

Demonstration on Transforming Data with the Query Editor

In this demonstration, you will see how to:

- Import data from Excel.
- Apply transformations to the table.

Demonstration Steps:

1. If Power BI Desktop is not already open, click Power BI Desktop on the taskbar. Click Get Data if the Get Data dialog box displays.
2. If Power BI Desktop is already open, click Get Data.
3. In the Get Data dialog box, click Excel, and then click Connect.
4. In the Open dialog box, browse to the D:\Demofiles\Mod04\Demo folder, click Sales Matrix.xlsx, and then click Open.
5. In the Navigator dialog box, select Sales, and then click Load.
6. When the data has finished loading, on the Ribbon, click Edit Queries, and from the drop-down list, click Edit Queries.
7. In the Untitled - Query Editor dialog box, in the Queries pane, click Sales.
8. On the Transform ribbon, click Transpose.
9. Note that the columns are now rows.
10. Click the table icon in the top left-hand corner of the table, and click Use First Row As Headers.
11. Right-click the Column1 column, click Rename, type Country, and then press Enter.
12. Right-click the Column2 column, click Rename, type Category, and then press Enter.
13. Click the Country column, and on the ribbon, in the Any Column group, click Fill, and then click Down. The null values are replaced.
14. Click the 2005 column, hold down the Ctrl key and click the 2006, 2007, and 2008 columns.
15. Right-click any of the selected column headers, and then on the ribbon, in the Any Column group, click Unpivot Columns.
16. Note that the names of the columns are Attribute and Value for the attribute-value pairing.
17. Right-click the Attribute column, click Rename, type Year, and then press Enter.
18. Right-click the Value column, click Rename, type Sales, and then press Enter.
19. On the File menu, click Close & Apply.
20. In the Fields pane, expand Sales, click Country to select the field.
21. On the Modeling ribbon, click Data Category: Uncategorized. Select Country/Region.
22. In the Fields pane, note the map icon next to Country.
23. In the Fields pane, under Sales, click Sales to select the field.
24. In the Formatting group, click Data Type: Text, and click Fixed Decimal Number.
25. If a Data type change dialog box appears, click Yes.
26. Click Format: Currency General, click Currency, and then select \$ English (United States).

- 27.** In the Fields pane, note the sum symbol next to Sales.
- 28.** Drag the Country field onto the report. Note that Power BI automatically chooses the map chart.
- 29.** Drag the Sales field onto the map, and note that the bubble sizes now represent the Sales figure.
- 30.** Click the report canvas.
- 31.** In the Visualizations pane, click Clustered column chart.
- 32.** Drag Category onto the Axis property.
- 33.** Drag Year onto the Axis property.
- 34.** Drag Country onto the Legend property.
- 35.** Drag Sales onto the Value property.
- 36.** Grab the corner edge of the chart to expand the width and height.
- 37.** Click the Click to turn on Drill Down arrow icon in the top right-hand corner of the chart.
- 38.** Click the tallest column in the Bikes group. This now breaks down the sales by year.

Save the file report as AdventureWorks Sales.pbix to D:\Demofiles\Mod04\Demo, as this will be used for the next demonstration.