Power BI Cheat Sheet

A sheet crammed with Power BI best practices, tips and tricks based on years of experience!

New ideas for the Power BI Cheat Sheet? Please let us know! Go to *https://bit.ly/PBICheatSheetGitHub*

Click on the flag below to download the PDF!

Power BI Cheat Sheet

when there are other requirements (like real-time insights). Use Date From instead of DateTime Date to extract a date from a

query folding won't break. More info on this blog post: http://bit.ly/DateFrom.

9. Re-use Power Ouery code and lower impact on your data source by using Power BI dataflows

11. Automatically beautify all column names in a query, e.g. "CustomerName" -> "CustomerName", by using the Power Query function Alex Power shared on his Github report http://bit.ly/PQSplitByCas Note: he also has a function to replace underscores in all column names automatically.

Repo by Imke Feldmann with a lot of custom Power Query functions: https://github.com/imkeF/M/

8. Turn off 'Enable Load' for gueries/tables that you don't need in the Data Model.

10. Turn on the Formula Bar so you get familiar with Power Ouery (M) code.

Code examples (don't forget that Power Query / M is case-sensitive!)

· Excel.Workbook(Web.Contents("[url]/[filename].xisx"), null, true) · #shared to list all functions and get PQ documentation

Power Ouery M Formula Reference: http://bit.ly/POMReference

natory name and merge steps of the same type, for better manageabilit

Some people prefer to not use spaces in the name of a step, for a better M coding experience.

Give queries and columns user-friendly names, as they will become part of your data model.

Make sure that each column has the correct data type. Making the model smaller and faster

Power Query

Give every step an expla

Tips & Tricks

New: other languages availablet

https://bit.lv/cheatsheetpbi (PDF download) eatSheetGitHub (Contribute to the cheat shee

English version - October 2019

Data Model Tips & Tricks

- Always use a separate Date table in your data model. Mark it as a Date Table
- Only use DAX Calculated Columns when it's not possible to create it using Power Query. This improves clarity and manageability of your report as transformations are located where you expect them. It also improves query speed of the model and reduces refresh duration
- Remove columns you are not going to use in your report. Prefer 'Remove Other Columns' above the Give measures a prefix (%, #, €). Remove Columns' option, for lower risk that structural changes in your data source break the query. 4. Use abbreviations like YTD, LY, PY, PP as a suffix, to keep the base fields together in the sort of Maximize the use of Ouerv Folding for faster and more efficient queries. With Ouerv Folding, multiple 5. Hide columns that are needed but are irrelevant for the user.
- transformations are merged as one query and then sent to the source. If View Native Query I solaring, many available, Query Folding has stopped before that step. 6. Hide the key at the many side of a many-to-one relation (e.g. [OrderDate] in the 'Revenue' table) 6. In general, prefer "Import" over "DirectQuery". Unless the amount of data is too large to import, o
 - 7. For each measure column in your data model, make a DAX Calculated Measure instead of using the Portacl measure column in your data mode, make a box calculated weature instead of using the "Default Summarization", then hide the original column. This way all measures will have the same icon. And it enables you to easily change the calculation in the future (e.g. adding a filter condition). Also, it is easier to reference this measure in other DAX calculations. (new)
 - 8. Always use the table name when you refer to a column for example: 'Product'/Categor 9. Use DIVIDE() to prevent division by 0, and to improve the speed of your divisions.
 - 10. Use IsInScope to get the right hierarchy level in DAX (read all about it in Kasper de Jonge's blog https://bit.ly/KasperOnBlinScope)
 - 11. In DAX: (un)comment DAX lines by pressing Alt + Shift + A or CTRL + /, and Shift + Enter for line break
 - 12. Use aggregations to keep your model small and performant, and still have all detailed data available. 13. Use Tabular Editor to make changes to your Power Bi file (currently unsupported by Microsoft), Also
 - make sure to check-out its best-practices analyzer
 - 14. Avoid bi-directional cross filtering and make use of measure filters http://bit.ly/Measu
 - 15. For very large models, group measures or fields in display folders for better usability. 16. Use DAX Studio to capture all DAX queries executed on your Premium Capacity.
 - 104 17. Keep your PBI desktop file fast and small by using TOP N (http://bit.ly/ImproveReportBuilding) and
 - switch underlying data source in PBI service after publishing (http://bit.lv/Parameterize

Resources

- Increase the readability of your DAX calculations: https://www.daxformatter.com
 - Use DAX Studio to analyze and tune your calculations: http://daxstudio.org.
 - Find all about DAX expressions: https://dax.guide. Use Tabular Editor to easily build and manage your models

I'VE GOT THE POWER BI

if T > 0 then A else B

try A/B otherwise 0

Resources

 #table({"X", "Y"}, {{1,2}, {3,4}}) DateTime LocalNow()

Date From/ DateTime LocalNow()

macaw

Available soon!

in French and Spanish language