Demonstration on Importing Files from a Local Folder

In this demonstration, you will see how to:

- Import data from an Excel file.
- Import data from a CSV file.

Demonstration Steps:

Import Data from an Excel File

1. Ensure that the MSL-TMG1, 20778A-MIA-DC, and 20778A-MIA-SQL virtual machines are running, and then log on to 20778A-MIA-SQL as ADVENTUREWORKS\Student with the password Pa$$w0rd.
2. In the D:\Demofiles\Mod03 folder, run Setup.cmd as Administrator, and then click Yes when prompted.
3. At the command prompt to close the SQL Server Launchpad, type Y, and then press Enter.
4. When the script completes, press any key to close the window.
5. On the taskbar, click Power BI Desktop.
6. In the Power BI Desktop window, click Get Data.
7. In the Get Data dialog box, click Excel, and then click Connect.
8. In the Open dialog box, navigate to D:\Demofiles\Mod03\Demo\Files for Import, click Sales.xlsx, and then click Open.
9. In the Navigator window, click Sales to show a preview of the data. Use the horizontal scrollbar to display the columns, select the Sales check box, and then click Load.
10. When the load completes, in the Fields pane, point out the Sales table. Mention that Power BI has detected columns that can be used in aggregations, as indicated by the Sum symbol next to the column names.

Import Data from a CSV File

1. On the Home ribbon, click Get Data.
2. In the Get Data dialog box, click CSV, and then click Connect.
3. In the Open dialog box, navigate to D:\Demofiles\Mod03\Demo\Files for Import, click SalesPerson.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.
5. Click Load.
6. In the Fields pane, expand the SalesPerson table to show the columns. Mention that the two tables from different sources are now available to use together in a report. If the report is published, the tables will be part of the same dataset.
7. Click File, click Save As, name the report Adventure Works Sales, and then save to the D:\Demofiles\Mod03\Demo folder.
8. Leave Power BI open for the next demonstration.