Customize the Excel Environment

Customize formula, proofing, and saving options

Enhancing workbooks and manage workbook properties

Exporting and sourcing data

✓ **Video:** Export data
3 min

✓ **Reading:** Exercise: Exporting worksheet data
10 min

▶ **Video:** Use data sources
6 min

📖 **Reading:** Exercise: Using data sources
10 min

📄 **Practice Assignment:** Knowledge check: Exporting and sourcing data
15 min

📄 **Graded Assignment:** Module graded quiz

Exercise: Using data sources

Note: You can pass this course and all graded assessments without access to the downloadable version of Excel.

How to complete this exercise

To complete this exercise, you will need access to Microsoft 365 Excel.

Note: Keep in mind that if you are using free Office for the web or another version of the Microsoft 365 Excel application some features covered in this exercise may not be available.

Free Office for the web

If you do not have access to Microsoft 365 Excel, you can use Free Office for the web. This version of Office allows you to view and edit files in apps like Word, Excel, and PowerPoint. This free service is available to anyone with a Microsoft account.

Access Microsoft Account

Log in to your Microsoft account. 🗗 Type the email, phone number, or Skype sign-in that you use for other services (Outlook, Office, etc.), then select Next. If you don't have a Microsoft account, you can select No account? Create one!

Let's get started!

You have been asked to create a price list, in Canadian dollars, for some of your company's products. You will need to update it regularly using the current exchange rate. You first need to import your price list, then create a web query to load and maintain the current exchange rate.
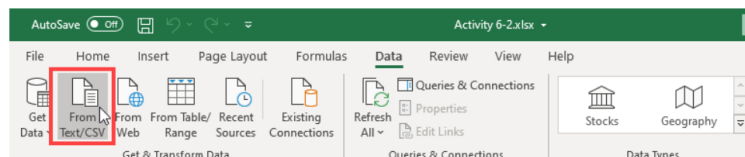
Note: The will need the following activities to complete this exercise:

- Exercise: Using Data Sources 🗗
- Exercise: Using Data Sources_text 🗗

1. Click on the link below to open the Microsoft Excel exercise document you can use to complete this exercise.

Exercise: Using Data Sources 🗗

2. Click **Data** → **From Text/CSV**:

3. The Import Data dialog box will open. Navigate to your activity files and select **Exercise: Using Data Sources_text**, then click the **Import** button:
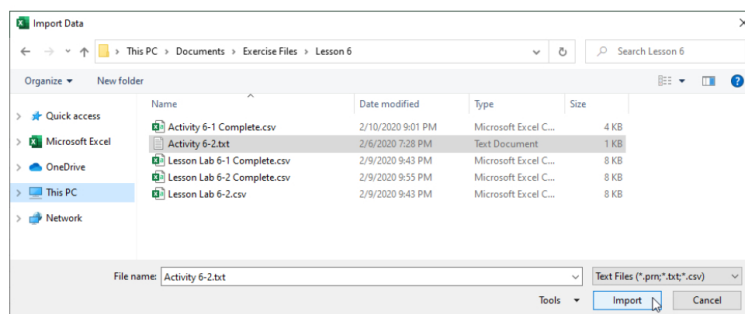
4. The Get & Transform Data dialog box will open, displaying the data in the source file. If the selection in the Delimiter drop-down list reads --**Custom**--, and there is an extra header, click to select the **Tab** option in the **Delimiter** drop-down list:
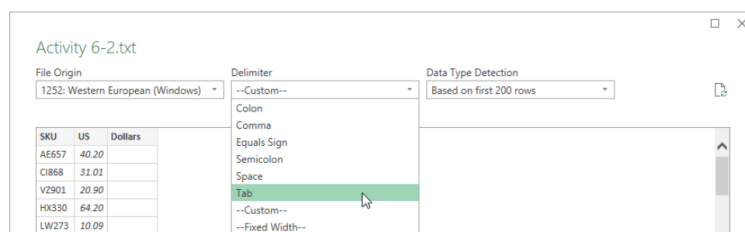
5. With your data properly aligned in the list box, click the **Load** button:

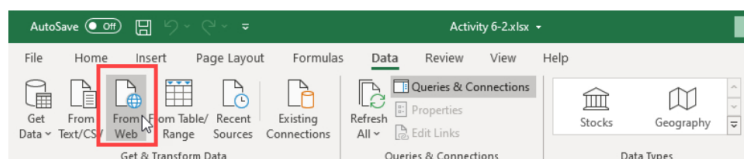6. A new worksheet is created and the data from your text file is loaded as a table. The Queries & Connections task pane opens on the right of the screen:
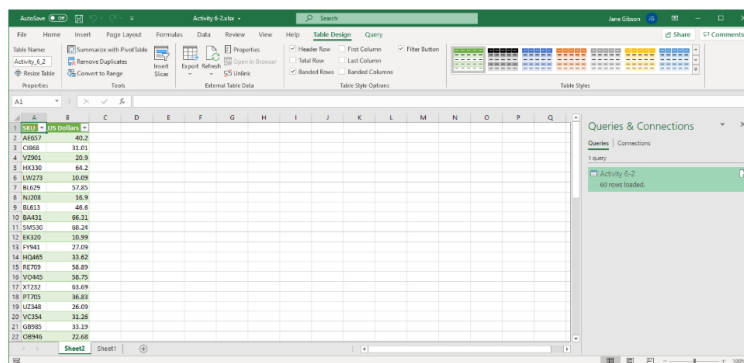
7. Click on the **Sheet1** tab to make it the active worksheet. Click to select cell **A1**, then press **Ctrl + C** to copy the URL of the exchange rate site:
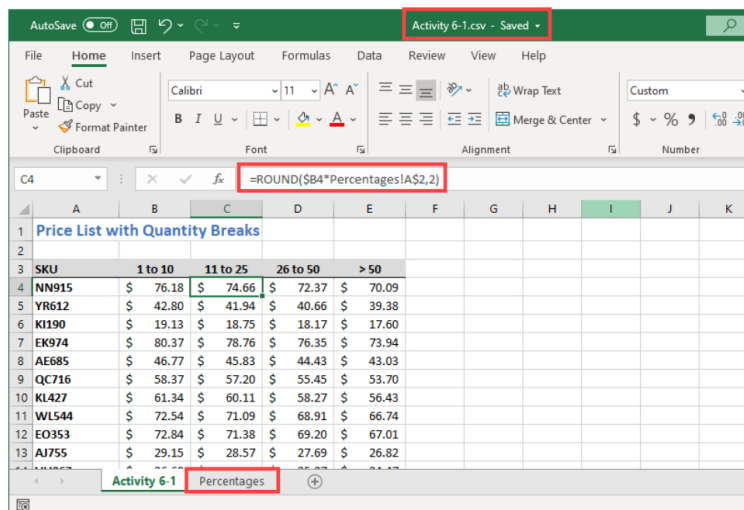
8. Now click **Data → From Web**:

9. The From Web dialog box will open. Click to select the **URL** field, then press **Ctrl + V**, to paste the URL. Click **OK**:
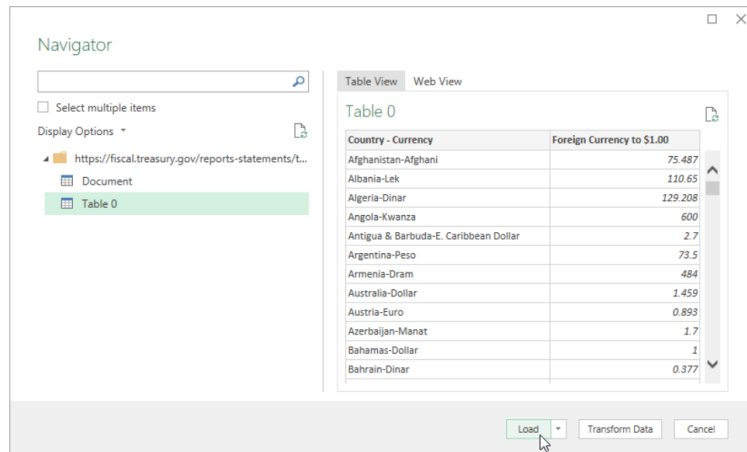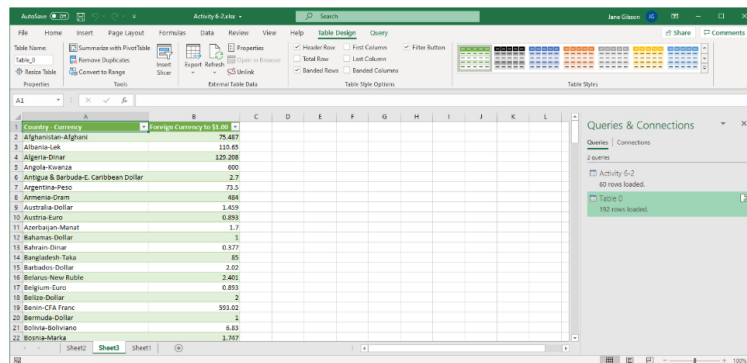
10. The Navigator dialog box will open. Click to select **Table 0** in the list box on the left, confirm the data is present in the Table View window on the right, then click the **Load** button:


11. A new worksheet is created and the data from the website is loaded as a table. The query appears under the **Exercise: Using Data Sources**


12. Hover your cursor over the **web query** in the Queries & Connections task pane, then click **Edit** in the table dialog box that appears:
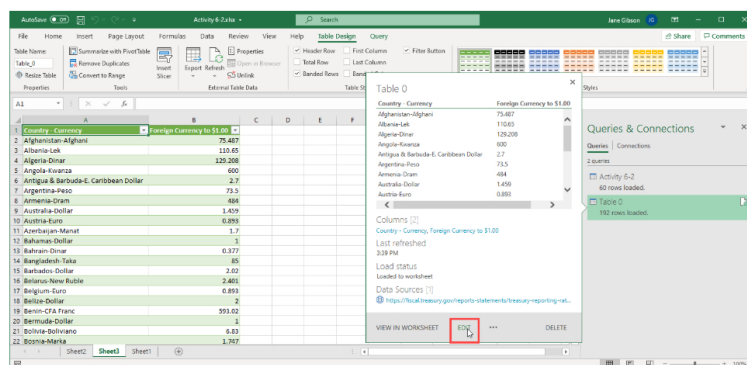

13. The Power Query Editor will launch. Click the **filter** button to the right of the header of the Country-Currency column, then click to select the **Text Filters** field and begin typing "**Canada**". When Canada-Dollar is the only selected item, click **OK**:
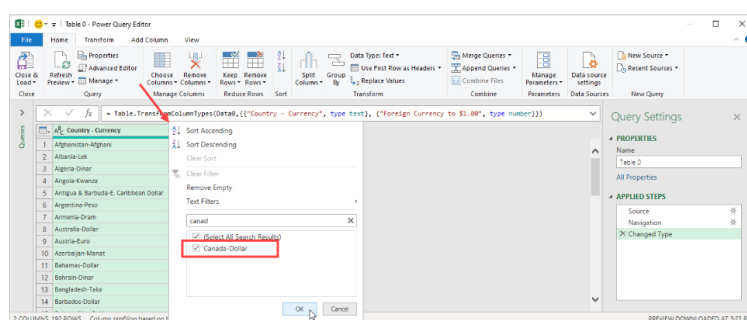
14. Click the **Close and Load** command in the Close group of the Home tab:
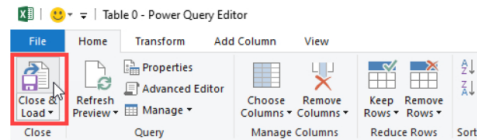
15. You will see that the Web Query table now only displays the Canada-Dollar row of data from the data set:
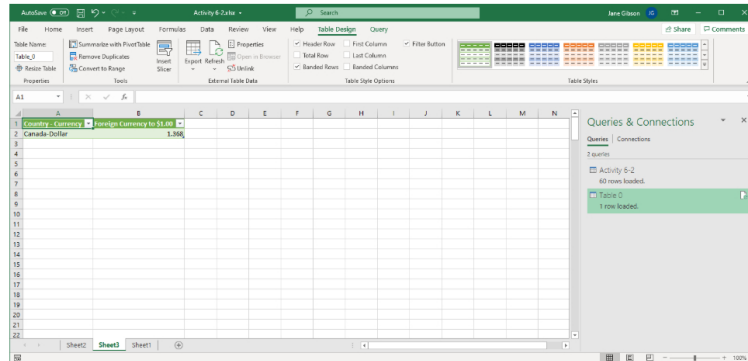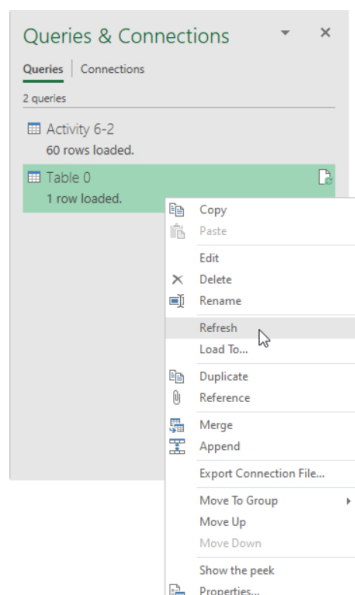

16. Click the **Sheet2** tab to make it the active sheet, then click to select cell **C2**. Type the formula "**=[@[US Dollars]]*VLOOKUP("Canada-Dollar",Sheet3!A:B,2,FALSE)**", then press the **Enter** key:

17. The table containing the price list will auto complete the formula for every row in the column:

18. To refresh the data from the website, right-click on the query in the Queries and Connections task pane, then select **Refresh**:

19. You can now save your changes as **Activity 6-2** Complete and close Microsoft Excel 365 to complete the activity.

20. Now, you can check out an example of a completed document in the link below:

Completed exercise: Using Data Sources ⬈

Mark as completed

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Completed exercise: Using Data Sources ⬈

Mark as completed

👍 Like   👎 Dislike   🚩 Report an issue