COMBINING DATA FROM THE SAME FOLDER

BY

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LAB 1: COMBINING DATA FROM THE SAME FOLDER.

You have been tasked to use Excel to create a process that would use a template file as a query and then apply that query the rest of the files. Finally, the would result would be one table with the results from each queried file.
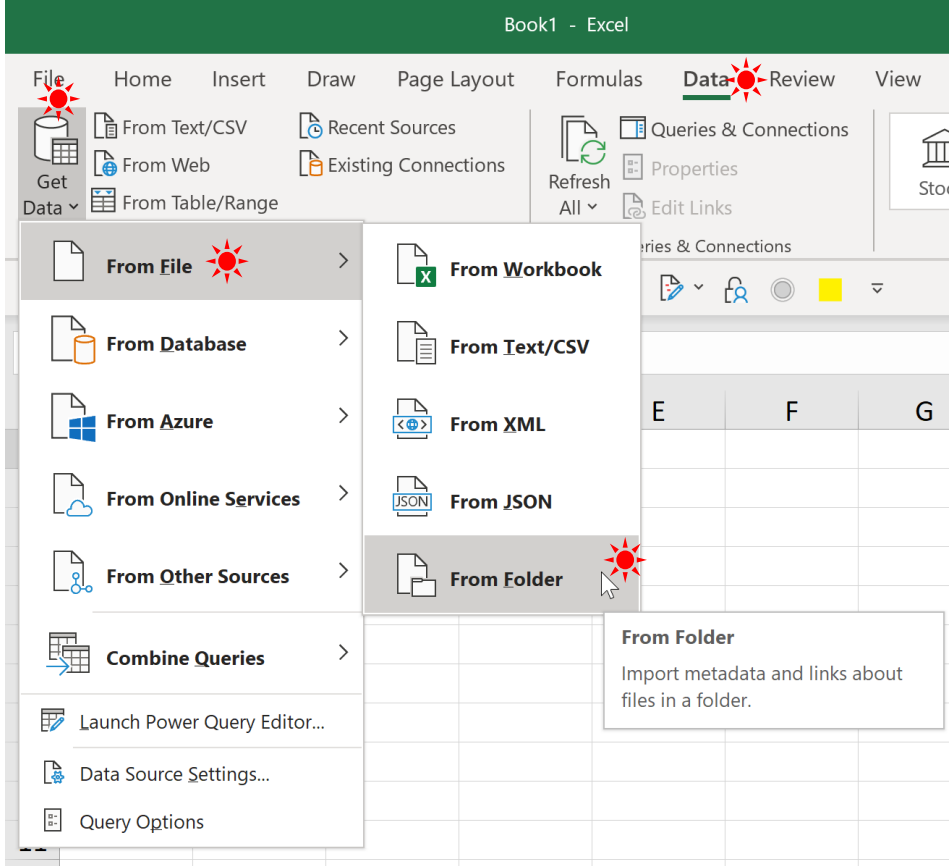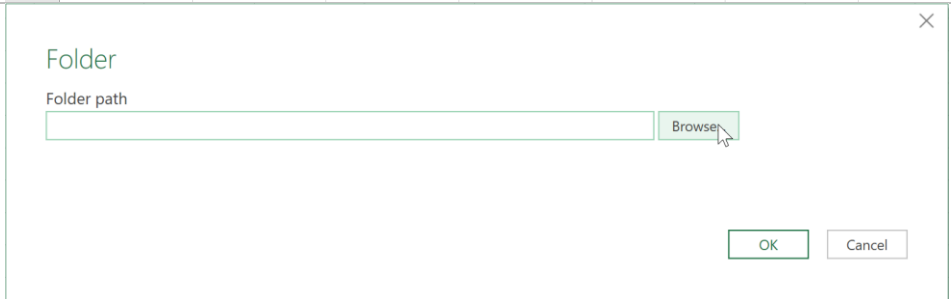
MODULE REQUIREMENTS

▶ Using File from Folder

▶ Identifying the sample file and final table

▶ Creating a query on the sample file
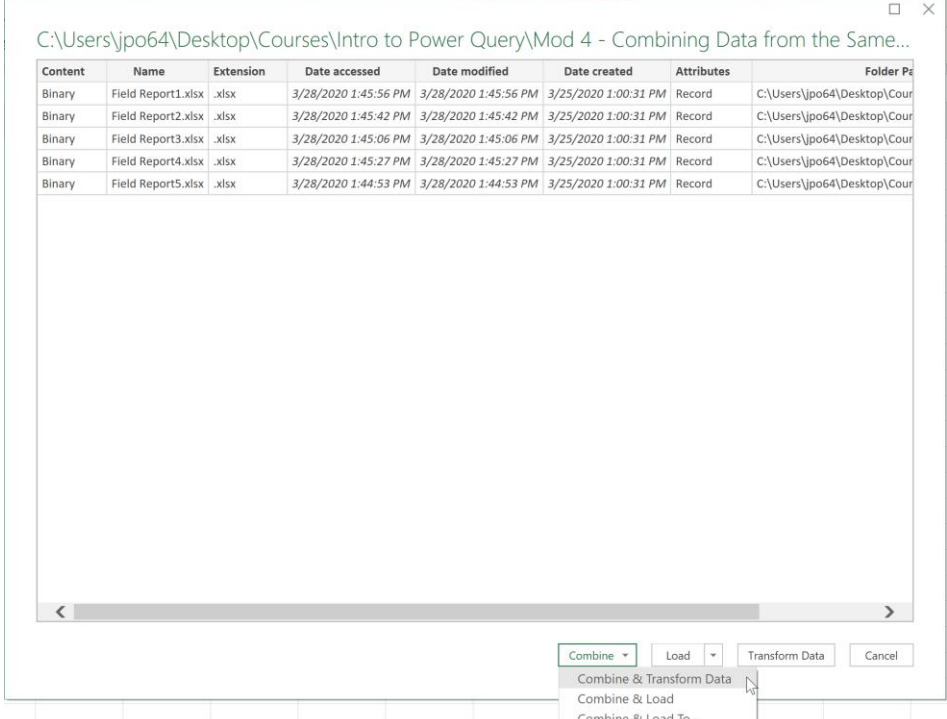
▶ Using transpose

▶ Reporting final results
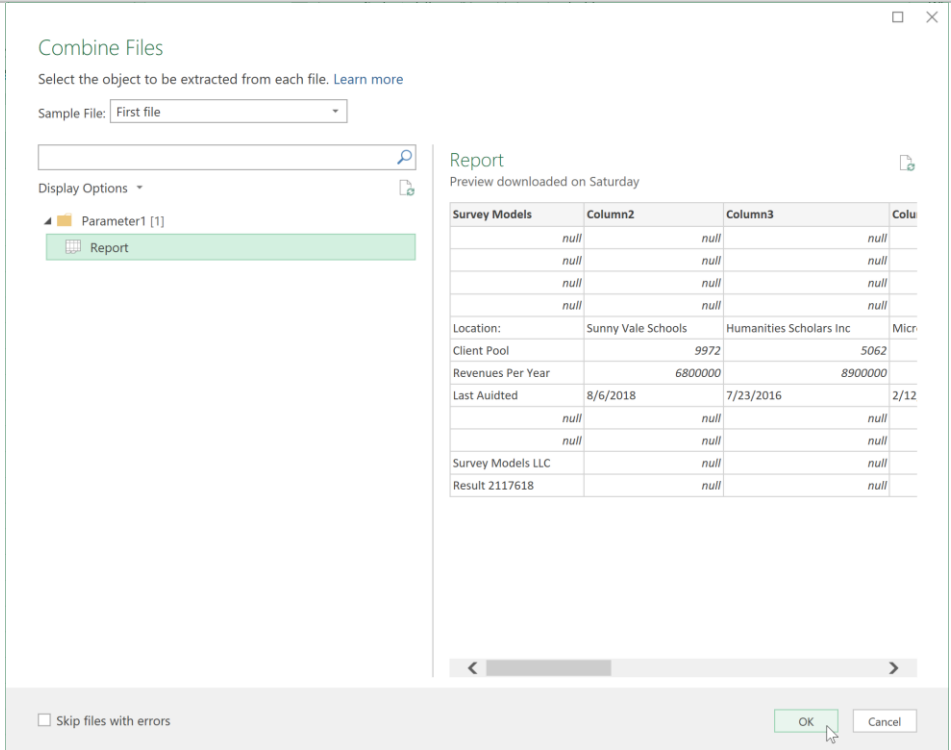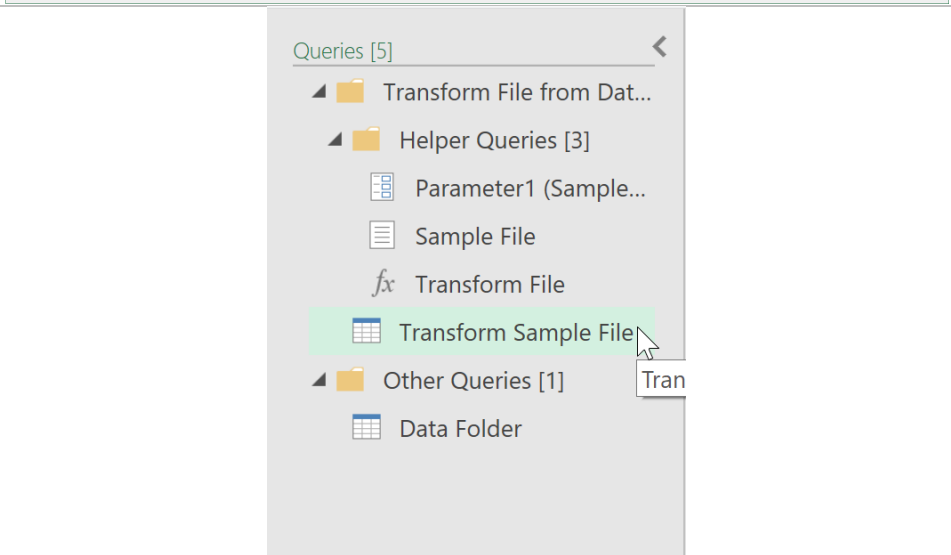
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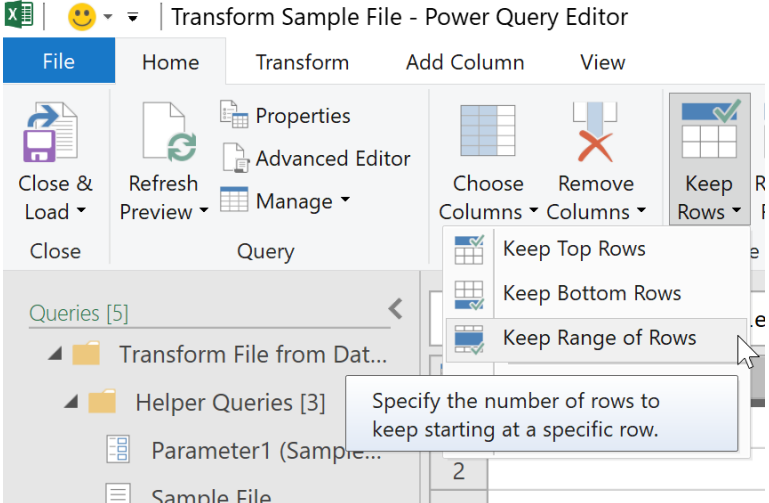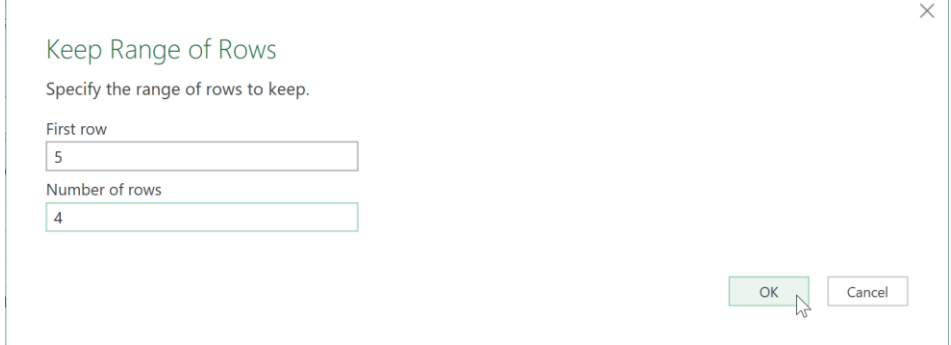Make sure to watch the associated video lessons.

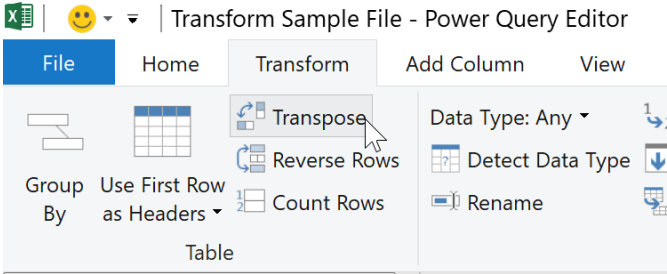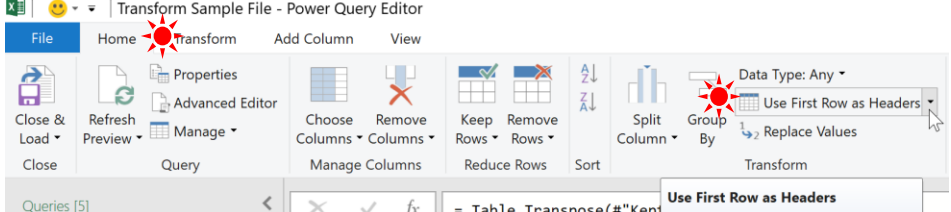## STEP-BY-STEP INSTRUCTIONS

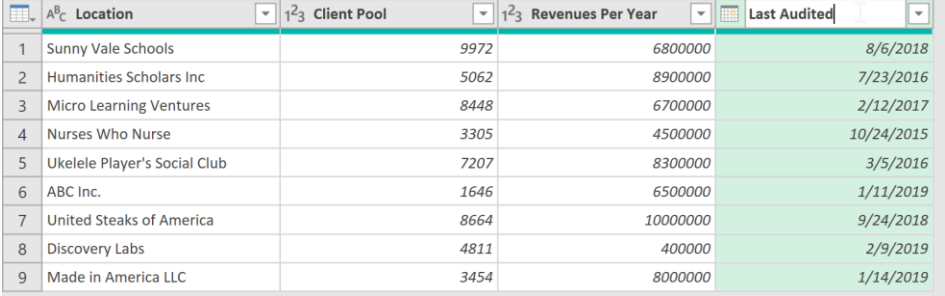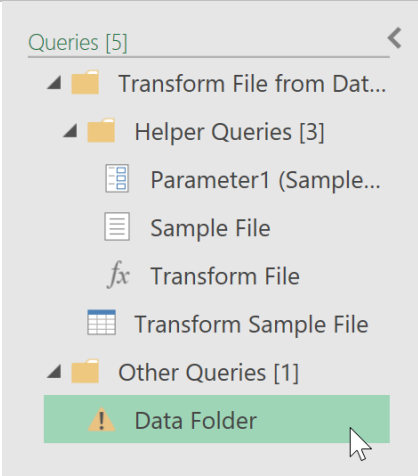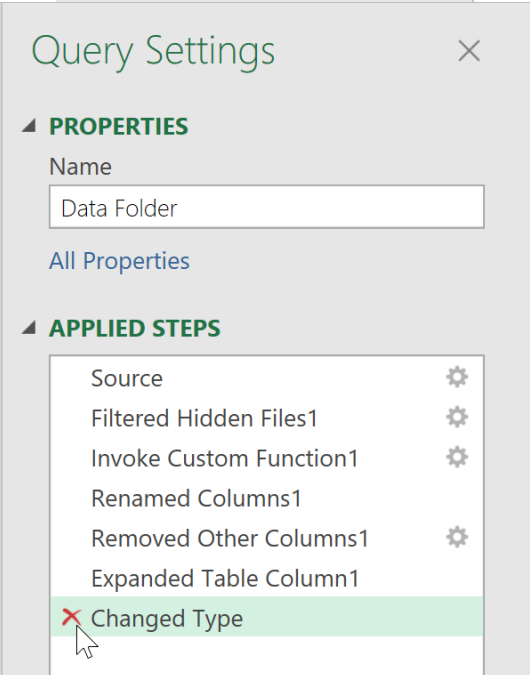| Click Steps	Screen Shots
1. Start with a fresh, new Excel file. 2. From on Data ribbon tab, select Get Data > From File > From Folder	
3. Click Browse… to select the folder path	
4. Brows to …\Intro to Power Query\Mod 4 - Combining Data from	

Click Steps	Screen Shots
the Same Folder\Data Folder from within the project files. Click OK. 5. Click OK once more to set the folder path.	
6. Power Query will then show you the files in that folder in table form. 7. Press Combine > Combine & Transform Data to bring them into the Power Query editor.	C:\Users\jpo64\Desktop\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same… | Content	Name	Extension	Date accessed	Date modified	Date created	Attributes	Folder Pa
---	---	---	---	---	---	---	---
Binary	Field Report1.xlsx	.xlsx	3/28/2020 1:45:56 PM	3/28/2020 1:45:56 PM	3/25/2020 1:00:31 PM	Record	C:\Users\jpo64\Desktop\Cour
Binary	Field Report2.xlsx	.xlsx	3/28/2020 1:45:42 PM	3/28/2020 1:45:42 PM	3/25/2020 1:00:31 PM	Record	C:\Users\jpo64\Desktop\Cour
Binary	Field Report3.xlsx	.xlsx	3/28/2020 1:45:06 PM	3/28/2020 1:45:06 PM	3/25/2020 1:00:31 PM	Record	C:\Users\jpo64\Desktop\Cour
Binary	Field Report4.xlsx	.xlsx	3/28/2020 1:45:27 PM	3/28/2020 1:45:27 PM	3/25/2020 1:00:31 PM	Record	C:\Users\jpo64\Desktop\Cour
Binary	Field Report5.xlsx	.xlsx	3/28/2020 1:44:53 PM	3/28/2020 1:44:53 PM	3/25/2020 1:00:31 PM	Record	C:\Users\jpo64\Desktop\Cour	 Combine ▾ Load ▾ Transform Data Cancel Combine & Transform Data Combine & Load Combine & Load To…
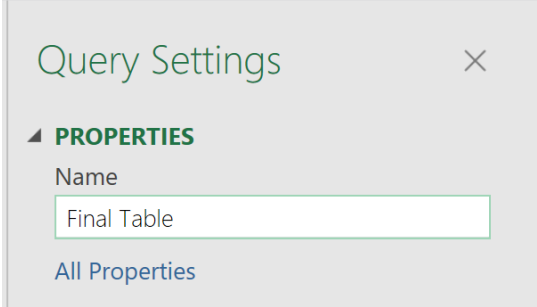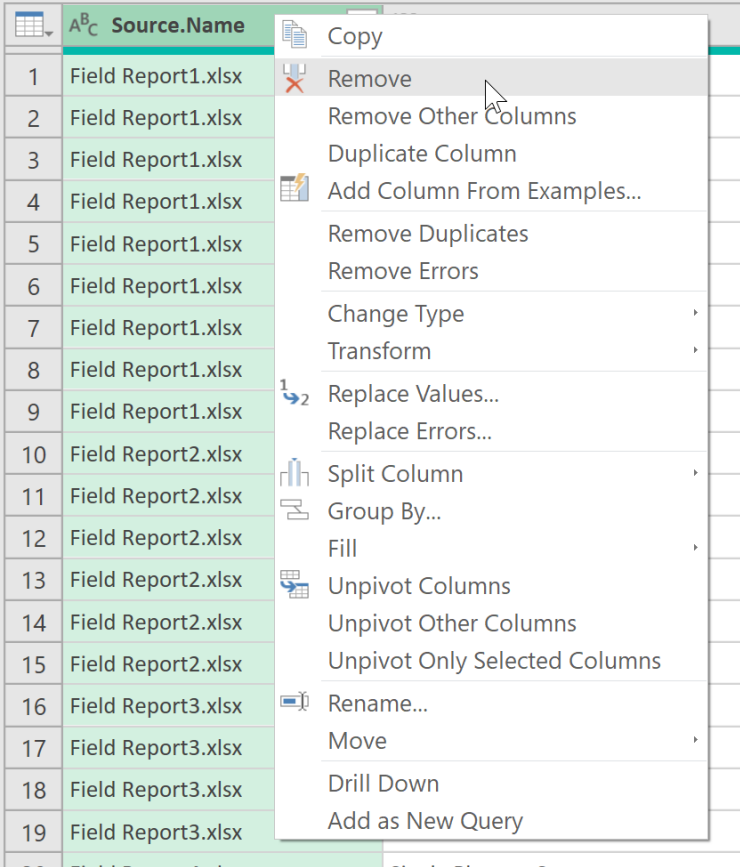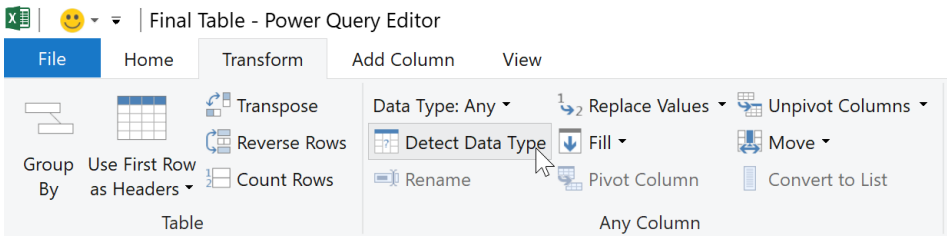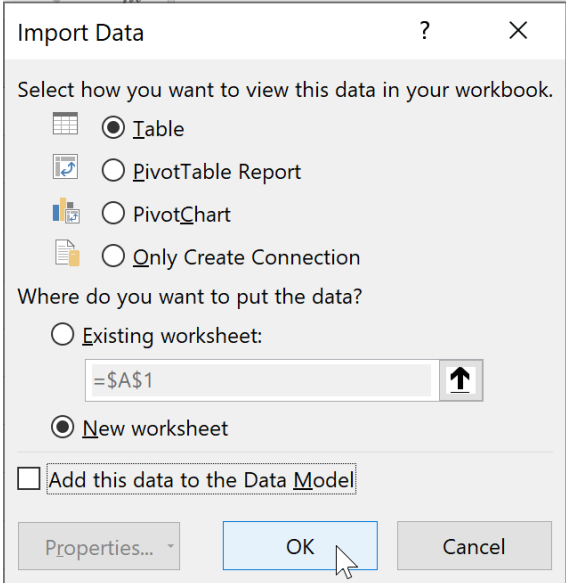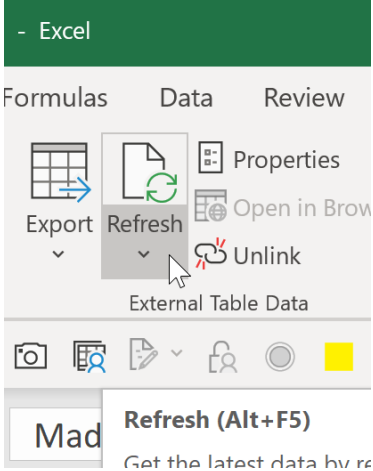
Click Steps	Screen Shots
8. The Combine Files dialog box appears. 9. Make sure First file is in the Sample File Dropdown. 10. Make sure Report is selected. 11. Press OK.	
12. Select Transform Sample File from the query listing on the left.	

Click Steps	Screen Shots
13. From on the Home tab, select Keep Rows > Keep Range of Rows	
14. Let's get rid of the rows we don't need. In the First row field enter 5. 15. In the Number of rows field type 4. 16. Click OK.	
17. Now let's transpose the dataset. From on the Transform tab, select Transpose.	
18. Let's make the first row our headers. From on the Home tab, click use First Row as Headers.	

Click Steps	Screen Shots
19. Change the column header Location: to Location by double clicking the column header. **20.** Fix the spelling error in "Last Auidited" to be Last Audited.	<table><tr><td></td><td>ABC Location</td><td>1²₃ Client Pool</td><td>1²₃ Revenues Per Year</td><td>Last Audited</td></tr><tr><td>1</td><td>Sunny Vale Schools</td><td>9972</td><td>6800000</td><td>8/6/2018</td></tr><tr><td>2</td><td>Humanities Scholars Inc</td><td>5062</td><td>8900000</td><td>7/23/2016</td></tr><tr><td>3</td><td>Micro Learning Ventures</td><td>8448</td><td>6700000</td><td>2/12/2017</td></tr><tr><td>4</td><td>Nurses Who Nurse</td><td>3305</td><td>4500000</td><td>10/24/2015</td></tr><tr><td>5</td><td>Ukelele Player's Social Club</td><td>7207</td><td>8300000</td><td>3/5/2016</td></tr><tr><td>6</td><td>ABC Inc.</td><td>1646</td><td>6500000</td><td>1/11/2019</td></tr><tr><td>7</td><td>United Steaks of America</td><td>8664</td><td>10000000</td><td>9/24/2018</td></tr><tr><td>8</td><td>Discovery Labs</td><td>4811</td><td>400000</td><td>2/9/2019</td></tr><tr><td>9</td><td>Made in America LLC</td><td>3454</td><td>8000000</td><td>1/14/2019</td></tr></table>
21. Now let's look at our combined query. Double Click Data Folder to see the combined query. Don't worry about the error.	Queries [5] ▲ 📁 Transform File from Dat… 　▲ 📁 Helper Queries [3] 　　📇 Parameter1 (Sample… 　　📄 Sample File 　　*fx* Transform File 　　▦ Transform Sample File ▲ 📁 Other Queries [1] 　⚠ Data Folder
22. Click on the red X next to Changed Type to remove the error.	**Query Settings** ✕ ▲ **PROPERTIES** Name [Data Folder] All Properties ▲ **APPLIED STEPS** Source　⚙ Filtered Hidden Files1　⚙ Invoke Custom Function1　⚙ Renamed Columns1 Removed Other Columns1　⚙ Expanded Table Column1 ✗ Changed Type

Click Steps	Screen Shots
23. Rename the query from Data Folder to Final Table.	**Query Settings** ✕ ▲ **PROPERTIES** Name [Final Table] All Properties
24. Right+Click onto the Source.Name column and select Remove to delete it. We don't need it.	
25. Press Ctrl + A to select all of the columns at once. 26. On the Transform ribbon tab, select Detect Data Type to have Power Query automatically detect	

Click Steps	Screen Shots
each column's datatype.	
27. We're done! Select File > Close & Load To… 28. Keep the defaults in the Import Data dialog box. Press OK to continue.	**Import Data** ? ✕ Select how you want to view this data in your workbook. ⊙ Table ○ PivotTable Report ○ PivotChart ○ Only Create Connection Where do you want to put the data? ○ Existing worksheet: =A1 ⬆ ⊙ New worksheet ☐ Add this data to the Data Model Properties… OK Cancel
29. Use windows explorer to navigate to the project files folders …\Intro to Power Query\Mod 4 - Combining Data from the Same Folder. 30. Copy Field Report6 (move to Data Folde).xlsx and paste it into the Data Folder 31. Go back to Excel and scroll down to the bottom of table. Take note of the current row number. 32. From on the Table Design Ribbon Tab select the Refresh button.	- Excel Formulas Data Review Export Refresh Properties Open in Brow Unlink External Table Data Mad **Refresh (Alt+F5)** Get the latest data by re

Click Steps	Screen Shots
33. Now the bottom of the table has automatically added records reflecting the new file added to the folder.	

30	Fences Foundation	9039	3200000	10/26/2016
31	Make a Gift Foundation	7342	7800000	11/22/2016
32	Second Chances	1319	8600000	3/14/2018
33	Jubilee	7084	8900000	3/14/2018
34	Fences Foundation	9039	3200000	10/26/2016
35	Make a Gift Foundation	7342	7800000	11/22/2016
36	Second Chances	1319	8600000	3/14/2018
37	Jubilee	7084	8900000	3/14/2018