

# Power BI for Business Intelligence

## Power BI Cheat Sheet

### What is Power BI?

Power BI is a business intelligence tool that allows you to effectively report insights through easy to use customizable visualizations and dashboard

### Why use Power BI?

Easy to use no coding involved

Integrates seamlessly with any data source

Fast and can handle large datasets

### Power BI Components

There are three components to Power BI each of them serving different purposes

#### Power BI Desktop

Free desktop application that provides data analysis and creation tools

#### Power BI service

Cloud based version of Power BI with report editing and publishing features

#### Power BI mobile

A mobile app of Power BI, which allows you to author, view, and share reports on the go

### Getting started with Power BI

There are three main views in Power BI

#### REPORT VIEW

This view is the default view, where you can visualize data and create reports

#### DATA VIEW

This view lets you examine datasets associated with your reports

#### MODEL VIEW

This view helps you establish different relationships between dataset

# Visualizing your first dataset

## Upload datasets into Power BI

- Underneath the Home tab, click on *Get Data*
- Choose any of your datasets and double click
- Click on Load if not prior data needs processing
- If you need to transform the data, click *Transform* which will launch Power Query, Keep reading this cheat sheet for how to apply transformations in Power Query.
- Inspect your data by clicking on the *Data View*

## Create relationships in Power BI

- If you have different datasets you want to connect, First, upload them into Power BI
- Click on the **Model View** from the left-hand pane
- Connect key columns from different datasets by dragging one to another
- (e.g, EmpID to e.g, SalespersonID)

## Create your first visualization

- Click on the *Report View* and go to the *Visualizations* pane on the right hand side
- Select the type of visualization you would like to plot your data on. Keep reading this cheat to learn different visualizations available in Power BI.
- Under the *Field* pane on the right hand side, drag the variables of your choice into *Values* or *Axis*

*Values let you visualize aggregate measures (e.g Total Revenue)*

*Axis let you visualize categories (e.g. Sales Person)*

## Aggregating data

**Power BI sums numerical fields when visualizing them under *Values*. However, you can choose different aggregations.**

- Select the *visualization* you just created
- Go to the *Visualizations* section on the right hand side
- Go to Values - the visualized column should be there
- On the selected column - click on the dropdown arrow and change the aggregation (i.e. AVERAGE, MAX, COUNT, etc..)

## Data Visualizations in Power BI

Power BI provides a wide range of data visualizations. Here is a list of the most useful visualizations you have in Power BI

- **Bar Charts:** Horizontal bars used for comparing specific values across categories (e.g. sales by region)
- **Column Charts:** Vertical columns for comparing specific values across categories
- **Line Charts:** Used for looking at a numeric value over time (e.g. revenue over time)
- **Area Chart:** Based on the line chart with the difference that the area between the axis and line is filled in (e.g. sales by month)
- **Scatter Chart:** Displays one set of numerical data along the horizontal axis and another set along the vertical axis (e.g. relation age and loan)
- **Combo Chart:** Combines a column chart and a line chart (e.g. actual sales performance vs target)
- **Treemaps:** Used to visualize categories with colored rectangles, sized with respect to their value (e.g. product category based on sales)
- **Pie Chart:** Circle divided into slices representing a category's proportion of the whole (e.g. market share)
- **Donut Chart:** Similar to pie charts; used to show the proportion of sectors to a whole (e.g. market share)
- **Maps:** Used to map categorical and quantitative information to spatial locations (e.g. sales per state)
- **Cards:** Used for displaying a single fact or single data point (e.g. total sales)
- **Table:** Grid used to display data in a logical series of rows and columns (e.g. all products with sold items)

## Power Query Editor in Power BI

**Power Query is Microsoft's data transformation and data preparation engine. It is part of Power BI Desktop, and lets you connect to one or many data sources, shape and transform data to meet your needs, and load it into Power BI.**

# Open the Power Query Editor

## While loading data

- Underneath the *Home* tab, click on Get Data
- Choose any of your datasets and double click
- Click on *Transform Data*

## When data is already loaded

- Go to the *Data View*
- Under *Queries* in the *Home* tab of the ribbon, click on *Transform Data* drop down, then on the *Transform Data* button

# Using the Power Query Editor

## Removing rows

You can remove rows dependent on their location, and properties

- Click on the Home tab in the *Query* ribbon
- Click on *Remove Rows* in the *Reduce Rows* group
- Choose which option to remove, whether *Remove Top Rows*, *Remove Bottom Rows*, etc.
- Choose the number of rows to remove
- You can undo your action by removing it from the *Applied Steps* list on the right hand side

## Adding 3 new column

You can create new columns based on existing or new data

- Click on the Add Column tab in the *Query ribbon*
- Click on Custom Column in the *General* group
- Name your new column by using the *New Column Name* option
- Define the new column formula under the custom column formula using the available data

## Replace values

You can replace one value with another value wherever that value is found in a column

- In the Power Query Editor, select the cell or column you want to replace
- Click on the column or value, and click on *Replace Values* under the Home tab under the *Transform* group

- Fill the *Value to Find* and *Replace With* fields to complete your operation

## DAX Expressions

Data Analysis Expressions (DAX) is a calculation language used in Power BI that lets you create calculations and perform data analysis. It is used to create calculated columns, measures, and custom tables. DAX functions are predefined formulas that perform calculations on specific values called arguments.

### Simple aggregations

- SUM(<column>) adds all the numbers in a column
- AVERAGE (<column>) returns the average (arithmetic mean) of all numbers in a column
- MEDIAN (<column>) returns the median of numbers in a column
- MIN/MAX(<column>) returns the smallest/biggest value in a column
- COUNT(<column>) counts the number of cells in a column that contain non blank values
- DISTINCTCOUNT (<column>) counts the number of distinct values in a column

### EXAMPLEH

- Sum of all deals – SUM('sales\_data'[deal\_size] )
- Average deal size – AVERAGE('sales\_data'[deal\_size] )
- Distinct number of customers – DISTINCTCOUNT('sales\_data'[customer\_name] )

### Logical functions

- IF( <logical\_test>, <value\_if\_true> [, <value\_if\_false> ]) check the result of an expression and create conditional result

### EXAMPLEH

- Create a column called large\_deal that returns “Yes if deal\_size is bigger than 2,000 and No” otherwise large\_deal = IF( 'sales\_data'[deal\_size] > 2000, “Yes , No”)

### Text Functions

- LEFT(<text>, <num\_chars>) returns the specified number of characters from the start of a text
- LOWER (<text>) converts a text string to all lowercase letter>
- UPPER (<text>) converts a text string to all uppercase letter>
- REPLACE (<old\_text>, <start\_num>, <num\_chars>, <new\_text>) replaces part of a text string with a different text string

### EXAMPLEH

- Change column customer\_name be only lower case  
customer\_name = LOWER('sales\_data' [customer\_name])

## Date and time functions

- CALENDAR(<start\_date>, <end\_date>) generates a column of continuous sets of dates
- DATE(<year>, <month>, <day>) returns the specified date in the datetime format
- WEEKDAY(<date>, <return\_type>) returns 1-7 corresponding to the day of the week of a date (return\_type) indicates week start and end (1: Sunday Saturday, 2: Monday Sunday)

### EXAMPLEH

- Return the day of week of each deal