



# MERGING MULTIPLE DATASETS

BY

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EXCELTV



## LAB 1: MERGING MULTIPLE DATA SETS

You have been tasked to use Power Query to merge multiple datasets together from different systems.

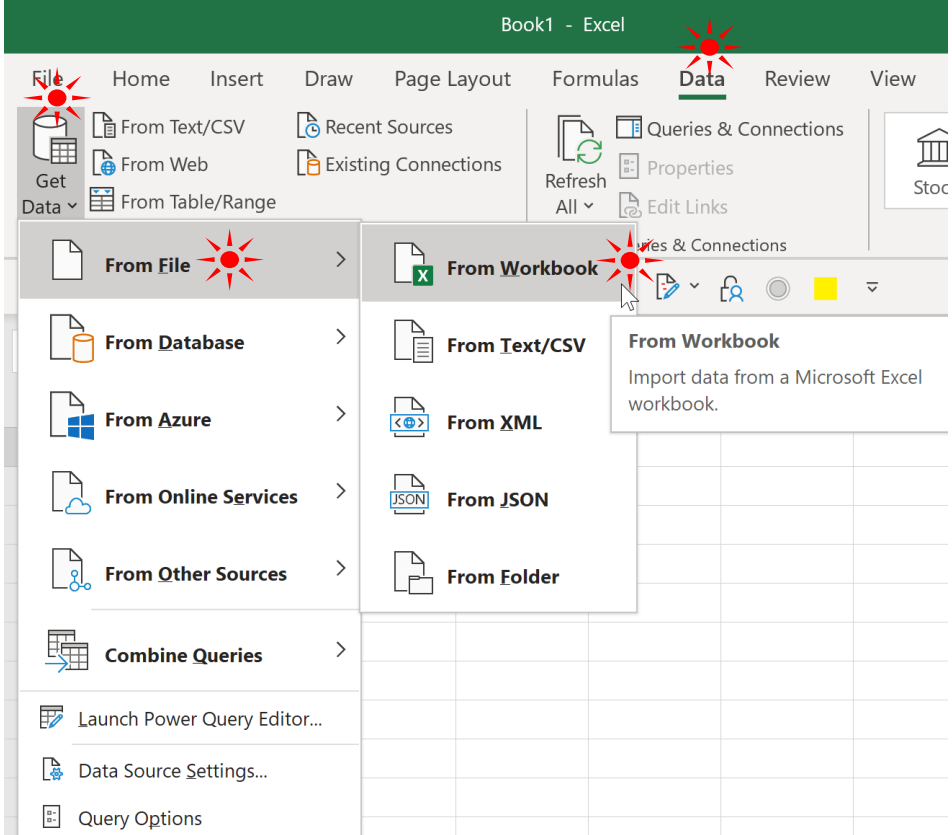
### MODULE REQUIREMENTS

- ▶ Pulling in multiple types of data into Power Query
- ▶ Using a merge queries
- ▶ Creating a final table with results from both datasets

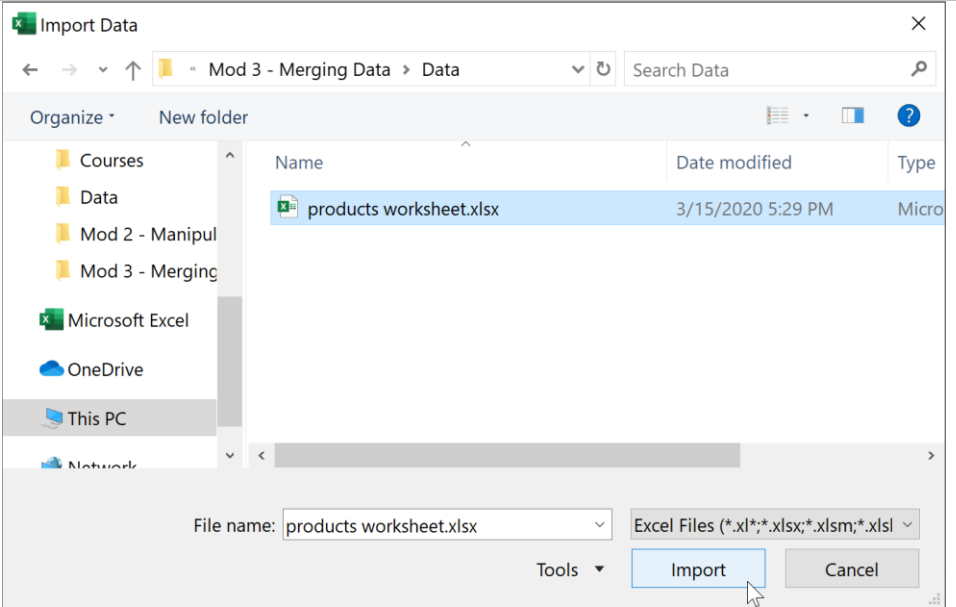
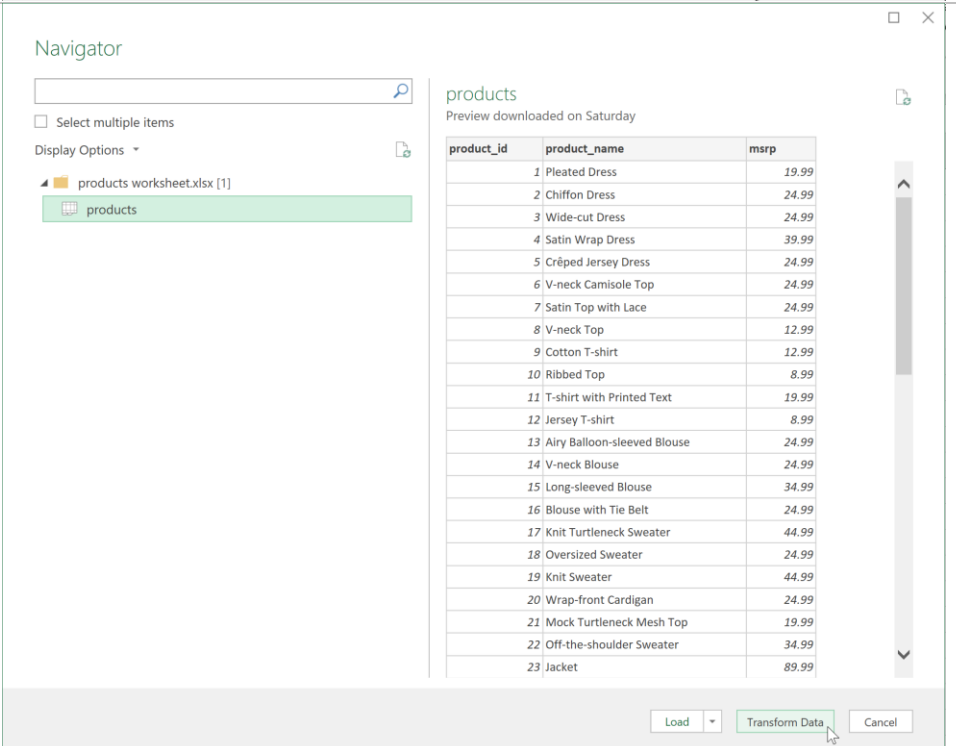
## HINTS

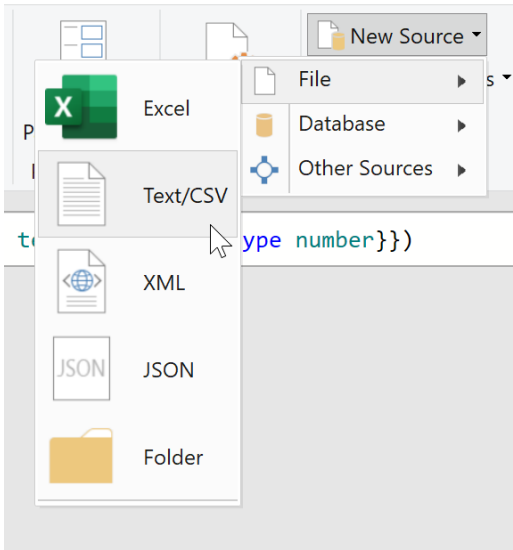
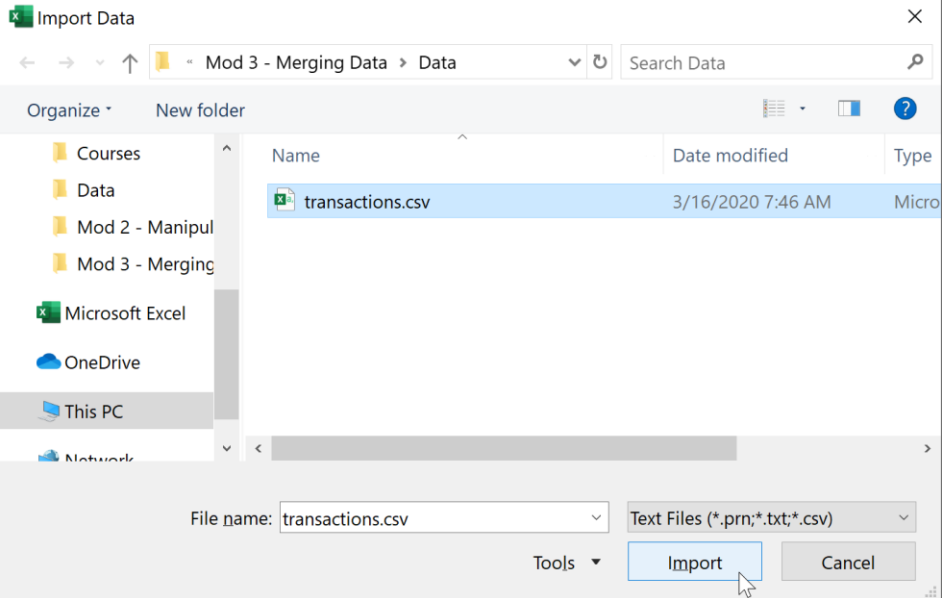
Watch both videos in the module first before attempting this lab.

## STEP-BY-STEP INSTRUCTIONS

Click Steps	Screen Shots
<ol style="list-style-type: none"> <li>1. Create a new fresh Excel File</li> <li>2. Save it Transactions Final or another name of your choice.</li> <li>3. From on the Data tab, select Get Data &gt; From File &gt; From Workbook</li> </ol>	 <p>The screenshot shows the Excel ribbon with the 'Data' tab selected. The 'Get Data' group is expanded, showing options like 'From Text/CSV', 'From Web', 'From Table/Range', 'From Database', 'From Azure', 'From Online Services', 'From Other Sources', 'Combine Queries', 'Launch Power Query Editor...', 'Data Source Settings...', and 'Query Options'. The 'From File' option is selected, opening a submenu with 'From Workbook' highlighted. A red starburst marks the 'From Workbook' option.</p>



Click Steps	Screen Shots
<ol style="list-style-type: none"><li>From the class files, navigate to ....\Courses\Intro to Power Query\Mod 3 - Merging Data\Data in the Import Data file selection box.</li><li>Select products worksheet.xlsx.</li><li>Press Import.</li></ol>	
<ol style="list-style-type: none"><li>In the Navigator window, select the products tab worksheet.</li><li>Then click Transform Data.</li></ol>	

Click Steps	Screen Shots
<p>9. Wait until Power Query is finished loading.</p> <p>10. Now it's time to bring the associated CSV file.</p> <p>11. From on the Home tab, select New Source &gt; Text / CSV</p> <p>New Source can be found on the far right of the ribbon tab.</p>	
<p>12. When the Import Data dialog box opens, navigate to ... \Intro to Power Query \Mod 3 - Merging Data \Data from within the project files.</p> <p>13. Select transactions.csv</p> <p>14. Click Import.</p>	



Click Steps

Screen Shots

15. Click OK to import the csv with no additional properties set.

transactions.csv

File Origin: 1252: Western European (Windows) | Delimiter: Comma | Data Type Detection: Based on first 200 rows

date	time	product_id	qty
9/20/2016	1:43:00 PM	12	5
5/10/2014	3:26:00 PM	55	9
6/14/2013	1:31:00 PM	22	1
11/28/2013	10:36:00 AM	40	2
12/23/2016	12:10:00 PM	50	3
6/15/2016	10:13:00 AM	2	1
6/25/2015	3:29:00 PM	47	6
10/23/2014	2:33:00 PM	51	9
5/26/2013	9:35:00 AM	31	9
11/16/2014	2:35:00 PM	48	3
1/10/2013	10:38:00 AM	26	6
1/5/2015	2:05:00 PM	7	9
3/8/2014	10:04:00 AM	27	6
8/19/2013	2:09:00 PM	48	6
12/25/2016	12:10:00 PM	53	8
2/21/2015	10:42:00 AM	8	10
2/26/2014	9:52:00 AM	44	8
5/24/2014	11:09:00 AM	25	5
8/30/2016	12:41:00 PM	15	4
9/24/2016	4:03:00 PM	12	1

The data in the preview has been truncated due to size limits.

OK Cancel

16. Now it's time to merge both datasets together.

17. From on the Home tab, select the Merge Queries dropdown > Merge Queries as New

Merge Queries

Merge Queries as New

Combine

product\_id qty



## Click Steps

18. In the merge dialog box, set the following properties:

- transactions in the top dropdown
- product\_id selected in the top table
- products selected in lower dropdown
- product\_id selected in the bottom table
- Join Kind is set to Left Outer...

19. Click OK

20. When the new table appears, immediately rename it to Final Table

## Screen Shots

Transform Combine Parameters Data Sources New Query

### Merge

Select tables and matching columns to create a merged table.

transactions

date	time	product_id	qty
9/20/2016	1:43:00 PM	12	5
5/10/2014	3:26:00 PM	55	9
6/14/2013	1:31:00 PM	22	1
11/28/2013	10:36:00 AM	40	2
12/23/2016	12:10:00 PM	50	3

products

product_id	product_name	msrp
1	Pleated Dress	19.99
2	Chiffon Dress	24.99
3	Wide-cut Dress	24.99
4	Satin Wrap Dress	39.99
5	Crêped Jersey Dress	24.99

Join Kind

Left Outer (all from first, matching from second)

☐ Use fuzzy matching to perform the merge

> Fuzzy matching options

✓ The selection matches 34000 of 34000 rows from the first table.

OK Cancel

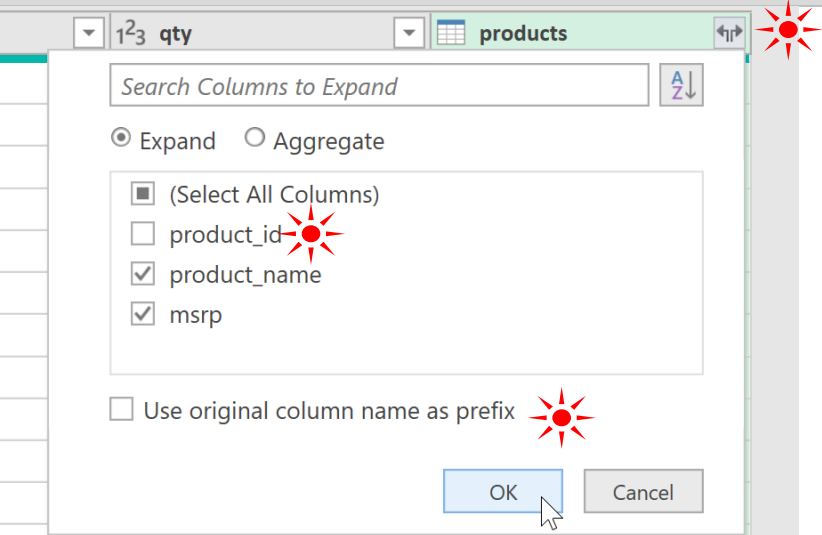
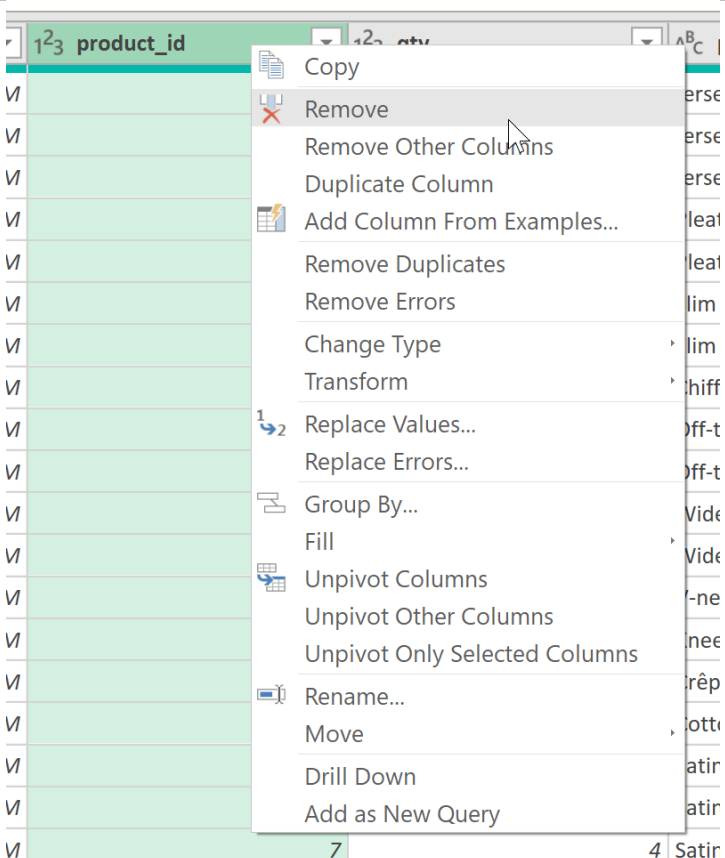
### Query Settings

#### PROPERTIES

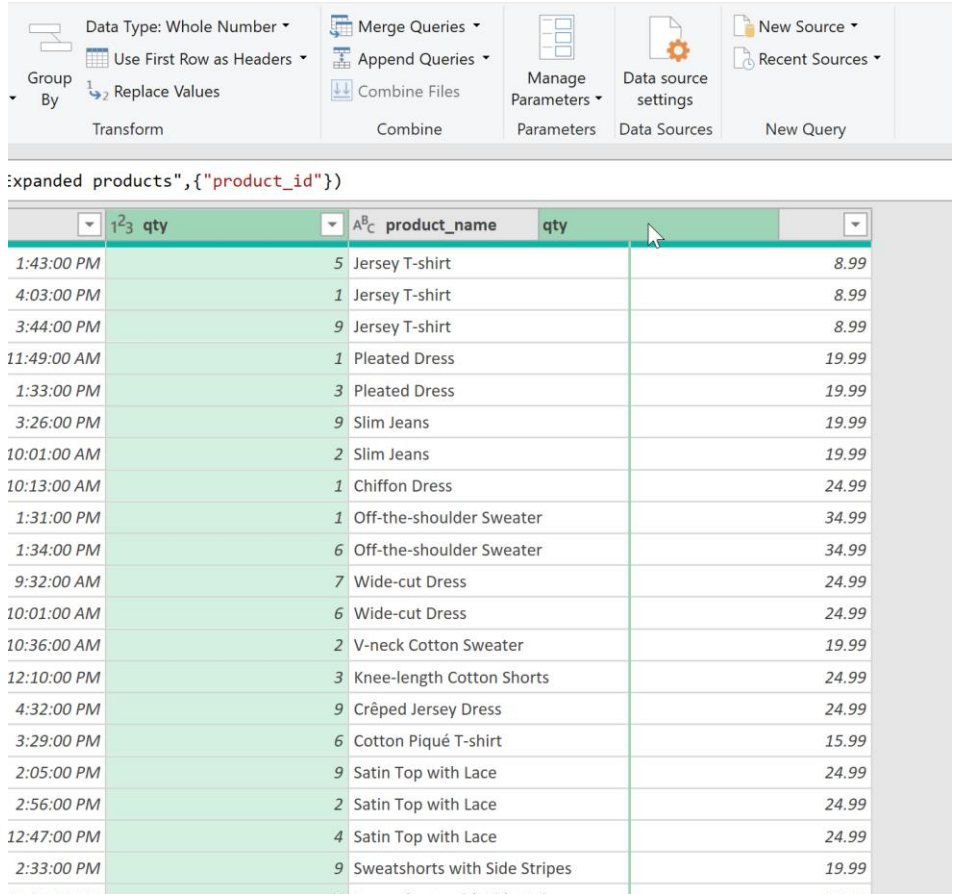
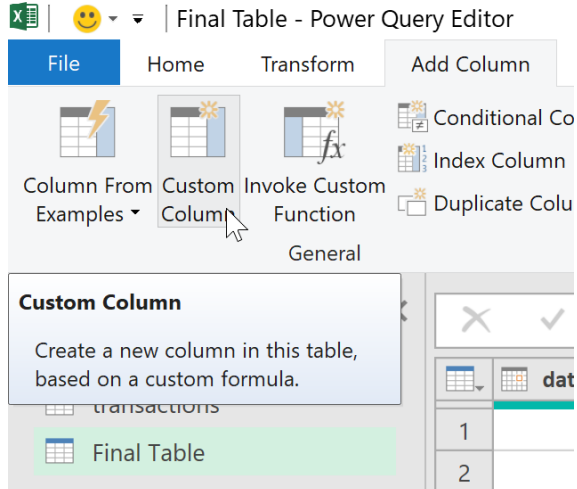
Name

Final Table

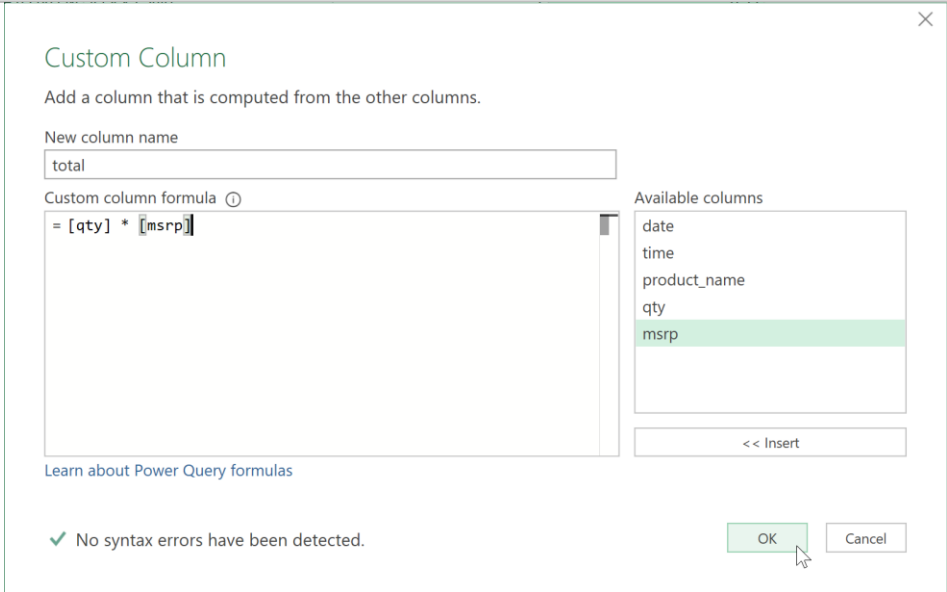
All Properties

Click Steps	Screen Shots
<p>21. Click on the expansion icon to the right of the products header</p> <p>22. Uncheck product_id</p> <p>23. Uncheck Use original name as prefix</p> <p>24. Click OK</p>	
<p>25. Remove the product_id column by right-clicking the header and selecting Remove.</p>	



Click Steps	Screen Shots
<p>26. Switch qty and product_name by clicking and holding the qty header and then dragging it to the right.</p>	
<p>27. Create a column that reflects the final sale price.</p> <p>28. From on the Add Column tab select Custom Column</p>	



Click Steps	Screen Shots
<p>29. In the Custom Column pop up type total in the New Column name field.</p> <p>30. Click into the custom column formula</p> <p>31. Type =</p> <p>32. Double-click the qty selection from Available columns. This will insert the field into the custom formula.</p> <p>33. Type *</p> <p>34. Double-click msrp to insert the field into the formula.</p> <p>35. Click OK.</p>	
<p>36. Select File &gt; Close &amp; Load To...</p> <p>37. Click Table and New Worksheet. Click OK.</p> <p>38. The updated table now appears on a new worksheet.</p>	