

Module 3: Power BI Data

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Lesson 1: Using Excel as a Data Source for Power BI

Demo 1: Importing Files from a Local Folder

Import Data from an Excel File

1. Ensure that you have copied all folders from `Desktop/power-bi-quickstart` folder into `*D:*` drive before starting the lab.
2. Open the **D:\Demofiles\Mod03** folder.
3. Run **Setup.cmd** as **Administrator**.
4. Optionally if prompted to continue this operation, type **Y**, and then press Enter.
5. When the script completes, press any key to close the window.
6. On the taskbar, click **Power BI Desktop**.
7. To close the getting started window, at the top-right of the window, click **X**.
8. In the **Power BI Desktop** window, click **Get data**.
9. In the **Get Data** dialog box, click **Excel**, and then click **Connect**.
10. In the **Open** dialog box, navigate to **D:\Demofiles\Mod03\Demo**, click **Adventure Works Sales.xlsx**, and then click **Open**.
11. In the **Navigators** window, click **SalesPerson** to show a preview of the data. Use the horizontal scrollbar to display the columns, select the **SalesPerson** check box, and then click **Load**.

Navigator

Display Options ▾

- Adventure Works Sales.xlsx [8]
 - ☐ Sales_vSalesPerson
 - ☐ StoreWithAddresses3
 - ☐ StoreWithContacts2
 - ☐ StoreWithDemographics1
 - ☒ SalesPerson
 - ☐ StoreWithAddresses
 - ☐ StoreWithContacts
 - ☐ StoreWithDemographics

SalesPerson

BusinessEntityID	FirstName	LastName	JobTitle
274	Stephen	Jiang	North American Sales Manager
275	Michael	Blythe	Sales Representative
276	Linda	Mitchell	Sales Representative
277	Jillian	Carson	Sales Representative
278	Garrett	Vargas	Sales Representative
279	Tsvi	Reiter	Sales Representative
280	Pamela	Ansman-Wolfe	Sales Representative
281	Shu	Ito	Sales Representative
282	José	Saraiva	Sales Representative
283	David	Campbell	Sales Representative
284	Tete	Mensa-Annan	Sales Representative
285	Syed	Abbas	Pacific Sales Manager
286	Lynn	Tsoflias	Sales Representative
287	Amy	Alberts	European Sales Manager
288	Rachel	Valdez	Sales Representative
289	Jae	Pak	Sales Representative
290	Ranjit	Varkey Chudukatil	Sales Representative



Load

Transform Data

Cancel

Import Data from a CSV File

1. On the **Home** tab, click **Get Data**.
2. In the **Get Data** dialog box, click **Text/CSV**, and then click **Connect**.
3. In the **Open** dialog box, navigate to **D:\Demofiles\Mod03\Demo**, click **Adventure Works Sales.csv**, and then click **Open**.
4. In the preview window, drag the lower-right corner to enlarge the window and display more of the data, and then click **Load**.

Navigator

Display Options ▾

Adventure Works Sales.xlsx [8]

- ☐ Sales_vSalesPerson
- ☐ StoreWithAddresses3
- ☐ StoreWithContacts2
- ☐ StoreWithDemographics1
- ☒ SalesPerson
- ☐ StoreWithAddresses
- ☐ StoreWithContacts
- ☐ StoreWithDemographics

SalesPerson

BusinessEntityID	FirstName	LastName	JobTitle
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280	Pamela	Ansman-Wolfe	Sales Representative
281	Shu	Ito	Sales Representative
282	José	Saraiva	Sales Representative
283	David	Campbell	Sales Representative
284	Tete	Mensa-Annan	Sales Representative
285	Syed	Abbas	Pacific Sales Manager
286	Lynn	Tsoflias	Sales Representative
287	Amy	Alberts	European Sales Manager
288	Rachel	Valdez	Sales Representative
289	Jae	Pak	Sales Representative
290	Ranjit	Varkey Chudukatil	Sales Representative

Load

Transform Data

Cancel

5. In the **FIELDS** pane, expand the **Adventure Works Sales** table to show the columns. Mention that the two tables from different sources are now available to use together in a report.
6. On the **File** menu, click **Save As**, name the report **Adventure Works Sales 3**, and then save to the **D:\Demofiles\Mod03\Demo** folder.
7. Leave Power BI open for the next demonstration.

Lesson 2: Using Databases as a Data Source for Power BI

Demo 1: Importing Data from SQL Server

Import Data from SQL Server

1. On the **Home** tab, click the **Get Data** arrow, and then click **SQL Server**.
2. In the **SQL Server database** dialog box, in the **Server** box, type **localhost**, in the **Database (optional)** box, type **AdventureWorks**, and then click **OK**.
3. If the **Encryption Support** dialog box appears, click **OK**.
4. In the **Navigator** window, select the **Sales.vSalesPerson** and **Sales.vStoreWithDemographics** check boxes, and then click **Load**.
5. If the **Connection settings** window appears, ensure **Import** is selected, and then click **OK**.

Import Data Using a Query

1. On the **Home** tab, click the **Get Data** arrow, and then click **SQL Server**.
2. In the **SQL Server database** dialog box, in the **Server** box, type **localhost**, in the **Database (optional)** box, type **AdventureWorks**.
3. Expand **Advanced options**, and in the **SQL statement (optional, required database)** box, type **SELECT * FROM [Production].[Product]**, and then click **OK**.
4. In the **localhost: AdventureWorks** window, a preview of the data is displayed, and then click **Transform Data**.
5. In Power Query Editor, in the **ProductSubcategoryID** column, click the filter icon, and then click **Remove Empty**.
6. In the **Queries** pane, right-click **Query1**, click **Rename**, type **Products**, and then click **Close & Apply**.