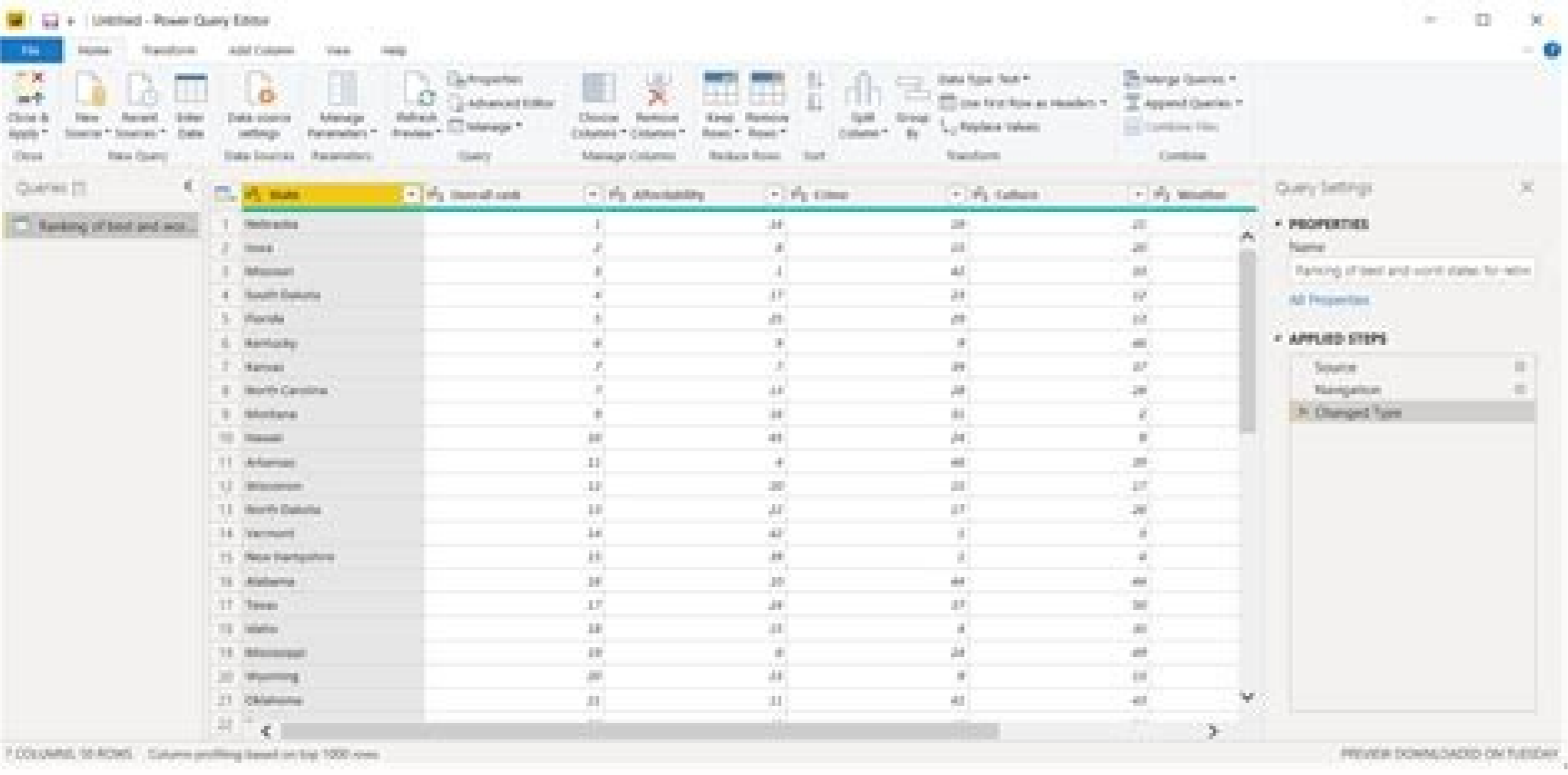


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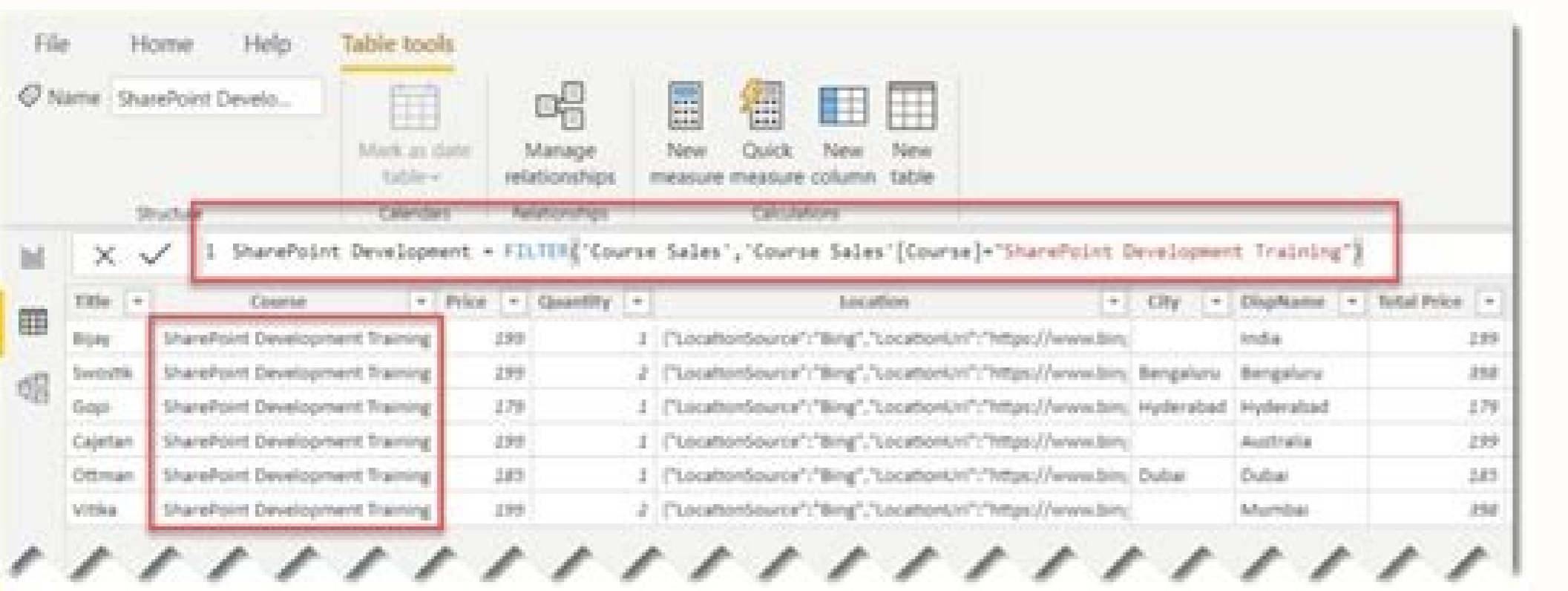
COMMODITIES & EQUITY INDICES CHEAT SHEET & KEY LEVELS

14/12/2015

Table with columns: GOLD, SILVER, HQ COPPER, WTI CRUDE, HH HQ, S&P 500, DOW 30, FTSE 100, DAX 30, NIKKEI. Includes various market indicators like % Change, 5 DMA, and Short Term indicators.



Comparison of 'Report from Summary Table (Calculated Table using variable)' and 'Report from Original Table'. Both tables show 'Sub-Category' and 'Sales' data for various items like Phones, Chairs, Storage, etc., with a total of 2,297,200.86.



Basic power bi dax functions. How to use and in power bi dax. Power bi dax tips and tricks. Power bi dax functions cheat sheet pdf. Does power bi use dax.

Hi Sorna, Once again I tried to update the file to include the new DAX formulas that were just released and I got the attached error. I think the problem is that the URL for this new functions is as follows: So it includes the standard DaxFunctionWebPath but the DaxFunctionName is not DaxFunctionNameFormatted. I have covered the following DAX expressions: CALENDARYEARMONTHDAYQUARTERWEEKUNWEEKDAYFIRSTDATELASTDATEDATESBETWEENDATESMTDOTALMTDALLSELECTEDDATEADDRRELATEDSTARTOFMONTHENDOFMONTHSTARTOFEARENDOFYEARPARALLELPERIODNEXTDAYPREVIOUSDAY. The AdventureWorks model also comes with a date table. This is the table named Date and is linked to the Sales table via the column DateKey. What is a Date table and why do we need one? A Date table is like any other table in Power BI but with some mandatory requirements as prescribed by Power BI. It must have a column of date type (or date/time) known as the Date column. The date column must contain unique values. The date column must not contain BLANKs. The date column must not have any missing dates. The date column must span full years. A year isn't necessarily a calendar year (January-December). The date table must be marked as a date table. Why not use the Date table that already comes along with AdventureWorks? 2 reasons. We want to explore this learning opportunity to create a fairly sophisticated date table. And, by not relying on the relationships we can learn how to marry a general purpose Date table to report on any date based data time (Sales Amount in this example) or to create a date table using DAX. There are two Power BI functions which are useful for creating date tables. These are CALENDAR and CALENDARAUTO. I have taken inspiration from this wonderful tutorial to create a custom date table and named it as MyCalendar. Structure of MyCalendar table: Setting the sort properties for the Text columns We are nearly there. But, there is one essential step to be carried out. The textual columns like Month, DayOfWeek and Quarter need to be aware of the sort order. Consider the Month column. When this column is selected as the Columns in a Matrix visual, the sort order by default would be alphabetical, i.e. Dec comes before January. This is not right. We want the order Jan, Feb, March, April ... Dec. To achieve this we need to specify MonthNumber as the sort column for the Month column. We have completed our ground work. We are now ready to begin our exploration to understand the underlying behaviour of the DAX expressions. This is a toy scenario. Given any slice of time, how do we find the number of Sundays in that period? In the following examples, a Matrix visual has been used with the Rows divided into hierarchical time periods. Matrix visual DAX measure: For both the examples presented above we have used the single measure NumberOfSundays. The measure is agnostic of the length of the time period. The ROW filter in each of the visuals has all the information about the rows from the MyCalendar[Date] table. We use the expression FIRSTDATE and LASTDATE to find the bounds of the time period in each cell. The DATESBETWEEN expression gives us a table of all MyCalendar within these bounds. The count of Sundays is extracted by using the FILTER expression. This is a toy scenario. In this example, we count the occurrences of all days which are Friday and are the 13th day of the month. The DAX measure is semantically identical to the one we wrote for counting the Sundays in any time period. Matrix visual DAX measure: Using a Slicer to select the time period. The same DAX measure can now be used to display the count of 'Friday the 13th' for any arbitrarily selected time period. Given any slice of time - calculate the total sales in this period. We will achieve this using 3 different approaches. Option 1 - Out of box drag n drop (no measure) Option 2 - A measure which queries using the out of box Adventure Works date table Option 3 - A measure which queries using the custom MyCalendar table. Option 1: Out of box drag n drop (no measure). This being a fairly simple calculation, we can drag and drop the Sales Amount column of the Total Sales and then selecting the Sum option from the context menu. Option 2: A measure which queries using the Adventure Works Date table. The FIRSTDATE and LASTDATE expressions on the out of box Date table gives us the bounds of the time period in the current context. The DATESBETWEEN gives us all the dates from the date table and we use this to provide a filter in the CALCULATE expression. Option 3: A measure which queries using the custom MyCalendar table. The Matrix visual is using the MyCalendar date table to render the hierarchy. Therefore, in this measure we use the FIRSTDATE and LASTDATE to get the bounds. The CALCULATE expression is modifying its context by filtering on the Adventure Works date table. Display the sales in any time period as a percentage of the total annual sales in that financial year. The financial year will be selected using a Slicer on the MyCalendar[Financial Year] column. DAX measure: Results We want to analyze progressive growth of sales from the first day of the specified month right up to the last day in that month. Example: The cumulative sales for June 3rd would be the sum of sales on June 1st and June 2nd. There are couple of ways to achieve this. The DAX expression DATESMTD will produce a new table with all dates from the start of the month up to the current day of the context. How is this useful? You can produce a report of running totals (month to date) for any given month. We will proceed cautiously here. Before we jump to calculating the sales we will attempt to get the cumulative dates for any given day in a month. Once this is obtained it is fairly easy to do the next step, i.e. calculate the cumulative sales. Step 1: DAX expression to produce a count of days in current month to date using the following DAX measure, we display the running total of days from start to current date. E.g. On 4th February the cumulative count would be 4 (1st Feb, 2nd, 3rd, 4th). Likewise for 5th February, the total would be 5. Why do we need the running total of the days? This will be useful in the next step. Step 2: Cumulative sales in a month - the hard way. In the previous step we obtained the cumulative count of days in a month. We will use this information to FILTER the Sales. In the following DAX measure we use the DATESMTD to get all the date values from the start of month till current day in the month. The Date[Date] column is filtered using the cumulative list of days. The cumulative value of Sales[Sales Amount] is then calculated by using the list of days. In the following illustration we do a side by side comparison of the cumulative sales on the last day of the month on the left side and the total sales in that month on the right. Notice that the cumulative total on Feb 28th (left side) is equal to the overall monthly total on Feb (right side). Our objective remains the same as stated in the previous section. But, there is a simpler way to achieve this objective. DAX measure: The following DAX measure expects a current day of month in the current context. How can we be sure that TOTALMTD produces the same value as that obtained by the customer measure DatesMtdDemo2 that we wrote in the previous section? Let us do a side by side comparison. We want to analyze the cumulative growth in Sales in any time interval on the MyCalendar table. A Slicer visual to select the time interval. This gives us the start and end dates of the time period being analysed. A custom measure CumulativeSalesInAnyPeriod which calculates the cumulative sales for each day of the specified time period. A Stacked column chart with the X-axis showing the Date column of the MyCalendar table and the Values set to CumulativeSalesInAnyPeriod. Consider a scenario where we want to compare the sales in a period in the year 2020 and the same period in the year 2019. The DATEADD function makes this possible. DAX measure to calculate the sales in the same period of last year: Matrix visual: Clustered column chart. Microsoft's documentation for STARTOFMONTH and ENDOFMONTH can be found here and here. To understand how these functions work, let's write out a DAX query on the MyCalendar table and display the outcome for each month. DAX Studio query: DAX Studio results: We want to plot the daily sales as a percentage of total sales in that month for any specified time slice. DAX measure: VisualCorrection - The measure should be '% of Monthly Sales'. Microsoft documentation for NEXTDAY and PREVIOUSDAY can be found here and here. This is best understood via the following query written in DAX Studio. In this query we are summarizing first by Year, followed by Month and then displaying the result of PREVIOUSDAY/NEXTDAY. I observed a slight difference in behaviour of the NEXTDAY function as per Microsoft's documentation here. As of writing this article, MS documentation says Returns a table that contains a column of all dates from the next day, based on the first date specified in the dates column in the current context. In my opinion, it should be...based on the last date specified in the dates column in the current context. Given any slice of time (e.g a Month) plot the daily change in Sales. Example: If this was plotted on a column chart, then the bar for June 5th should indicate the difference between the sales on June 5th and June 4th. Custom measure: VisualMicrosoft documentation for STARTOFEARENDOFYEAR can be found here and here. This is best understood via the following queries written in DAX Studio. Both STARTOFEARENDOFYEAR have a second parameter which defaults to 31st December. This is the financial year end. DAX studio query with default year end: We examine the behaviour when we do not specify any default year end (i.e. 31st December). Results with with default year end: DAX expression when using a custom year end: Results with with custom year end: We are now specifying a custom year end (15th March). The 'year end' defines the end of the fiscal year. How does the behaviour change? Caveats: The DAX expressions presented above demonstrate the susceptibility of STARTOFEARENDOFYEAR formulas to the 'year end' parameter. If there is a need for a custom year end for compliance with financial accounting standards, then any calculation involving STARTOFEARENDOFYEAR must have the 'year end' parameter. This makes me feel that it is safer to define the financial period through a custom date table, as in the example MyCalendar[Financial Year] and also in the Date[Fiscal Year] table of Adventure Works. The function DATESYTD works in a similar fashion to DATESMTD. The function produces a table of dates with dates starting from the first day of the year till the current date in the context. The behaviour of this function is sensitive to the 'year end date' parameter. By default this is set to 31st December. When is DATESYTD useful? Consider a scenario where you want to display the cumulative sales from the start of the year right up to current date. (Refer to section on DATESMTD). Let us write out the following DAX query to better understand the behaviour of this function. DAX Studio query: The functions PARALLELPERIOD and DATEADD appear to be deceptively similar. However, there are important differences. Microsoft documentation for PARALLELPERIOD and DATEADD can be found here and here respectively. Notice the fine print in the documentation of PARALLELPERIOD. The PARALLELPERIOD function is similar to the DATEADD function except that PARALLELPERIOD always returns full periods at the given granularity level instead of the partial periods that DATEADD returns. For example, if you have a selection of dates that starts at June 10 and finishes at June 21 of the same year, and you want to shift that selection forward by one month then the PARALLELPERIOD function will return all dates from the next month (July 1 to July 31); however, if DATEADD is used instead, then the result will include only dates from July 10 to July 21. Let us write out some custom DAX queries to understand the differences. In the following DAX, we create a CALENDAR table with just the months of Jan and Feb (upto 25th) in the year 2017. We summarize the results by the WEEKNUM and display the outcome of FIRSTDATE/LASTDATE on PARALLELPERIOD and DATEADD. We are incrementing PARALLELPERIOD/DATEADD by a 1 month interval. DAX Studio Results: We want to do a moving window analysis within a specified period of time. For every day within this period, look back N days and compute some statistic over this N day time frame. The statistic could be the average daily sales - commonly known as the 'moving average' or 'rolling mean'. Likewise, we could also compute the 'moving range', i.e. the difference between the highest and lowest daily sales over the N day time frame. Custom DAX measure: Results: Taking inspiration from the '10 day moving range', we will attempt to do a '10 day moving average'. The principles are identical. Custom DAX measure: Results



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