

Example - 3

Consolidating a folder
of files with
Power Query

⇒ How to take a folder of all
files & consolidate them
into
one big table using
Power - B.I

Data



practise 6 Data



CSV folder

we can also use this technique
to combine data that is in
text files ; csv files ; even pdfs
through Power Query.



make a note/copy that folder path

(Ctrl+C) : its path

Now,

Data : Ribbon



Get Data ▼



From File



From Folder



just paste that path (Ctrl+V)



OK.

↓
Now, it will open the Navigator
screen

↓
Click : Combine ▾

↓
Combine & Transform Data

↓
Now, Combine files screen opens up

↓
just : 4 files in the folder you want me
to combine but what do you
want in each file, what is
the process you want to run on
each file teach me for one and
then I'll do the same for all
of them

↓
Sample file : (Pick any file)
eg: 1st file

↓
Sheet 1 select Bottom

↓
OK

↓
Now, P.Q will open the editor
and load up Query here

↓
Now you'll see a bunch of Queries
before CSV Query
(there are things that power
Query needs in order to generate
this)

Understanding

Folder

Combine

Operation

final Query \Rightarrow CSV

Notes:-

So, we taught it what we want to do which is select the sheet 1 in the 1st file and then it will do the same for all of that so that kind of process is usually done through

functions :

we loaded : sample file

So, based on the sample file P.Q builds a small internal Query called = "Transform sample file" where operations we want to do is defined.

Once these are done, based on it ; P.Q. will create a

"Transform file fⁿ" fⁿ

↓
is for defining the process
that we want to run on all the
files in the folder so once
this process is defined then P.O.
will go to the folder for each
file in the folder; it will
simply run that process that
function & get the output &
put everything together here
in 1 go.

Output :

SourceName

month

Amount

New,

Formatting :->

(1.) Rename source column as
Project Name and Remove
xlsx from its name

⇒ # select source name column

↓
Right click

↓
Replace values

↓
To : .xlsx

with : -
↓
space

↓
OK

Double click on source name
and Rename "Project Name"

Adding

Extra

Operations

to

Transform Sample File

&

functions

we don't want Month No.
but Instead want Name of
the Month #

→ so, these things will happen
on all the files so any changes
to that need to happen at the
function level but we don't
know to edit functions-

Then,
simply we'll make changes
to "Transform Sample file"

Now,

Click :  Transform Sample File



Add column : Ribbon



Click : Custom Column

↓
Custom Column dialogue Box Appears

↓
New Column Name: Date


formula: = #date(2020, [month], 1)

Available Column: select:- month

↓
OK

↓
then Date column will appear

↓
Remove month column

↓
Go to CSV 
all the same will be updated there (for all files)

Note:- if we don't run this function on all the files on the

folder,

let's say it has some additional files like - excel, ppt, word, pdf, text file but we want only excel file

↓
To do this ⇒ steps :
↓

Applied steps



Click: Source
(listing all items in the folder)



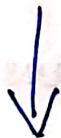
** P.O. ignores hidden files in the folder



Go to Extension column



↑ click here



↓
Text filters

↓
Equals

↓
equals = .xlsx (extension of excel file)

↓
OK

↓
Now, close & load it

↓
All the data will come in
your Excel sheet

↓
Note: Date is shown as NO.

↓
Select Date Column

↓
Home: Ribbon of Excel

↓
General: Short Date

Note:-

Add a new file to this folder



just open your excel sheet



select any cell



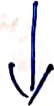
Right : Queries & Connections



Right click : CSV



Refresh



Now, you'll see new file
will be updated here.