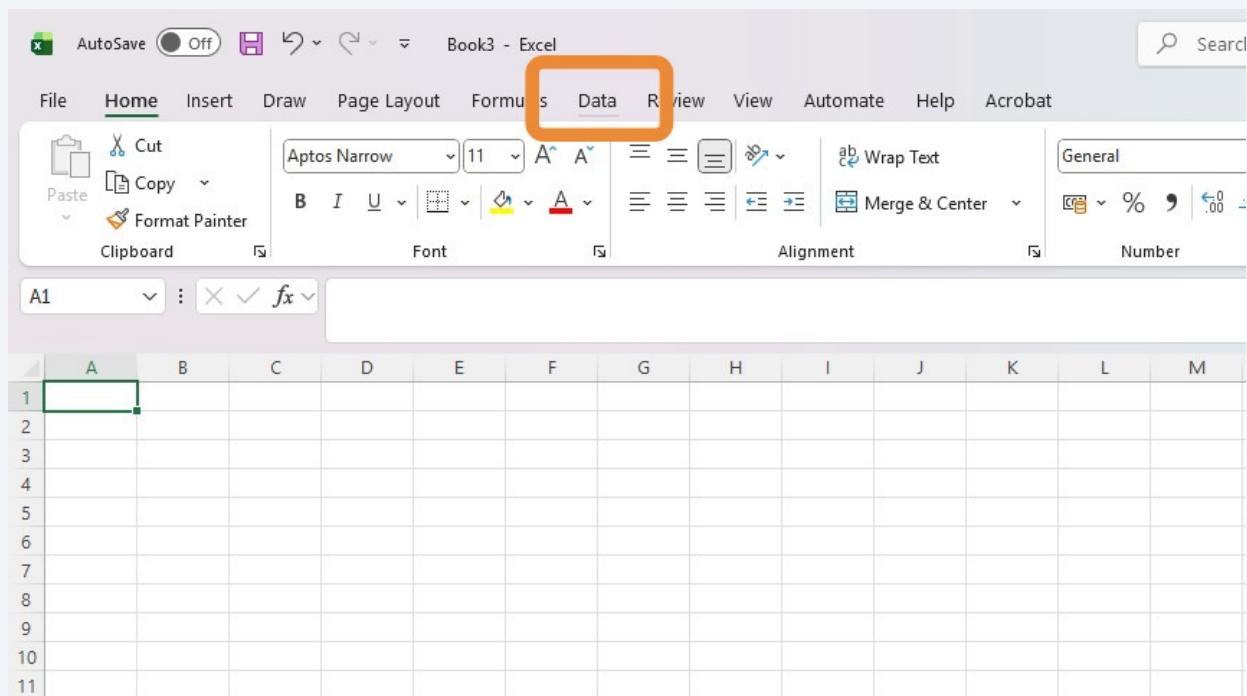


# Scenario Demonstration Skill Builder 1 - Getting Data Into Microsoft Excel

This guide provides a step-by-step approach to importing various data types into Microsoft Excel, including Excel files, CSVs, and PDFs. It simplifies the process of data integration, ensuring users can efficiently manage and format their datasets for analysis. By following these instructions, users can enhance their Excel skills and streamline their data handling, making it an essential resource for anyone looking to improve their data management capabilities.

- 1 Start by opening a blank spreadsheet

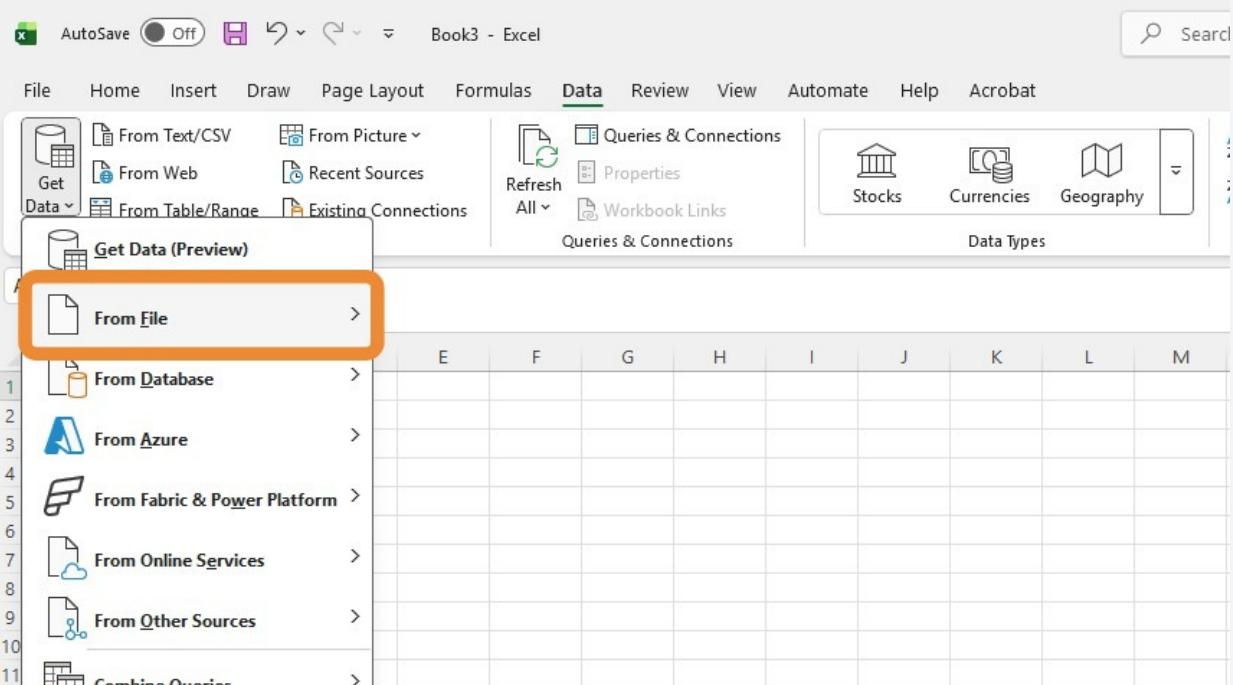
- 2 Now click on the **Data** option in the ribbon



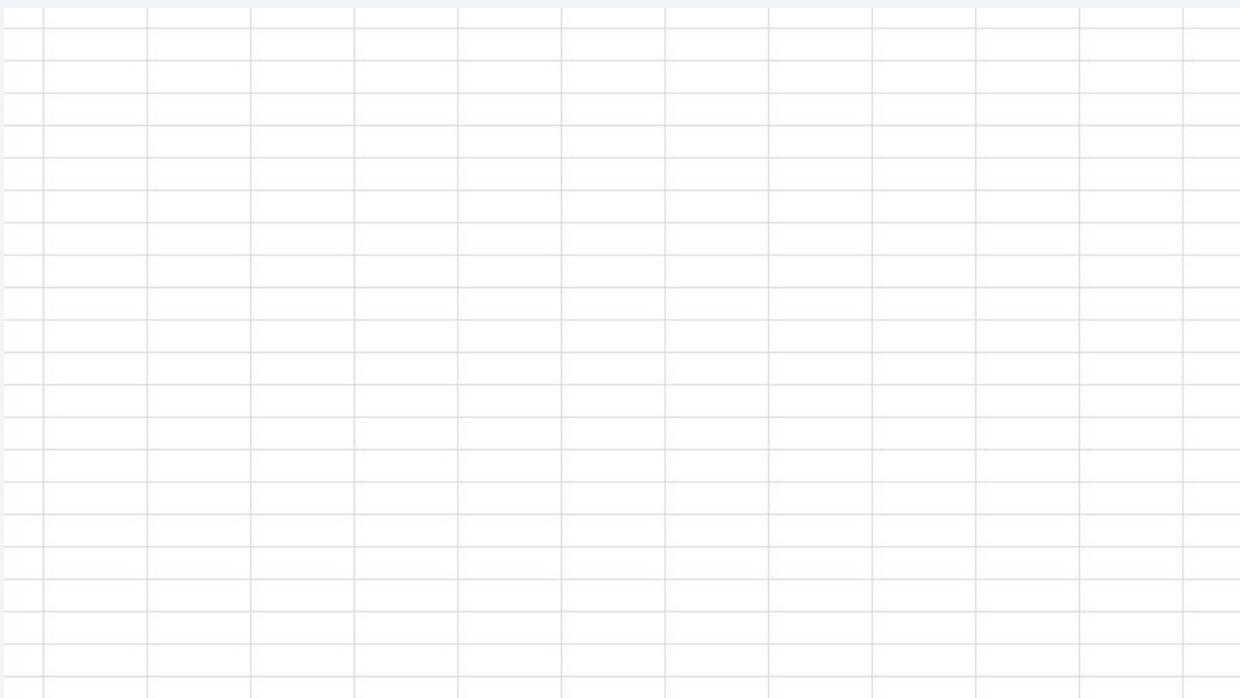
- 3 Select **Get Data**. This will be your go-to for all the imports that you will need to do for the Scenario Demonstrations



- 4 You have a lot of options, but most of the scenario demonstrations will expect you to import a file of some sort. The only other option we have seen so far is **Picture** which we will talk about in a separate document.

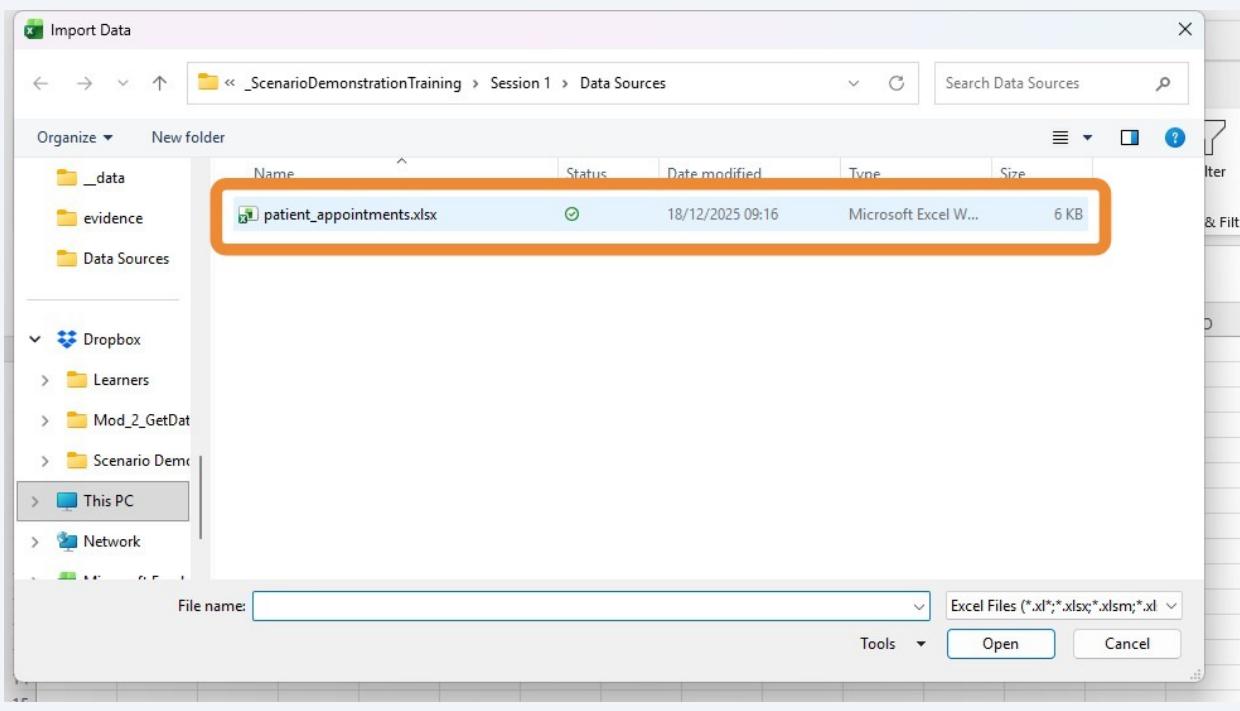


- 5 To start with let's import an Excel file - select **From Excel Workbook**

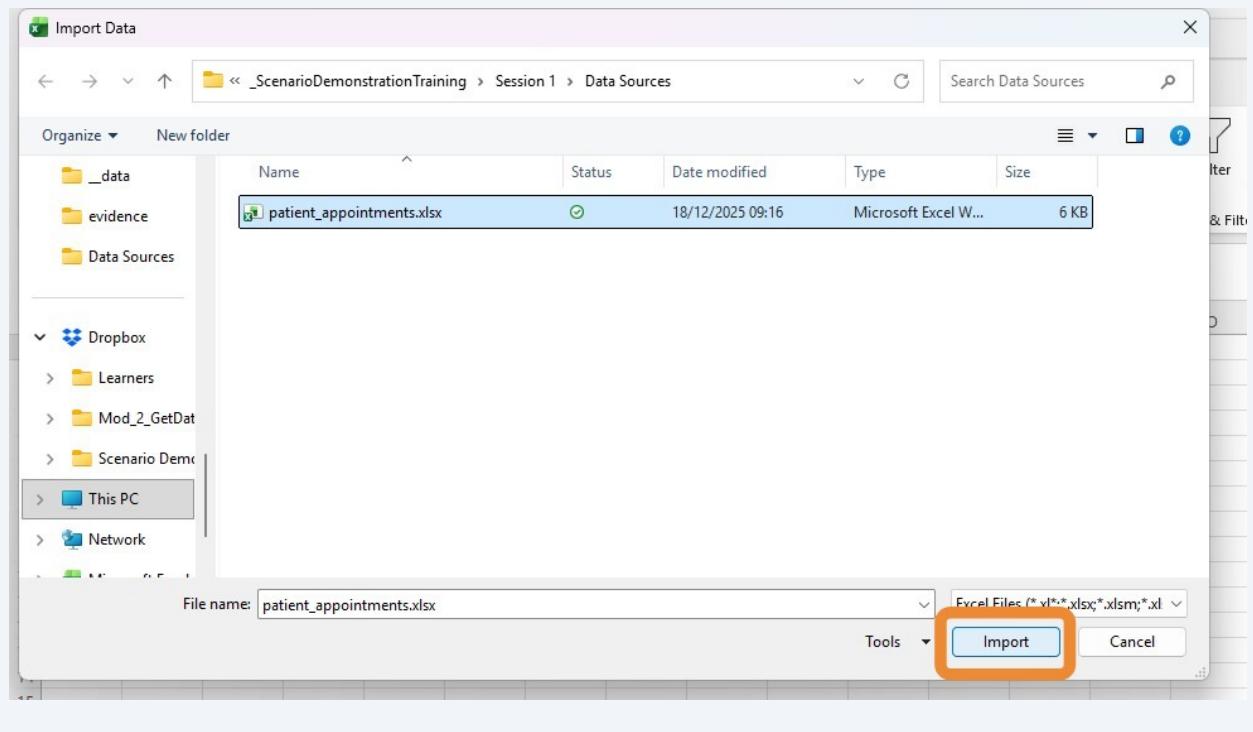


- 6 In the box that appears, navigate to the folder where you extracted these files and under *Session 1 > Data Sources* you should see an Excel sheet waiting for you.

Select it.

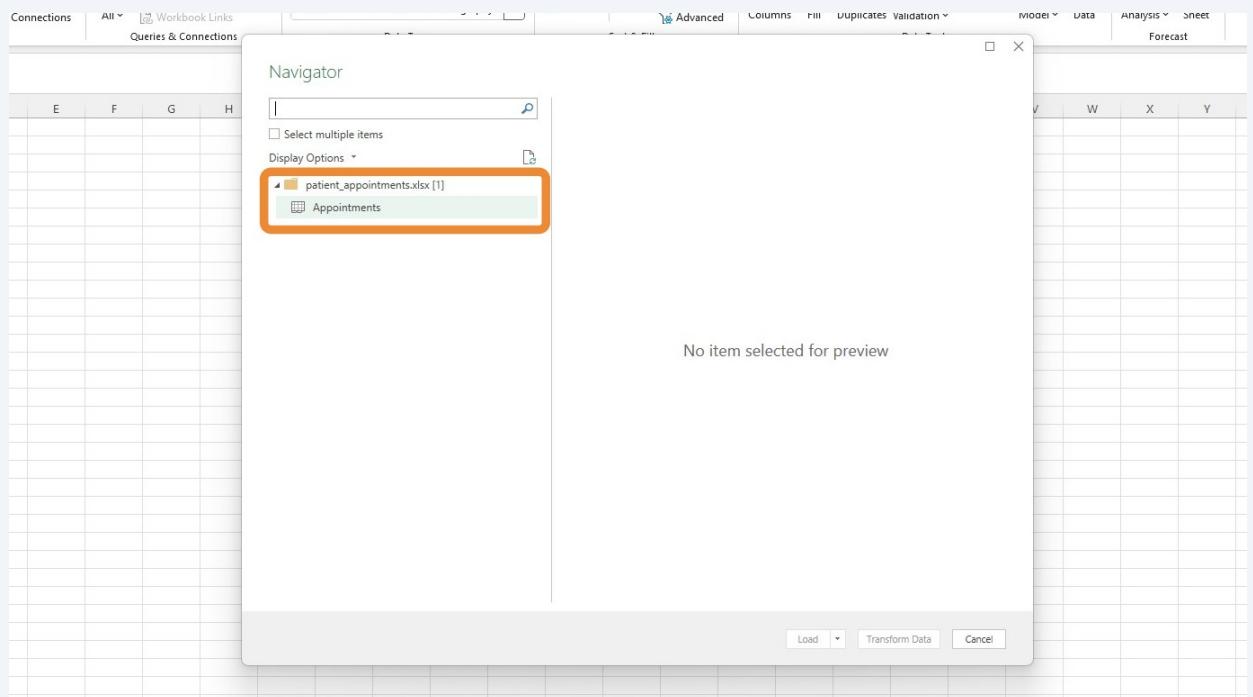


**7 Now click on Import**



**8 After a few seconds a navigator window will appear showing all the tables in the selected file. In this case there is only one.**

**Click on Appointments**



**9** The navigator will provide a preview of the data.

Once you are satisfied, click on **Load**

The screenshot shows the Microsoft Power BI Data Navigator interface. A preview window displays a table titled 'Appointments' with three columns: 'Patient\_ID', 'Appointment\_Count', and 'Did\_Not\_Attend'. The table contains 24 rows of data. At the bottom of the preview window, there are three buttons: 'Load' (highlighted with a red box), 'Transform Data', and 'Cancel'. The background shows a blurred view of a Power BI report with various charts and tables.

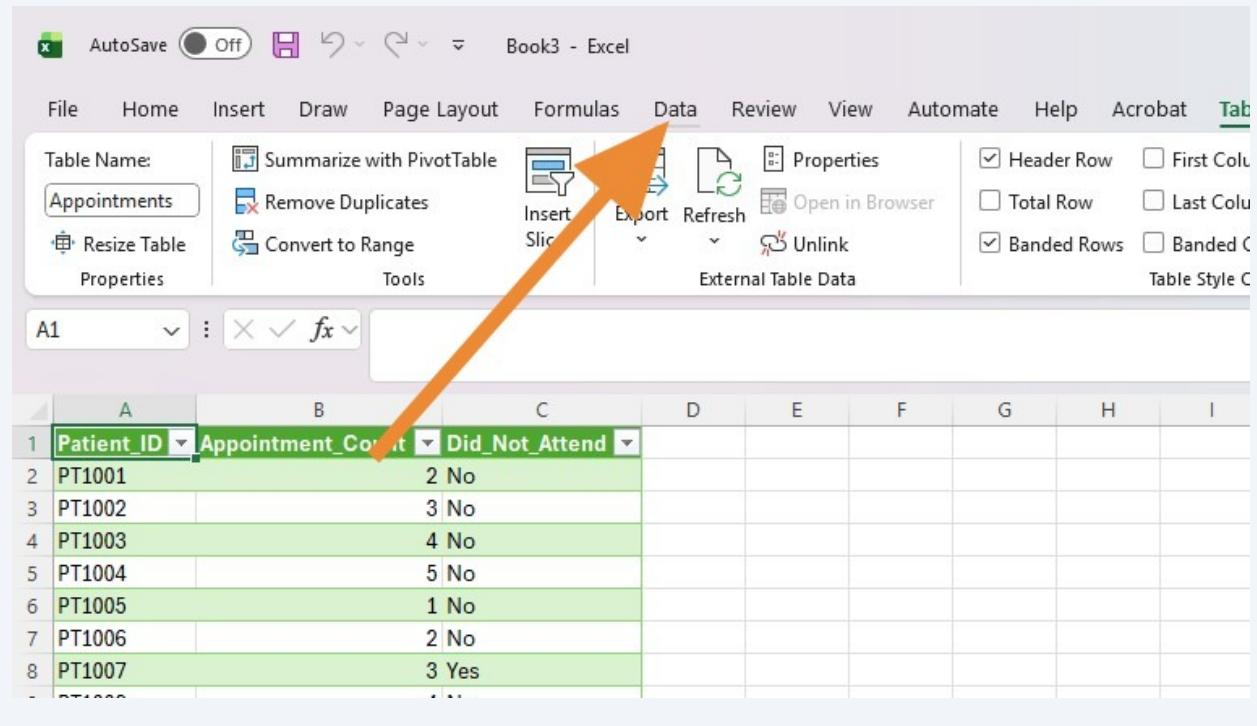
Patient_ID	Appointment_Count	Did_Not_Attend
PT1001	2	No
PT1002	3	No
PT1003	4	No
PT1004	5	No
PT1005	1	No
PT1006	2	No
PT1007	3	Yes
PT1008	4	No
PT1009	5	No
PT1010	1	No
PT1011	2	No
PT1012	3	No
PT1013	4	No
PT1014	5	Yes
PT1015	1	No
PT1016	2	No
PT1017	3	No
PT1018	4	No
PT1019	5	No
PT1020	1	No
PT1021	2	Yes
PT1022	3	No
PT1023	4	No
PT1024	5	No

10

After a few seconds the data will appear in your spreadsheet, already formatted as a table.

But we are not done yet!

Click **Data** again

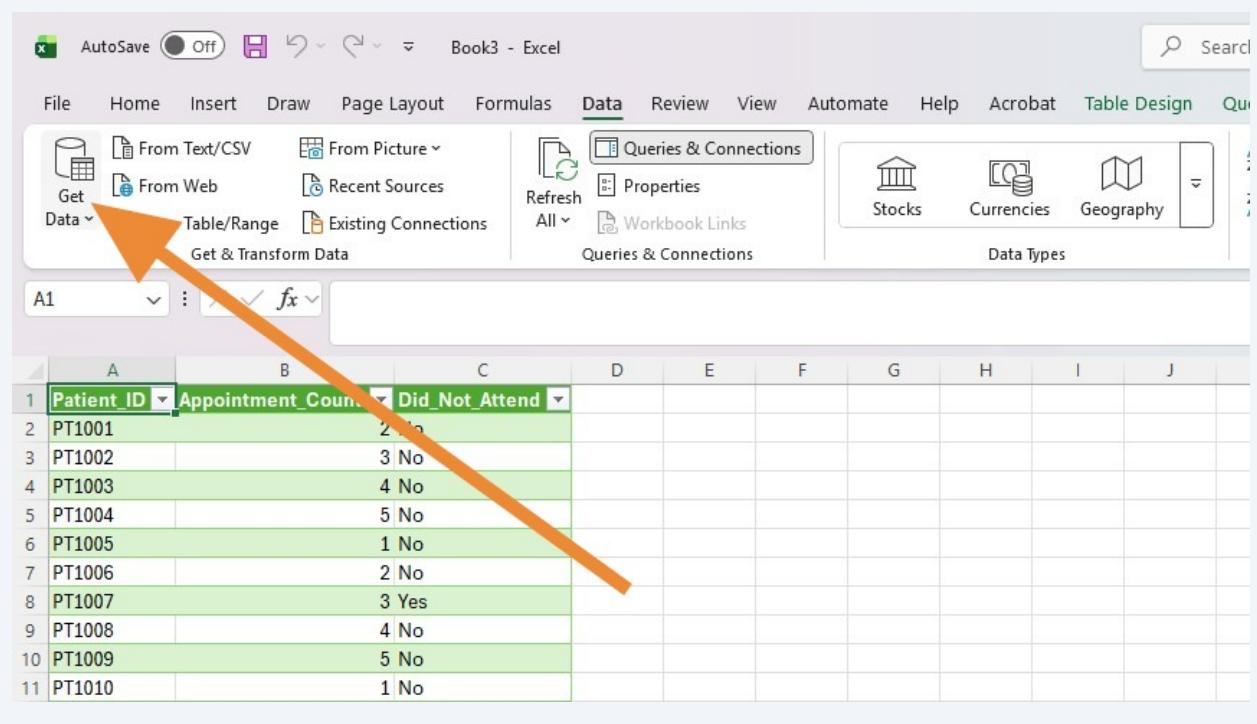


The screenshot shows the Microsoft Excel ribbon with the 'Data' tab selected. In the 'Table' group, the 'Insert' icon is highlighted with an orange arrow. Below the ribbon, a table is displayed with columns: Patient\_ID, Appointment\_Count, and Did\_Not\_Attend. The rows show data for patients PT1001 through PT1007, with the last row being a continuation symbol (ellipsis).

Patient_ID	Appointment_Count	Did_Not_Attend
PT1001	2	No
PT1002	3	No
PT1003	4	No
PT1004	5	No
PT1005	1	No
PT1006	2	No
PT1007	3	Yes
PT1008		

11

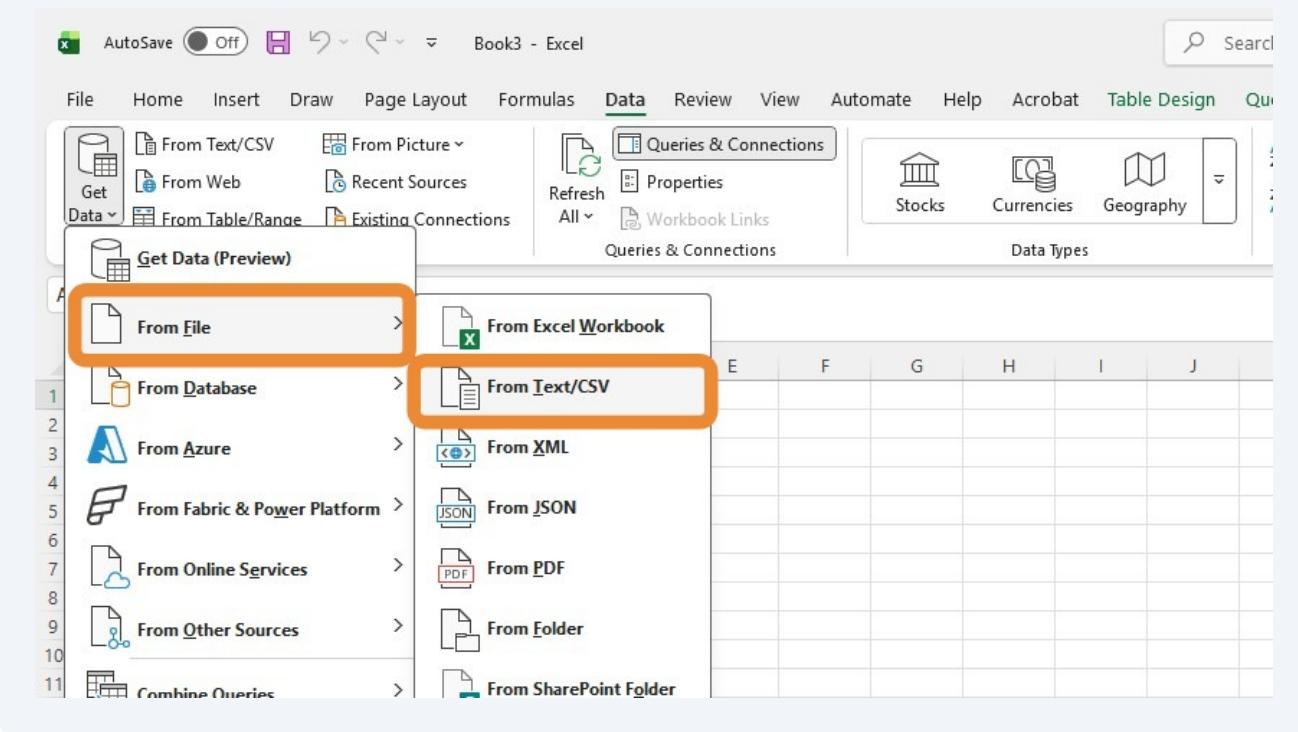
Select **Get Data**



The screenshot shows the Microsoft Excel ribbon with the 'Data' tab selected. The 'Get & Transform Data' button in the 'Table/Range' group is highlighted with an orange arrow. Below the ribbon, the same table as in the previous screenshot is displayed, showing data for patients PT1001 through PT1010.

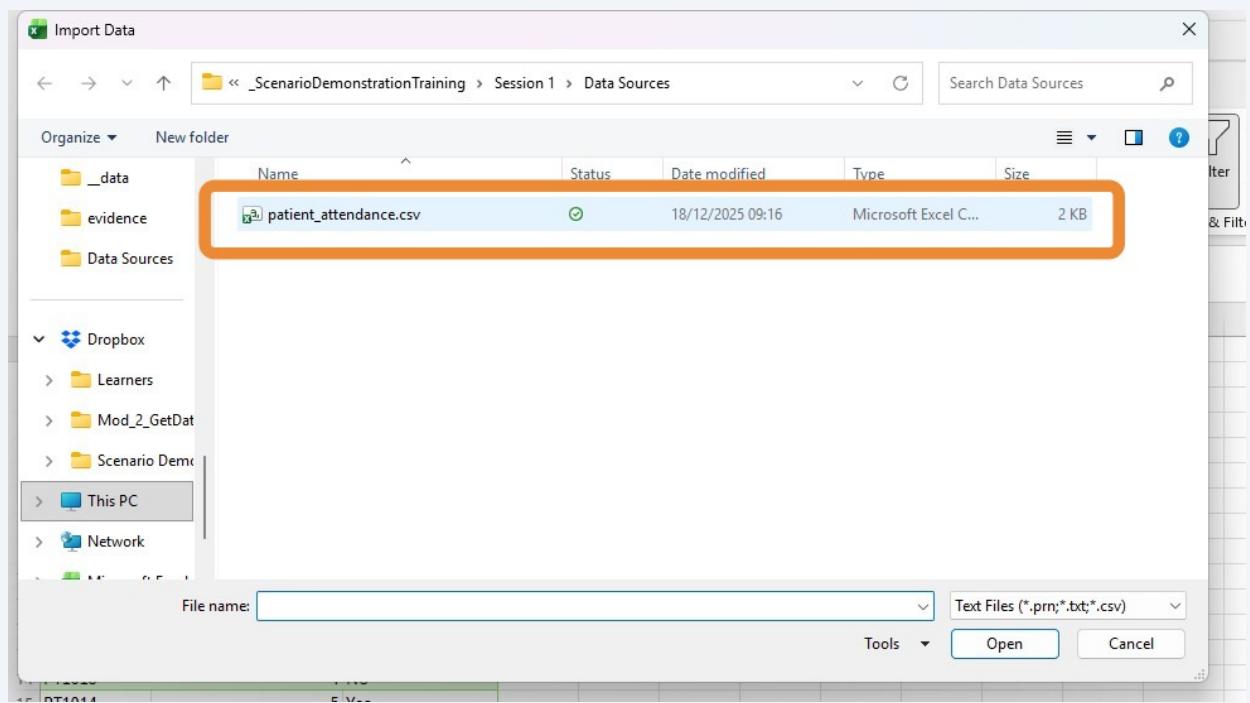
Patient_ID	Appointment_Count	Did_Not_Attend
PT1001	2	No
PT1002	3	No
PT1003	4	No
PT1004	5	No
PT1005	1	No
PT1006	2	No
PT1007	3	Yes
PT1008	4	No
PT1009	5	No
PT1010	1	No

## 12 Now choose the **From Text/CSV** option

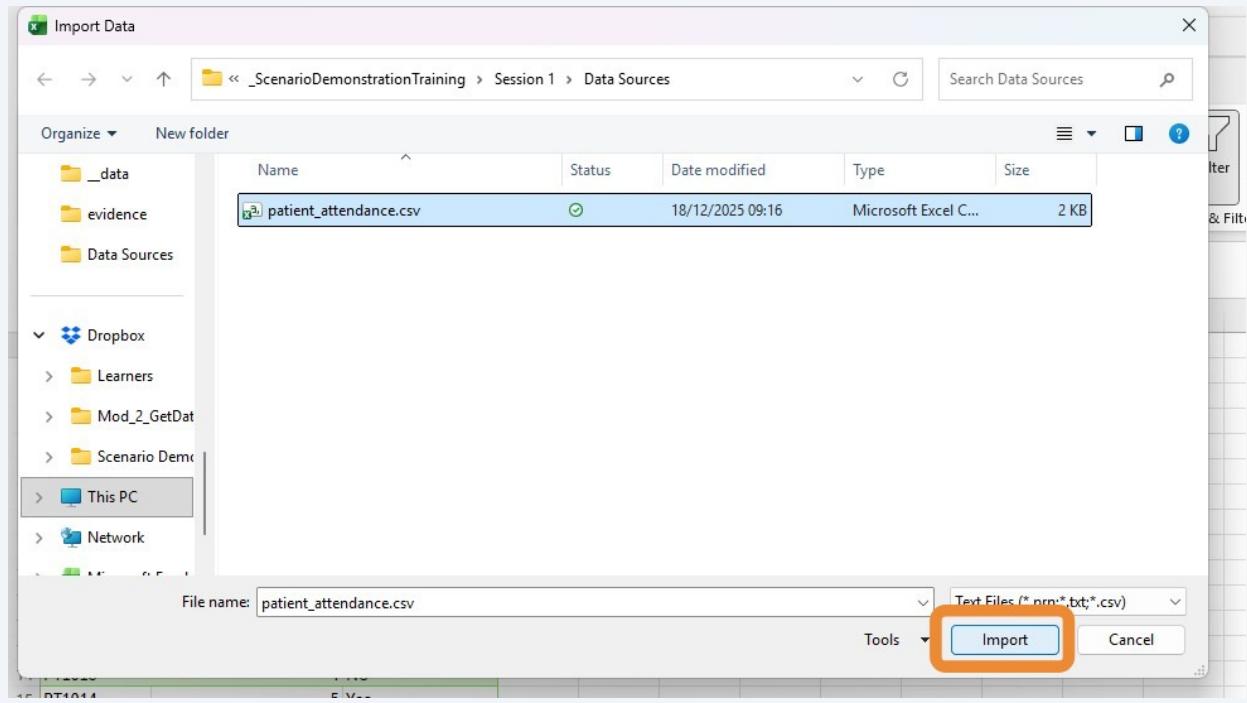


13 In the same place where you picked up the Excel file, there is also a Text/CSV file (patient\_attendance.csv).

Click on this to select it.



## 14 Click "Import"



15

After a few seconds the navigator will appear again, but it looks slightly different.

This is nothing to worry about, it is just the fact that a CSV will only have one table of data in it, so you do not need to select a table for this, you can just click straight onto **Load**

The screenshot shows the Power BI Data Editor interface. At the top, there are tabs for 'Queries & Connections' and 'Data Tools'. Below the tabs, a preview window displays a CSV file named 'patient\_attendance.csv'. The preview shows 20 rows of data with the following schema:

Patient_ID	Patient_Name	Department	Year	Month
PT1001	Patient 1	Cardiology	2025	2
PT1002	Patient 2	Cardiology	2025	3
PT1003	Patient 3	Cardiology	2025	4
PT1004	Patient 4	Cardiology	2025	5
PT1005	Patient 5	Cardiology	2025	6
PT1006	Patient 6	Cardiology	2025	7
PT1007	Patient 7	Cardiology	2025	8
PT1008	Patient 8	Cardiology	2025	9
PT1009	Patient 9	Cardiology	2025	10
PT1010	Patient 10	Cardiology	2025	11
PT1011	Patient 11	Cardiology	2025	12
PT1012	Patient 12	Cardiology	2025	1
PT1013	Patient 13	Cardiology	2025	2
PT1014	Patient 14	Cardiology	2025	3
PT1015	Patient 15	Cardiology	2025	4
PT1016	Patient 16	Cardiology	2025	5
PT1017	Patient 17	Cardiology	2025	6
PT1018	Patient 18	Cardiology	2025	7
PT1019	Patient 19	Cardiology	2025	8
PT1020	Patient 20	Cardiology	2025	9

A note at the bottom of the preview window states: 'The data in the preview has been truncated due to size limits.'

At the bottom right of the preview window, there are three buttons: 'Load' (highlighted with an orange box), 'Transform Data', and 'Cancel'.

**16** After a few seconds that data will appear.

Now we have one more file to go - the PDF.

For the last time, click **Data**.

The screenshot shows the Microsoft Excel ribbon with the 'Data' tab highlighted by a red box. The 'Table Design' tab is also visible. Below the ribbon is a table with columns: Patient\_ID, Patient\_Name, Department, Year, and Month. The data rows show patients from PT1001 to PT1013, all assigned to the Cardiology department in the year 2025.

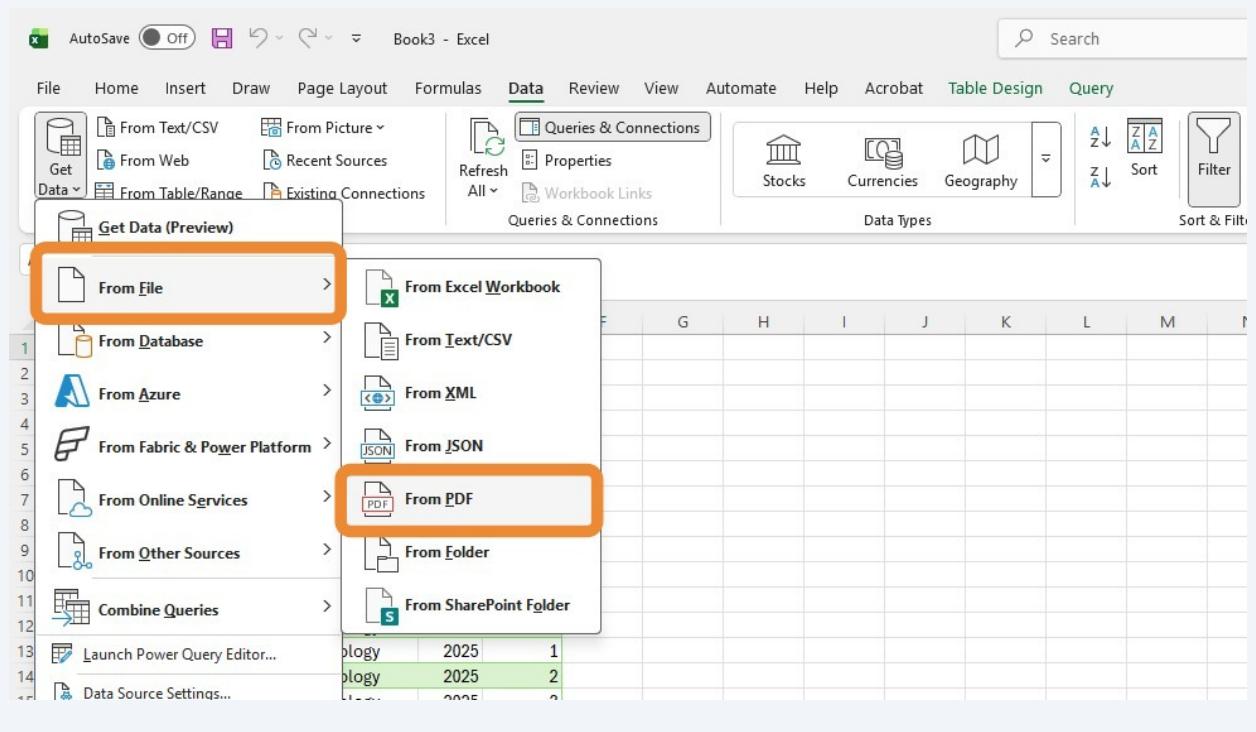
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Patient_ID	Patient_Name	Department	Year	Month	F	G	H	I	J	K	L	M	N
2	PT1001	Patient 1	Cardiology	2025	2									
3	PT1002	Patient 2	Cardiology	2025	3									
4	PT1003	Patient 3	Cardiology	2025	4									
5	PT1004	Patient 4	Cardiology	2025	5									
6	PT1005	Patient 5	Cardiology	2025	6									
7	PT1006	Patient 6	Cardiology	2025	7									
8	PT1007	Patient 7	Cardiology	2025	8									
9	PT1008	Patient 8	Cardiology	2025	9									
10	PT1009	Patient 9	Cardiology	2025	10									
11	PT1010	Patient 10	Cardiology	2025	11									
12	PT1011	Patient 11	Cardiology	2025	12									
13	PT1012	Patient 12	Cardiology	2025	1									
14	PT1013	Patient 13	Cardiology	2025	2									
15	PT1014	Patient 14	Cardiology	2025	3									

**17** Now click **Get Data**

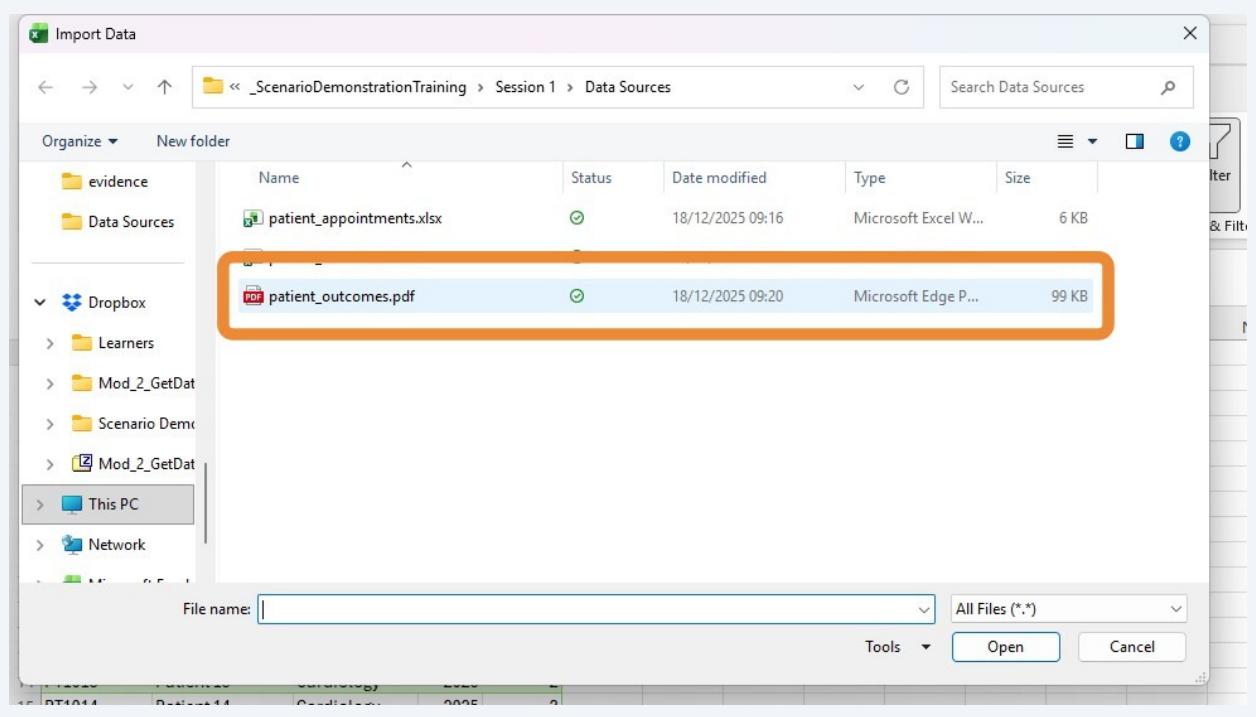
The screenshot shows the Microsoft Excel ribbon with the 'Data' tab selected. A red box highlights the 'Get Data' button in the 'From' section of the ribbon. Below the ribbon is a table with columns: Patient\_ID, Patient\_Name, Department, Year, and Month. The data rows show patients from PT1001 to PT1013, all assigned to the Cardiology department in the year 2025.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Patient_ID	Patient_Name	Department	Year	Month	F	G	H	I	J	K	L	M	N
2	PT1001	Patient 1	Cardiology	2025	2									
3	PT1002	Patient 2	Cardiology	2025	3									
4	PT1003	Patient 3	Cardiology	2025	4									
5	PT1004	Patient 4	Cardiology	2025	5									
6	PT1005	Patient 5	Cardiology	2025	6									
7	PT1006	Patient 6	Cardiology	2025	7									
8	PT1007	Patient 7	Cardiology	2025	8									
9	PT1008	Patient 8	Cardiology	2025	9									
10	PT1009	Patient 9	Cardiology	2025	10									
11	PT1010	Patient 10	Cardiology	2025	11									
12	PT1011	Patient 11	Cardiology	2025	12									
13	PT1012	Patient 12	Cardiology	2025	1									
14	PT1013	Patient 13	Cardiology	2025	2									
15	PT1014	Patient 14	Cardiology	2025	3									

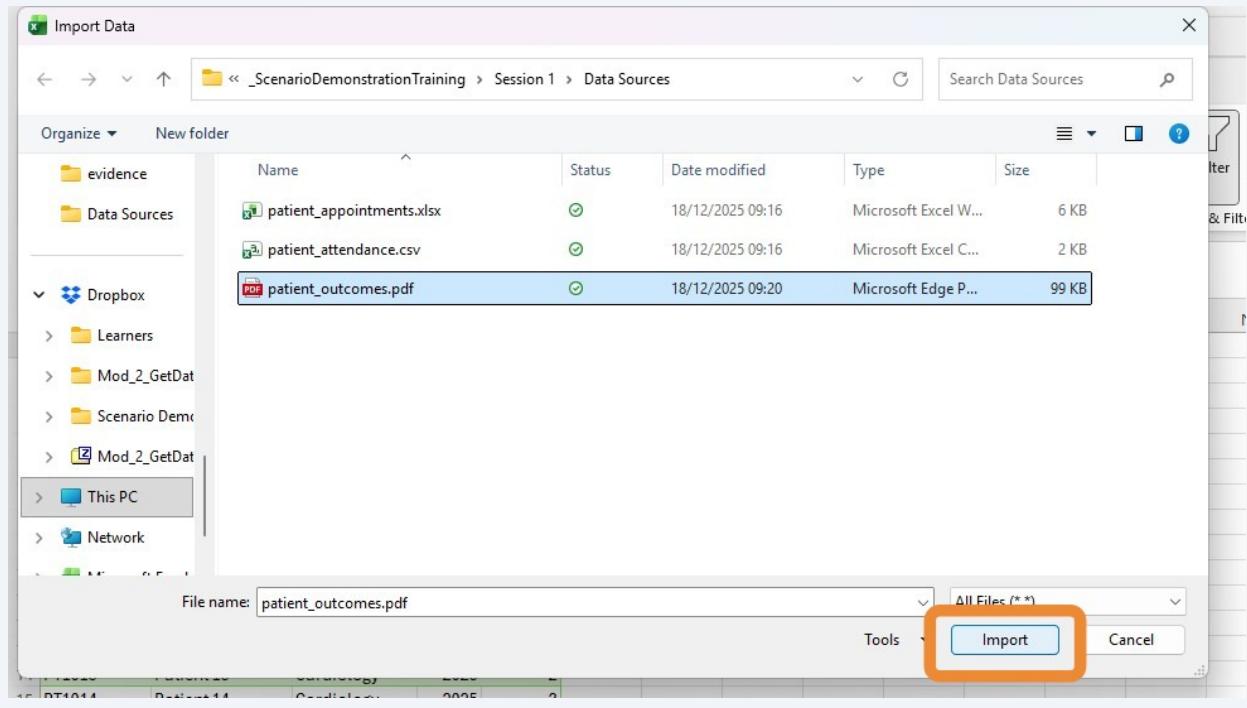
## 18 Choose From File > From PDF



## 19 Select patient\_outcomes.pdf



## 20 Click Import



21

Now we see a few option. The PDF importer is not good at seeing tables that break across different pages, so what we should do is import both separately, and recombined in the Excel sheet

### Click Table001 (Page 1)

The screenshot shows the Microsoft Power BI Data Editor interface. On the left, there is a table with columns labeled 'Patient', 'Year', and 'Month'. In the center, the 'Navigator' pane is open, displaying a list of items from a PDF file named 'patient\_outcomes.pdf'. The item 'Table001 (Page 1)' is highlighted with a green background and has an orange arrow pointing to it. Below the list, there are buttons for 'Load', 'Transform Data', and 'Cancel'. On the right side of the screen, the main workspace shows some previewed data.

22

Click Load, then repeat this process to add Table002 (Page 2)

This screenshot continues from the previous one, showing the 'Table001 (Page 1)' item selected in the Navigator pane. The 'Load' button at the bottom of the dialog box is highlighted with an orange box. The main workspace on the right shows a preview of the imported data, which is a table with columns 'Column1', 'Column2', and 'Column3', containing 23 rows of patient information.

Column1	Column2	Column3
PT1001	Ongoing	Yes
PT1002	Improved	No
PT1003	Improved	No
PT1004	Improved	No
PT1005	Ongoing	No
PT1006	Improved	No
PT1007	Improved	Yes
PT1008	Improved	No
PT1009	Ongoing	No
PT1010	Improved	No
PT1011	Improved	No
PT1012	Improved	No
PT1013	Ongoing	Yes
PT1014	Improved	No
PT1015	Improved	No
PT1016	Improved	No
PT1017	Ongoing	No
PT1018	Improved	No
PT1019	Improved	Yes
PT1020	Improved	No
PT1021	Ongoing	No
PT1022	Improved	No
PT1023	Improved	No

**23** You should now have both tables from the PDF imported as different sheets.

Let's fix this.

Highlight all of the data in the **Table 002** sheet

The screenshot shows a Microsoft Excel interface with the following details:

- Top Bar:** AutoSave (Off), ribbon tabs: Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Automate, Help, Acrobat, **Table Design** (selected), Query.
- Table Tools (Table Design Tab):** Sub-tabs: Summarize with PivotTable, Remove Duplicates, Resize Table, Properties, Insert Slicer, Export, Refresh, Open in Browser, Unlink, External Table Data.
- Checkboxes:** Header Row (checked), Total Row (unchecked), Banded Rows (checked), First Column (unchecked), Last Column (unchecked), Banded Columns (unchecked), Filter Button (checked).
- Table Style Options:** A grid of color swatches.
- Table Data:** A table with 15 rows and 3 columns. The first three columns are highlighted with an orange border. The columns are labeled Column1, Column2, and Column3. The data rows are:

Column1	Column2	Column3
PT1024	Improved	No
PT1025	Ongoing	Yes
PT1026	Improved	No
PT1027	Improved	No
PT1028	Improved	No
PT1029	Ongoing	No
PT1030	Improved	No
PT1031	Improved	Yes
PT1032	Improved	No
PT1033	Ongoing	No
PT1034	Improved	No
PT1035	Improved	No

**24** Right-click the highlighted data and select **Copy**

A screenshot of Microsoft Excel showing a context menu for row 6. The menu options include Copy, Paste Options, Refresh, Insert, Delete, Select, and Clear Contents. The Copy option is highlighted with an orange rectangle.

PT1024	improved	IVC
PT1025	Search the menus	
PT1026	Cut	
PT1027	Copy	
PT1028	Paste Options:	
PT1029	Refresh	
PT1030	Insert	
PT1031	Delete	
PT1032	Select	
PT1033	Clear Contents	
PT1034		
PT1035		

**25** Go back to the sheet containing the other PDF import and highlight the three rows at the bottom

A screenshot of Microsoft Excel showing the 'patient\_attendance' sheet. The last three rows (34, 35, 36) are highlighted with a yellow background. The 'Queries & Connections' pane on the right shows two loaded queries: 'Appointments' (35 rows) and 'patient\_attendance' (35 rows). The status bar at the bottom right shows the date as 18/12/2025 and the time as 09:34.

PT1024	improved	IVC
PT1025	Search the menus	
PT1026	Cut	
PT1027	Copy	
PT1028	Paste Options:	
PT1029	Refresh	
PT1030	Insert	
PT1031	Delete	
PT1032	Select	
PT1033	Clear Contents	
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## 26 Press Ctrl + V

The screenshot shows an Excel spreadsheet titled "Book3 - Excel". The "Home" tab is selected. A table named "Table002" is visible, containing 35 rows of data. The data includes columns for Patient\_ID, Outcome, and Follow\_Up\_Required. The last 13 rows of the table represent the appended data from "Table001". The "Queries & Connections" pane on the right shows four queries: "Appointments" (35 rows), "patient\_attendance" (35 rows), "Table001 (Page 1)" (24 rows), and "Table002 (Page 2)" (12 rows). The status bar at the bottom right indicates the date as 18/12/2025 and the time as 09:34.

27 When you have confirmed that data has been successfully appended, select **Table002**, right-click and select **Delete** as it is no longer required

The screenshot shows the same Excel spreadsheet as above. The "Table002" table is selected, and a context menu is open over its first three columns. The menu options include Insert..., Delete, Rename, Move or Copy..., View Code, Protect Sheet..., Tab Color, Hide, Unhide..., Select All Sheets, and Link to this Sheet. An orange arrow points to the "Delete" option in the menu.

**28**

Well done, you have completed **Scenario Demonstration Skill Builder 1**