

USING DAX FUNCTIONS IN CALCULATED COLUMNS

BY

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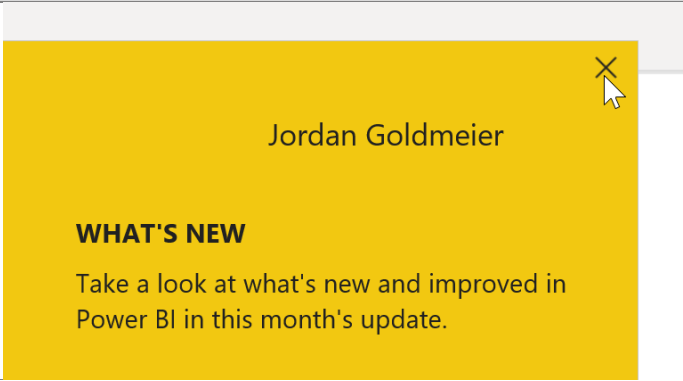

INTRODUCTION TO DAX FUNCTIONS IN CALCULATED COLUMNS

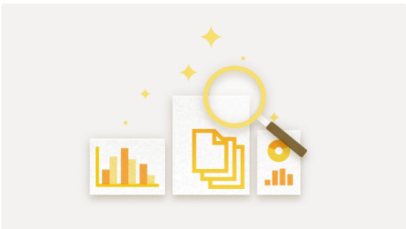
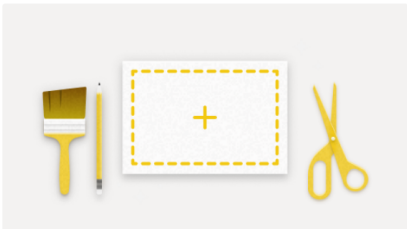
In this lab you will connect to a Power BI sample dataset and then use DAX functions to create calculated columns.

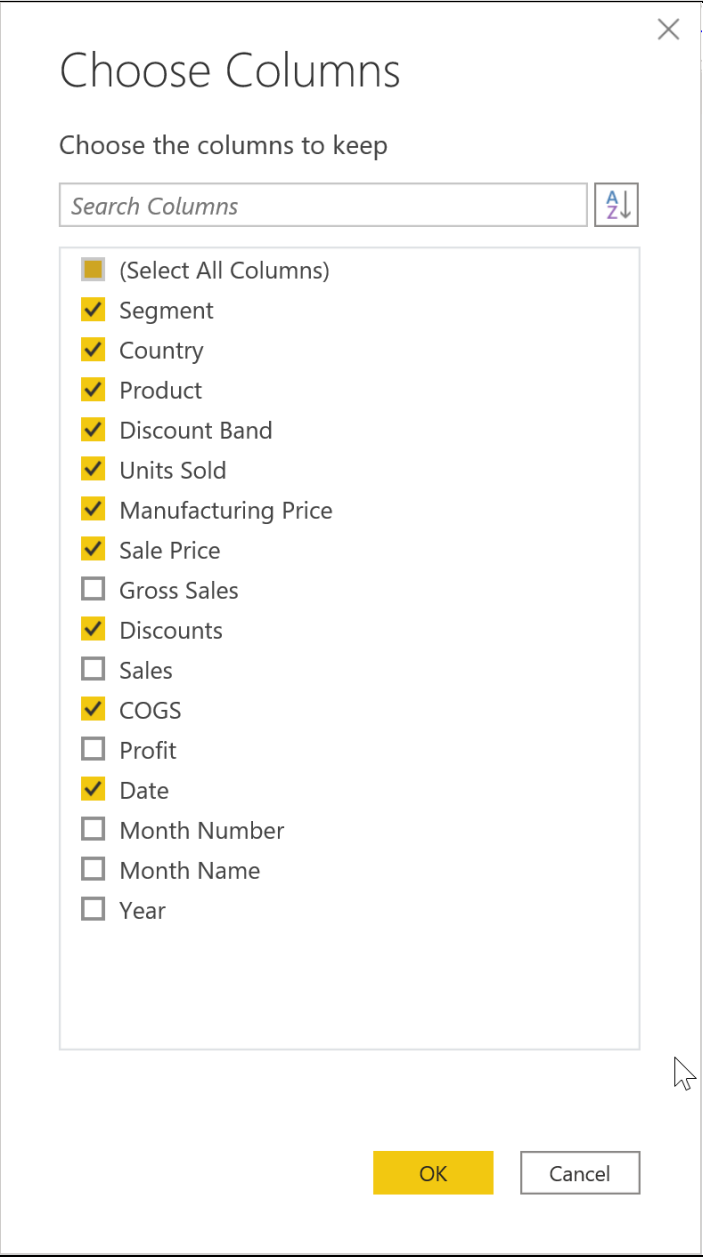
AT A GLANCE

- ▶ Retrieve the sample data set and use Power Query to remove unnecessary columns.
- ▶ Use DAX to calculate the results
- ▶ Use Report View to preview the results

STEP-BY-STEP INSTRUCTIONS

Click Steps	Screen Shots
<ol style="list-style-type: none">1. Open an entirely new instance of Power BI.2. If the welcome screen opens, click the black X in the upper-right hand to close it.	
<ol style="list-style-type: none">3. In the main report view, click Try a sample dataset. It will appear as the right-most block in the center of the screen.	

Click Steps	Screen Shots																																																																																																																								
<p>4. A dialog box will appear. Click on the Load sample data button.</p>	<div><div><h3>Two ways to use sample data</h3><div></div><div><p>Take a tutorial online</p><p>Learn how to create a robust report, step-by-step.</p><p>Launch tutorial</p></div></div><div><div></div><div><p>Experiment on your own</p><p>To start creating visuals on your own, load sample data.</p><p>Load sample data</p></div></div></div>																																																																																																																								
<p>5. The sample data is a financial spreadsheet. When the navigator pops up, click the financials dataset on the left.</p> <p>6. Next, click the Transform Data button.</p> <p>If you are having trouble finding this file, you can also find a copy within the local folder containing this lab. Use Power Query (Get Data > Excel) to upload it.</p>	<div><div><h3>Navigator</h3><div><div>Financial Sample.xlsx [2]</div><div><div>financials</div><div>Sheet1</div></div></div><div><table><thead><tr><th>Segment</th><th>Country</th><th>Product</th><th>Discount Band</th><th>Unit</th></tr></thead><tbody><tr><td>Government</td><td>Canada</td><td>Carretera</td><td>None</td><td></td></tr><tr><td>Government</td><td>Germany</td><td>Carretera</td><td>None</td><td></td></tr><tr><td>Midmarket</td><td>France</td><td>Carretera</td><td>None</td><td></td></tr><tr><td>Midmarket</td><td>Germany</td><td>Carretera</td><td>None</td><td></td></tr><tr><td>Midmarket</td><td>Mexico</td><td>Carretera</td><td>None</td><td></td></tr><tr><td>Government</td><td>Germany</td><td>Carretera</td><td>None</td><td></td></tr><tr><td>Midmarket</td><td>Germany</td><td>Montana</td><td>None</td><td></td></tr><tr><td>Channel Partners</td><td>Canada</td><td>Montana</td><td>None</td><td></td></tr><tr><td>Government</td><td>France</td><td>Montana</td><td>None</td><td></td></tr><tr><td>Channel Partners</td><td>Germany</td><td>Montana</td><td>None</td><td></td></tr><tr><td>Midmarket</td><td>Mexico</td><td>Montana</td><td>None</td><td></td></tr><tr><td>Enterprise</td><td>Canada</td><td>Montana</td><td>None</td><td></td></tr><tr><td>Small Business</td><td>Mexico</td><td>Montana</td><td>None</td><td></td></tr><tr><td>Government</td><td>Germany</td><td>Montana</td><td>None</td><td></td></tr><tr><td>Enterprise</td><td>Canada</td><td>Montana</td><td>None</td><td></td></tr><tr><td>Midmarket</td><td>United States of America</td><td>Montana</td><td>None</td><td></td></tr><tr><td>Government</td><td>Canada</td><td>Paseo</td><td>None</td><td></td></tr><tr><td>Midmarket</td><td>Mexico</td><td>Paseo</td><td>None</td><td></td></tr><tr><td>Channel Partners</td><td>Canada</td><td>Paseo</td><td>None</td><td></td></tr><tr><td>Government</td><td>Germany</td><td>Paseo</td><td>None</td><td></td></tr><tr><td>Channel Partners</td><td>Germany</td><td>Paseo</td><td>None</td><td></td></tr><tr><td>Government</td><td>Mexico</td><td>Paseo</td><td>None</td><td></td></tr><tr><td>Midmarket</td><td>France</td><td>Paseo</td><td>None</td><td></td></tr></tbody></table></div><div><div>Load</div><div>Transform Data</div><div>Cancel</div></div></div></div>	Segment	Country	Product	Discount Band	Unit	Government	Canada	Carretera	None		Government	Germany	Carretera	None		Midmarket	France	Carretera	None		Midmarket	Germany	Carretera	None		Midmarket	Mexico	Carretera	None		Government	Germany	Carretera	None		Midmarket	Germany	Montana	None		Channel Partners	Canada	Montana	None		Government	France	Montana	None		Channel Partners	Germany	Montana	None		Midmarket	Mexico	Montana	None		Enterprise	Canada	Montana	None		Small Business	Mexico	Montana	None		Government	Germany	Montana	None		Enterprise	Canada	Montana	None		Midmarket	United States of America	Montana	None		Government	Canada	Paseo	None		Midmarket	Mexico	Paseo	None		Channel Partners	Canada	Paseo	None		Government	Germany	Paseo	None		Channel Partners	Germany	Paseo	None		Government	Mexico	Paseo	None		Midmarket	France	Paseo	None	
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<p>7. When the file finishes loading into Power Query, click the Choose columns button from on the Home tab.</p>	<div><div><div>FileHomeTransformAdd ColumnViewToolsHelp</div><div><div><div>Close & Apply</div><div>New Source</div><div>Recent Sources</div><div>Enter Data</div><div>Data source settings</div><div>Manage Parameters</div><div>Refresh Preview</div><div>Manage Query</div></div><div><div>Choose Columns</div><div>Remove Columns</div><div>Keep Rows</div><div>Remove Rows</div><div>Sort</div><div>Split Column</div><div>Group By</div><div>Replace Values</div></div><div><div>Merge Queries</div><div>Append Queries</div><div>Combine Files</div><div>Combine</div><div>Text Analyze</div><div>Vision</div><div>Azure Map</div><div>All Tools</div></div></div></div></div>																																																																																																																								

Click Steps	Screen Shots
<p>8. In the Choose Columns dialog box unselected Gross Sales, Sales, Profit, Month Number, Month Name and Year. Check the image to make sure you've done this correctly. Click OK when complete.</p>	

Click Steps	Screen Shots
9. Click the Close & Apply button in the upper-left hand corner.	
10. Let's create some calculated columns. Click on the Data view	
11. Click the New Column button to create a new column.	
12. In the Dax Formula bar type Gross Sales (DAX) = [Units Sold] * [Sale Price] - [Discounts] To calculate gross sales.	

Click Steps	Screen Shots				
<p>13. Create a new column. Then use the following formula: Profit (DAX) = [Gross Sales (DAX)] - [COGS]</p> <p>14. Create another new column. Use the following formula: Profit Tier = IF([Profit (DAX)] > 10000, "Tier I", "Tier II")</p> <p>Your screen should look like the screen shot.</p>	