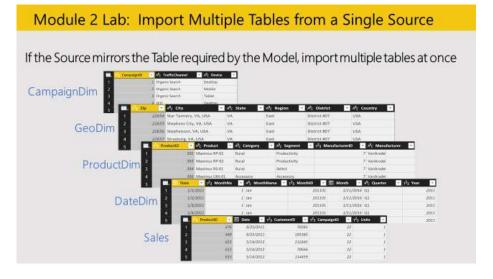


Module 2 Lab: Import and basic transform



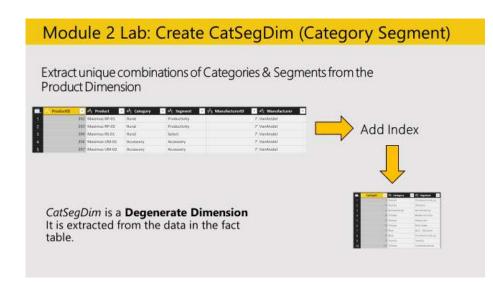
Student Notes

Step by Step

VERSION CHECK!!

Objective: Import multiple worksheets from an Excel file in one step

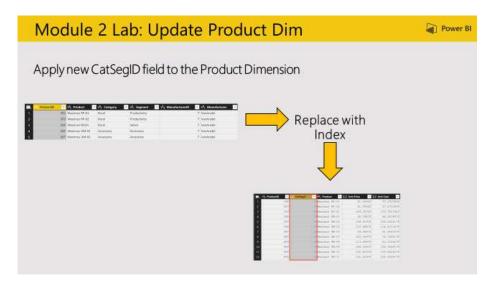
- 1. Get Data > from Excel
 - C:\Power BI_Adv_M\VansArsdel_Actuals.xlsx
- 2. Select the following Tables (All but CustomerDim):
 - a) CampaignDim
 - b) GeoDim
 - c) ProductDim
 - d) DateDim
 - e) Sales
- 3. In GeoDim, change the [ZIP] Data Type to Text



Step by Step

Objective: Create the Product Category Dimension by extracting Categories from the ProductDim

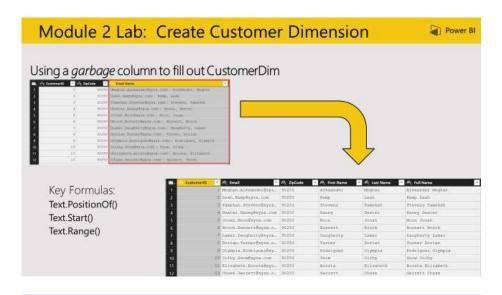
- 1. From the View ribbon **check** "Always Allow"
- 2. **Duplicate** the *ProductDim* query
- 3. Highlight [Category] and [Segment], and Remove other columns
- 4. Highlight [Category] and [Segment], and Remove Duplicates
- 5. Add Column > Add Index Column starting at 1, with column name [CatSegID]
- **6. Reorder Columns:** [CatSegID], [Category], [Segment]
- 7. **Rename** the query "CatSegDim"



Step by Step

Objective: Update the Product Category ID in the ProductDim

- 1. Select the *ProductDim* query
- 2. From Home Ribbon > Merge Queries > **Select** ProductDim
 - a) From *ProductDim*, **highligh**t [Category] and [Segment]
 - b) From CatSegDim, highlight [Category] and [Segment]
 - c) Note the Join Kinds available, and leave Left Outer
 - **d) Expand** the [NewColumn] > **Select** [CatSegID] and **deselect** "Use Original column name as prefix"
- **3. Remove columns:** [Category], [Segment], [Manufacturer ID], and [Manufacturer].
 - a) Hint: There is only one manufacturer name and one manufacturer ID, so we don't need this information!
- **4. Reorder columns**: [ProductID], [CatSegID], [Product], [Unit Price], [Unit Cost]



Step by Step

Objective: Create a First, Last, and Full Name columns based on the Email Name column.

- 1. Use **Recent Sources** to get *CustomerDim* from Excel
- 2. Change the ZipCode column data type to TEXT
- 3. Split by Delimiter Custom ": " colon space
- 4. Replace to Remove (and)
- 5. Add Column to find Text.PositionOf() the comma
 - a) Add Column > Custom Column
 - b) Name = "Separator"
 - c) Formula = Text.PositionOf([Email Name.2],",")
- 6. Use position of comma to split Last Name and First Name
 Add Columns for First Name, Last Name and Full Name
 Last Name = Text.Start([Email Name.2],[Separator])
 First Name = Text.Range([Email Name.2],[Separator]+2)
 Full Name = [First Name] & " " & [Last Name]

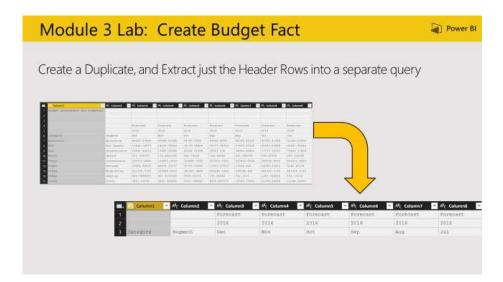
Import CSV, remove blank rows, and rename query to BudgetFact_Data | Topic | Columb | Columb

Student Notes

Step by Step

Objective: Create the Budget Fact

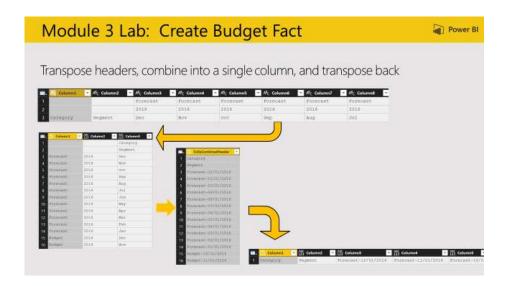
- 1. Import CSV document "C:\Power BI_Adv_M\VanArsdel_Budget.csv"
- 2. Rename query from VanArsdel_Budget to BudgetFact_Data
- 3. Remove Rows > Remove Top Rows, enter 3 (to remove the first 3 rows)



Step by Step

Objective: To Create a Header which combines the first three rows

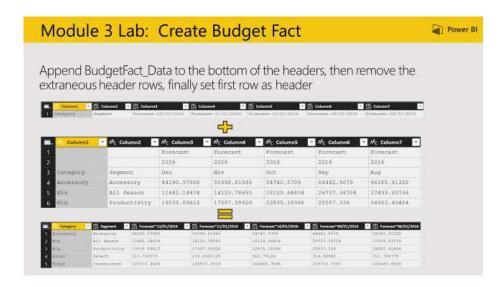
- 1. **Duplicate** query BudgetFact_Data rename to "BudgetFact"
- 2. Keep Rows > Keep Top Rows, enter 3 (to keep the first three rows)



Step by Step

Objective: To Create a Header which combines the first three rows

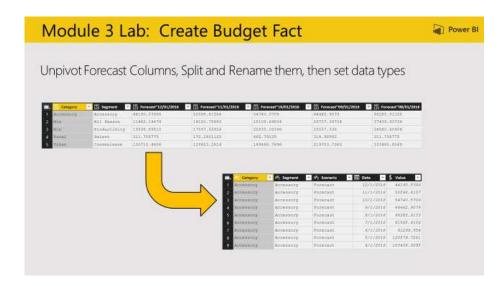
- 1. Transform > Transpose
- 2. Add Column > Custom Column
- 3. Add Column to combine month and year into a date
 - a) Add Column > Custom Column
 - b) Name = "Budget Month"
 - c) Formula = try Date.From ([Column3] & [Column2]) otherwise null
- 4. Add Column to combine Month and Scenario
 - a) Add Column > Custom Column
 - b) Name = "FullyCombinedHeader"
 - c) Formula = if Text.Length([Column3]) > 3 then [Column3] else [Column1] & "~" & Date.ToText([Budget Month], "M/D/YYYY")
 - d) Hint: Day did not come through correctly, as it is case sensitive. Update to "MM/dd/yy"
- 5. Remove all columns except for [FullyCombinedHeader]
- 5. Transform > Transpose to transpose back to wide



Step by Step

Objective: To Append the new header row to the data to create the new wide data table with a single header row

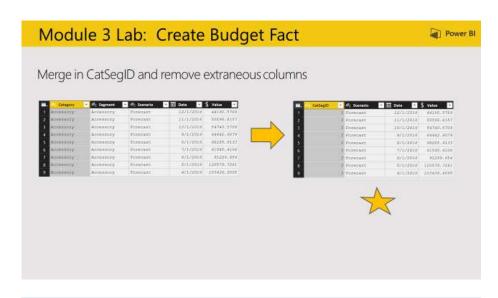
- 1. Append query BudgetFact_Data
- 2. Use First Row as Header to promote the newly fixed header row
- 3. Remove Rows > Remove Top Rows, enter 3 (to remove the first 3 rows the old header rows)



Step by Step

Objective: Create the Budget Fact

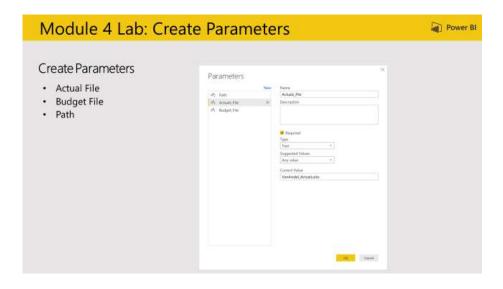
- 1. Highlight [Category] and [Segment] and Transform > Unpivot Other Columns
- 2. **Highlight** [Attribute] and navigate to Home > Split Column > By Delimiter > "~"
- **3.** Rename: [Attribute.1] = "Scenario", [Attribute.2] = "Date", [Value] = "Budget Amount"
- **4. Change** the Data Types: [Budget Amount] = Fixed Decimal, [Date] = Date



Step by Step

Objective: Merge the queries together to create the final Budget Fact table

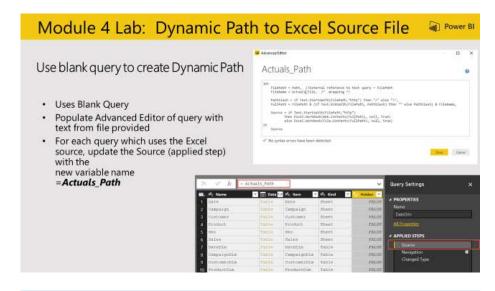
- 1. Home > Merge Queries > Select CatSegDim
 - a) From the CatSegDim highlight both [Category] and [Segment]
 - b) Go back up to BudgetFact, **highlight** both [Category] and [Segment]
 - c) Show the Join Kinds available, and leave "Left Outer"
 - **d)** Expand [NewColumn] > Select "CatSegID" and deselect "Use Original column name as prefix"
- **Remove**: [Category], [Segment]
- **3. Reorder:** [CatSegID], [Scenario], [Date], [Budget Amount]
- **4. Disable** the load of BudgetFact_Data



Step by Step

Objective: Update file paths to use dynamic variables

- 1. From the Home Ribbon > Manage Parameters
- 2. Create a new Parameter
 - a) Parameter Name: Path
 - b) Type: Text
 - c) Current Value = C:\Power BI_Adv_M\
- 3. Create a new Parameter
 - a) Parameter Name: Actuals_File
 - b) Type: Text
 - c) Current Value = VanArsdel_Actuals.xlsx
- **4. Create** a new Parameter
 - a) Parameter Name: Budget_File
 - b) Type: Text
 - c) Current Value = VanArsdel_Budget.csv
- **5. Update** the text files to ensure the parameter names are consistent



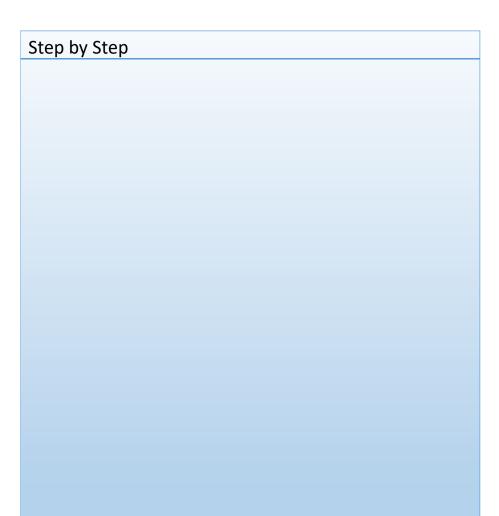
Step by Step

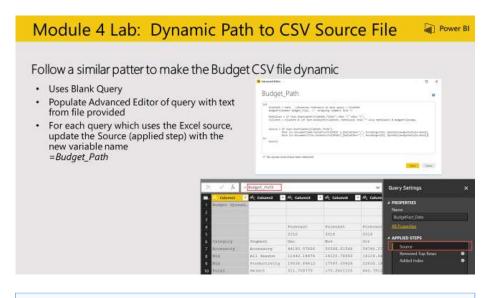
Objective: Create a query to validate if source is Web or Local and resolve path

- 1. Create a new blank query
 - a) Query Name: "Actuals_Path"
 - b) Text as shown in slide (white box)
- 2. Update Source Applied Step to use Resolved Path = "Actuals_Path" to the following Queries:
 - CampaignDim
 - CustomerDim
 - ProductDim
 - CatSegDim
 - DateDim
 - GeoDim
 - SalesFact

Use the Actuals_Path query as a variable in other queries In Advanced Editor, update the Excel source to the new Actuals_Path source. CampaignDim Original Original Original Original Original Original Original Original Original Description of the about of the about of the source of the new Actuals_Path source. CampaignDim Original Original Original Original Original Description of the about of the ab

Student Notes





Step by Step

Objective: Update CSV file paths to use dynamic variables

- 1. Create a new blank query
 - a) Query Name: "Budget_Path"
 - b) Copy in text from Budget_Path.txt
- 2. Update Source Applied Step to use ResolvedBudgetPath = "Budget_Path" to the following Queries:
 - BudgetFact
 - BudgetFact_Data

