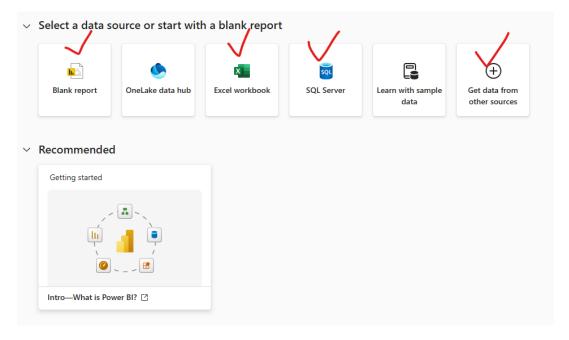# Power BI using SOP (Data Loading):
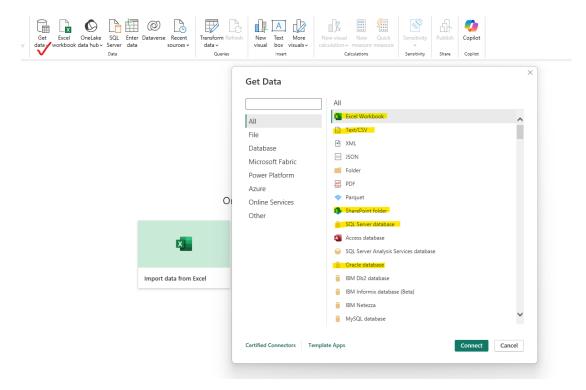
Important note: Power BI is a data visualization and analysis tool. All operations are read-only and will not change the content or structure of the data source.

Desktop:

1. Open the Power BI desktop app.
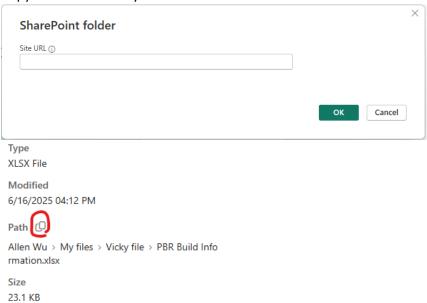2. Choose "Blank report"; (You can also use another source to load data)
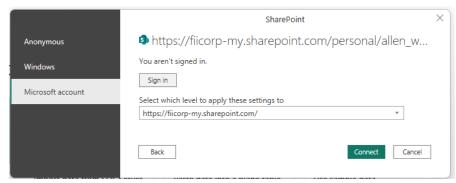

3. Choose "Get data" from the data panel.

4. Source choice (Power BI supports multiple data source formats, such as Excel, CSV, Folder, JSON, Web, OData Feed, etc. I just list some common sources.)

- Excel: choose from your PC.
- SharePoint folder:
  Copy the "Path" from your OneDrive or SharePoint site.

Type
XLSX File

Modified
6/16/2025 04:12 PM

Path 🔴

Allen Wu > My files > Vicky file > PBR Build Info
rmation.xlsx

Size
23.1 KB

Then, use your credentials to verify.

- SQL Server & Oracle database:

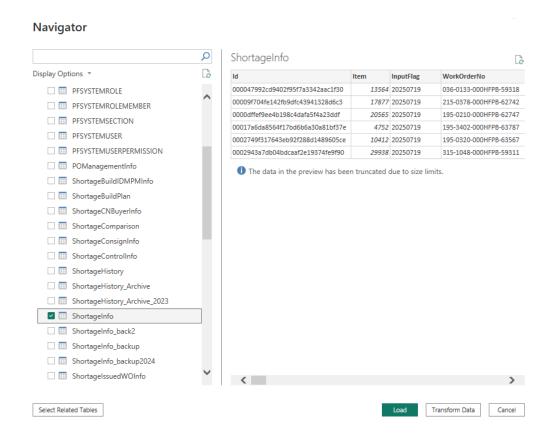You need the "Server" address to connect to your database.

"Import" mode means Power BI will download the whole data table to Power BI memory. (Better for design scenario, but not real-time connecting)

"DirectQuery" mode means Power BI will connect to the data table in a real-time manner. (Better for the final report, but it will use the huge capacity of your CPU, and it may be prolonged.)

If you use "Import" mode, you need to click "Refresh" to update the data after the subsequent data changes; if you use "DirectQuery", the report will automatically read the latest data from the source.

Note: The system will ask you for your credentials. Please use the "username" and "password" that IT gave you.

When you succeed in logging into the database, you can choose the table and click "Load". (For the "Transform Data" function, please navigate to the back of the report)

Note: Some databases need a "client driver". For example, the Oracle database needs "Oracle Data Access Components (ODAC)" installed. You can find the technical support on Microsoft: https://learn.microsoft.com/en-us/power-bi/connect-data/

5. Transform data
   - For the "Transform Data" function, it is exactly like the "Power Query" in MS Excel.
   - You can clean, structure, add columns, remove columns, and remove duplicates in Power Query mode.
   - When you finish, click "Close & Apply" and the modified version data will load into your Power BI, then start your design.
   - **Note: Power BI is a data visualization and analysis tool. All operations are read-only and will not change the content or structure of the data source.**