

Power BI – Joins Guide



Agenda

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- 3 What is needed to start using Power BI Desktop
- 4 How to join to the Datamart using Power BI – Guide Review



Datamart reminders:



- **Datamart:**
 - Is not changing.
- **Query tool status: OBIEE**
 - Available through December 2027
- **Power BI Desktop**
 - #1 resource is the Datamart website
 - Common questions, Getting started, Joins

Query Tool: Timeline



- 11/30/25: Provide users with documents on Power BI (Repository) Workspace.
- 01/31/26: Provide users with an initial beginning Power BI training. Present in TEAMS as well as load to Workday Learning. This will include a manual.
- 06/30/26: Provide users with DAFR/SEFA queries for the new query tool. Have users test for year-end but have OBIEE for normal reporting.
- 06/30/26: Officially stop updating OBIEE RPD. No more OBIEE work requests.
- 12/31/27: Close down OBIEE and support Power BI as the main query tool.

What is needed to start using Power BI Desktop.



1. Download the application (email your agency tech support)
2. Obtain Datamart (RACF) Security access (email an Agency Security Officer)
3. Load the Datamart ODBC (SFMSP) to your computer ('Guide to ODBCs'; Agency tech support to install)
4. Create a query in Microsoft's Power BI Desktop ('Power BI-Connect to the Datamart-Statewide')

Join Guide review



- Review the **Power BI - Joins Guide** as shown on the Datamart website.

Recap: Join Guide



Joins Guide Reminders:

1. Focus on using the **key** fields.
2. Do not join these types of tables.
Financial to Financial or **Profile to Profile**.
3. Simple drag and drop from field to field to create a join.
4. Confirm each join due to Power BI automatic joining feature.
5. Limit the number of joined tables as it slows a query's run time.

Questions?

Contact information:

Name: Aaron Wallace

Email: Datamart.Support@das.Oregon.gov

Phone: 971-900-9988

Website:

<https://www.oregon.gov/das/Financial/AcctgSys/Pages/datamart.aspx>

