# Module 3: Power BI Data
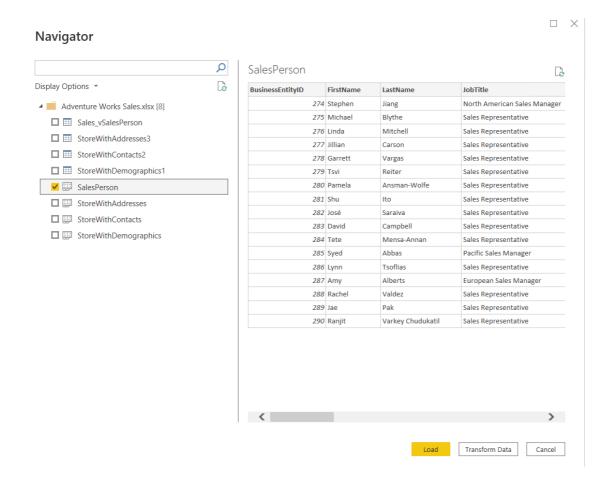
## Lesson 1: Using Excel as a Data Source for Power BI
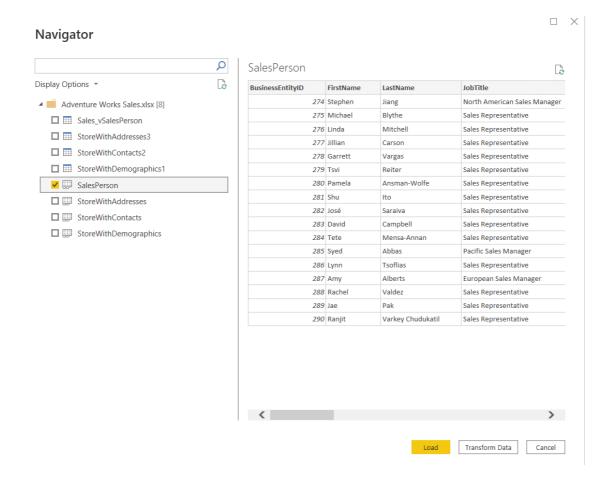
### Demo 1: Importing Files from a Local Folder

**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. In the **D:\Demofiles\Mod03** folder, run **Setup.cmd** as Administrator.

3. In the **User Account Control** dialog box, click **Yes**.

4. 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 **Navigator** 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



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**.