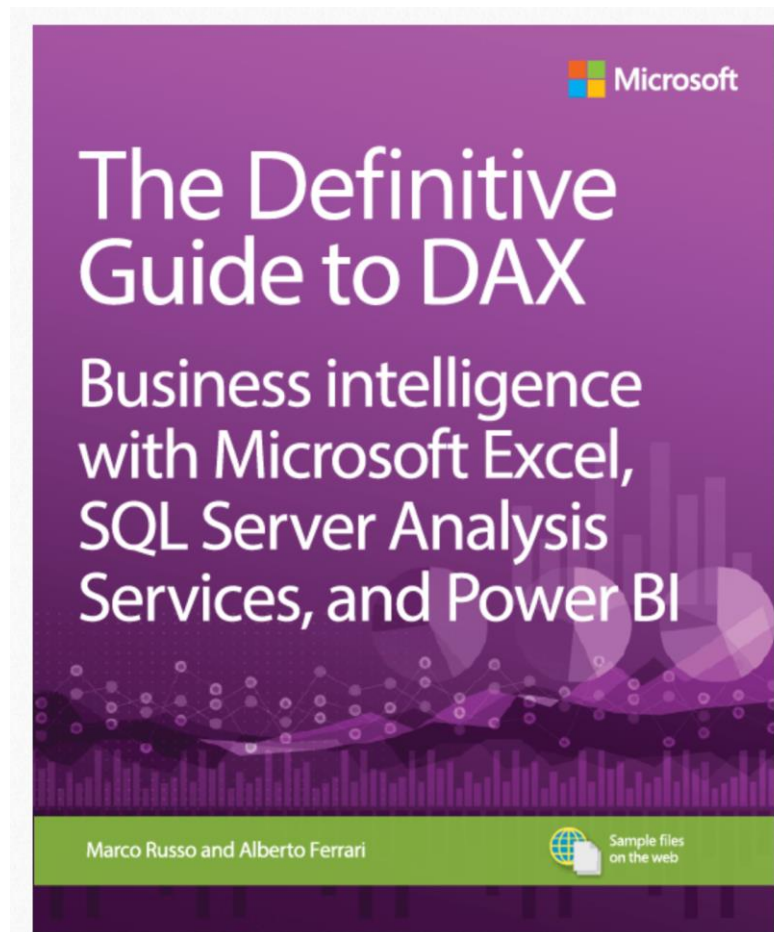
### Totals

- Running total
- Total for category (filters applied)
- Total for category (filters not applied)

### Mathematical operations

- Addition
- Subtraction
- Multiplication
- Division
- Percentage difference

# DAX



# DAX

DAX 101

<https://youtu.be/klQAZLr5vxA>

Advanced DAX

<https://youtu.be/6ncHnWMEdic>





# Resources

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Continued

## Explore Virtual Labs!

Immerse yourself in a virtual hands-on lab and experience the product first hand, or try our guided experiences, and click through a tour of the various product features.

[View system requirements for virtual labs](#)



- <https://technet.microsoft.com/en-us/virtuallabs>
- Search the growing library of Power BI technical labs

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