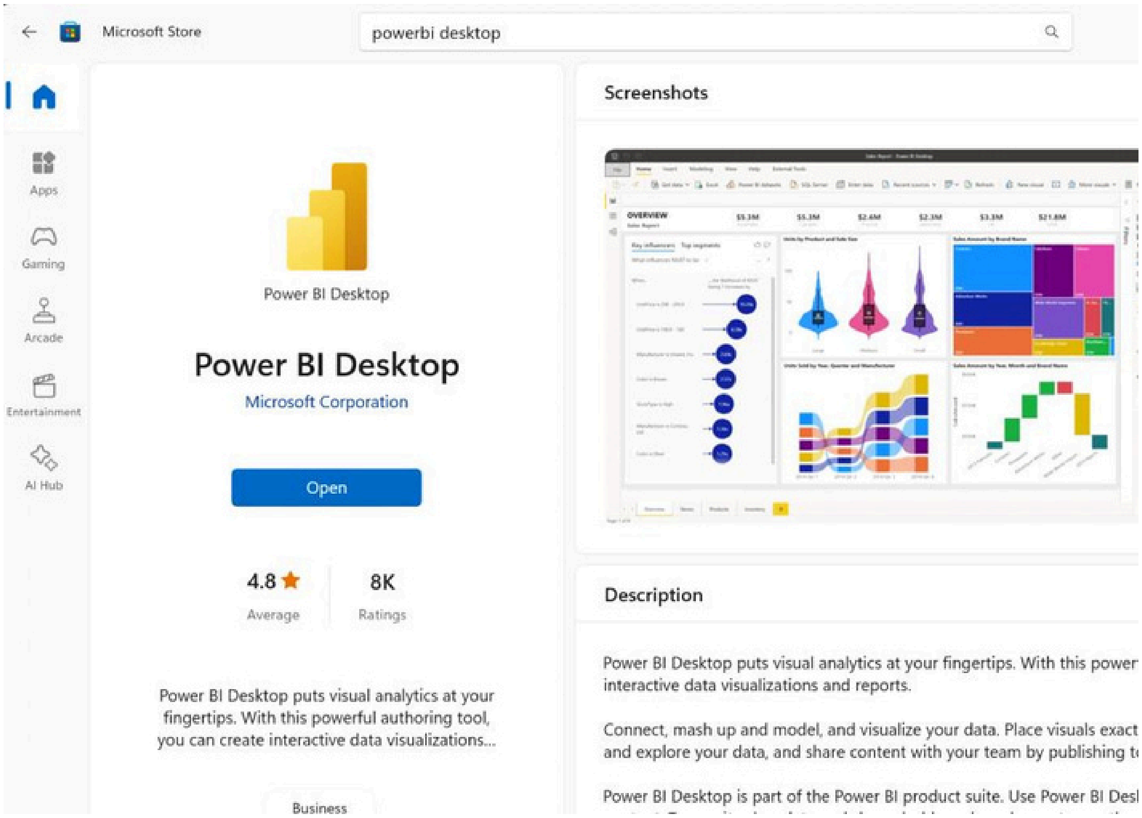
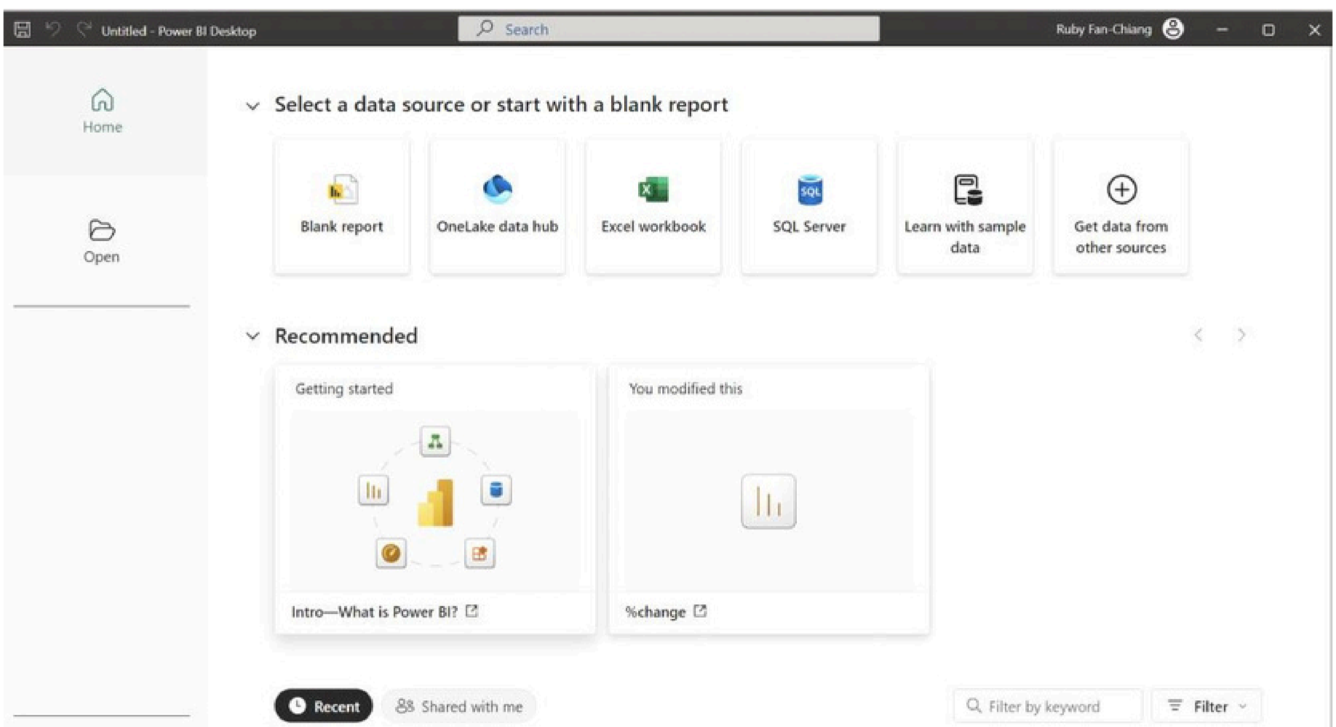
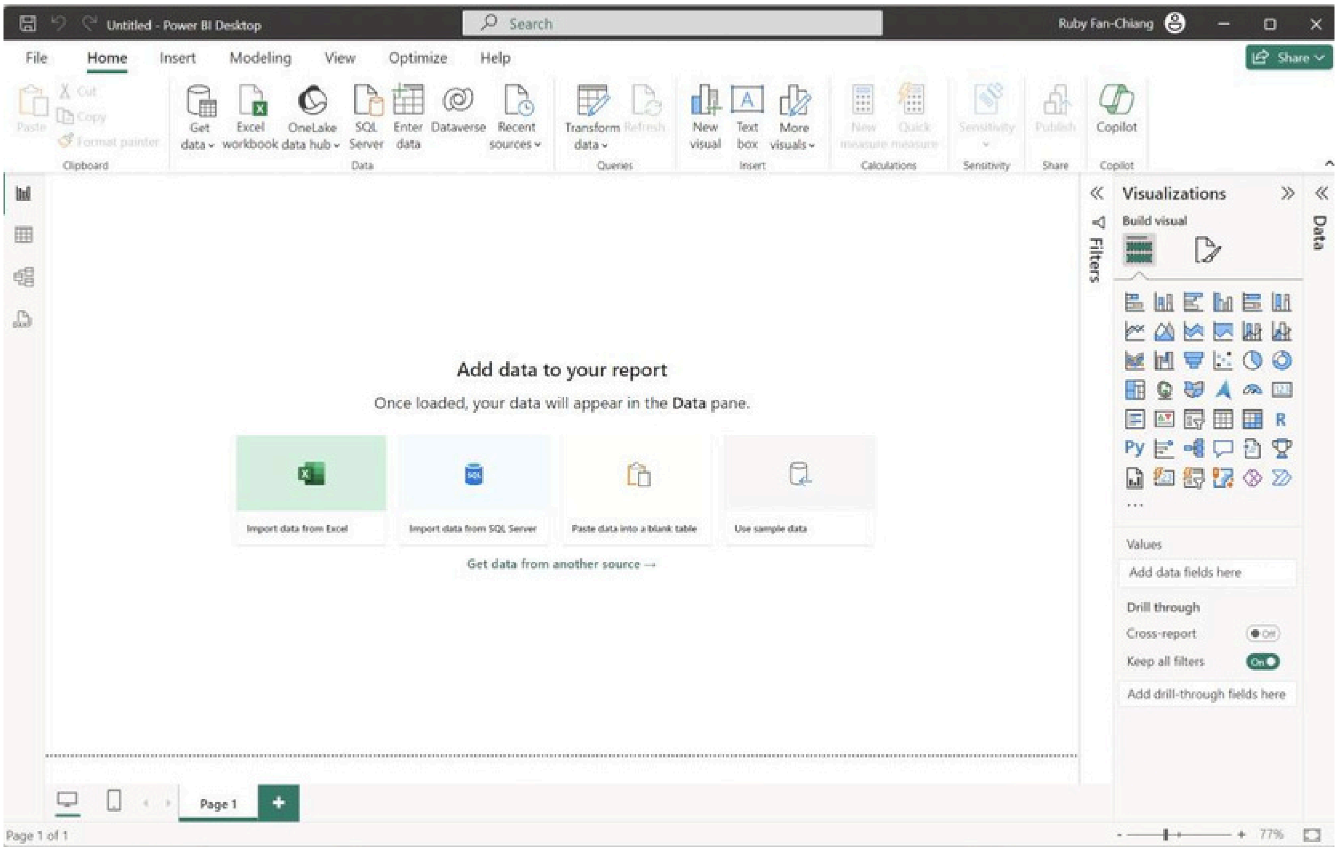
Download Power Bi

Saturday, June 15, 2024 9:39 PM





Click Blank report



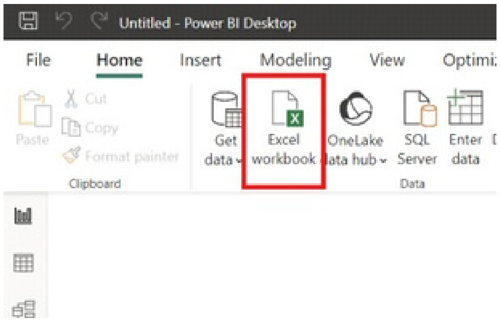
Power Bi report Page 2

Import Data

Saturday, June 15, 2024 9:38 PM

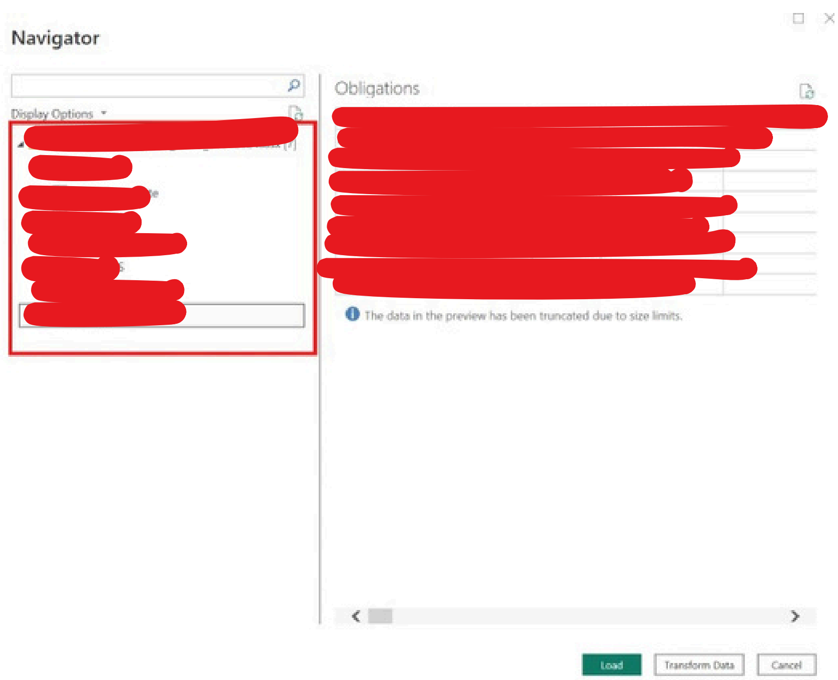
Import Excel workbook

Click the**Excel workbook**this allow you to upload data from Excel



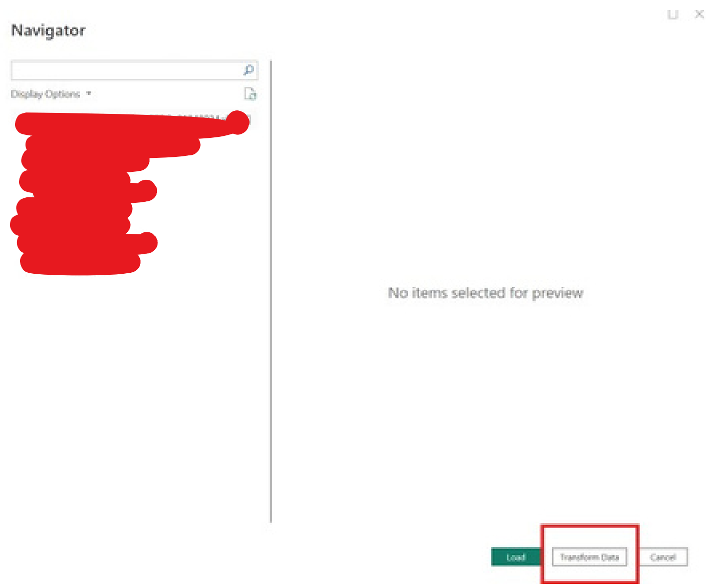
Then we click the Excel sheet we want to import

As the example I import my excel sheet call Obligations_ULO_NON_ZER0_01042024.xlsx and inside the sheet there are multiple sheet and now we only need Obligations

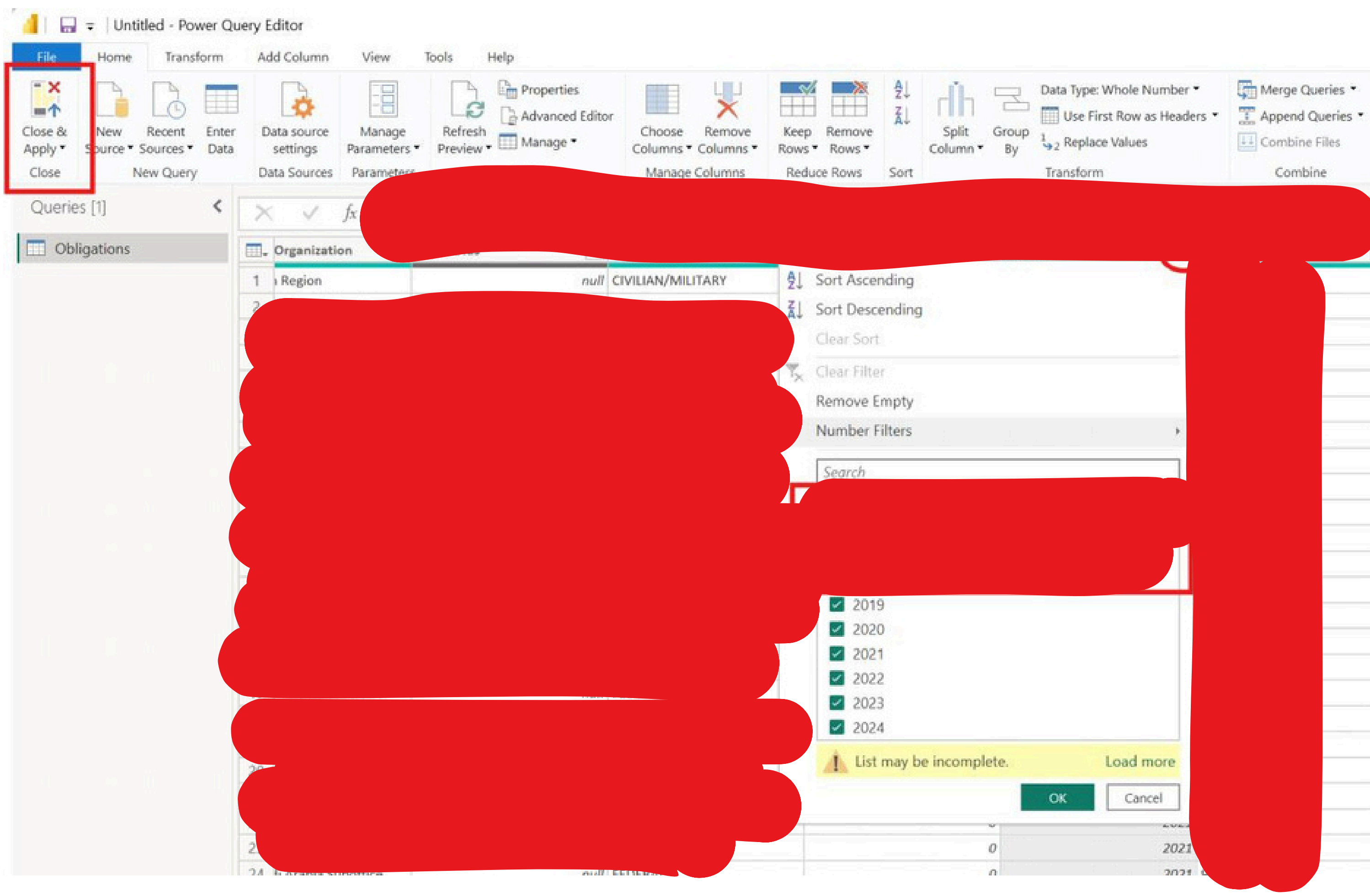


After that you can just click **Load** then whole data will import into the table (in power bi they call sheet = table)

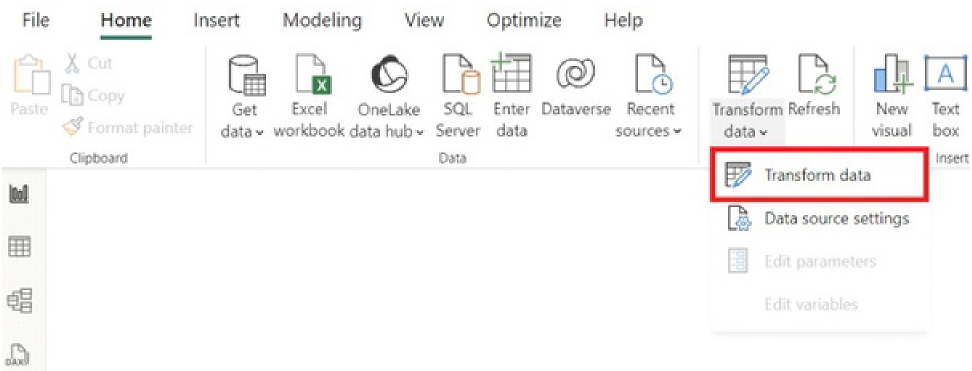
But now we goanna clean the data before we import the data so click**Transform Data**



We now get into the Power Query Editor this allows us to do a lot of function, but now we only going to clean the column BFY since we only need data from 2019 to 2024 we will unselect the year we don't want and after unselect the year click **Close & Apply** to save our change. If you want to clean other data will be the same steps.



That's said if you forget to clean the data or maybe you change your mind and wan to clean the data after you click the **Load.** You still can change the data by clicking the **Home -> Transform Data** this will bring you back to the Power Query Editor



We going to do the same steps for our comparison data

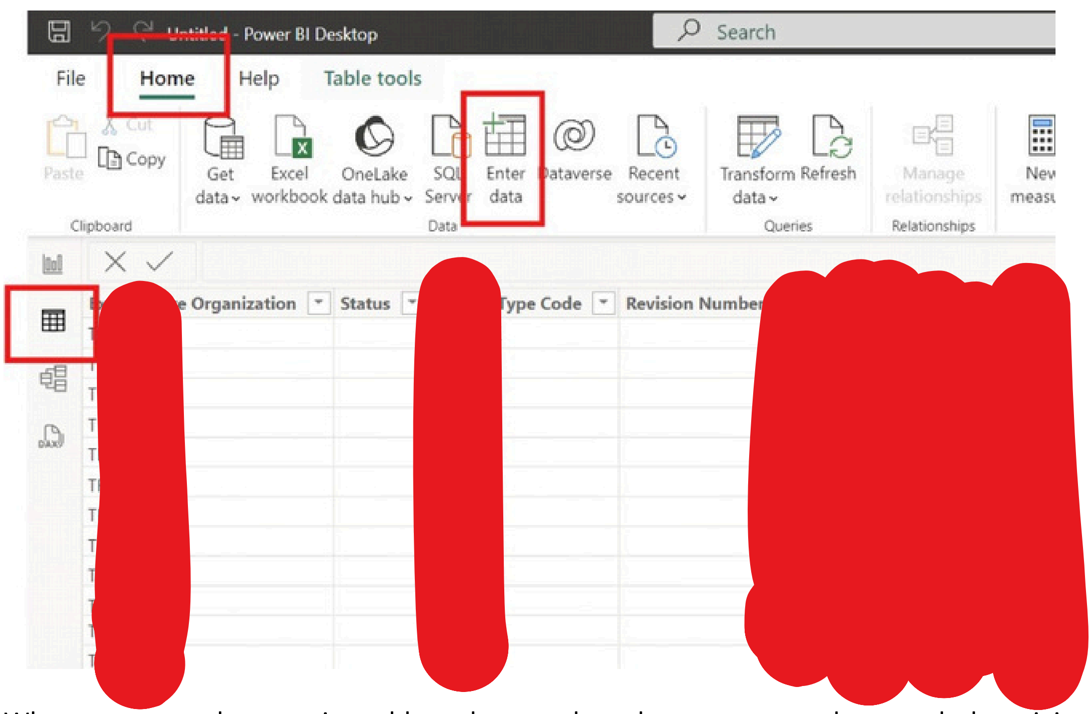
Create Mapping

Sunday, June 16, 2024 12:40 AM

To make our report more clean and organize, we see in the example on the left is the name in our data and the right is the name we want to have in our report

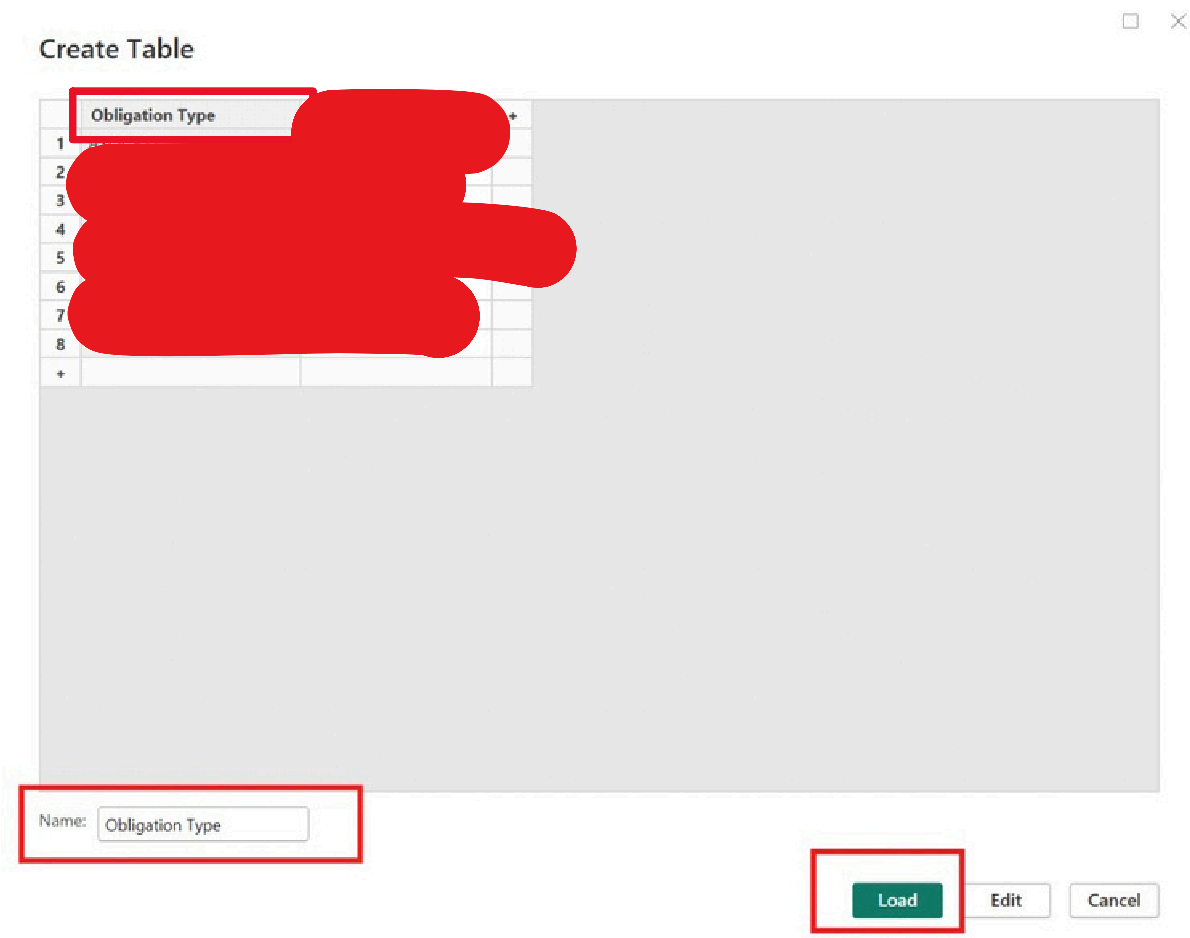
So now we need to create a new table for our mapping click **Table View -> Home -> Enter data**

(You can find all your data inside the Table View)



When we create the mapping table make sure the column name need to match the original data and the left side is the name we want to show in the report. For the second column I just easy name it Obligation you definitely can change that.

At the bottom I name this table Obligation Type then click Load



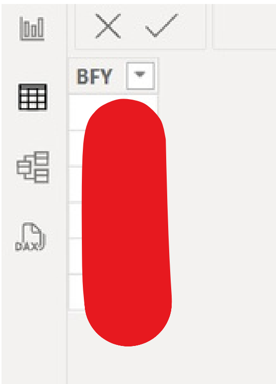
Just repeat the steps to do other mapping for Fund

Create relationship

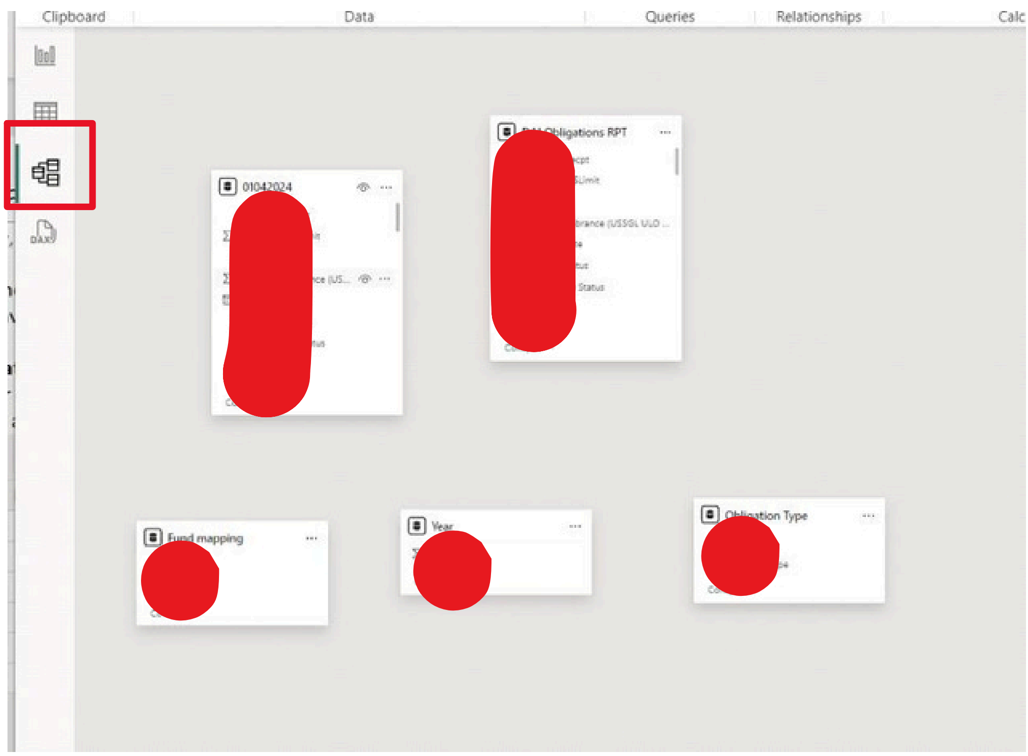
Sunday, June 16, 2024 1:38 AM

Since now we have two data one is current and one is prior. We need to connect two data and just have one slicer, so when I click the bottom both of the data will display what I select.

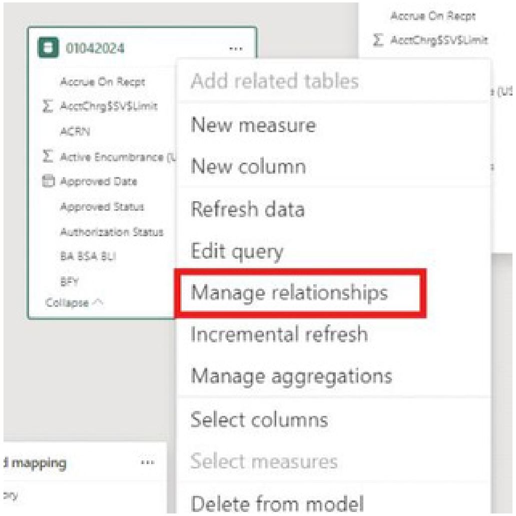
In **Create Mapping,**we create the new table for our report this also actually can be our slicer. But for our report we want to have three slicer the Obligation Type, Fund, and Year. We need to create a table for our year. Just need to make sure have the same column name from the data.



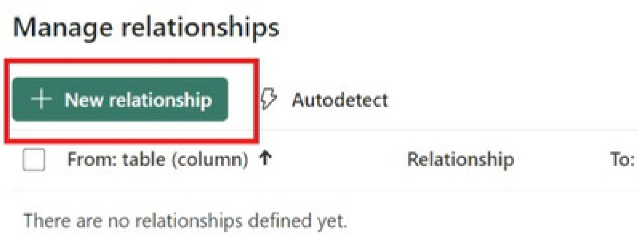
Now click **Model view** we can see all the data we create and import 01042024 and DAI are the two data we going to compare and at the bottom three is the slicer we are going to create and make the relationship with the data.



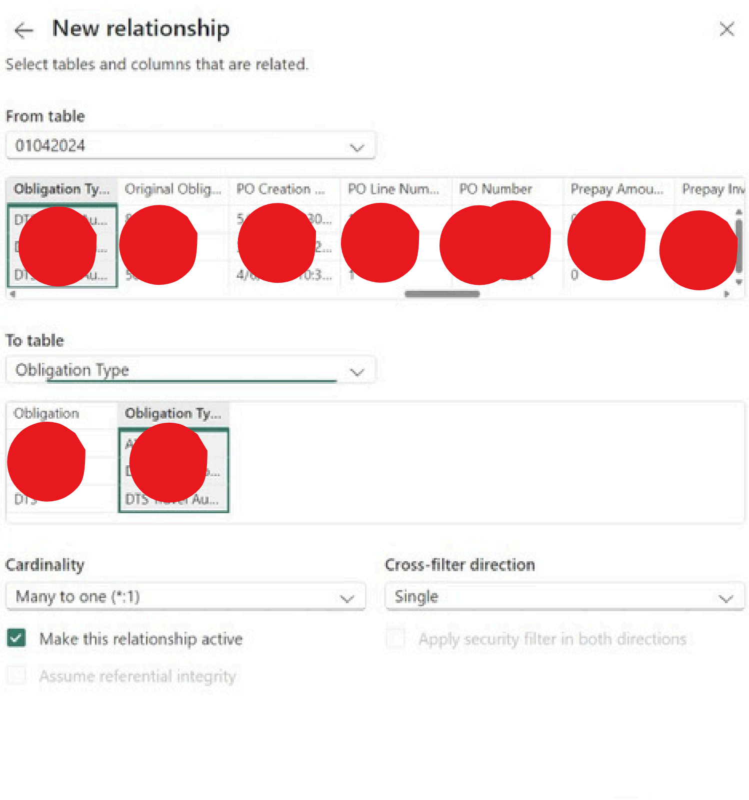
Right click the model and click **Manage relationships**

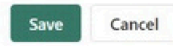


Click**+ New relationship**



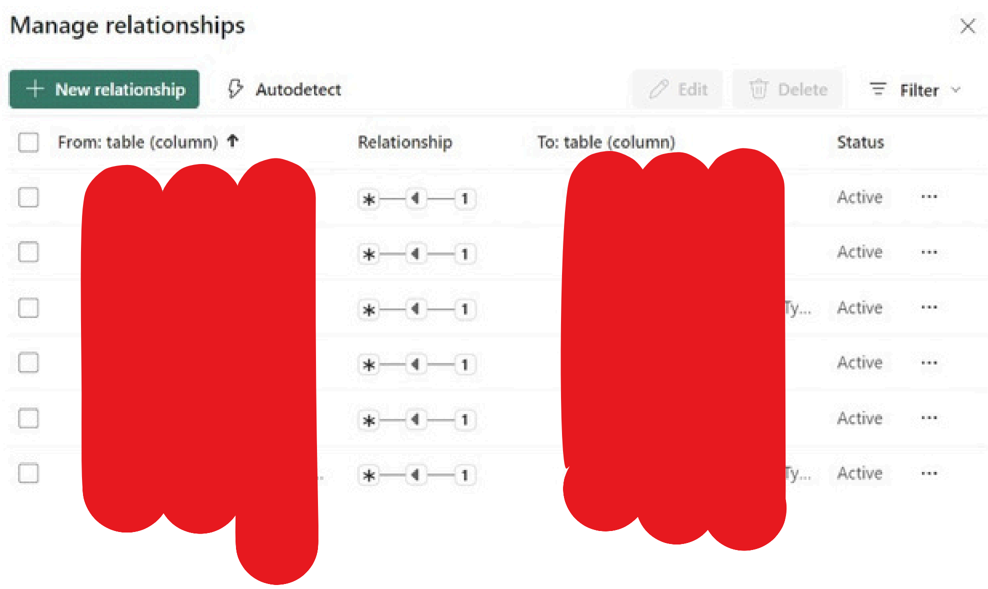
From tablewe need to pick our data and **To table**we need to pick the data we want to create the slicer. For the **Cardinality** we need to pick Many to one because in our data there are 2000+ row and **Cross-filter direction** just choice single. Make sure to select **active**

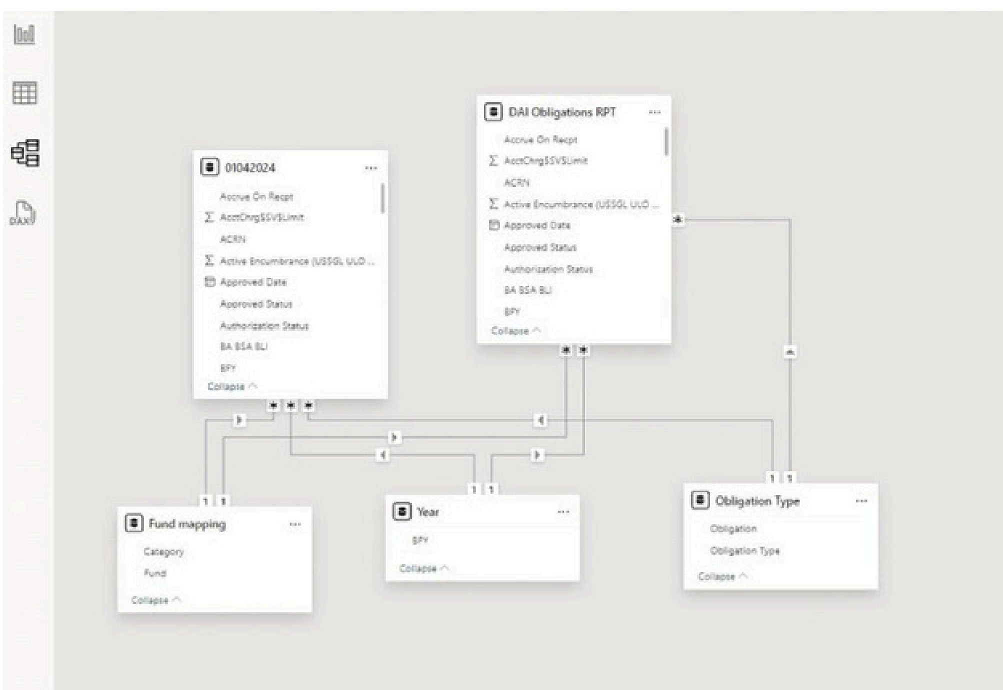




Now we need to connect rest of the slicer for two data repeat the same steps

After you done should be looks like this

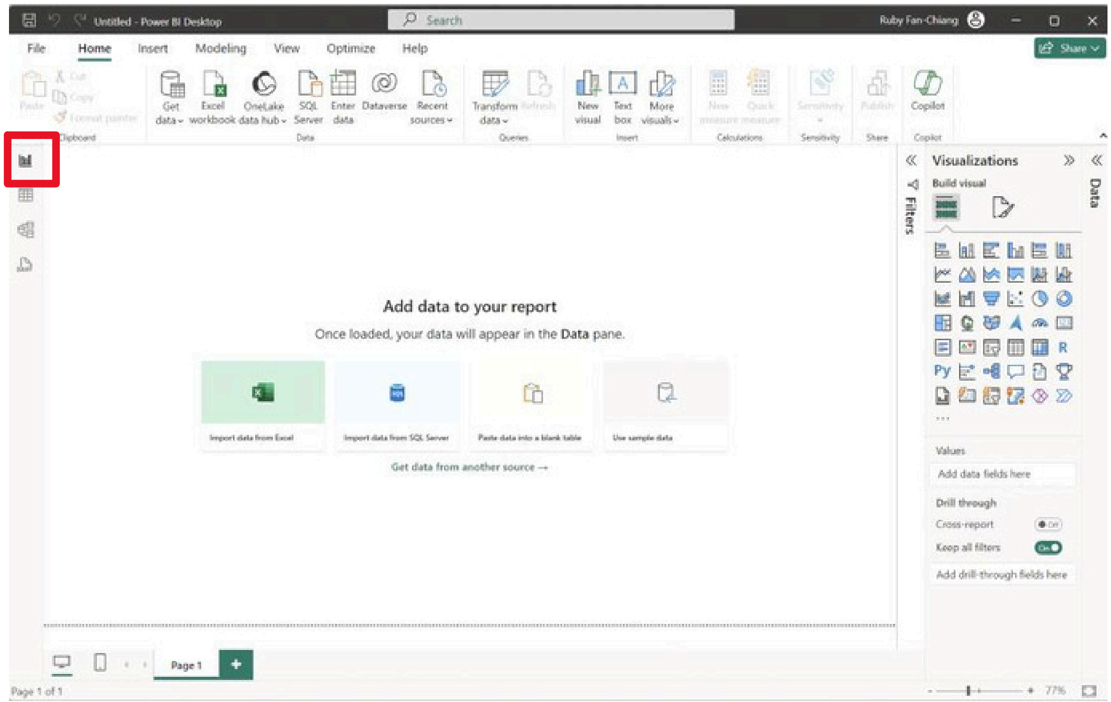




Report-slicer

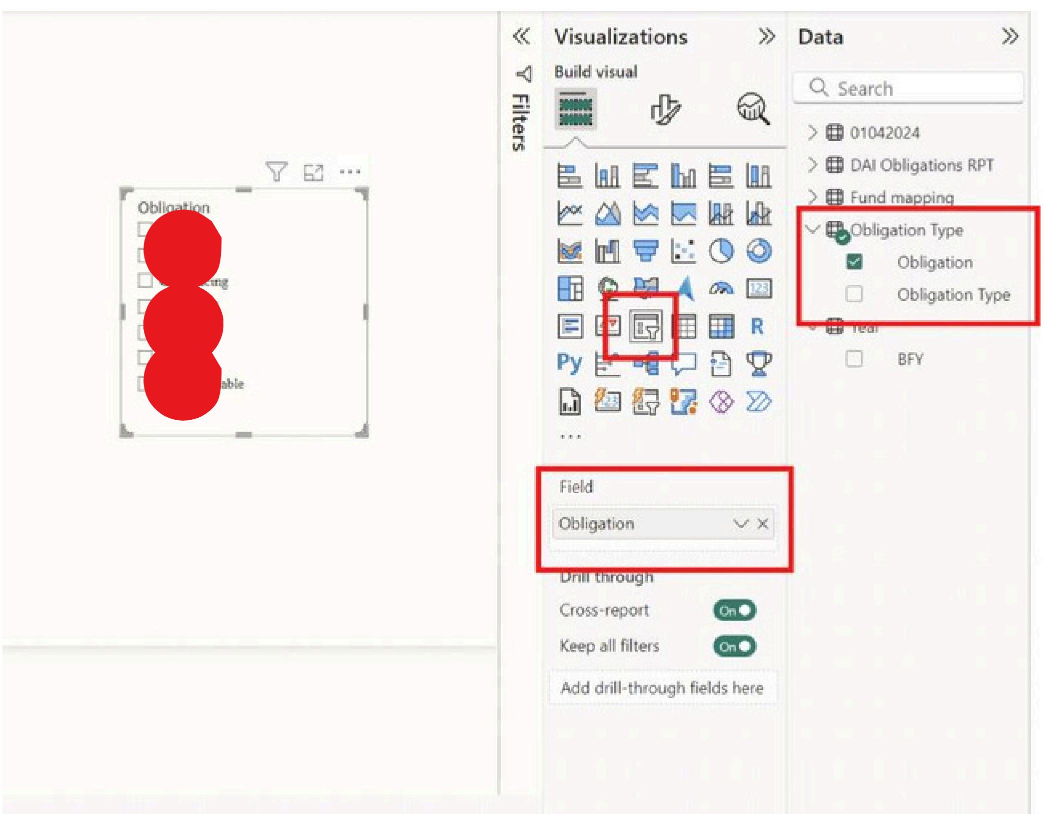
Sunday, June 16, 2024 2:44 AM

Now we going back to Report view



To create a slicer click **slicer** then pull the data you want to Field, then you will see slicer on the left.

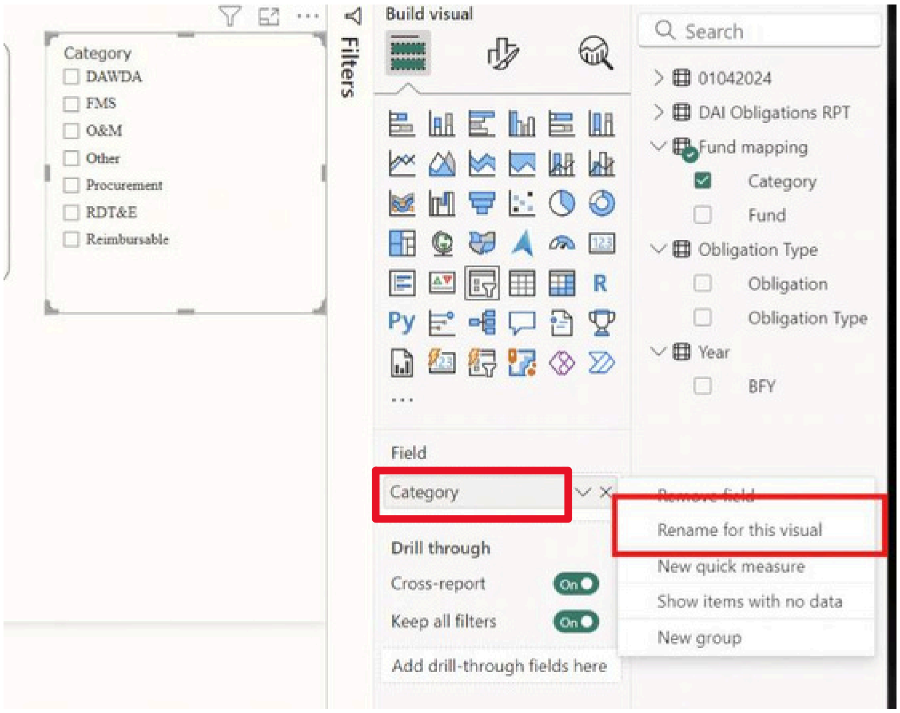
For this slicer Obligation is the name I create in the mapping and the Obligation Type is the original name from my data



And we will do the same steps for Fund and Year slicer

For my Fund slicer I name the mapping I create Category but now I want it to show title Fund in the report

Right click **Category** -> **Rename for this visual**

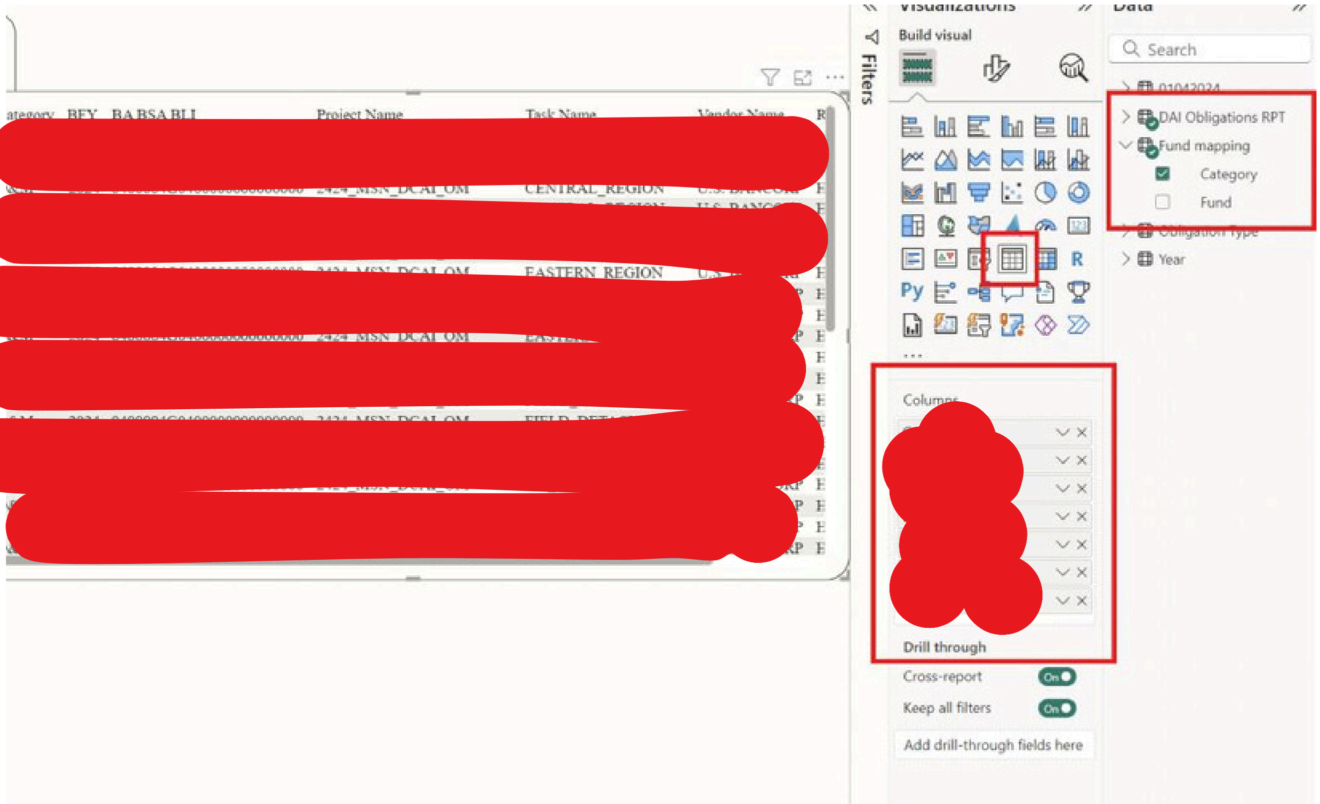


Report-table

Sunday, June 16, 2024 3:08 AM

After create the slicer now we can create the table in our report

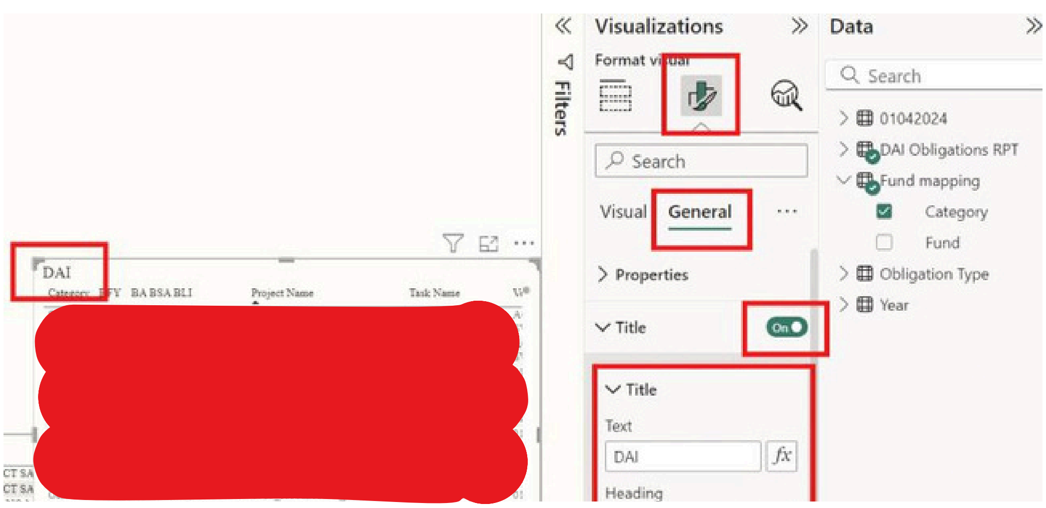
Click **table** and pull the column you want to show in the table in to Columns. The order in Columns will be the order to show in the table.

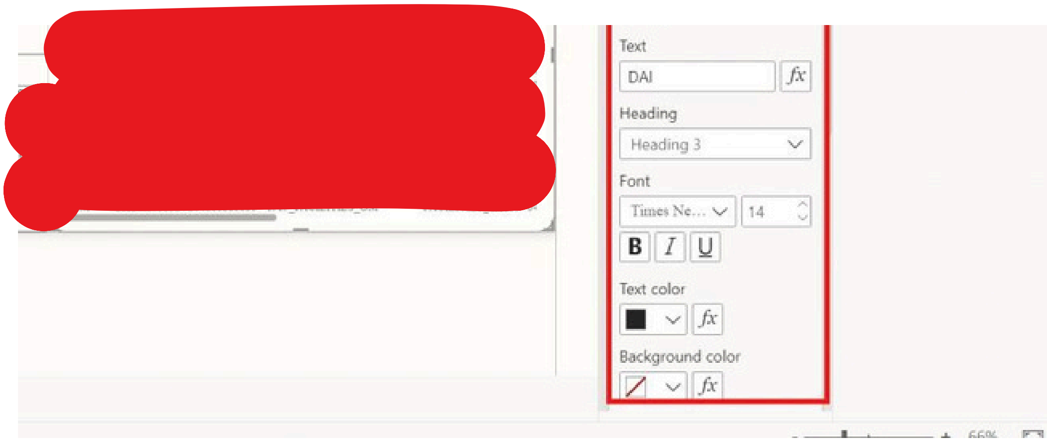


Repeat the steps for other data

Now we want to create a title for the table

Click**the table you want to add title -> Format your visual -> General -> turn on Title -> Title -> Text**





Repeat the steps for other data

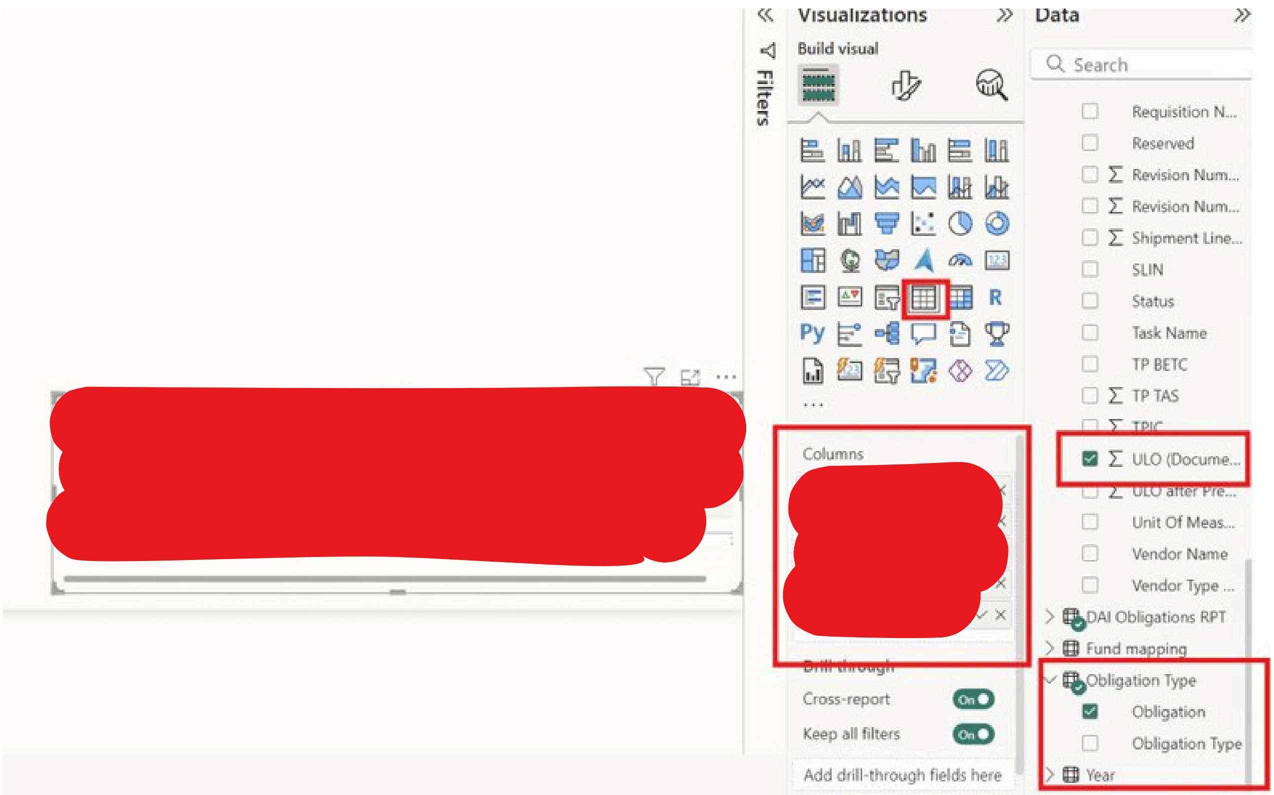
Report-sum and count

Sunday, June 16, 2024 3:29 AM

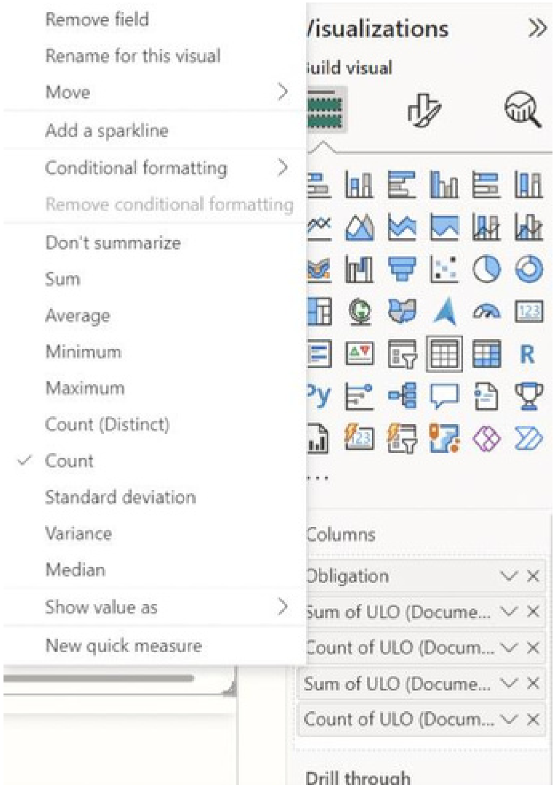
Now we need to create the table for ULO total and ULO count for both data, and the #change and % change between the total and count

Click **table**and inside the Columns we need to pull ULO twice from same data one for sum and one for count, and don't forgot pull the Obligation Type form the mapping we create.

Remember order matter

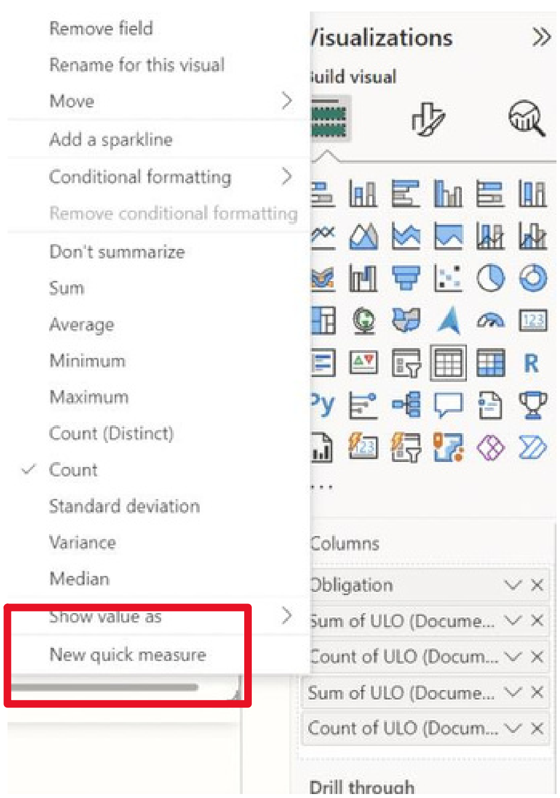


To change how it calculate the ULO
Right click the one you want to change and select the measurement you want.

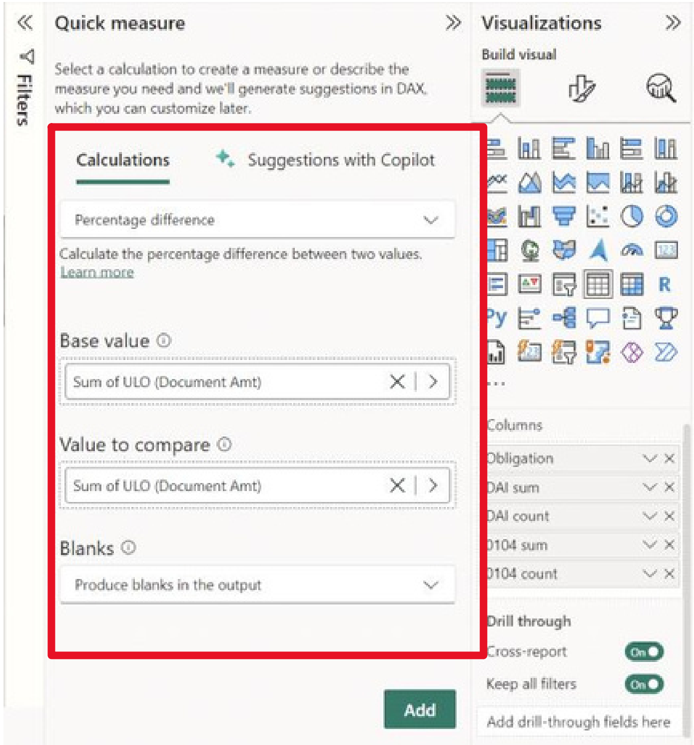


Since we want to know the % change from DAI to 0104 which is 0104sum/DAIsum.

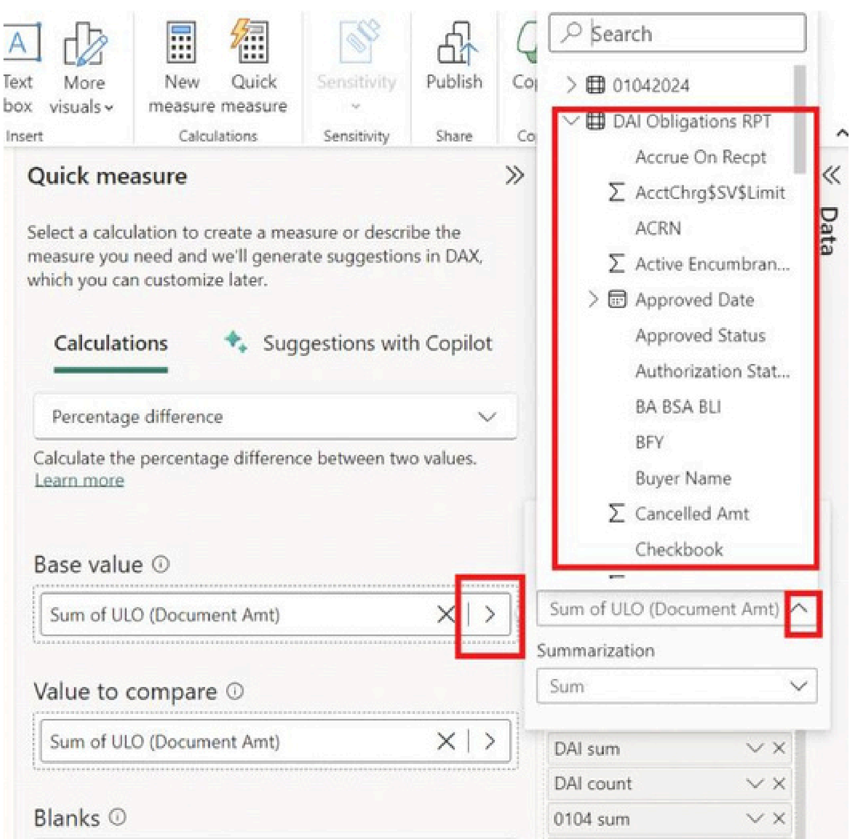
We will right click the **DAI sum-> New quick measure**



Click **Calculations-> Percentage difference -> add**
If you right click the correct one, the Base value should from DAI data and Value to compare should from 0104 data it automatically put in for you already

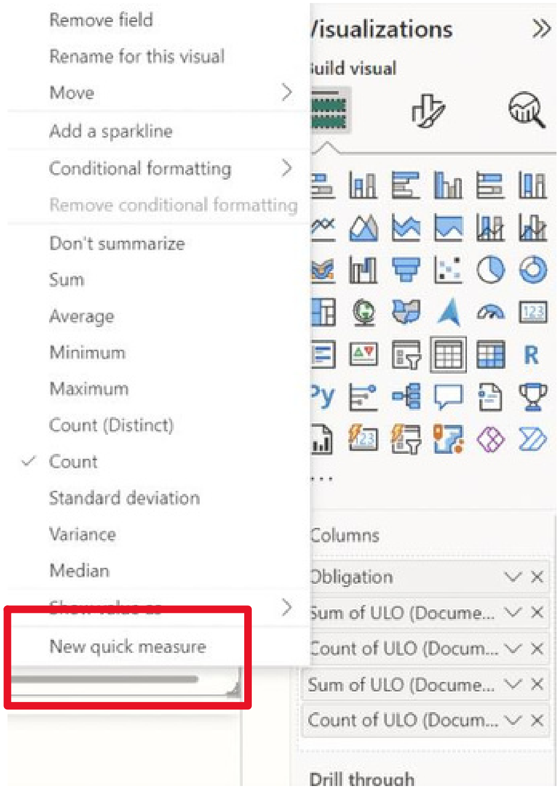


Way to double check



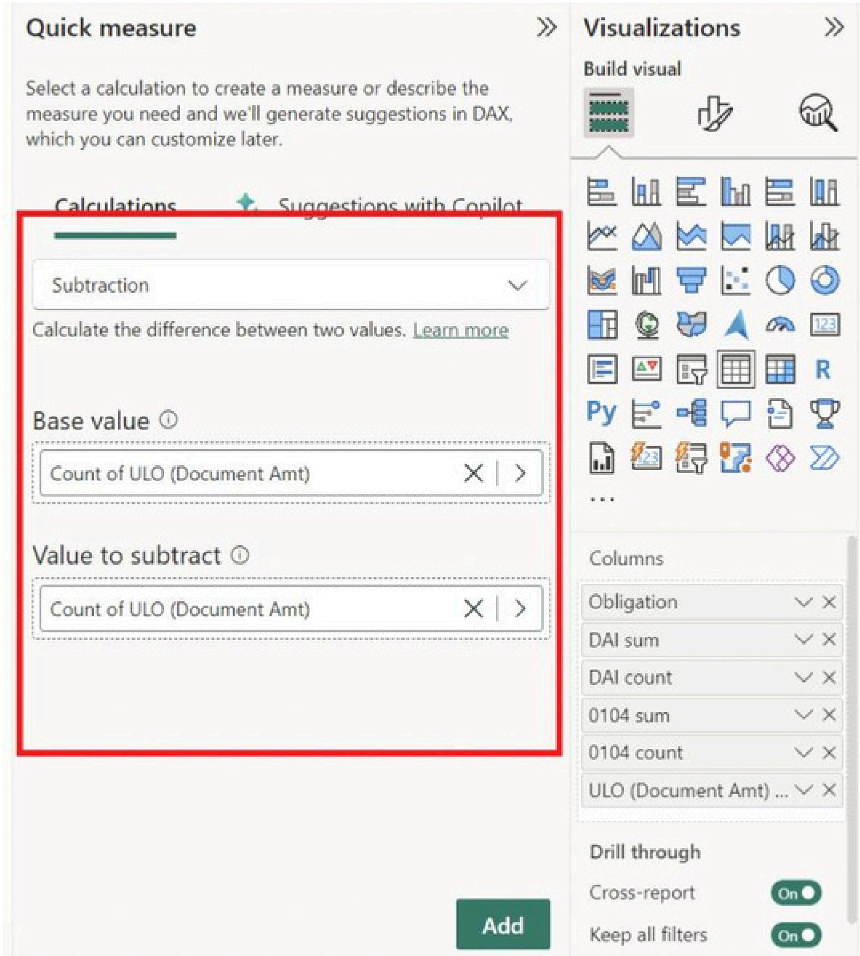
Now we want to find the #change from DAI to 1014 which is DAI count -1014 count

We will right click the **DAI count-> New quick measure**



Click **Calculations-> Subtraction -> add**

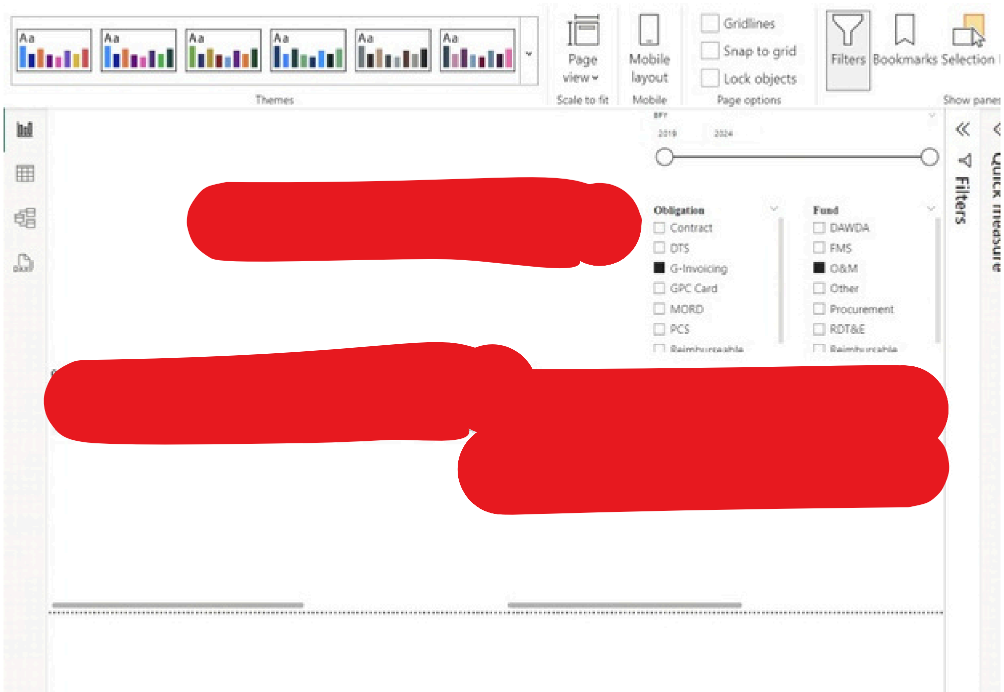
If it still show the sum of ULO just right click and change the measurement to count


Quick measure
Select a calculation to create a measure or describe the measure you need and we'll generate suggestions in DAX, which you can customize later.
Calculations
Suggestions with Copilot
Subtraction
Calculate the difference between two values. Learn more
Base value
Count of ULO (Document Amt)
Value to subtract
Count of ULO (Document Amt)
Add
Visualizations
Build visual
Columns
Obligation
DAI sum
DAI count
0104 sum
0104 count
ULO (Document Amt) ...
Drill through
Cross-report
On
Keep all filters
On

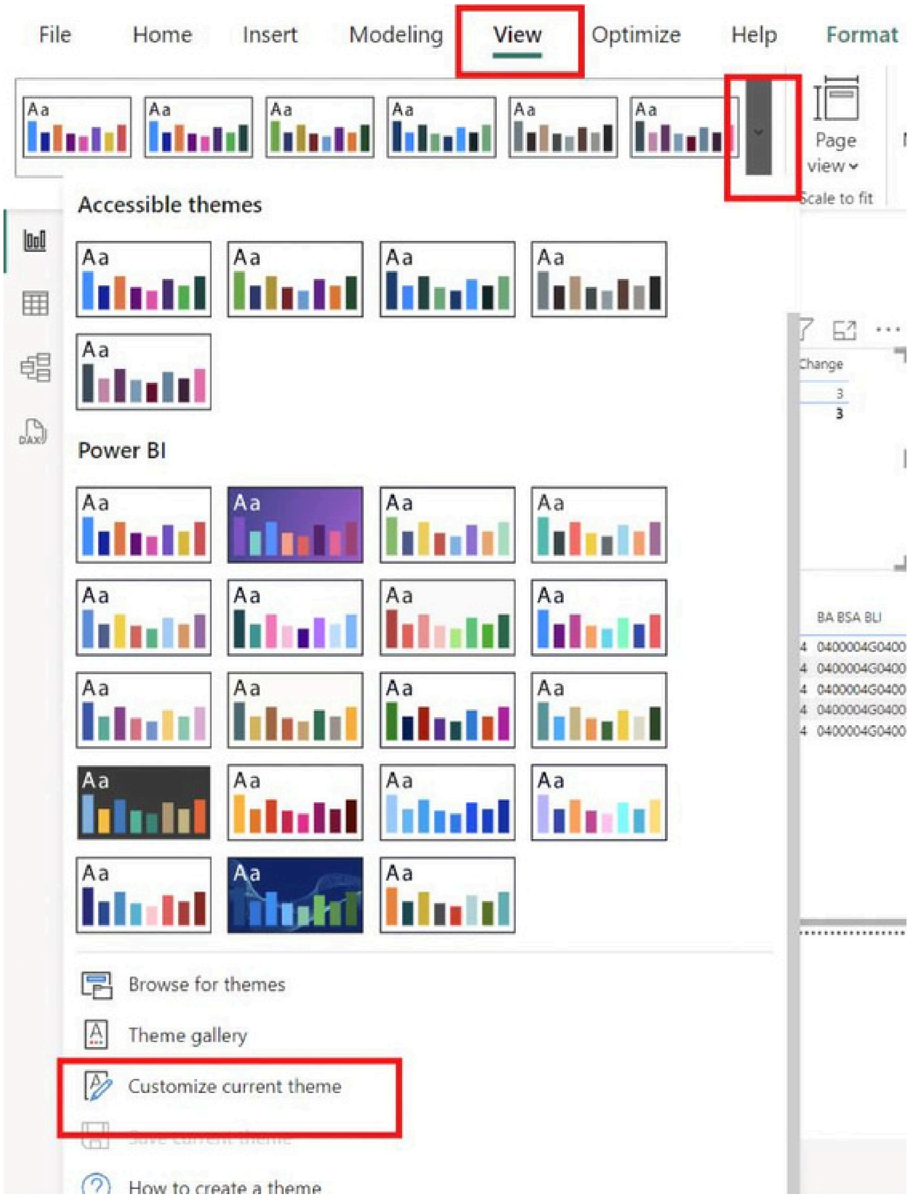
Report -design

Sunday, June 16, 2024 4:27 AM

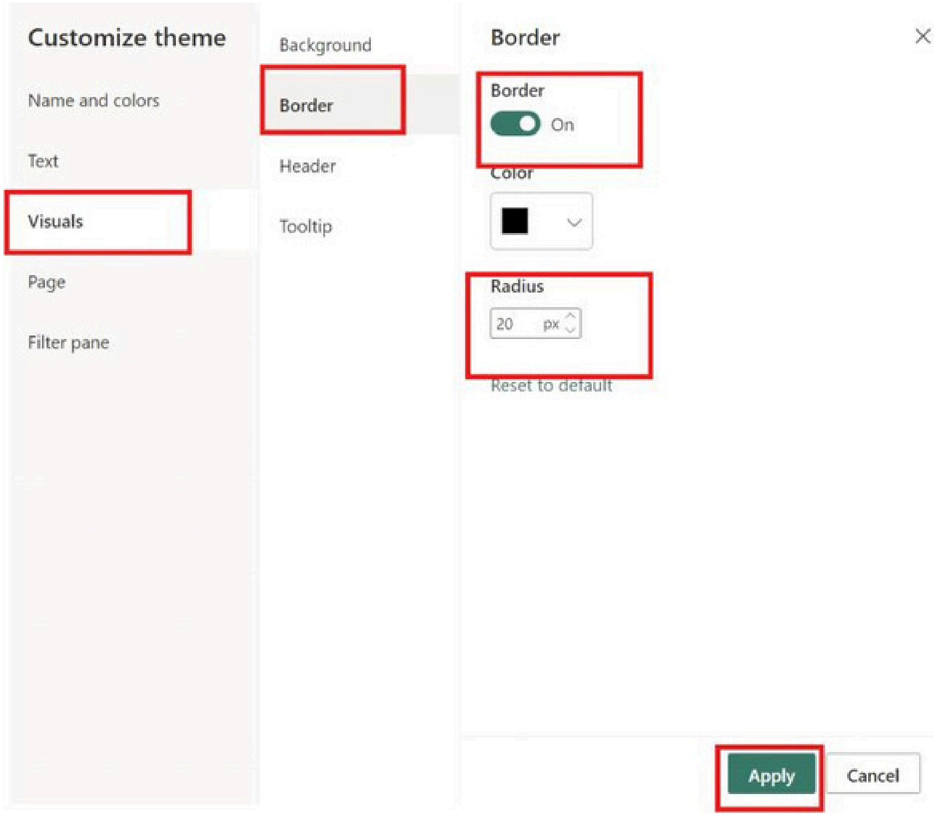
Now our report looks like this

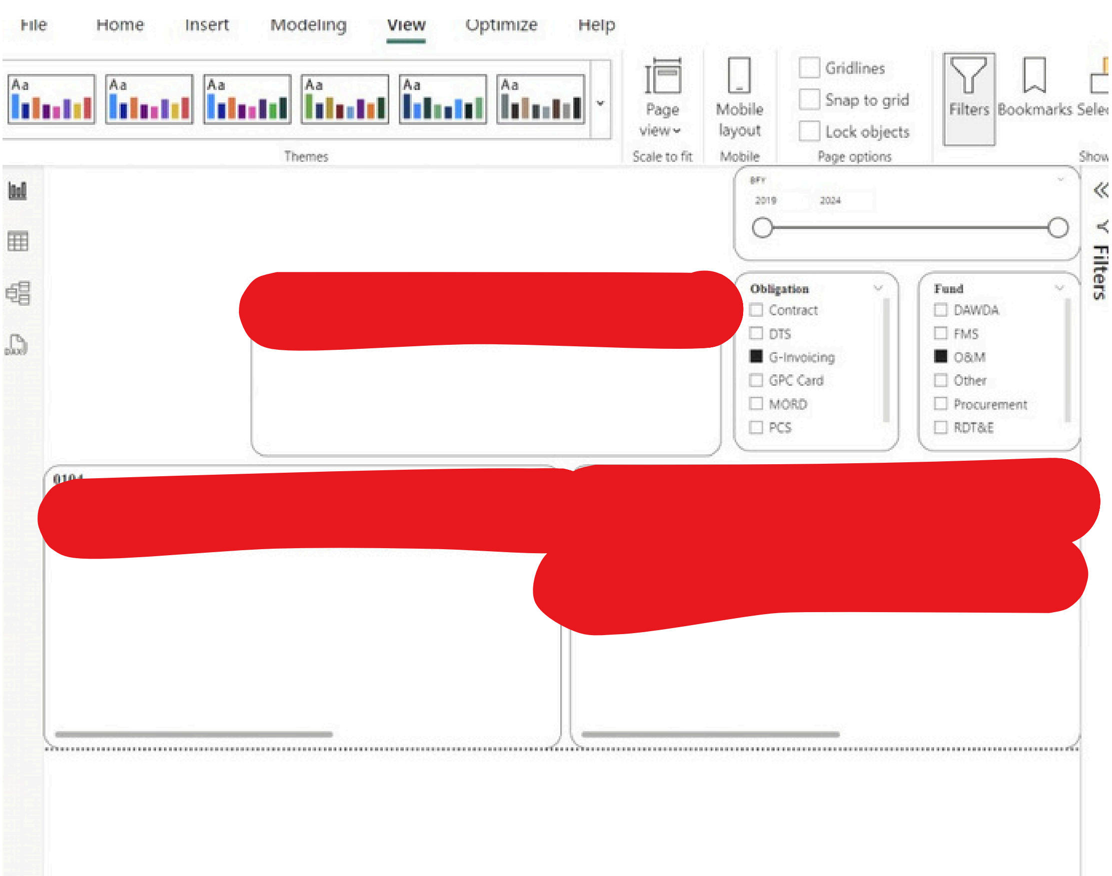


To make it more clear with each section
Select one of the section
Click **View -> Themes -> Customize current theme**

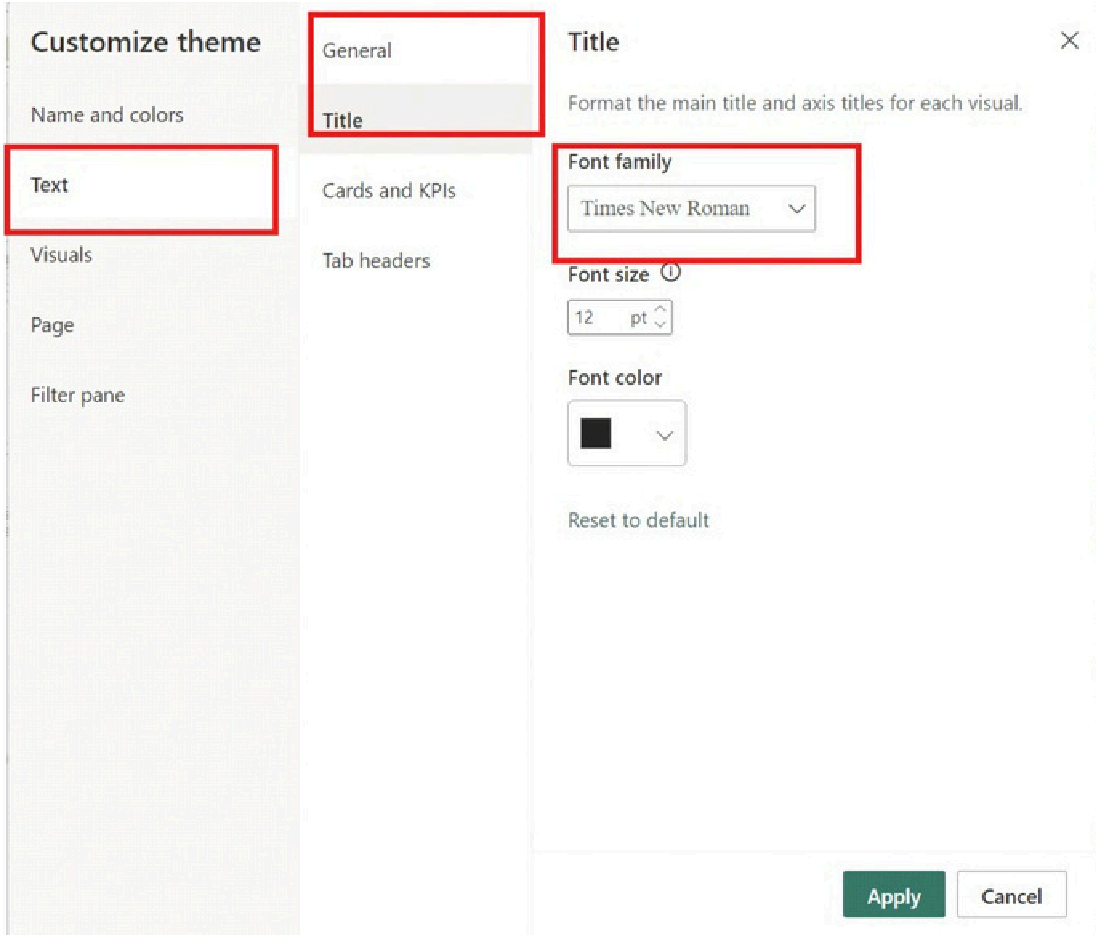


Click **Visuals -> Border -> turn On -> Radius 20**





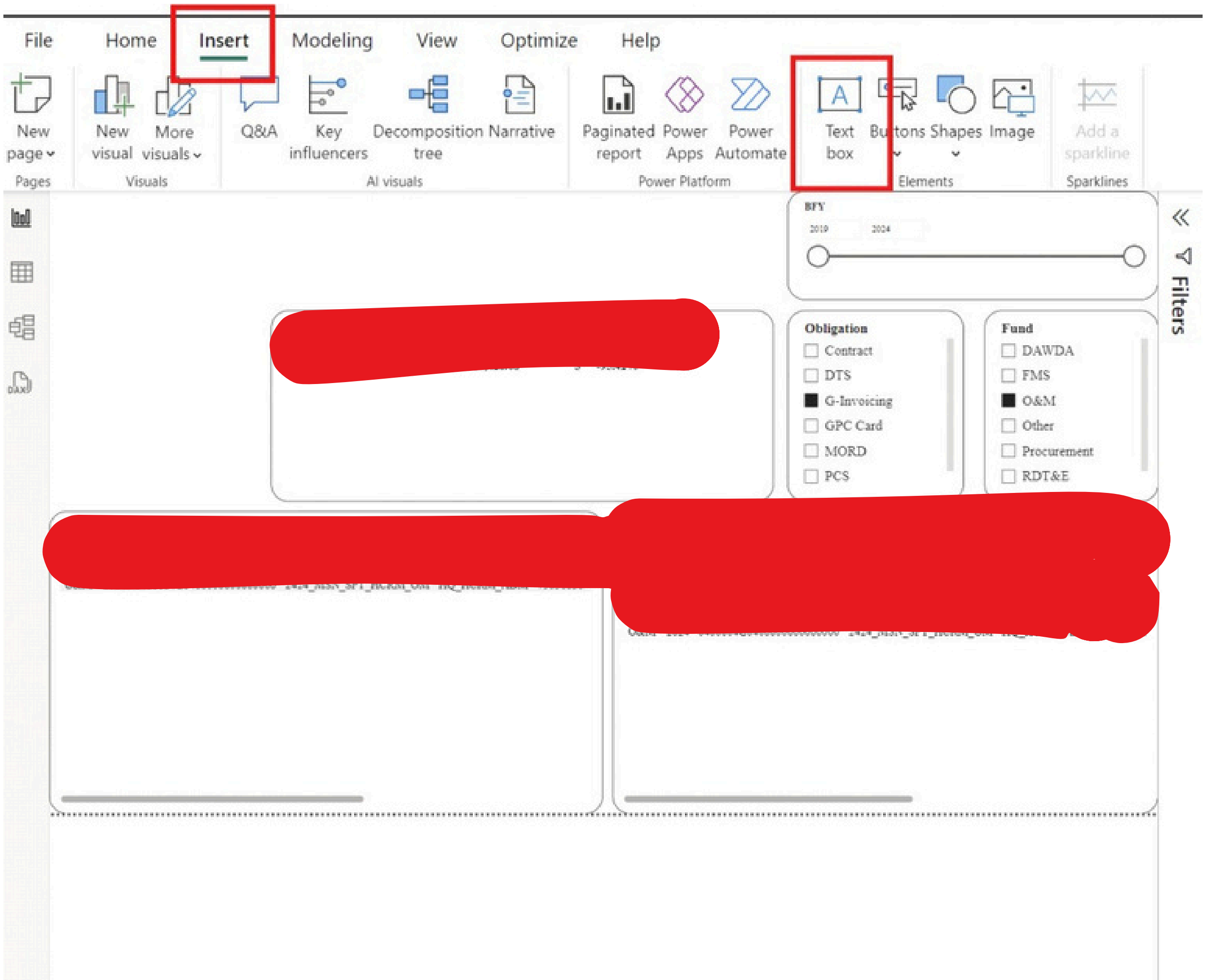
If you want to change the font for whole report



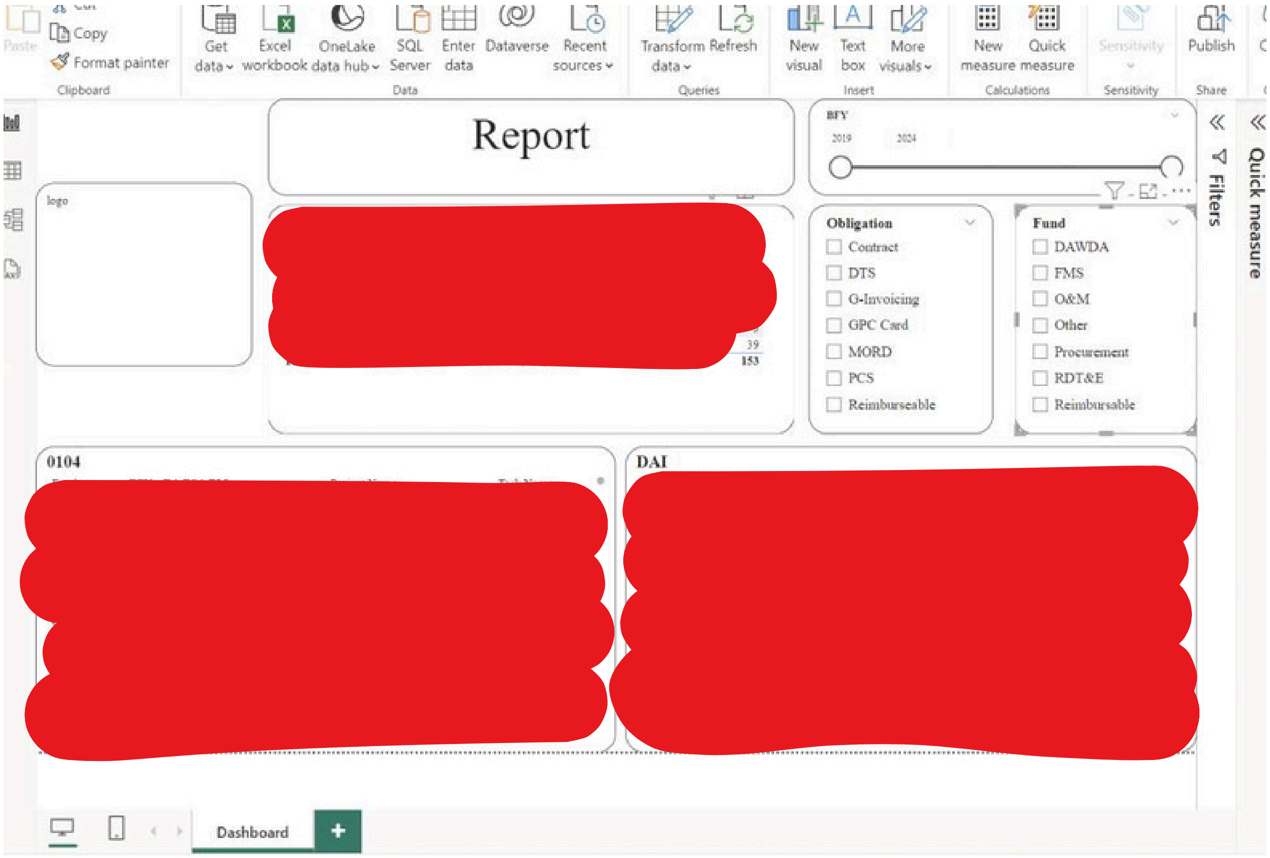
Next time if want to use the same custom just click **custom**

We can inert the text box for our report name

Click **Insert -> Text box**



This is final view of our report

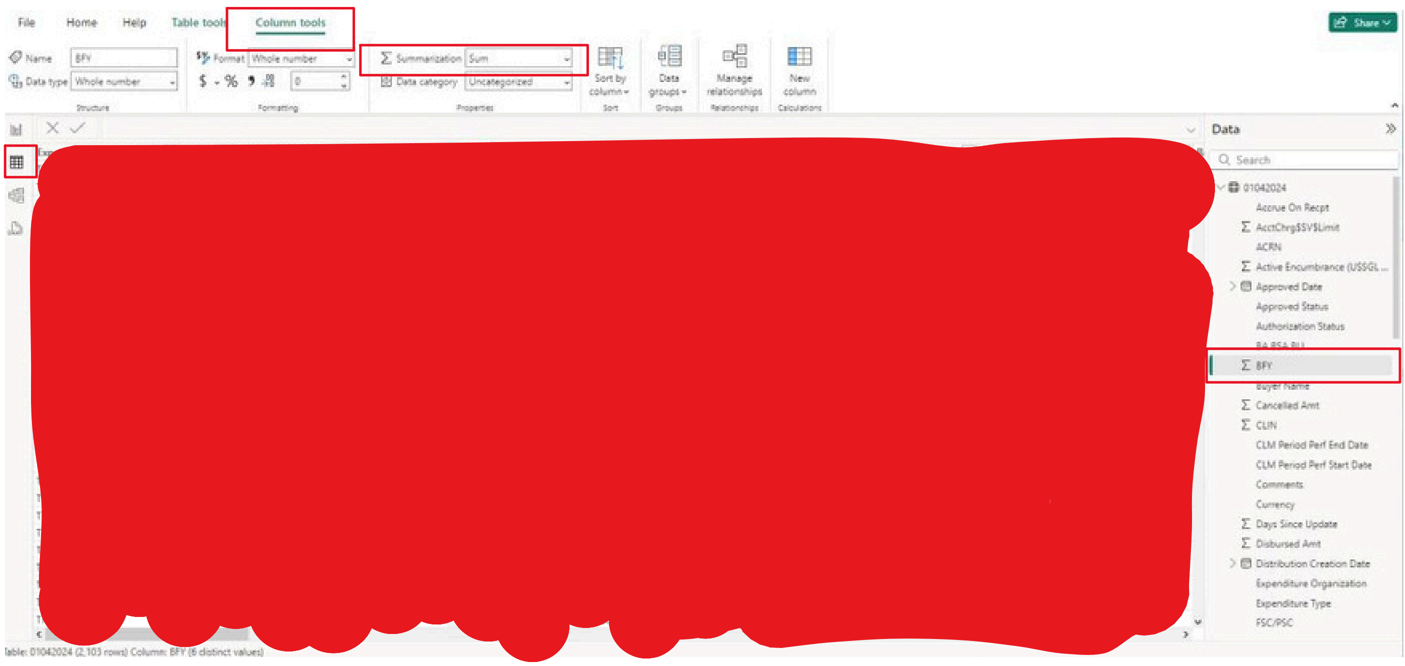

Copy
Format painter
Clipboard
Get data
Excel workbook
OneLake data hub
SQL Server
Enter data
Dataverse
Recent sources
Data
Transform data
Refresh
Queries
New visual
Text box
More visuals
Insert
New measure
Quick measure
Calculations
Sensitivity
Publish
Share
Report
BFY
2019
2024
logo
Obligation
Contract
DTS
G-Invoicing
GPC Card
MORD
PCS
Reimburseable
Fund
DAWDA
FMS
O&M
Other
Procurement
RDT&E
Reimbursable
0104
DAI
Filters
Quick measure
Dashboard

BFY can't create relationship

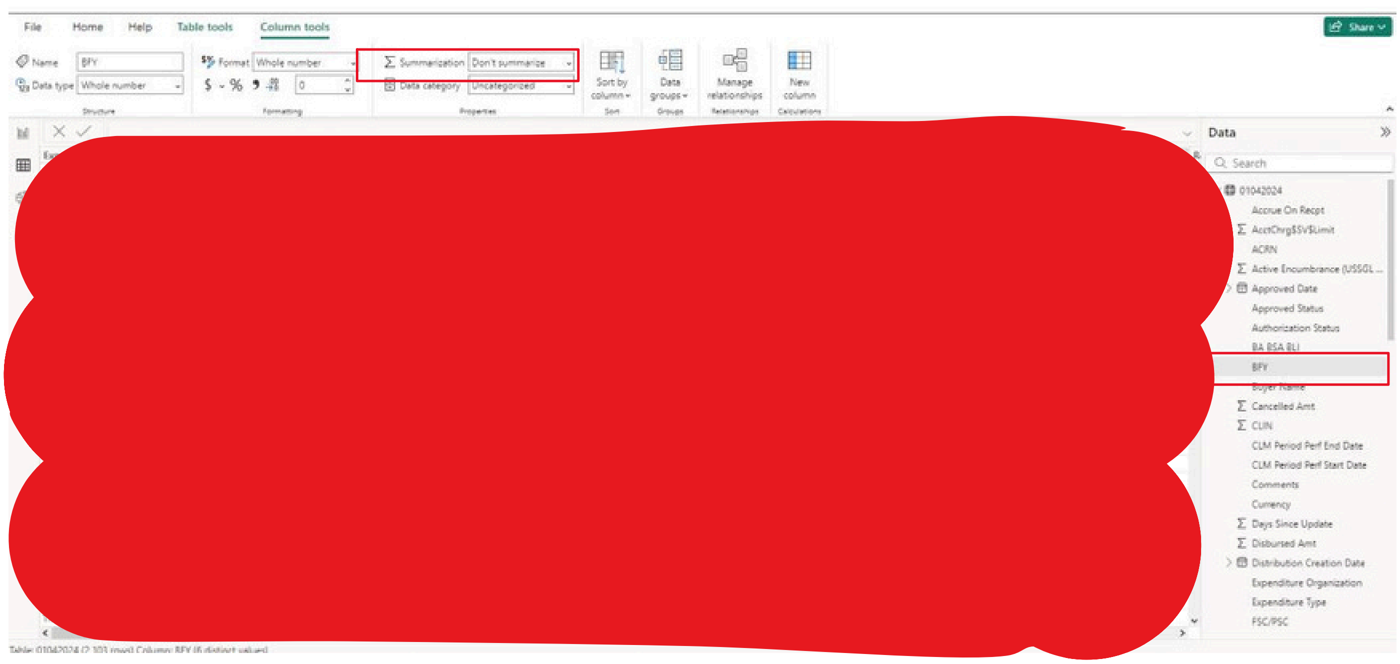
Sunday, June 16, 2024 5:04 AM

Buy the time I import the data sometime they convert BFY to sum BEY (∑ BFY)

Click **Table view -> BFY column -> Column Tools -> Summarization -> Don't summarize**



After change should looks like this



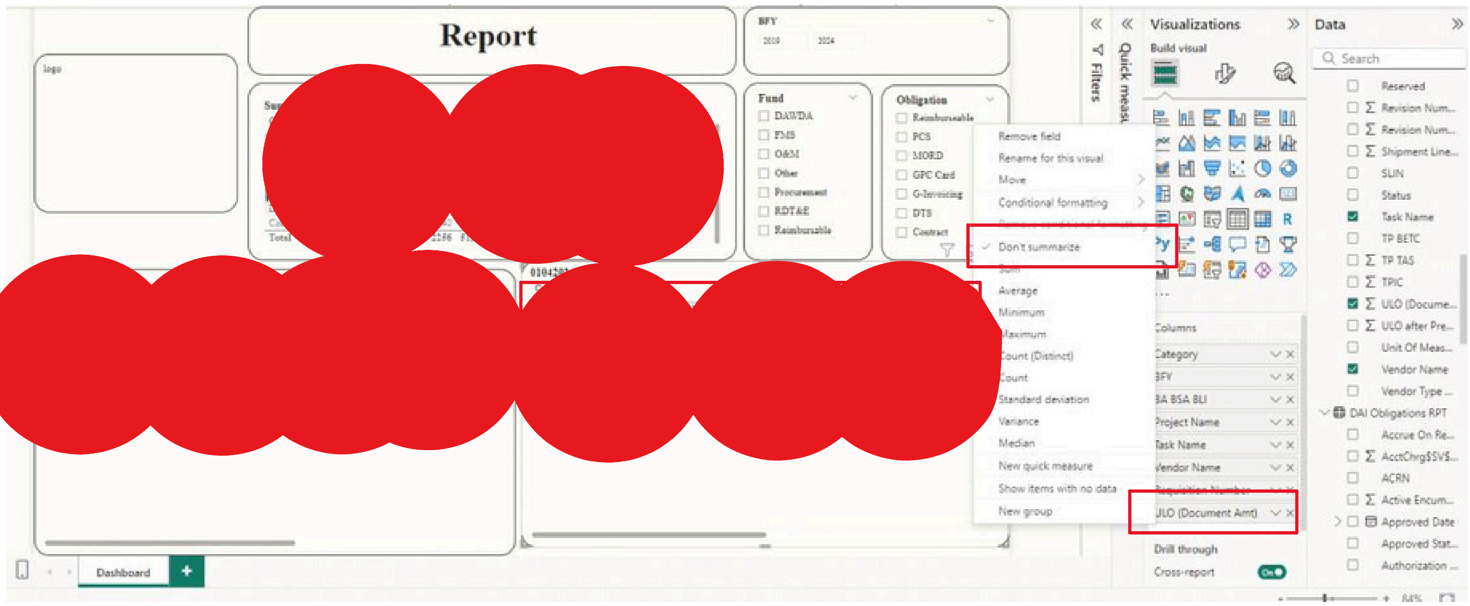
Count doesn't match the table

Sunday, June 16, 2024 5:11 AM

From the below example you can see that DAI suppose to have 6 rows only show 5 and 0104 should have 3 but only show 2

This is because inside the table while we pick the column there have 2 rows have exactly same name for all the columns, then the system only show one. To fix this we can just add the ULO into the table since we get the number of count from that.

After add ULO into columns and make sure change to Don't summarize you will see the total row match the count


Report
logo
BFY
2019
2024
Fund
DAWDA
FMS
O&M
Other
Procurement
RDT&E
Reimbursable
Obligation
Reimburseable
PCS
MORD
GPC Card
G-Invoicing
DTS
Contract
Remove field
Rename for this visual
Move
Conditional formatting
Don't summarize
Average
Minimum
Maximum
Count (Distinct)
Count
Standard deviation
Variance
Median
New quick measure
Show items with no data
New group
Filters
Quick measures
Visualizations
Build visual
Columns
Category
BFY
BA BSA BLI
Project Name
Task Name
Vendor Name
ULO (Document Amt)
Drill through
Cross-report
Data
Search
Reserved
Revision Num...
Revision Num...
Shipment Line...
SLIN
Status
Task Name
TP BETC
TP TAS
TPIC
ULO (Docume...
ULO after Pre...
Unit Of Meas...
Vendor Name
Vendor Type ...
DAI Obligations RPT
Accrue On Re...
AcctChrgSV...
ACRN
Active Encum...
Approved Date
Approved Stat...
Authorization ...
Dashboard

Template

Sunday, June 16, 2024 3:35 PM