LAB 2: CONNECTING MULTIPLE DATA SOURCES

BY

JORDAN GOLDMEIER

EXCELTV

LAB: **CONNECTING TO AN ONLINE DATA SOURCE**

MODULE OUTCOMES

- Connect multiple data sets in power query
- Creating a new data model
- Create interesting charts with those connections

DESCRIPTION

This lab relies on the following files:

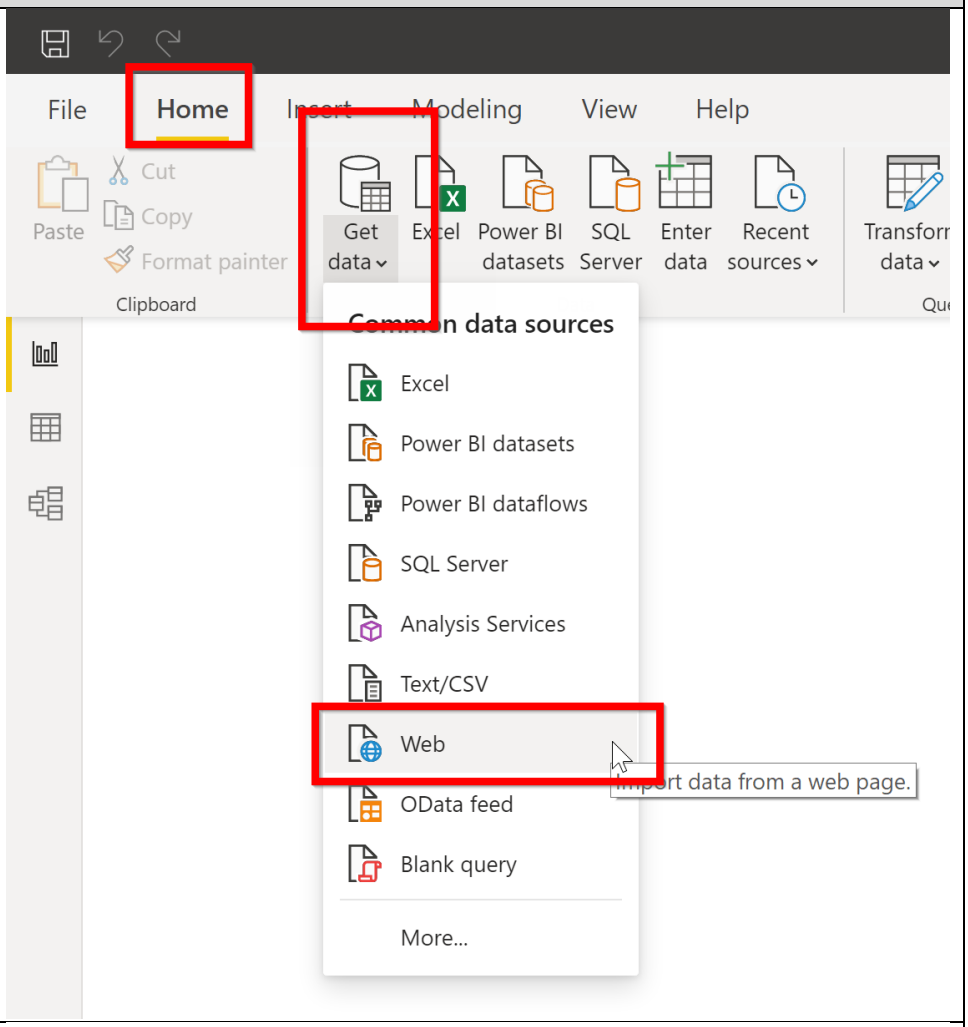
- products worksheet.xlsx - https://github.com/exceltv/power-bi/raw/master/2%20-%20Connecting%20Data%20Sets/products%20worksheet.xlsx

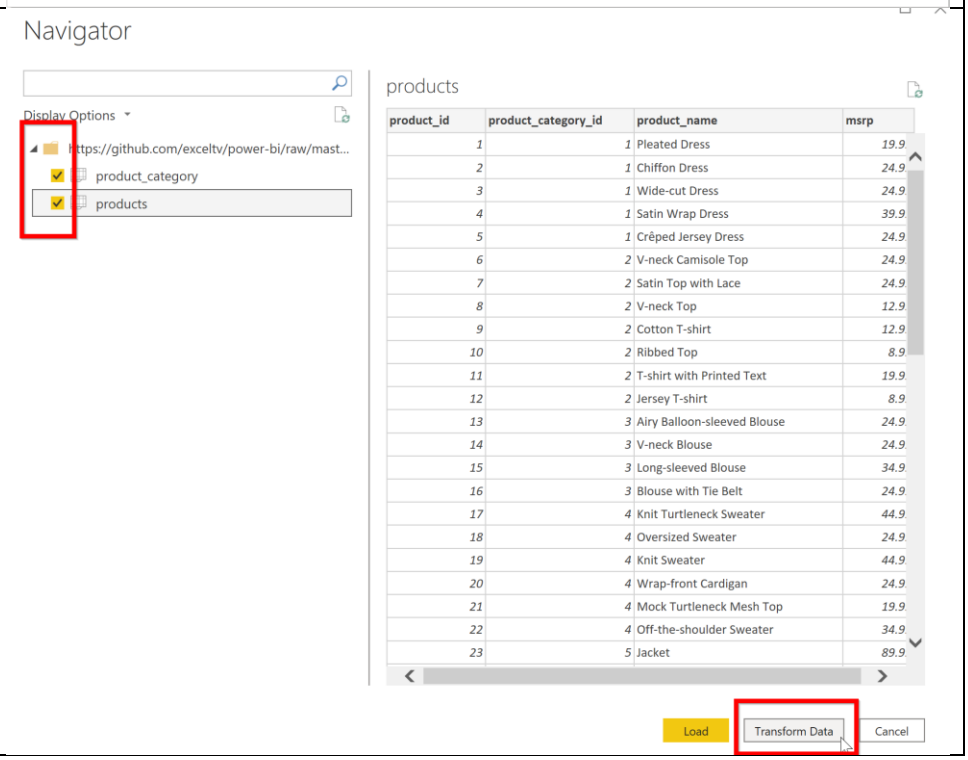
- store list.xlsx – https://github.com/exceltv/power-bi/raw/master/2%20-%20Connecting%20Data%20Sets/store%20list.xlsx

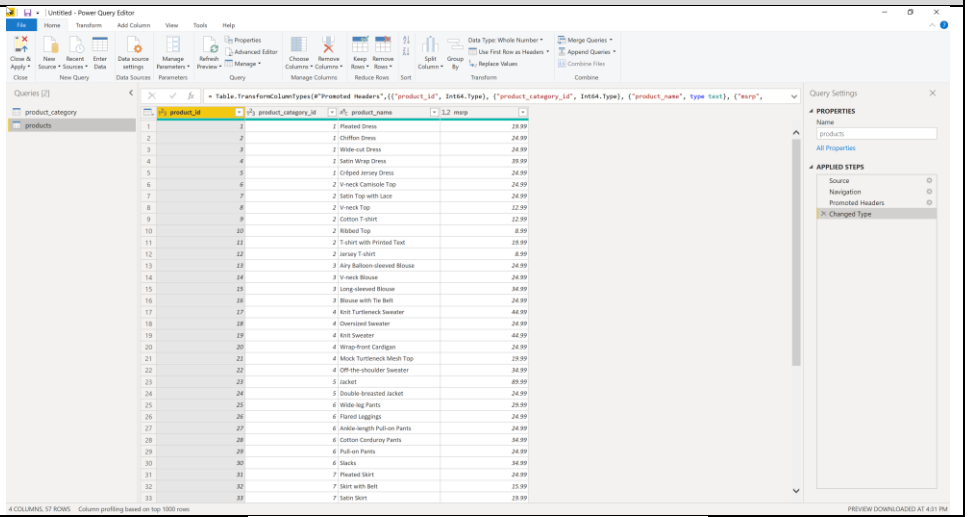
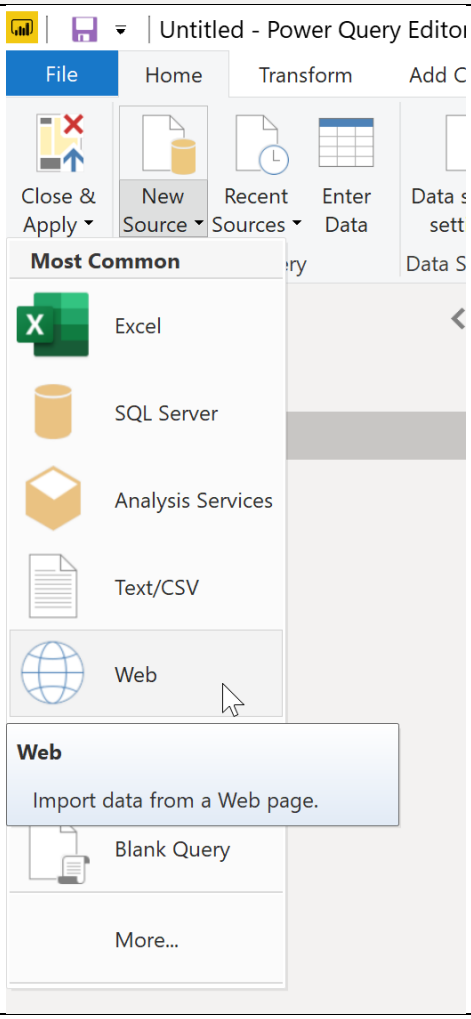
- transactions.csv – https://github.com/exceltv/power-bi/raw/master/2%20-%20Connecting%20Data%20Sets/transactions.csv

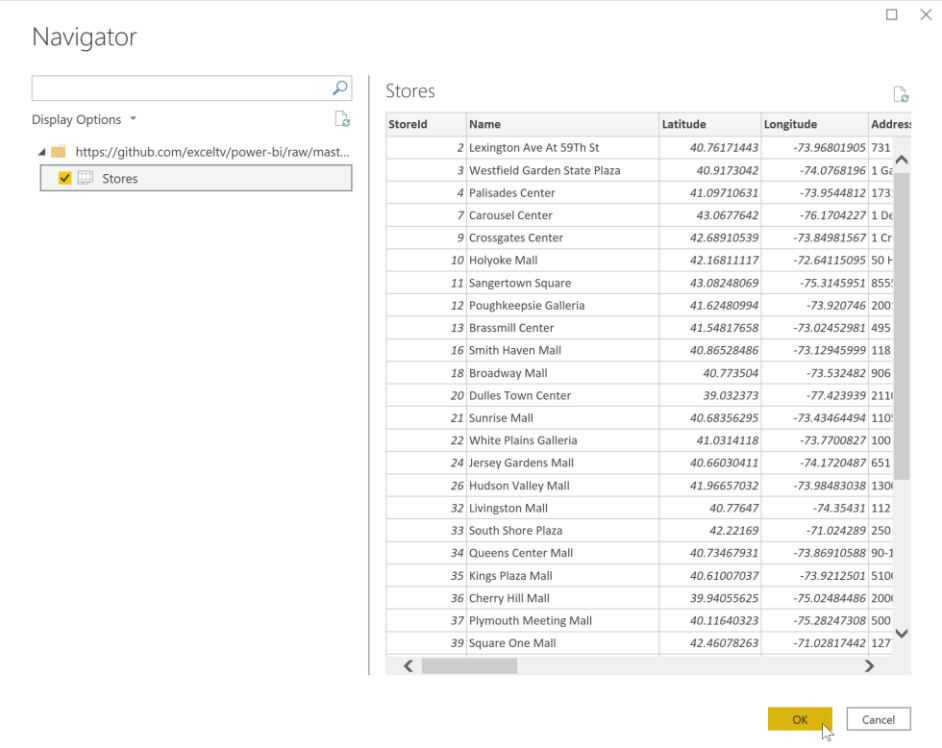
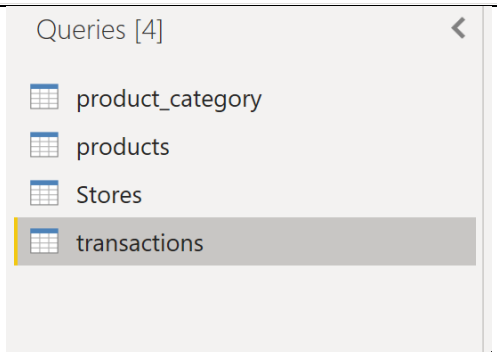
Use the links next to each to each of the files to connect the files.

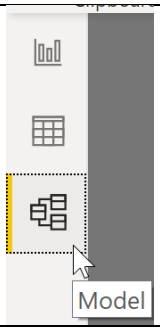
STEP-BY-STEP INSTRUCTIONS

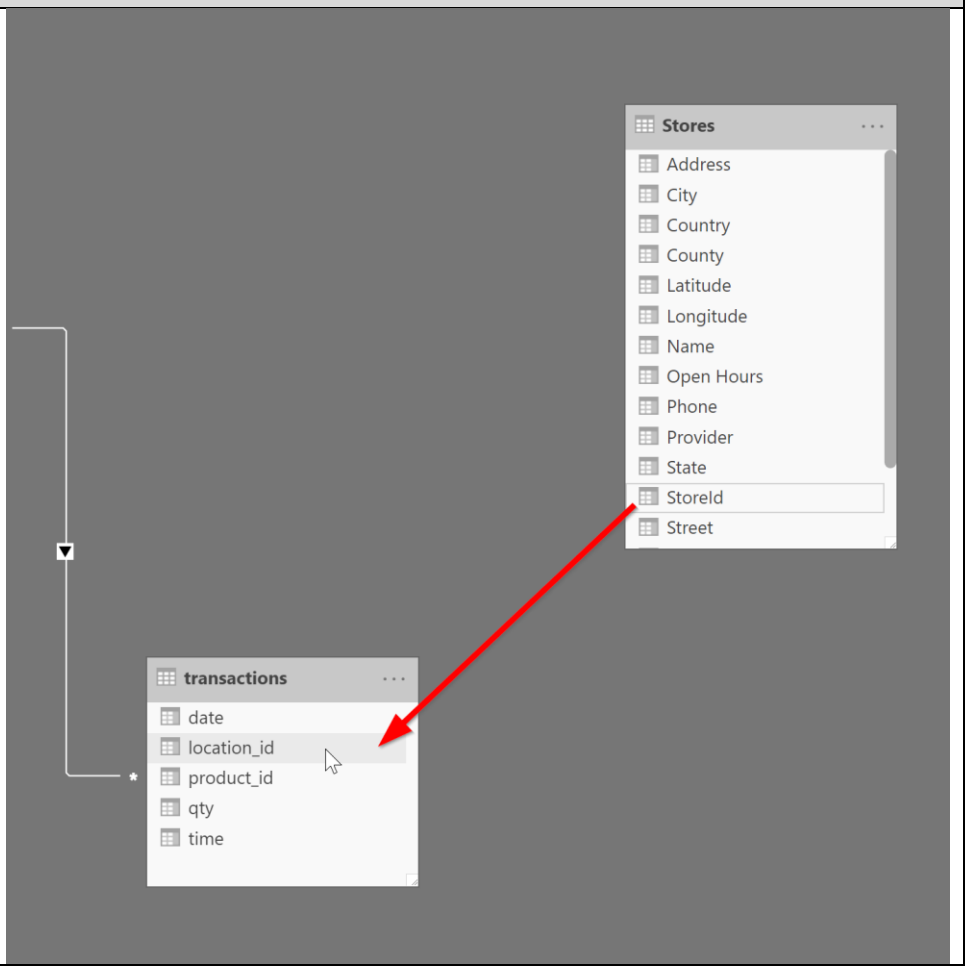
Click Steps	Screen Shots
1. Open Power BI 2. Click Home > Get data > Web	
3. We're going to bring the products worksheet.xlsx workbook into Power BI. Scroll up. Copy the URL next to the	**DESCRIPTION** This lab relies on the following files: ▸ products worksheet.xlsx - https://github.com/exceltv/power-bi/raw/master/2%20-%20Connecting%20Data%20Sets/products%20worksheet.xlsx

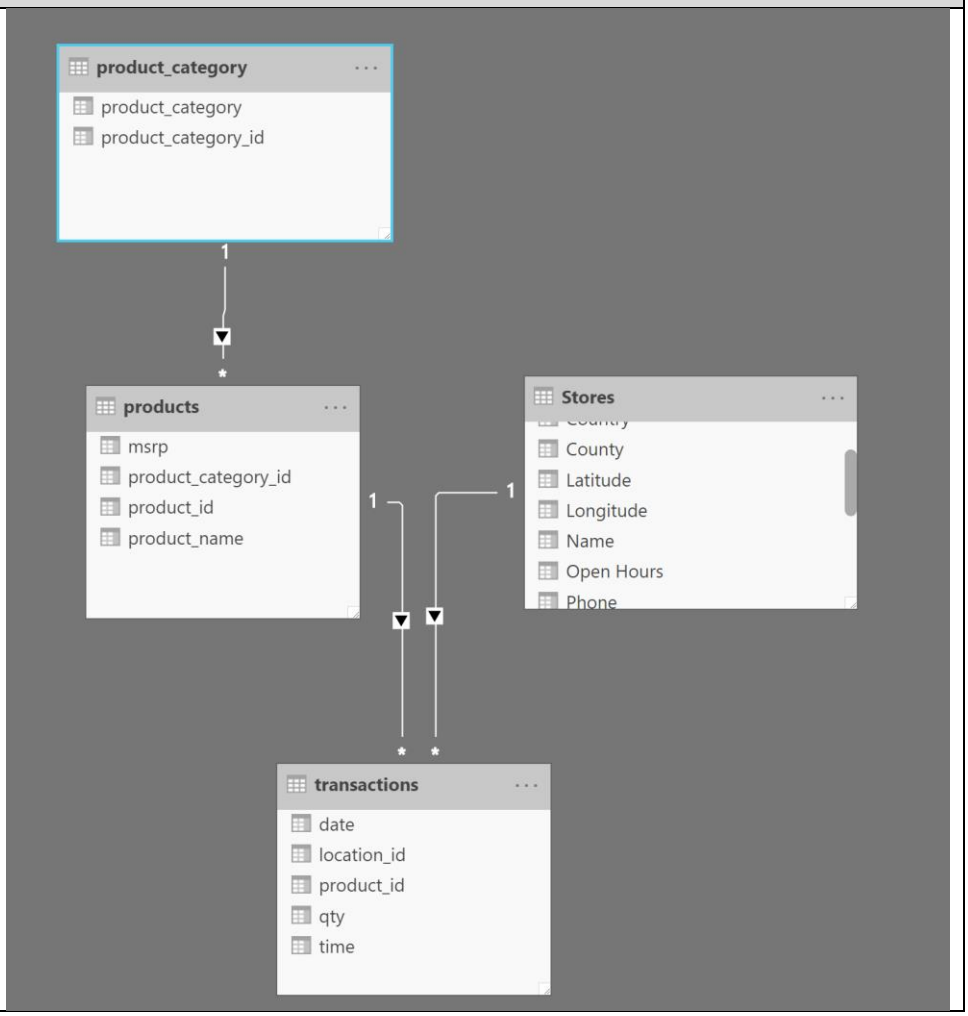
Click Steps	Screen Shots
filename. This is the URL we will use to connect to the file stored on GitHub	
4. Paste the filepath into the URL text field. 5. Click OK	
6. Check the product_category and products tables to bring them in. 7. Click Transform Data.	

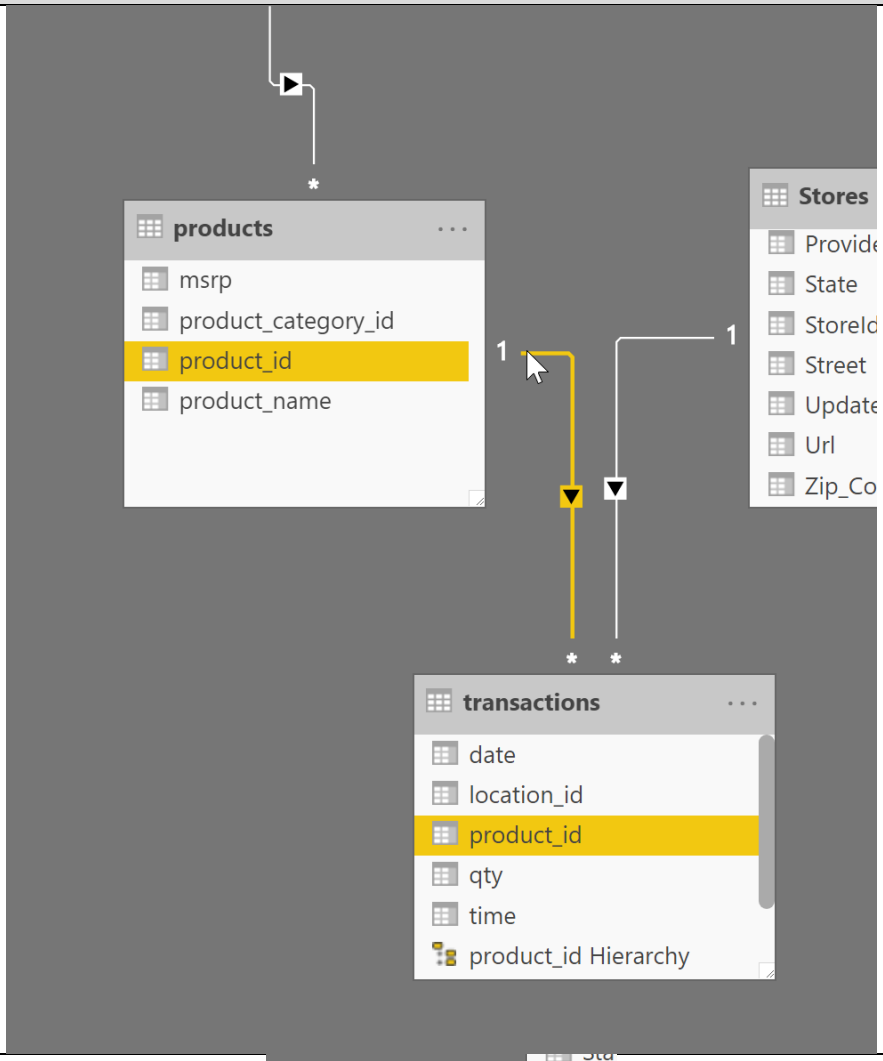
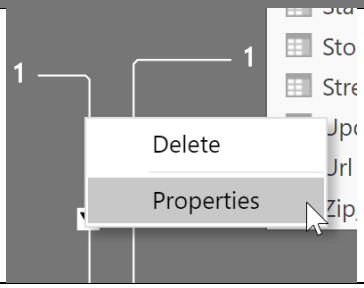
Click Steps	Screen Shots
8. If everything goes according to plan, your screen should look like this.	
9. Now let's bring in store list.xlsx. 10. From inside Power Query, click on the Home Ribbon. Then click New Source > Web.	

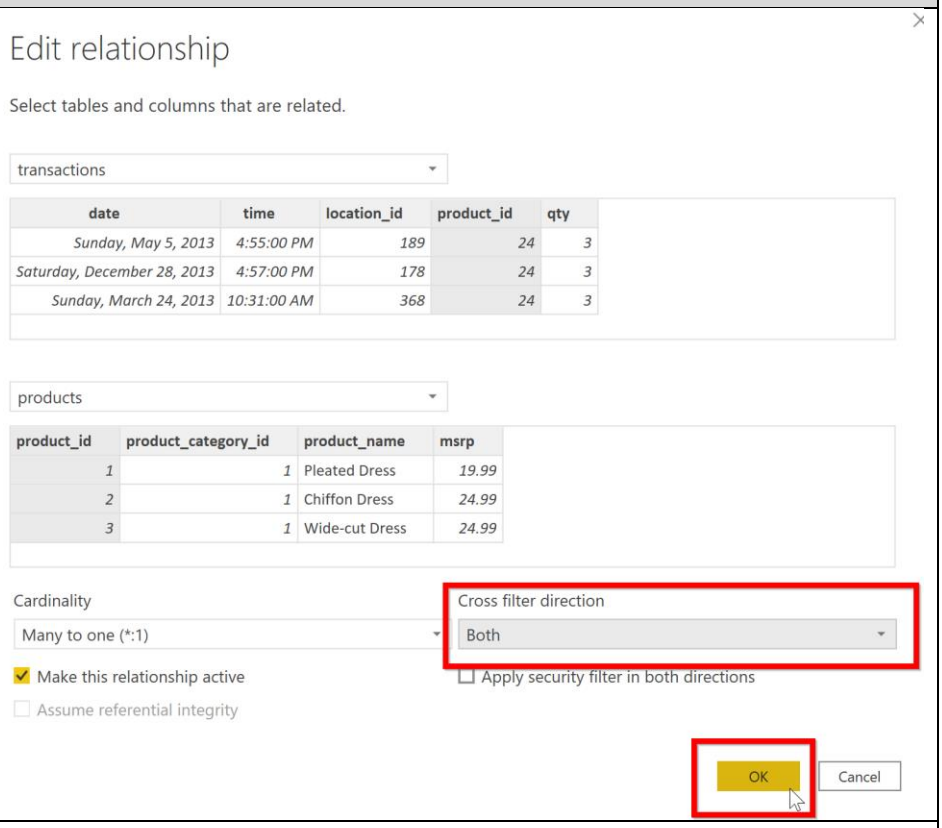
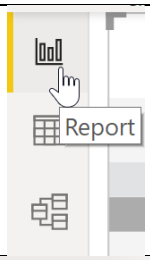
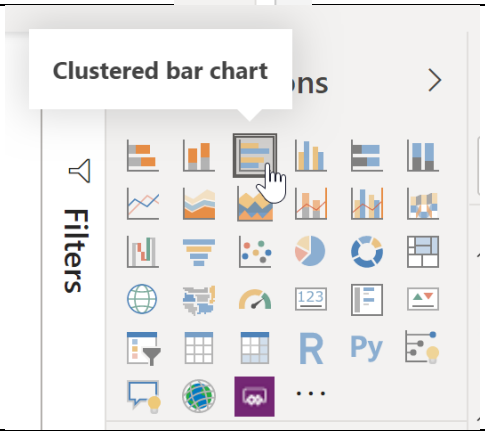
Click Steps	Screen Shots
11. Copy the URL next to store list.xlsx. Paste it in the URL text field. 12. Click OK.	
13. Click the checkbox next to Stores. 14. Click OK.	
15. Now let's add the transactions.csv file. Click Home > Get data > Web. 16. Copy the URL next transactions.csv and paste it in the URL text field in the From Web dialog box. Click OK. 17. If all went well, you should see the list of	

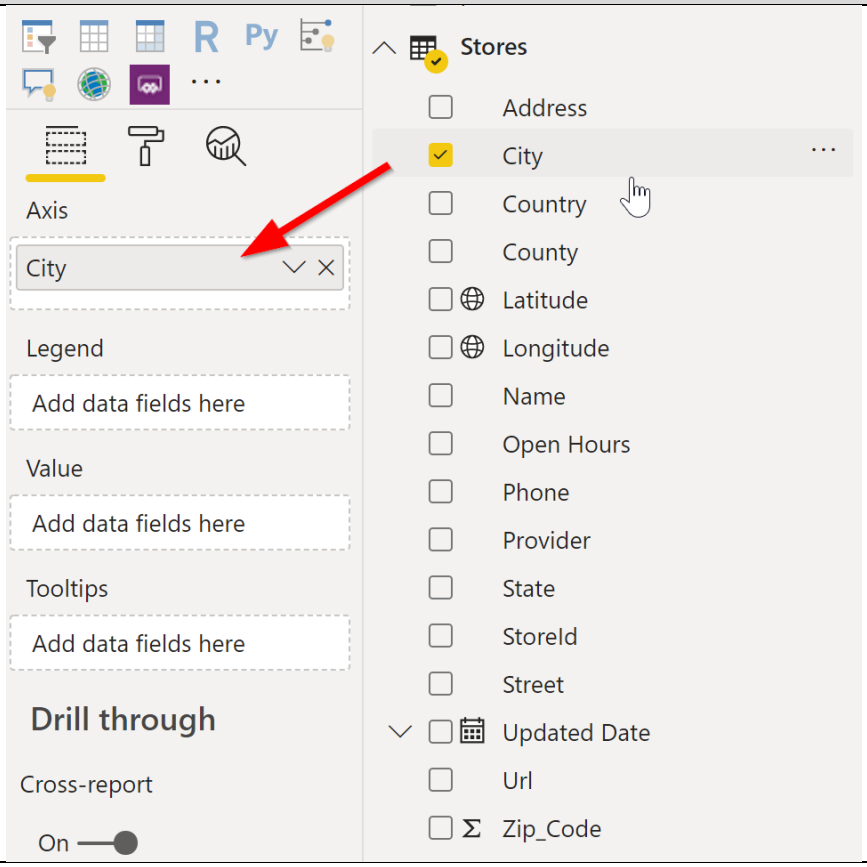
Click Steps	Screen Shots
queries as shown in the screen shot. 18. Click Close & Apply in the upper left hand corner.	
Creating the Data Model	
19. Now let's create the data model. This part is very similar to Microsoft Access. 20. Click the Model view button on the left hand side.	

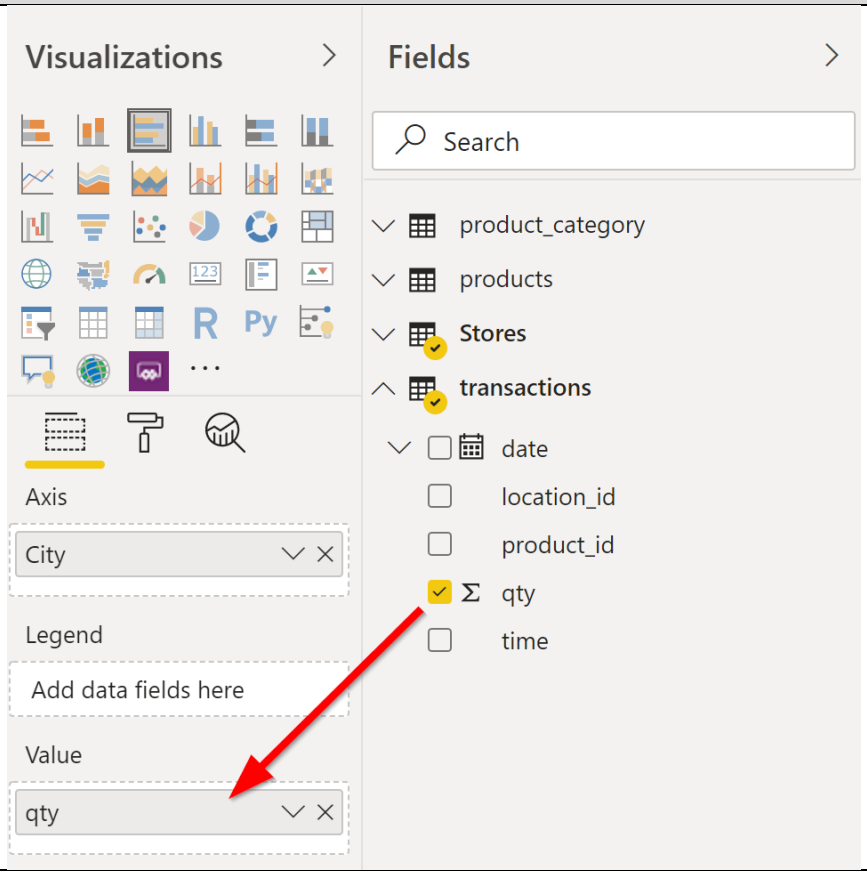
Click Steps	Screen Shots
21. Notice Power BI has already connected multiple tables 22. Make the final connection by dragging StoreID on top of location_id. Store ID is the primary key to location_id.	

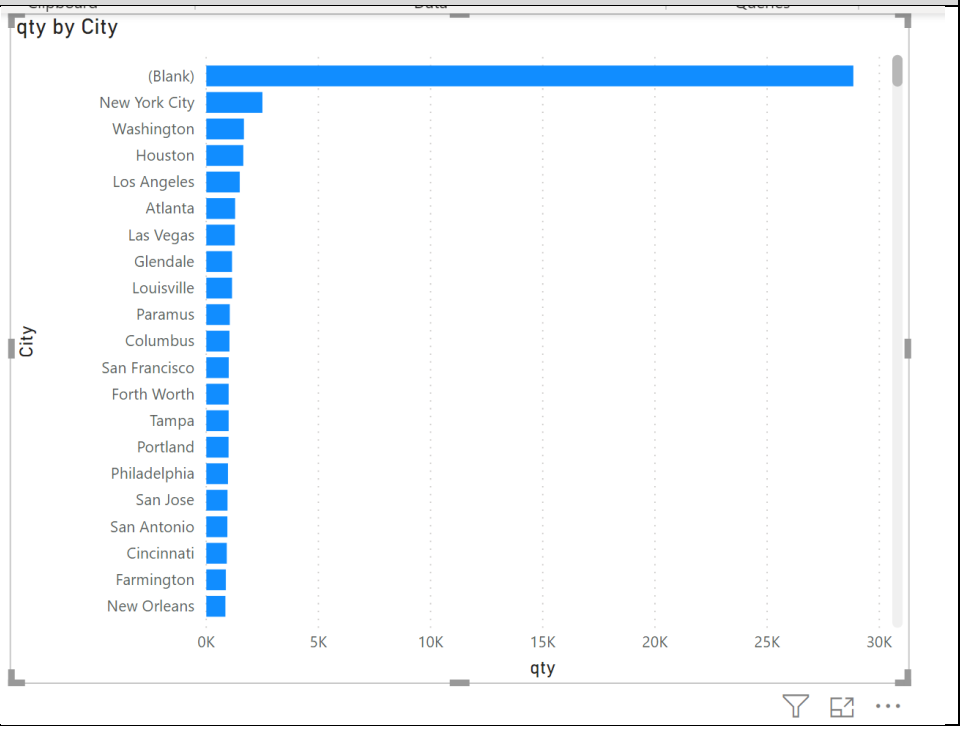
Click Steps	Screen Shots
23. Redraw the tables so that they appear in a funnel shape.	

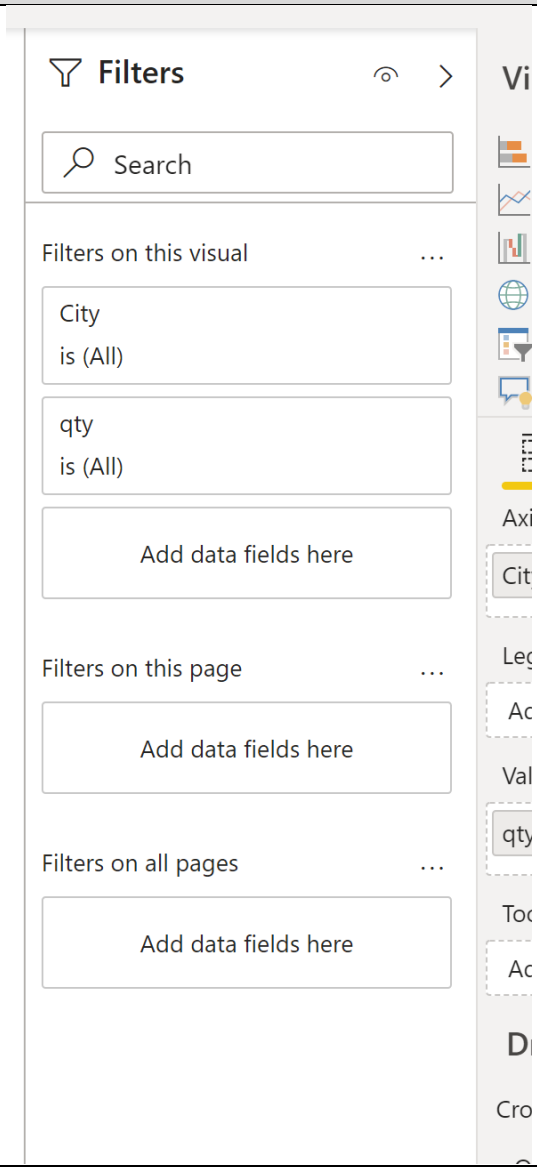
Click Steps	Screen Shots
24. Place your mouse over the relationship between products and transactions. The link will highlight product_id between both links.	
25. Right click onto the link and select properties.	

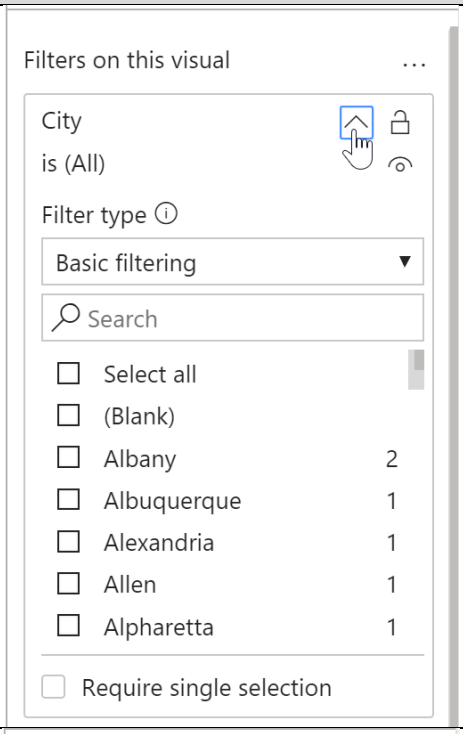
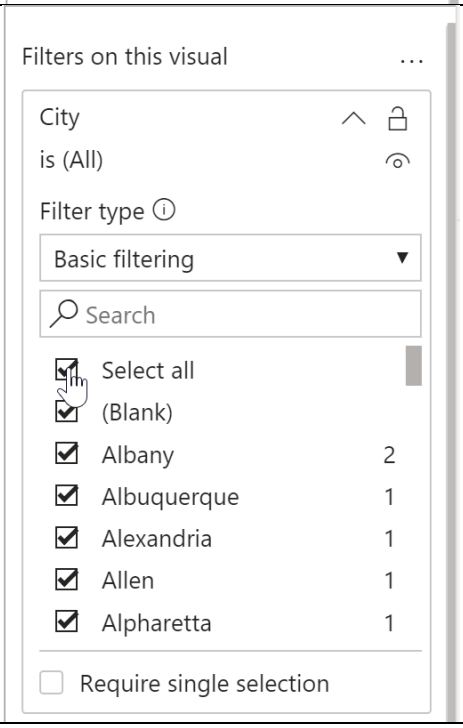
Click Steps	Screen Shots
26. From the Cross filter direction dropdown select Both to make the connection cross directional. 27. Click OK.	
Create an interesting report	
28. Click the Report view button	
29. Let's create chart for sales by the top cities. Click the clustered bar chart to insert a new bar chart.	

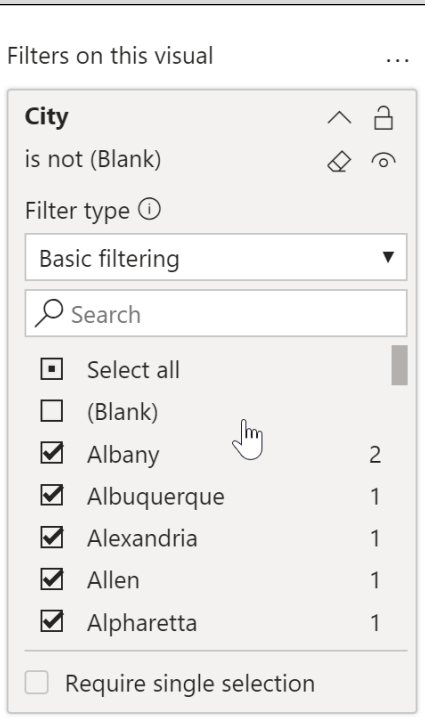
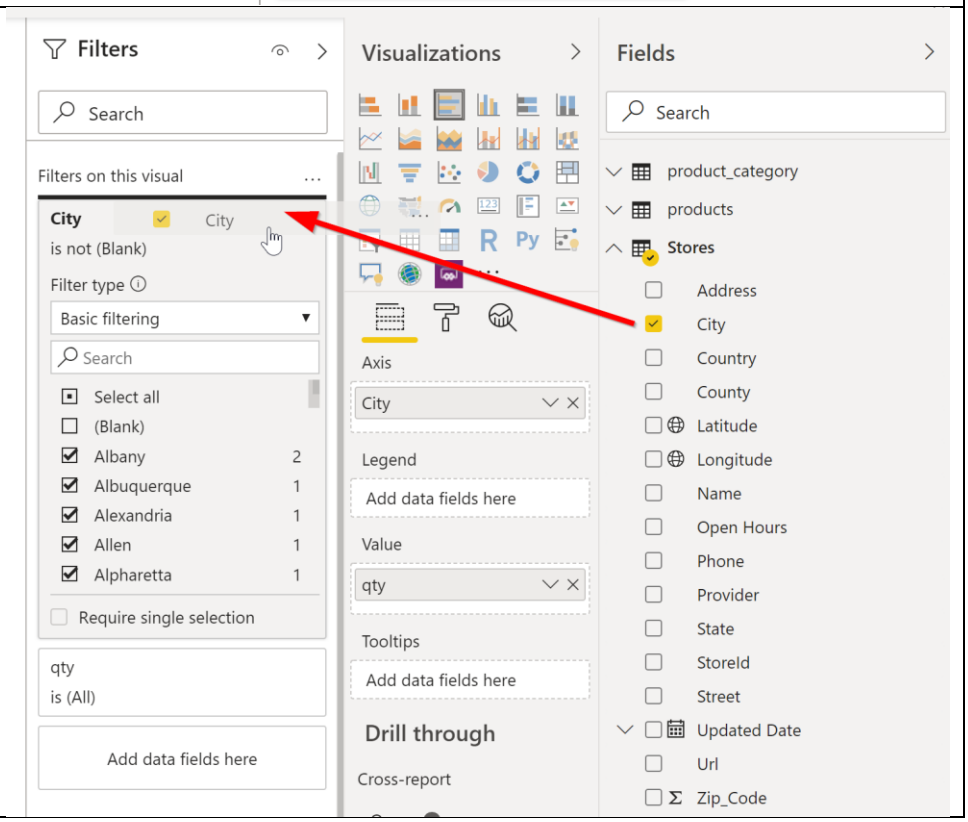
Click Steps	Screen Shots
30. Drag City (from the Stores table)	

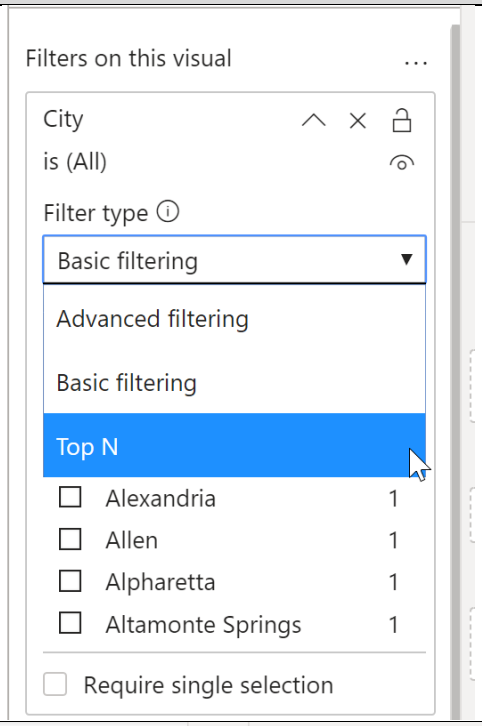
Click Steps	Screen Shots
31. Drag qty over to the Value field well.	

Click Steps	Screen Shots
32. Notice the are a lot of blank rows in our city column in the database. Let's remove those.	

Click Steps	Screen Shots
33. Make sure your Filters tab is expanded.	

Click Steps	Screen Shots
34. Click on City to expand it.	
35. Click Select All to select everything.	

Click Steps	Screen Shots
36. Uncheck (blank) to remove it.	
37. Now let's show only the top 10. You'll need to place another city filter onto the visual.	

Click Steps	Screen Shots
38. When the new filter is placed. Click the Filter Type drop down and select Top N.	
39. Type 10 in the Show Items value field. 40. Drag qty from the transactions table to the By value field well.