# **Fast-track Power BI & DAX**

# Sample manual - first two chapters



Manual 1294 - 364 pages -

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### **CHAPTER 1 - GETTING STARTED**

### 1.1 Getting Started in Power BI Desktop

This chapter describes the basic workflow you'll use to build a report in Power BI Desktop:

Stage	Details
Loading and transforming data	Loading one or more tables from various data sources, cleansing the data and linking the tables together if necessary.
Creating a report	Using the data that you've loaded to create a report, including visuals like charts.
Publishing this	Publishing the results to your report server (usually Microsoft's Power BI Service) so that other people can view your reports.

You'll find much more detail on the ideas mentioned in this chapter in later parts of this courseware.

#### **Example for this Chapter**

To demonstrate the basic process of building a report, we'll import a table of data from a webpage and create and publish a report based upon this:



We can use the imported, cleaned data to create a variety of visuals, such as this chart.

The final report published to Power BI Service, and viewed

Finally we will publish this report to the Power BI Service, so that anyone in your organisation can see it:



Country

Average of Upper Slopes Average of Lower Slopes

through your browser.



### 1.2 Working with Files

#### **Creating New Files**

You can create a new report in Power BI Desktop in the following ways:

	<b>日</b> り	۲ <sup>۲</sup>		
	File	Home	Insert	Modelin
	Paste	Copy Format paint lipboard	Get data v	Excel workbook
		. \		
a)	lf you a Deskto	already have p open, sel	e Power E ect the <b>Fi</b> l	3I <b>le</b> menu.

<b>8</b> 9 9	
Home	∼ New
D Open	Report
b) Click on this icc report.	on to create a new

#### **Opening and Saving Files**

You can open and save files using options in the File menu:





Every time you open a Power BI Desktop report a new instance of the application will launch, leaving the current report you're working on unaffected. To close a report you must close down the Power BI Desktop application containing it (there is no option to close a report but still leave Power BI Desktop running).



#### 1.3 Views in Power BI Desktop

The most important components of the Power BI Desktop screen are as follows:



#### **Switching Panes**

You can use the icons on the right-hand side of your Power BI screen to choose what to show:

Data ···· »	Click on this icon to see the data tables in your model	Format ···· »
→ ⊕ Forecast ···· + □ Country □ Σ Last Scoutfall	or this icon to see the format properties of the thing you currently have selected (in this case a chart visual).	Visual Properties ···· +
<ul> <li>Σ Last Showfall</li> <li>Σ Lower Slopes</li> <li>Resort</li> <li>Σ Upper Slopes</li> </ul>	You can also use these tools on the <b>View</b> tab of the Power BI Desktop ribbon to choose what you want to view.	> Size and style       > Title
View Op	timize Help External tools Format Data / Dritt	
	Aa Gridlines Data	Selection de Build a visual

view 🗸 Scale to fit layout

Mobile



Lock objects

Page options

switcher

🛃 Sync slicers

Show panes

Bookmarks

#### **Report, Table and Model View**

You can switch between the three views of a report using the tools on the left of the screen:

View	lcon	What it shows	Example view
Report	Report view	The report that you're creating, consisting of visuals and shapes.	Snow forecast 330.0 200 0 Austra Switzerand Country Average of Upper Slopes © Average of Lower Slopes
Table	Table view	The tables of data that you've loaded into your model (you can see one table at a time in this view).	Image: Start of the second
Model	Model view	The links between the tables in your model, called <i>relationships</i> in Power BI Desktop.	Forecast



The 4<sup>th</sup> icon – if present – allows you to create queries in DAX to interrogate the data upon which your report is based, but this is definitely not something to consider in this courseware chapter!



### 1.4 Getting Data

The first stage in building a report is to find some data!





### 1.5 Transforming Data

You'll often need to make changes to the data you have imported so that it can be presented easily in visuals. This process is known as *transforming* data.

Column1 💌	Column2 💌	Column3 💌	Column4 💌	Column5
Resort	Country	Upper Slopes	Lower Slopes	Last Snowfall
St Anton snow reports	Austria	335cm	70cm	12cm
lschgl snow reports	Austria	160cm	80cm	4cm
ObergurgI snow reports	Austria	159cm	85cm	1cm
Lech snow reports	Austria	335cm	70cm	12cm
Saas Fee snow reports	Switzerland	310cm	70cm	1cm
Flims Laax snow reports	Switzerland	350cm	45cm	1cm
Zurs am Arlberg snow reports	Austria	335cm	70cm	12cm
Solden snow reports	Austria	283cm	30cm	1cm
Zell am See snow reports	Austria	148cm	20cm	1cm

We will change the column
headings, turn some
column into numbers and
remove the final column.

<b></b> *	A <sup>B</sup> <sub>C</sub> Resort	A <sup>B</sup> <sub>C</sub> Country	1 <sup>2</sup> 3 Upper Slopes 🔹	1 <sup>2</sup> 3 Lower Slopes 👻
1	St Anton snow reports	Austria	335	70
2	Ischgl snow reports	Austria	160	80
3	Obergurgl snow reports	Austria	159	85
4	Lech snow reports	Austria	335	70
5	Saas Fee snow reports	Switzerland	310	70
6	Flims Laax snow reports	Switzerland	350	45
7	Zurs am Arlberg snow reports	Austria	335	70
8	Solden snow reports	Austria	283	30
9	Zell am See snow reports	Austria	148	20



As with everything else in this chapter, we will go into this topic in much more detail later in this courseware.

#### Editing Queries / Transforming Data

Each table that you import into a report generates a *query* which tells Power BI Desktop which data to get (and how to get it). You can edit these queries in (at least) 3 different ways:





#### The Power BI Query Editor

Choosing to edit a query as described above opens the *Power Query Editor* tool within Power BI Desktop.

Although you're still working in the	]			conditi	ons						
same Power BI Desktop file, the	,	File	Home	Trar	sform	Add Column	View	Tools	Help		
Power Query Editor has a different		×					-8		🕒 📑 Propert	ies	
ribbon with options related to		-1		LC	) ====	<b>₽</b>			–😂 🛛 🔓 Advance	ed Editor	
modifying data.		Close & Apply	New Source •	Recen Source	t Enter s▼ Data	Data source settings	Manag Paramete	ge Re ers∙ Pre	fresh view 👻 🔝 Manage	• •	Cho Colur
	_	Close	1	New Qu	ery	Data Sources	Paramet	ters	Query		Ma
	/	Queries	s [1]	<	×	√ fx =	Table.Tr	ransformC	ColumnTypes(#"E	xtracted	Table
		🔲 Fore	casts		Resort		C	ountry		Upper Slop	pes
When you have finished cleaning your	1/				St Anton	snow reports	A	ustria		335cm	
data click <b>Close &amp; Apply</b> to close the	V				Ischgl sno	ow reports	A	ustria		160cm	
Power Query Editor.					Obergurg	I snow reports	A	ustria		159cm	
					Lech snow	w reports	A	ustria		335cm	



This program to edit Power BI queries has gone by many names in the past! This courseware will call it **Query Editor**, although this name seems to have been abandoned by Microsoft. Little known fact: everything that you can do using Query Editor in Power BI Desktop you can also do when getting data in Excel.

#### **Promoting Row Headers**

For our example the first thing you need to do is to make the first row your table headers:





#### **Replacing Values**

To allow us to average snowfalls for our data we need to remove the **cm** suffices then convert the resulting data to integer numbers:

· · · · · · · · · · · · · · · · · · ·	A <sup>8</sup> c Upper Slopes 335cm 160cm 159cm 335cm	A <sup>8</sup> c 1 70cn 80cn 85cn 70cn	È K	Copy Remove Columns Remove Other Columns Add Column From Examples		a)	Select want t and se select	the first column whose <b>cm</b> suffices you o remove, then hold down the <u>Shift</u> key elect the last one (this is the easiest way to multiple columns in Query Editor).
	310cm	70cn		Remove Duplicates				
	350cm	45cn	_	Remove Errors		b)	Right-	click on the selected columns and choose
	335cm	70cn 1	2	Replace Values			to reni	ace values
	283cm	30cn		Fill	►	_	to repi	
	148cm	20cn		Change Type	Þ			
				Transform	4			Replace Values Replace one value with another in the selected columns. Value To Find A <sup>B</sup> <sub>c</sub> * cm Replace With
c)	c) Choose to replace the text <b>cm</b> with nothing, then selec					lect OK .		

#### **Changing Data Types**

You can now change the data types of the 3 columns you have selected:

Right-click on the 3 columns and choose to change their data types to **Whole Number** (note that this would have generated errors if we had done this earlier).

▼ <sup>AB</sup> C	Upper Slopes	Pa.	Comu	- AB	Last Snowfall
33	5		Сору		
16	0	×	Remove Columns		
15	9		Remove Other Columns		
33	5		Add Column From Examples		
31	0		Remove Duplicates		
35	0		Remove Errors		
33	5	1	Replace Values		
28	3	*2	Fill		
14	8				
			Change Type	►	Decimal Number
			Transform	►	Fixed decimal number
			Merge Columns	-	Whole Number
				-	Percentage

#### **Removing Columns**

Finally, we're not interested in the last snowfall depth, so we'll remove this column.

<b>•</b> 1	<sup>2</sup> <sub>3</sub> Lower Slopes	1 <sup>2</sup> 3 Last Sn	nowfa	all	¥		
335	70	E		Сору			
160	80	>	×	Remove			
159	85			Remove (	Other Colum	_	Right-click on the Last Snowfall column and rer
335	70			Duplicate	Column		from your query.



### 1.6 Creating Visuals

*Visuals* are the tables, charts or other gizmos which display the data in your report. There are many types of visual (you'll learn a lot more about them in later chapters of this courseware).

#### **Inserting a Visual**

Probably the easiest way to add a visual to a report is as follows:



#### Assigning Grouping Fields to a Visual

Once you have inserted a visual you can begin assigning fields to it:





#### **Assigning Numerical Fields**

You can assign numerical fields in the same way, then change how you want to aggregate them:





### 1.7 Three Ways to Format Visuals

Much of your time in Power BI Desktop will probably be spent applying formatting like this:



### In Situ Selection

There are a few parts of a chart that you can edit on the chart itself:



### Changing what's on your Chart

You can choose to add or remove some parts of your chart using the following icon:

Click on this icon to add or remove certain chart components (here we can add or remove the title, data labels or a slider).





The **More options** button is less useful than you might think: it just takes you to the **Format** pane on the right-hand side of Power BI Desktop.



### The Format Pane

You'll spend much of your time in Power BI Desktop using the Format pane:





As a short-cut, double-click on a visual to select any part of it that you want to format; the relevant card will automatically then be selected in the **Format** pane.



### 1.8 Publishing your Report

When you've finished your report you will probably want to share it!





A (much) later chapter in this courseware will cover publishing in more detail, including an explanation of workspaces (and why you might want to create them), how to create dashboards and much more besides.



# **CHAPTER 2 - IMPORTING DATA**

### 2.1 Our Example

Our example is based on a relational database which keeps track of sales of soft toys. The diagram below shows which type of data source we'll use to import each table:





Once you've loaded your data into Power BI from disparate data sources all tables will be treated equally (so for example you can join a table imported from Excel with one imported from a website without any problem).



### 2.2 Importing from Different Sources

This section shows how to import data into a report from a variety of common data source types. Regardless of which data source type you're using, you can begin the import process as follows:





What happens next depends on which data source type you've chosen, but it inevitably involves launching some type of wizard which will help you import your data.

#### **Re-Using a Data Source**

You can quickly re-use a recent data source as shown below:





### 2.3 Importing from Excel

To start importing from an Excel workbook, use this short-cut:

Home	Insert	Modeling	
Cut	9	B	
Сору		Evcel D	
Format painte	er data∨	workbook hul	
ipboard		N3.	

Power BI gives you a special Excel tool because it's such a popular choice.
Double-click on a workbook containing
one or more worksheets or named
ranges that you want to import.



The dialog box which appears lists the contents of the workbook you have selected. You can choose which parts of the workbook you want to import as shown below:



Note that Power BI Desktop will where possible build relationships between the worksheets you've imported:

Power BI Desktop creates these relationships for this example (we've tidied the diagram up a bit). You'll learn how and why Power BI Desktop creates relationships between pairs of loaded tables in another chapter in this courseware.





### 2.4 Importing CSV or Text Files

You can import from CSV files as well as a variety of other text file types.



#### To begin importing from a text file like this:

Get Data		This PC > OS (C:) > wiseowl
Search	All	folder
All	Excel Workbook	* Name
File	Text/CSV	ual 💉 💌 Products.csv
Database	ML XML	
Choose to get dat	ta from a <b>Text/CSV</b> file	then browse for and double-click the file you want to import.

You can then choose exactly how the text file is configured using the dialog box which appears:

The prev good wa selected	view of y ay to che I the cor	your data is eck if you've rect options	a If I pic s. yo	Power cked tł u can	BI Deskt ne correc choose a	top hasn't t delimiter, a new one.	Power data ty rows.	Power BI Desktop attempts to work out the data type of each column using a sample of rows. You can set the sample size here.			
								/		Record	
Product	s.csv			/							
File Origin			Delimiter			Data Type De	tection				
65001: Unico	ode (UTF-8)	Ŧ	Comma 🔺			Based on fir	st 200 rows 🔺	*		L2	
Productid	ProductNa	me Animal	Habitatld	Legs	Familyld	WeightGrams	ProductionCost				
1	Sammy	Snake	1	0	1	950	7.19			^	
2	Pokyo	Penguin	4	2	3	850	4.5				
3	Fenella	Frog	3	4	4	400	10.79				
4	Layla	Lemur	2	2	5	550	4.28				
5	Dave	Dachsund	1	4	5	775	5.85				
6	Kylie	Camel	5	4	5	1200	3.15				
7	Jeremy	Jackdaw	7	2	3	295	7.65				
8	Faye	Fox	6	4	5	420	4.95				
9	Oliver	Owl	7	2	3	380	6.75				
10	Cleopatra	Clownfish	4	0	2	290	2.69				
11	Oscar	Otter	3	4	5	340	13.72				
12	Bob	Butterfly	7	6	6	450	5.85				
13	Englebert	Elephant	1	4	5	1450	3.15				
14	Petronella	Parakeet	2	2	3	520	4.05			· ·	
Extract Ta	ble Using I	Examples	_					Load	Transform Data	Cancel	
			$\searrow$								
Optional columns everythii	lly you c you wa ng then	an click on t ant to import remove fror	this button to , although it n the query	t. Wł	When you've finished configuring the text file, click the <b>Load</b> button to import it into your Power BI report.						



### 2.5 Importing from SQL Server

You can import data from a SQL Server database as shown in the diagram below:



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#### Using Queries and Stored Procedures

Rather than choosing to import from a list of tables, you can write a *query* to return your data. This is more complicated but provides much more control over which data you get.



#### **Passing Arguments to Stored Procedures**

Note that you can now pass arguments to a stored procedure using these advanced options:

Here we have a stored procedure listing out all the towns for any given region. We could load this as follows:						
	Advanced options Command timeout in minutes (optional)					
	SQL statement (optional, requires database) EXEC spListTowns 'East Anglia'					



### 2.6 Importing from a Website

Power BI Desktop makes it easy to grab data from a website, as shown below:





### 2.7 Entering Data Manually

As well as importing existing data, Power BI Desktop allows you to enter data into a model manually.

#### **Pasting Data**

Although you can't import directly from Word, you can copy and paste:

Habitatld       HabitatName       Enviro         Habitatld       HabitatName       Enviro         1       Grasslands       Enviro         2       Forest       Forest         3       Fresh water       Enviro         4       Salt water       Enviro         5       Desert       Enviro         a)       In Word, select the tarcopy it.	onmentid BackColour 1 Light green 1 Dark green 3 LightBlue 3 #78aaf5 1 #d6a740 Able you want to	ForeColour Black White Dark blue White Black	b) Clie	ome In nat painter d ck on this	Get Exce data v workbu	eling Data Data bok hubv	View SQL En Server da Data	Optimize
Create Table			c) Righ	nt-click on r data.	the empty gr	id and c	hoose to	paste in
Paste A			d) <i>Pow</i> of y	ver BI Des our table	sktop will dec should becon	ide whet ne the he	her the fir eader colu	st row umns.
e) Give your table a better name.	Create Table	)	ad has been promotion	ad to column	headers Und			
\ \	U The list row	oi data triat you paste	ed has been promot	ed to column	ineaders. Undo	Headers		
	Habitatld	HabitatName	EnvironmentId	BackColour	ForeColour	+		
	1 1	Grasslands	1	Light green	Black			
	2 2	Forest	1	Dark green	White			
	3 3	Fresh water	3	LightBlue	Dark blue			
	4 4	Salt water	3	#78aaf5	White			
	5 5	Desert	1	#d6a740	Black			
	6 6	Urban	1	#222	White			
	7 7	Sky	2	#0a66f0	White			
	+							
f) Choose to <b>Load</b> it into your data model.	Name: Table						Load	Edit





### **Typing in Data**

The final option for loading data into a model in Power BI Desktop is to type it in!































# What we do!

		Basic training	Advanced training	Systems / consultancy
e	Microsoft Excel VBA macros	<b>2</b>	<u>*</u>	<b>2</b>
Offi	Office Scripts Microsoft Access			
BI, etc	Power BI and DAX	<u>.</u>		
Power ]	Power Apps Power Automate (both)			
	SQL	<b>2</b>	<b>2</b>	
erver	Reporting Services	<u>.</u>	<u>.</u>	
<b>2L Se</b>	Report Builder		<b>**</b>	<u>.</u>
Ň	Integration Services	<u>.</u>	<u>.</u>	<u>*</u>
	Analysis Services	<u></u>		
	Visual C#	<b>1</b>	<b>2</b> 4	<b>≥</b> 4
D	VB programming	M	<u>M</u>	
Codin	MySQL			-
	Python	<b>*</b>	<b>*</b>	



