Single Year Power BI Without Python by Anubhav and

Jason

Thursday, February 13, 2025 12:25 PM

No Python Coding Needed

- 1. Ensure that all prerequisite files required to run the code are present in the same directory. The relevant files are :
 - a. CiviCRM_Export e.g. Barossa Council_24_25_CiviCRM
 - b. Data.Gov Export e.g. Barossa Council_24_25_DataGov_export
 - c. GA4_export for that financial yr e.g. GA4_export_24_25
- 2. Navigate the PowerBI OneYear Template file found at Data Analytics Team -> Editor HOWTOs -> Google Analytics 4 Steps.
- 3. Download a copy of the template and paste it in your working directory rename the file **Council_Yearfrom_YearTo** e.g. Barossa Council_23_24.

4. Start by adding the **PowerBI** excel file e.g. *PowerBI_BarossaCouncil* and **Data.gov export** e.g. *Barossa*

Council_23_24_DataGov_export to the report.



5. Rename Organisation name and Organisation ID to keep constant between CiviCRM and Data.Gov export.



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1988; Unhide all 1988; New group 1988

antist Church

6. If success, it should be like this



7. Click Edit query in CiviCRM.

CiviCRM_Contact_Searc	Add related tables
∑ ID_19	New measure
Org_name	New column
∑ Primary Category	Refresh data
∑ Subject_id	Edit query
Subject_id #10	Manage relationships
Subject_id #11	Incremental refresh
Subject_id #12	Manage aggregations
Subject_id #13	Select columns
Subject id #14	Select measures
Collapse 🔿	Delete from model
	Hide in report view
	Unhide all
	Collapse all
	Expand all

8. Click Append queries as new, choose two tables then pick CiviCRM and Data.Gov.



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9. After you select OK, a new query is created with two tables appended.

Concatenate rows from two table	es into a sing	gle table.		
Two tables O Three or more	tables			
First table				
CiviCRM_Contact_Search (1)	٣			
Second table				
cu_export_2025-02-11_Data Gov a	a v			

10. Then link the new table with all year data.

Properties	*
\lor Relationship	
Table	Column
Append1	ID_19
Cardinality	
Many to one (*:1)	\sim
Table	Column
all year data(ol	✓ Organisation ID ✓
Make this relationshi	p active
Yes	

OneNote

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Cross-filter direction		
Single		\sim
Apply security filter i	n both dire	ections
No No		
		Apply changes
	Open re	lationship editor
		atabla

11. Hide the CiviCRM and Data.Gov table.

CiviCRM_Contact_S	😿
∑ ID_19	X
Org_name	X
∑ Primary Category	x
∑ Subject_id	X
Subject_id #10	X
Subject_id #11	X
Subject_id #12	X
Subject_id #13	X
Subject id #14	X
Collapse 🔿	

12. This will be the final relationship map with all relationship Many to one.

Manage relationships

+	New relationship 🧳 Autodetect	:	🖉 Edit 🔟 Delete	e
	From: table (column) 个	Relationship	To: table (column)	Status
	Append1 (ID_19)	* 1	CiviCRM_Contact_Search (1) (I	Active …
	Append1 (ID_19)	* 1	all year data(old one) (Organis	Active …
	Append1 (Org_name)	*	cu_export_2025-02-11_Data G	Active …



OneNote

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OneNote

	Email_3	Ň
	Email 4	X
	Collapse 🔿	

13. Put Org_name from Append1 under Filter on all pages.

Filters	0	»
✓ Search		
Filters on this page		
Add data field	s here	
Filters on all pages		
Org_name is (All)		
Add data field	s here	

14. Then follow Single Year Power BI implementation step 6 and so on.