Lab Exercise 1: Shape Power BI Data

Scenario

You are exploring how Power BI can help shape and combine data that comes from multiple sources. Currently, much of the data is exported from SQL Server into Excel. You have been given two worksheets, one for sample sales data for the North America territory, and one for the European territory. After importing the data into Power BI, you will shape the data using transformations and formatting.

The main tasks for this exercise are as follows:

- Preparing the Environment
- Import Data from Excel
- Apply Formatting to the Existing Data

Task 1: Preparing the Environment

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. Run Setup.cmd in the D:\Labfiles\Lab04\Starter folder as Administrator.
3. If a message asks Do you want to continue with this operation?, type Y and press Enter.
4. If you do not already a Power BI login, go to https://powerbi.microsoft.com/en-us/documentation/powerbi-admin-signing-up-for-power-bi-with-a-new-office-365-trial, and follow the steps to create an account.
5. Download and install the Microsoft Power BI Desktop from https://www.microsoft.com/en-us/download/details.aspx?id=45331.

Task 2: Import Data from Excel

1. Open Power BI Desktop.
2. Import the Sales - Europe.xlsx file from the D:\Labfiles\Lab04\Starter folder.

3. In the Navigator window, select Europe, and click Load.

4. Import the Sales - North America.xlsx file from the D:\Labfiles\Lab04\Starter folder.

5. In the Navigator window, select North America, and click Edit, to open the Query Editor.

6. Leave the Query Editor window open for the next

Task 3: Apply Formatting to the Existing Data

1. In the Queries pane, click Europe to display the data in preview mode.

2. Remove the ProductKey column.

3. Remove the SalesOrderNumber column.

4. Rename the SalesTerritoryCountry column to Country.

5. Rename the SalesTerritoryGroup column to Sales Territory.

6. Rename the EnglishProductCategoryName to Main Category.

7. Rename the EnglishProductSubcategoryName column to Sub Category.

8. Rename EnglishProductName to Product.

9. Move the Color column to the left.

10. In the Queries pane, click North America.

11. Remove the ProductKey column.

12. Remove the SalesOrderNumber column.

13. Rename the SalesTerritoryCountry column to Country.

14. Rename the SalesTerritoryGroup column to Sales Territory.

15. Rename the EnglishProductCategoryName to Main Category.

16. Rename the EnglishProductSubcategoryName column to Sub Category.

17. Rename EnglishProductName to Product.

18. Move the Color column to the left.

19. Open Advanced Editor to view the query that has been updated with the applied steps.

20. Leave Query Editor open for the next exercise.

Results: At the end of this exercise, the data will be imported from Excel, and shaped ready to be combined.