

power bi cheat sheet

power bi cheat sheet serves as an essential resource for data analysts, business intelligence professionals, and anyone looking to harness the full potential of Microsoft Power BI. This article provides a comprehensive overview of the most important features, functions, and best practices to help users efficiently navigate the platform. Covering essential DAX formulas, visualization tips, data transformation techniques, and key Power BI service functionalities, this cheat sheet is designed to boost productivity and enhance data insights. Whether you are a beginner or an advanced user, mastering these core concepts can significantly improve your report-building and data analysis workflow. This guide also includes useful shortcuts and troubleshooting advice to streamline your Power BI experience. Below is a detailed table of contents outlining the main topics covered in this article.

- Power BI Basics and Interface Overview
- Essential DAX Functions and Formulas
- Data Transformation and Modeling Techniques
- Visualization Best Practices and Tips
- Power BI Service and Collaboration Features
- Keyboard Shortcuts and Productivity Hacks

Power BI Basics and Interface Overview

Understanding the Power BI interface and basic components is crucial for efficient report creation and data analysis. Power BI Desktop is the primary application used to build reports, which can then be published to the Power BI Service for sharing and collaboration. The interface consists of several panes, including the Fields pane, Visualizations pane, and Filters pane, each serving a specific purpose.

Key Components of Power BI Desktop

The main components of Power BI Desktop include the Report View, Data View, and Model View. Report View allows users to build and arrange visualizations, Data View is used to inspect and manage imported data tables, and Model View facilitates the creation and management of relationships between tables. Familiarity with these views is fundamental to effective Power BI use.

Data Sources and Connections

Power BI supports a wide range of data sources such as Excel files, SQL Server databases, SharePoint

lists, and cloud services like Azure and Salesforce. Establishing reliable data connections and understanding refresh capabilities ensures that reports are accurate and up-to-date.

- Connect to various data sources using Get Data feature
- Manage data refresh schedules in Power BI Service
- Use DirectQuery or Import modes based on dataset size and performance needs

Essential DAX Functions and Formulas

Data Analysis Expressions (DAX) are the backbone of Power BI for creating powerful calculations and metrics within reports. This section highlights commonly used DAX functions that are integral to developing meaningful insights.

Calculated Columns vs. Measures

Calculated columns are computed during data refresh and stored in the model, while measures are calculated on the fly during report interaction. Choosing between the two depends on the specific use case and performance considerations.

Commonly Used DAX Functions

Key DAX functions to have on a power bi cheat sheet include:

- **SUM()** – Adds up all values in a column.
- **CALCULATE()** – Changes the context of a calculation.
- **FILTER()** – Returns a subset of a table based on criteria.
- **RELATED()** – Retrieves related data from another table.
- **IF()** – Performs conditional logic.
- **VALUES()** – Returns distinct values from a column.
- **ALL()** – Removes filters from a column or table.

Data Transformation and Modeling Techniques

Effective data transformation and modeling are vital for creating accurate and performant Power BI reports. Using Power Query Editor, users can clean, reshape, and combine data before building the data model.

Power Query Editor Essentials

Power Query Editor provides a user-friendly interface to perform tasks such as removing duplicates, filtering rows, splitting columns, and merging tables. Applying these transformations early ensures cleaner datasets for analysis.

Data Modeling Best Practices

Building a robust data model involves defining relationships, setting the correct data types, and optimizing model size. Star schema design is widely recommended for its simplicity and efficiency in Power BI.

- Create one-to-many relationships between fact and dimension tables
- Avoid bi-directional cross-filtering unless necessary
- Use calculated tables sparingly to reduce complexity
- Optimize model performance by limiting unnecessary columns

Visualization Best Practices and Tips

Visualizations are the core of Power BI reports, enabling users to interpret data trends and patterns effectively. Choosing the right visuals and customizing them enhances report usability and engagement.

Popular Visualization Types

Power BI offers a wide variety of visualizations such as bar charts, line charts, pie charts, scatter plots, and maps. Understanding when to use each type depends on the nature of the data and the story to be told.

Customization and Formatting

Formatting options allow users to adjust colors, labels, tooltips, and interactions to improve readability. Consistency in design and adherence to accessibility standards contribute to professional

reports.

- Use slicers and filters to enable user interaction
- Apply conditional formatting to highlight key insights
- Leverage bookmarks and buttons for dynamic report navigation
- Optimize visuals for mobile viewing where necessary

Power BI Service and Collaboration Features

The Power BI Service extends desktop capabilities by facilitating report sharing, scheduling data refresh, and enabling collaboration among teams. Understanding its features helps maintain data governance and streamline workflows.

Publishing and Sharing Reports

Reports created in Power BI Desktop can be published to the Power BI Service workspace, where they can be shared with colleagues or embedded in other applications. Proper permission management ensures data security.

Workspaces and Apps

Workspaces organize content and control access, while Power BI apps allow bundling multiple reports and dashboards for distribution. These features support scalable collaboration in enterprise environments.

- Set up scheduled refresh to keep data current
- Use dataflows for centralized data preparation
- Monitor usage metrics to track report adoption
- Implement row-level security (RLS) to restrict data access

Keyboard Shortcuts and Productivity Hacks

Using keyboard shortcuts and productivity tips can significantly reduce time spent navigating Power BI and enhance efficiency.

Common Keyboard Shortcuts

Some useful shortcuts include:

- **Ctrl + C** and **Ctrl + V** – Copy and paste visuals or elements
- **Ctrl + Z** – Undo last action
- **Ctrl + Y** – Redo last undone action
- **Ctrl + Shift + C** – Copy visual as an image
- **Alt + Shift + F** – Focus on filter pane

Tips for Faster Report Building

Additional productivity hacks include using templates, creating reusable measures, and taking advantage of the selection pane to manage visuals effectively. These techniques contribute to a smoother development cycle and higher-quality reports.

Frequently Asked Questions

What is a Power BI cheat sheet?

A Power BI cheat sheet is a concise reference guide that summarizes key features, formulas, shortcuts, and best practices to help users efficiently work with Power BI.

Where can I find a comprehensive Power BI cheat sheet?

You can find comprehensive Power BI cheat sheets on Microsoft's official Power BI documentation, community forums, GitHub repositories, and various data analytics blogs.

What important DAX functions are usually included in a Power BI cheat sheet?

Common DAX functions in a Power BI cheat sheet include CALCULATE, FILTER, SUMX, RELATED, ALL, VALUES, and IF, among others, which are essential for data calculations and modeling.

How can a Power BI cheat sheet improve my report-building efficiency?

A cheat sheet provides quick access to syntax, formulas, and shortcuts, reducing the time spent searching for information and minimizing errors during report creation.

Are there Power BI cheat sheets available for beginners?

Yes, many Power BI cheat sheets are tailored for beginners, focusing on basic concepts, essential functions, and simple visualization techniques to help new users get started.

What keyboard shortcuts are typically featured on a Power BI cheat sheet?

Common keyboard shortcuts include Ctrl + C (copy), Ctrl + V (paste), Ctrl + Z (undo), Ctrl + Y (redo), and shortcuts for adding visuals or refreshing data, which streamline workflow in Power BI.

Can Power BI cheat sheets help with data modeling and visualization tips?

Absolutely, many cheat sheets include tips for efficient data modeling, relationships, and visualization best practices to help create more insightful and performant reports.

Additional Resources

1. *Power BI Cheat Sheet: Mastering Data Visualization*

This book serves as a quick reference guide for beginners and intermediate users of Power BI. It covers essential formulas, functions, and visualization tips to create impactful reports. Perfect for professionals who want to boost their data storytelling skills efficiently.

2. *Power BI DAX Cheat Sheet: Essential Formulas and Functions*

Focused solely on DAX (Data Analysis Expressions), this cheat sheet simplifies complex calculations and expressions used in Power BI. It includes examples and use cases to help users understand and implement powerful data modeling techniques. A must-have for advanced Power BI users aiming to enhance their analytical capabilities.

3. *Power BI Dashboard Cheat Sheet: Best Practices and Tips*

This guide offers practical advice on designing effective and visually appealing dashboards in Power BI. It highlights layout principles, color schemes, and interactivity features to improve user engagement. Ideal for report developers seeking to create professional-grade dashboards quickly.

4. *The Ultimate Power BI Cheat Sheet for Data Analysts*

Tailored for data analysts, this cheat sheet compiles essential shortcuts, formulas, and data transformation techniques. It emphasizes efficiency and accuracy in data preparation and report creation. A valuable resource for analysts looking to streamline their Power BI workflow.

5. *Power Query Cheat Sheet for Power BI Users*

Focusing on Power Query, this cheat sheet explains data extraction, transformation, and loading processes within Power BI. It offers step-by-step instructions and common M language snippets to automate data cleansing tasks. Great for users who want to optimize their data import and shaping processes.

6. *Power BI Visualization Cheat Sheet: Tips and Tricks*

This book highlights the best visualization practices and lesser-known features within Power BI. It

provides quick tips for selecting the right chart types, customizing visuals, and enhancing report interactivity. Useful for users aiming to create visually compelling and insightful reports.

7. Power BI Performance Optimization Cheat Sheet

Dedicated to improving the speed and responsiveness of Power BI reports, this cheat sheet covers optimization techniques such as query folding, data modeling best practices, and efficient DAX writing. It helps users troubleshoot and enhance report performance. Essential for developers managing large datasets.

8. Power BI Mobile Cheat Sheet: Designing for On-the-Go Insights

This guide focuses on creating Power BI reports and dashboards optimized for mobile devices. It discusses layout adjustments, touch-friendly visualizations, and mobile-specific features. Perfect for users who need to deliver data insights accessible from smartphones and tablets.

9. Power BI Security Cheat Sheet: Protecting Your Data

This cheat sheet addresses data security within Power BI, including row-level security, workspace permissions, and data governance. It provides practical steps to safeguard sensitive information while maintaining report accessibility. Ideal for administrators and developers responsible for secure data environments.

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power bi cheat sheet: Exam Ref 70-778 Analyzing and Visualizing Data with Microsoft Power BI Daniil Maslyuk, 2018-06-07 Prepare for Microsoft Exam 70-778-and help demonstrate your real-world mastery of Power BI data analysis and visualization. Designed for experienced BI professionals and data analysts ready to advance their status, Exam Ref focuses on the critical thinking and decision-making acumen needed for success at the MCSA level. Focus on the expertise

measured by these objectives: Consume and transform data by using Power BI Desktop Model and visualize data Configure dashboards, reports, and apps in the Power BI Service This Microsoft Exam Ref: Organizes its coverage by exam objectives Features strategic, what-if scenarios to challenge you Assumes you have experience consuming and transforming data, modeling and visualizing data, and configuring dashboards using Excel and Power BI

power bi cheat sheet: Microsoft Excel 2016 Business Analytics and Power BI Quick Reference Guide, 2017 Ed. (4-Page Cheat Sheet of Instructions, Tips and S , 2017-01-18 This guide was updated in January 2017 to reflect the latest user interface. For power users who want to bring big data onto the desktop this four page laminated quick reference provides guidance on powerful Excel 2016 and Power BI data analytic features. Step-by-step instructions are given for many data gathering, transforming, analyzing and visualizing features such as the Data Model, Query Editor and Power View. DAX functions are highlighted and Power BI Desktop is introduced. Written with Beezix's trademark focus on clarity, accuracy, and the user's perspective, this guide will be a valuable resource to improve your proficiency in using Excel 2016. This guide is suitable as a training handout, or simply an easy to use reference guide. The following topics are covered: Gathering Data: Excel's Data Model; Adding External Data to the Data Model; Adding Ranges to the Data Model; Adding a Folder of Files to the Data Model; Edit Existing Connections. Transforming Data: Opening the Query Editor; Using the Query Editor to Transform; Using the Query Editor to Filter; Suggested Data Transformations; Working with Query Actions; Using the Query Editor to Merge; Using the Query Editor to Unpivot Columns; Using the Query Editor to Append; Using the Query Editor to Split Text Into Columns; Closing the Query Editor; Add Table Data to the Data Model; Defining Relationships Across Multiple Tables; Managing Relationships Within the Data Model. Analyzing Data: Quick Analysis Using PivotTables; Creating a PivotTable from the Data Model; Adding Tables and Fields to an Existing PivotTable; Updating PivotTable Data; Analyzing with Calculated Columns and Measures; Calculating in PivotTables; Calculating in the Data Model Using DAX; Forecasting with the Forecast Sheet Wizard. Visualizing with Power View: Adding Power View to Excel; Creating a Power View Sheet; Adding Visualizations to Power View. Visualizing with Power

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carefully crafted hands-on demonstrations, case studies, and interview questions Gain insights into HR interviews, salary negotiations, and onboarding procedures Who this book is for This book is for data enthusiasts and professionals aspiring to secure interviews for roles such as data analyst, business intelligence analyst or developer, and Power BI-related positions. Whether you're new to the field or an experienced practitioner, this book provides valuable insights and strategies to enhance your Power BI skills and succeed in the hiring process. Basic knowledge of Power BI and data analytics, coupled with a drive to create impactful Power BI solutions with precise data insights, will help you make the most of this book.

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cloud service Who This Book Is For Data analysts, developers, architects, and managers who want to leverage Power BI for their reporting solution

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and avoid common mistakes. Also, experienced data analysts will find tips and tricks on how to enrich their reports with advanced visuals. This book helps you understand: The basic rules for classic charts that are used in 90% of business reports Exceptions to general rules based on real business cases Best practices for dashboard design How to properly set up interactions How to prepare data for advanced visuals How to avoid pitfalls with eye-catching charts

power bi cheat sheet: Microsoft Fabric Analytics Engineer Associate Certification

Companion Dr. Gomathi S, 2025-08-31 As organizations increasingly leverage Microsoft Fabric to unify their data engineering, analytics, and governance strategies, the role of the Fabric Analytics Engineer has become more crucial than ever. This book equips readers with the knowledge and hands-on skills required to excel in this domain and pass the DP-600 certification exam confidently. This book covers the entire certification syllabus with clarity and depth, beginning with an overview of Microsoft Fabric. You will gain an understanding of the platform's architecture and how it integrates with data and AI workloads to provide a unified analytics solution. You will then delve into implementing a data warehouse in Microsoft Fabric, exploring techniques to ingest, transform, and store data efficiently. Next, you will learn how to work with semantic models in Microsoft Fabric, enabling them to create intuitive, meaningful data representations for visualization and reporting. Then, you will focus on administration and governance in Microsoft Fabric, emphasizing best practices for security, compliance, and efficient management of analytics solutions. Lastly, you will find detailed practice tests and exam strategies along with supplementary materials to reinforce key concepts. After reading the book, you will have the background and capability to learn the skills and concepts necessary both to pass the DP-600 exam and become a confident Fabric Analytics Engineer. What You Will Learn A complete understanding of all DP-600 certification exam objectives and requirements Key concepts and terminology related to Microsoft Fabric Analytics Step-by-step preparation for successfully passing the DP-600 certification exam Insights into exam structure, question patterns, and strategies for tackling challenging sections Confidence in demonstrating skills validated by the Microsoft Certified: Fabric Analytics Engineer Associate credential Who This Book Is For Data engineers, analysts, and professionals with some experience in data engineering or analytics, seeking to expand their knowledge of Microsoft Fabric

power bi cheat sheet: MODERN SQL FOR BUSINESS INTELLIGENCE MAXIM BROOKS, Are your Power BI dashboards frustratingly slow? Do you find yourself fighting with complex data transformations in Power Query instead of delivering the insights your business needs? Or perhaps you're a SQL expert who's been asked to build visual reports and you're not sure where to begin? You're not alone. Many BI analysts and SQL developers face a critical gap: they know the power of Power BI and they know the language of SQL, but making them work together in perfect harmony is a challenge. The result is often slow reports, complex maintenance, and a constant struggle to deliver truly deep, actionable analysis. This is the single biggest barrier to becoming a high-impact BI professional. This book was written to bridge that gap. It is designed specifically for the data professional who knows there has to be a better way. It understands that you might feel limited by a graphical interface, or that you might be an SQL veteran feeling a little lost in the new world of interactive dashboards. This book respects your experience and gives you a new, powerful methodology. SQL is not just a legacy skill; it is your single greatest asset for building high-performing BI solutions. This guide introduces the SQL-First approach to Business Intelligence—a proven method for pushing complex work to the database, where it belongs. This frees up Power BI to do what it does best: create stunning, lightning-fast, and interactive visualizations. This comprehensive handbook breaks down the entire BI workflow into manageable, step-by-step chapters. It focuses on practical application, showing you how to leverage your SQL skills to solve real-world business problems and build a truly professional-grade analytics portfolio. It's about empowering you to architect solutions that are not just beautiful, but also robust, scalable, and incredibly fast. Inside, you'll discover how to: · Stop fighting with slow dashboards: Learn the performance tuning techniques that senior BI professionals use to make their reports fly. · Build a rock-solid data foundation: Master the art of data modeling with star schemas, creating a single

source of truth that the entire organization can trust. · Move from being a report builder to a true BI architect: Understand the crucial relationship between SQL and Power Query, and when to use each tool for maximum effect. · Answer complex business questions with confidence: Implement advanced analytical scenarios like RFM segmentation, market basket analysis, and customer cohort analysis directly in SQL. · Future-proof your career: Gain a clear understanding of how SQL is evolving and its central role in the cloud, big data, and AI. Here's a glimpse of what you'll learn: · Advanced SQL for Data Transformation: Master CTEs, Window Functions (LAG, LEAD, RANK), and CASE statements for sophisticated data shaping. · Data Modeling for Power BI: Design and implement a high-performance star schema from the ground up. · Query Optimization: Learn to read Execution Plans, leverage Indexes, and write SARGable queries that the database loves. · The Power Query vs. SQL Debate: Understand the critical concept of Query Folding and the best practices for a hybrid approach. · DAX for the SQL Professional: Get a clear introduction to DAX, its core differences from SQL, and the powerful CALCULATE function. · Security & Governance: Implement Row-Level Security, manage permissions, and apply data governance best practices to your solutions. This book is more than just a guide to syntax; it's a roadmap to becoming the BI expert that companies are fighting to hire. It's time to connect your SQL expertise to the power of modern visualization and deliver the insights that truly drive the business forward. Ready to become the indispensable BI expert your organization relies on?

power bi cheat sheet: Data Analytics & Visualization All-in-One For Dummies Jack A. Hyman, Luca Massaron, Paul McFedries, John Paul Mueller, Jonathan Reichental, Joseph Schmuller, Alan R. Simon, Allen G. Taylor, 2024-04-09 Install data analytics into your brain with this comprehensive introduction Data Analytics & Visualization All-in-One For Dummies collects the essential information on mining, organizing, and communicating data, all in one place. Clocking in at around 850 pages, this tome of a reference delivers eight books in one, so you can build a solid foundation of knowledge in data wrangling. Data analytics professionals are highly sought after these days, and this book will put you on the path to becoming one. You'll learn all about sources of data like data lakes, and you'll discover how to extract data using tools like Microsoft Power BI, organize the data in Microsoft Excel, and visually present the data in a way that makes sense using a Tableau. You'll even get an intro to the Python, R, and SQL coding needed to take your data skills to a new level. With this Dummies guide, you'll be well on your way to becoming a priceless data jockey. Mine data from data sources Organize and analyze data Use data to tell a story with Tableau Expand your know-how with Python and R New and novice data analysts will love this All-in-One reference on how to make sense of data. Get ready to watch as your career in data takes off.

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Revit floor plans and make a Power BI dashboard to track model issues. By the end of this book, you'll have learned how to develop a script to gather a model's data and visualize datasets in Power BI easily. What you will learn Understand why businesses across the world are moving toward data-driven models Build a data bridge between BIM models and web-based dashboards Get to grips with Autodesk Dynamo with the help of multiple step-by-step exercises Focus on data gathering workflows with Dynamo Connect Power BI to different datasets Get hands-on experience in data management, analysis, and visualization techniques with guidance from experts across the world Who this book is for This book is for BIM managers, BIM coordinators, design technology managers, and all AEC professionals who want to learn Autodesk Dynamo to analyze, manage, and visualize their BIM data as well as understand some associated computer science topics. You need to have a background in BIM and knowledge of what a BIM model is to make the most of this book.

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power bi cheat sheet: POLICIES OF BUSINESS INTELLIGENCE USING BIG DATA ANALYTICS Dr. Yogesh Kumar Sharma , Dr. Rajendra Patil , Mr. Sachin Bhosale , Mr. Vinayak Pujari, Dr. Raju Shanmugam, Dr. Thirunavukkarasu Kannapiran, 2020-12-10 One approach to build up a valuable point of view about what business knowledge (BI) is and its significance in the business world is to take a gander at what business individuals talk about when the subject is BI. Building up a BI Strategy utilizing the techniques we'll portray in this book is a human serious procedure—as it ought to be. We can use demonstrated methods, however the nature of the results depends to a noteworthy degree on getting into the heads of key heads and chiefs. How would they see their reality, what are they hoping to achieve, and how would they need BI to support them? We can construct a business case that is slug verification from a consistent, corporate point of view, yet it likewise needs to reverberate with businessmen on a more instinctive level that squares with what they accept they would have the option to accomplish on the off chance that they would do well to BI. So to put a human face on BI, this section will step through the business difficulties and BI holes recognized by top heads in an assembling organization we'll call Big Brand Foods (BBF). We'll at that point sum up the BI Vision and BI Portfolio that risen up out of the system definition procedure and offer a few speculations about BI openings (BIOs) for other assembling organizations. While we've picked an assembling organization for this BI contextual investigation, the rationale and procedure of recognizing industry challenges, organization systems, utilitarian difficulties, and BIOs applies to any organization in any industry. Further, the perspectives on heads in the distinctive business capacities might be of incentive to chiefs in a similar capacity yet various businesses.

power bi cheat sheet: Financial Modelling in Power BI Jonathan Liao, Liam Bastick, 2022-07-28 Just like a shovel, this book is genuinely ground-breaking. It hits you over the head with the proverbial gardening tool, implementing the way forward for financial modelling. Many working in banking and finance create their financial models in Excel and then import them into Power BI for graphical interpretation and further analysis. Not on our watch. We're going to jettison the universal spreadsheet and build the entire model in Power BI. We can't stress how far off the range we're

taking the horses. If you are reading this, you are a true pioneer. Some have managed to build the odd financial statement in Power BI, but all three? This is where you can gain a major advantage in the workplace. If you build the calculations for financial statements in Power BI, you can produce statements by product, by customer, by geography... Get the picture? The limitation will be restricted to the granularity of the underlying data and your imagination. This book unearths some of the tricks, measures, logic and tools needed to build the model (there is no need to bury your mistakes). We just can't promise you a rose garden... With the usual jokes in spades, it's just a shame we couldn't get Doug (get it?) to assist.

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Bob Familiar, Jeff Barnes, 2017-06-05 Learn how today's businesses can transform themselves by leveraging real-time data and advanced machine learning analytics. This book provides prescriptive guidance for architects and developers on the design and development of modern Internet of Things (IoT) and Advanced Analytics solutions. In addition, Business in Real-Time Using Azure IoT and Cortana Intelligence Suite offers patterns and practices for those looking to engage their customers and partners through Software-as-a-Service solutions that work on any device. Whether you're working in Health & Life Sciences, Manufacturing, Retail, Smart Cities and Buildings or Process Control, there exists a common platform from which you can create your targeted vertical solutions. Business in Real-Time Using Azure IoT and Cortana Intelligence Suite uses a reference architecture as a road map. Building on Azure's PaaS services, you'll see how a solution architecture unfolds that demonstrates a complete end-to-end IoT and Advanced Analytics scenario. What You'll Learn: Automate your software product life cycle using PowerShell, Azure Resource Manager Templates, and Visual Studio Team Services Implement smart devices using Node.JS and C# Use Azure Streaming Analytics to ingest millions of events Provide both Hot and Cold path outputs for real-time alerts, data transformations, and aggregation analytics Implement batch processing using Azure Data Factory Create a new form of Actionable Intelligence (AI) to drive mission critical business processes Provide rich Data Visualizations across a wide variety of mobile and web devices Who This Book is For: Solution Architects, Software Developers, Data Architects, Data Scientists, and CIO/CTA Technical Leadership Professionals

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