Module 3: Power BI Data

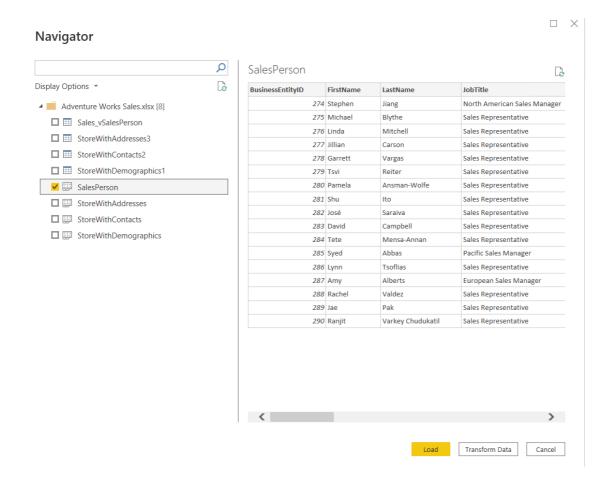
- Module 3: Power BI Data
 - Lesson 1: Using Excel as a Data Source for Power BI
 - <u>Demo 1: Importing Files from a Local Folder</u>
 - Import Data from an Excel File
 - Import Data from a CSV File
 - Lesson 2: Using Databases as a Data Source for Power BI
 - <u>Demo 1: Importing Data from SQL Server</u>
 - <u>Import Data from SQL Server</u>
 - Import Data Using a Query

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

Demo 1: Importing Files from a Local Folder

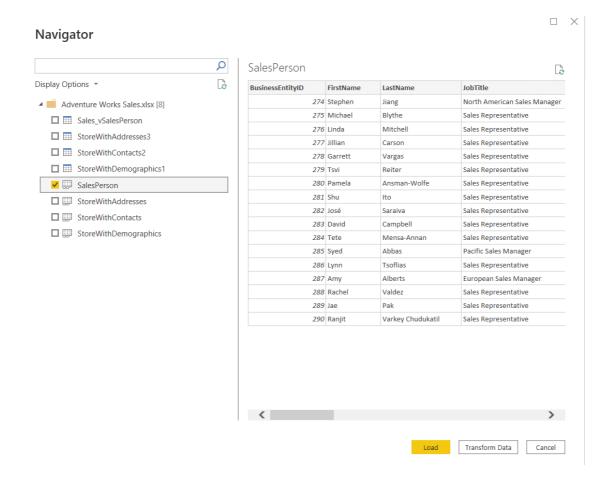
Import Data from an Excel File

- 1. Ensure that you have copied all folders from <code>Desktop/power-bi-quickstart</code> 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 \mathbf{X} .
- 8. In the **Power BI Desktop** window, click **Get data**.
- 9. In the Get Data dialog box, click Excel, and then click Connect.
- 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**.



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**.



- 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.
- 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.