

Lab Exercise 1: Importing Excel Files into Power BI

Scenario

As a data analyst for Adventure Works, you will be using Power BI to create reports that the business analysts can use to create dashboards in the Power BI service. One of the business analysts has asked you to import an Excel file as the basis for a report. The file contains formatting that needs to be removed before you can import it. You will remove the formatting, and then import the data in the workbook to create a new dataset. As part of this exercise, you will alter the column names so that they are more suitable for Q&A to find answers within the dataset.

The main tasks for this exercise are as follows:

- Prepare the Lab Environment
- Reduce the Size of Excel Files
- Import Excel Files

Task 1: Prepare the Lab Environment

1. Ensure that the 20778A-MIA-DC, 20778A-MIA-SQL, and MSL-TMG1 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\Lab03\Starter folder as Administrator.
3. If you do not already have a Power BI login, browse to <https://powerbi.microsoft.com/en-us/documentation/powerbi-admin-signing-up-for-power-bi-with-a-new-office-365-trial>, and then follow the steps to create an account.
4. Download and install Microsoft Power BI Desktop from <https://www.microsoft.com/en-us/download/details.aspx?id=45331> using the default options.

Task 2: Reduce the size of Excel Files

1. In the D:\Labfiles\Lab03\Starter\Project folder, double-click Adventure Works Data.xlsx to open the file.
2. On the Product Category worksheet, change the names of the columns to user-friendly versions.
3. Change the cell style to normal.
4. Convert the cells into a table.
5. Change the name of the table to ProductCategory.
6. On the Product Subcategory worksheet, change the names of the columns to user-friendly versions.
7. Change the cell style to normal.
8. Convert the cells into a table.
9. Change the name of the table to ProductSubcategory.
10. On the Products worksheet, change the names of the columns to user-friendly versions.
11. Change the cell style to normal.
12. Convert the cells into a table.
13. Change the name of the table to Products.
14. On the Sales worksheet, change the names of the columns.
15. Change the cell style to normal.
16. Convert the cells into a table.
17. Convert the Order Date cells to a date type.
18. Convert the Unit Price, Unit Price Discount, Line Total, and Total Due cells to the US dollar currency type.
19. Change the name of the table to Sales.
20. Save the file.

Task 3: Import Excel Files

1. In Internet Explorer, go to <https://powerbi.microsoft.com> and sign in to Power BI.
2. Upload the Adventure Works Data.xlsx file that you formatted in the previous task.
3. Notice that the table and column names match the names of the tabs and columns in Excel.

Results: After this exercise, the data in Excel will be available as a dataset in Power BI Desktop.