

Get Data in Power BI: Takeaways

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Syntax

- Connect to data in a file:

1. On the Home tab, click on Get data.
2. In the list that displays, select the type of the file (`Text/CSV` or `XML` or `Excel` etc).
3. Select the data file to import.

- Importing an Excel file:

1. On the Home tab, click on Get data
2. In the list that displays, select Excel
3. Select the data file to import
4. Click on Open
5. Click on Load or Transform Data

- Updating the file source:

1. Click on Transform Data to open Power BI Editor
2. On the Home tab, click on Data source settings
3. Select a file, and then select Change Source
4. Locate the file
5. Select OK, and then select Close

Concepts

- **Load** automatically loads data into a Power BI model in its current state, whereas **Transform Data** opens data in **Power Query Editor**.
- Opening data **Power Query Editor** is preferred when we need to perform actions such as deleting unnecessary rows or columns, grouping our data, removing errors, and for performing many other data quality tasks.
- Change the location of a source file for a data source during development, or if a file storage location changes. To keep reports up to date, update file connection paths in Power BI.

References

- [Get data from Comma Separated Value \(.CSV\) files](#)
- [Get data from Excel workbook files](#)