

Ex01

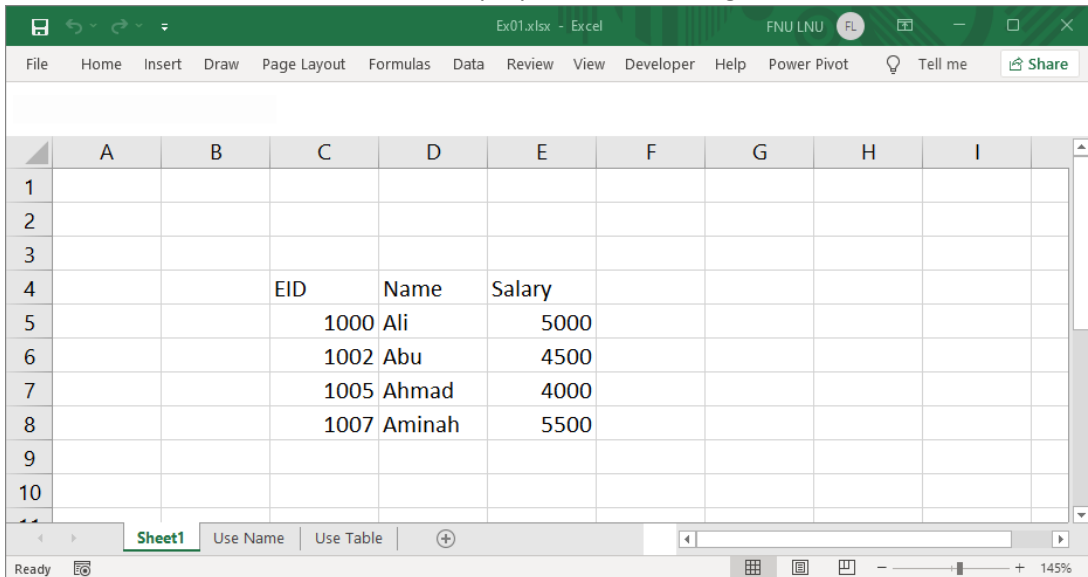
Introduction: Excel is one of the most in-used data sources for Power BI. Therefore, learning various techniques to pull data from Excel workbook is essential.

Objective: Learn different ways to load data from Excel.

Steps:

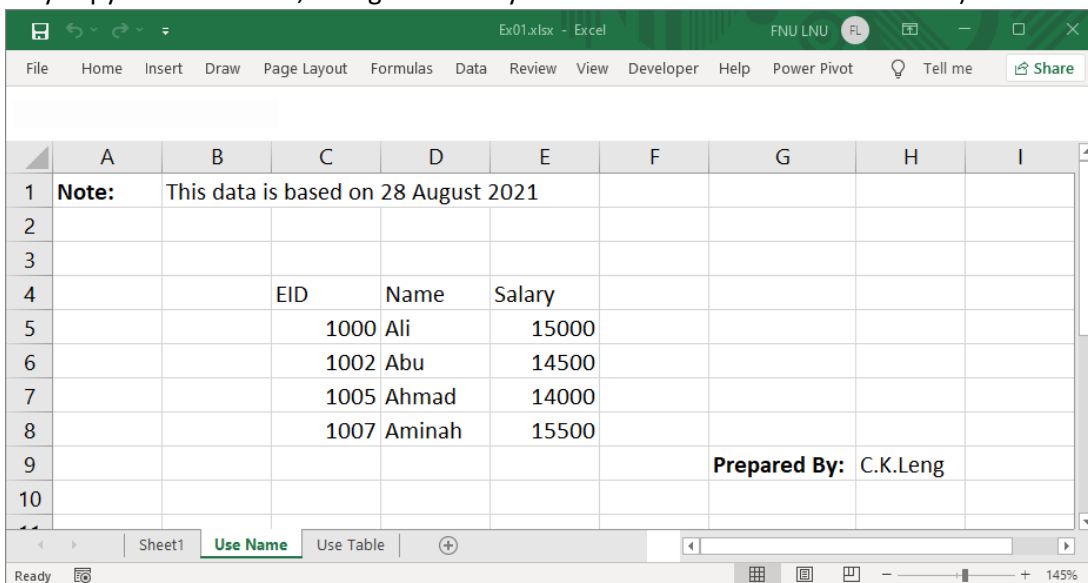
Part-1: Prepare Data Workbook

1. Create a new Excel workbook with name “Ex01.xlsx”
2. In the first default worksheet “Sheet1”, prepare the following tabular data:



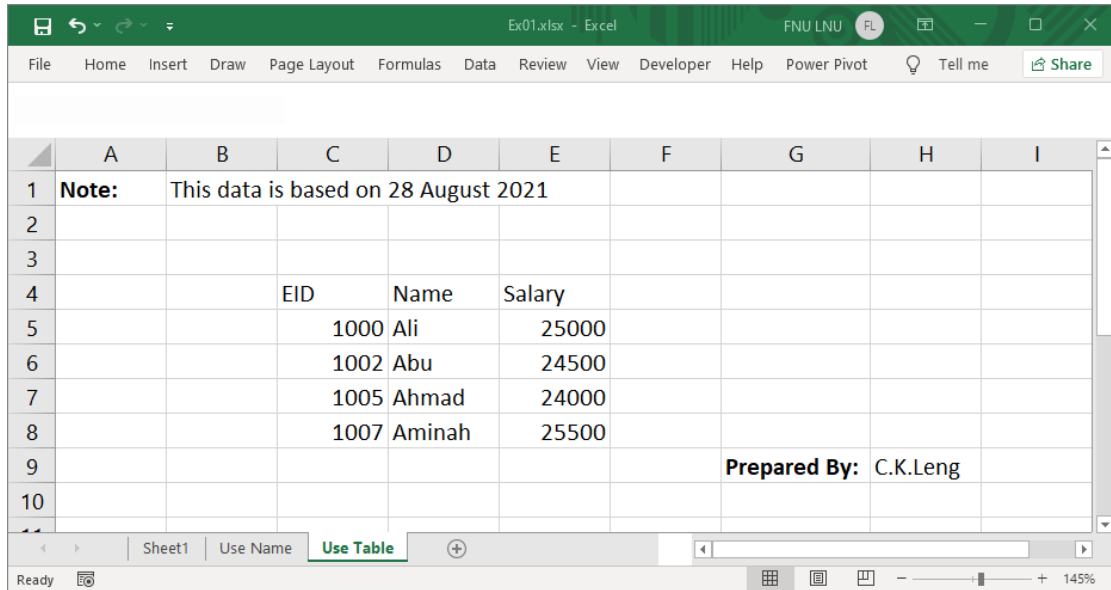
	A	B	C	D	E	F	G	H	I
1									
2									
3									
4			EID	Name	Salary				
5			1000	Ali	5000				
6			1002	Abu	4500				
7			1005	Ahmad	4000				
8			1007	Aminah	5500				
9									
10									

3. Create a new worksheet with name “Use Name” and prepare the contents as shown below (You may copy from “Sheet1”, change the salary values and add more other contents):

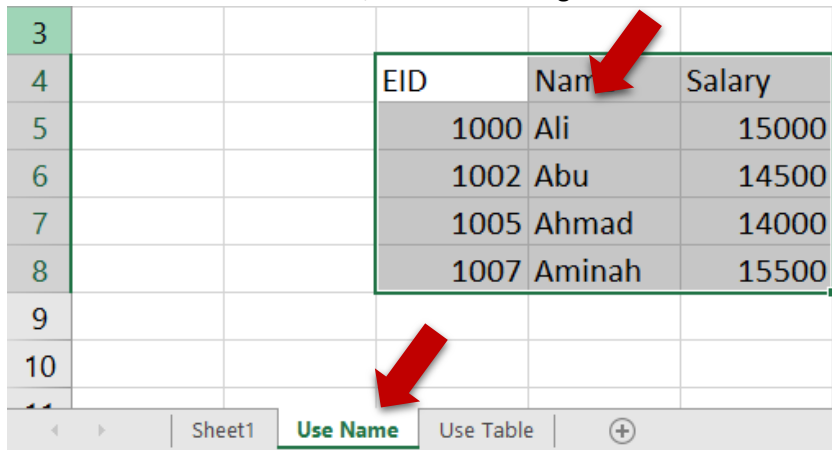


	A	B	C	D	E	F	G	H	I
1	Note:	This data is based on 28 August 2021							
2									
3									
4			EID	Name	Salary				
5			1000	Ali	15000				
6			1002	Abu	14500				
7			1005	Ahmad	14000				
8			1007	Aminah	15500				
9								Prepared By:	C.K.Leng
10									

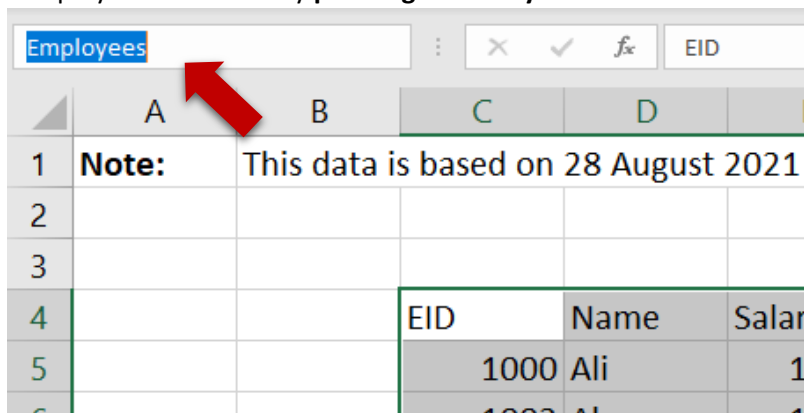
4. Create a new worksheet with name "Use Table" and prepare the contents as shown below (You may copy from "Use Name" and just rename the tab and change the salary values):



5. Select "Use Name" worksheet, then select range C4:E8:



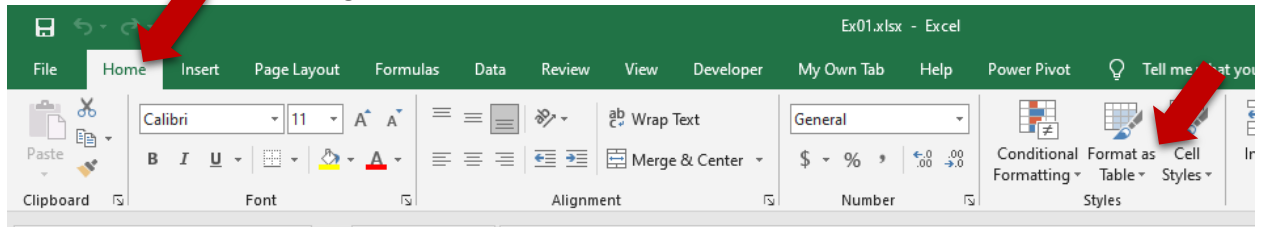
6. While the range is selected, go to name box (Near the top left corner), and type the new name "Employees" followed by pressing enter key to confirm.



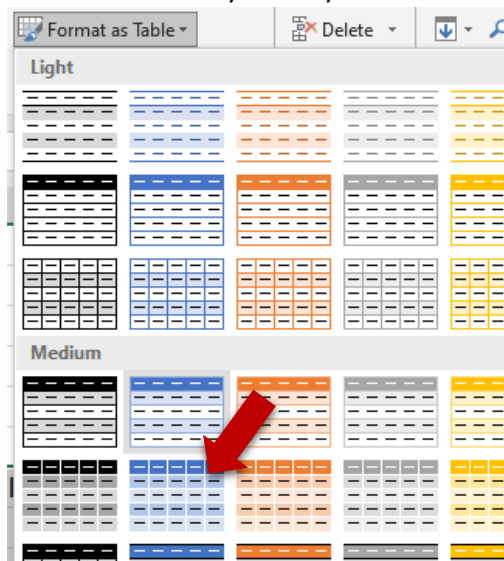
7. Select "Use Table" worksheet, then select range C4:E8:

EID	Name	Salary
1000	Ali	25000
1002	Abu	24500
1005	Ahmad	24000
1007	Aminah	25500

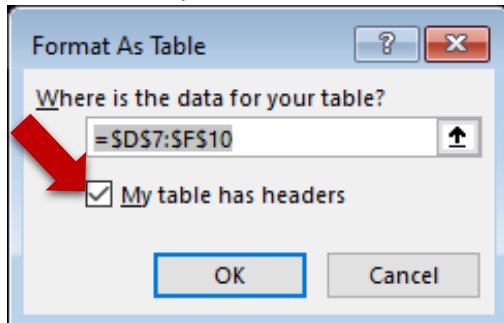
8. While the range is selected, go to "Home" ribbon tab and locate for "Format as Table":



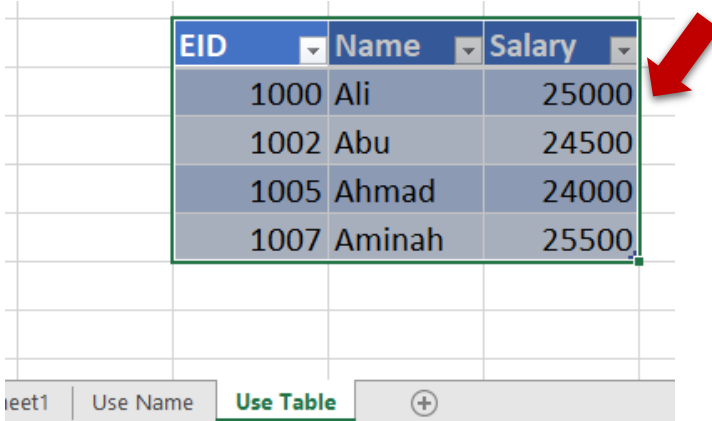
9. Select the Table Style that you like:



10. In the "Format As Table" dialog box, make sure that the "My table has headers" checkbox is checked, then press "OK" to confirm:

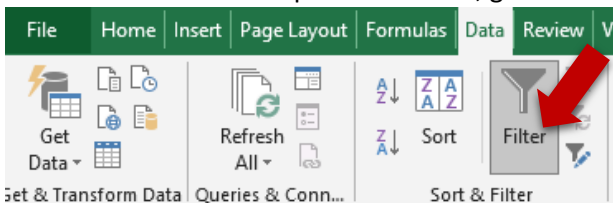


11. Now, you should get the following:

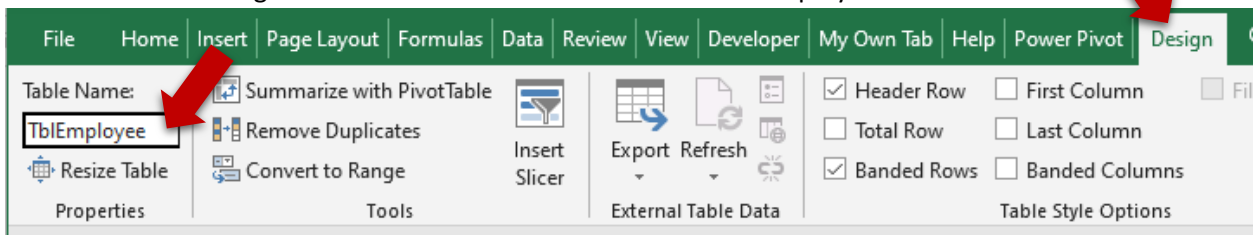


EID	Name	Salary
1000	Ali	25000
1002	Abu	24500
1005	Ahmad	24000
1007	Aminah	25500

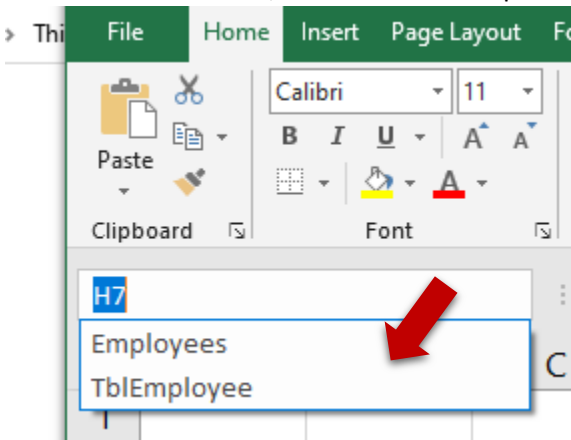
12. To turn off the Filter dropdown buttons, go to “Data” ribbon tab and unselect the “Filter”:



13. Now, while the table still selected, “Design” ribbon tab, and at the far left you will find the “Table Name:”. Change the default table name “Table#” to “TblEmployee”:



14. Press Enter to confirm, and Select the Dropdown from name box, you should see the following:



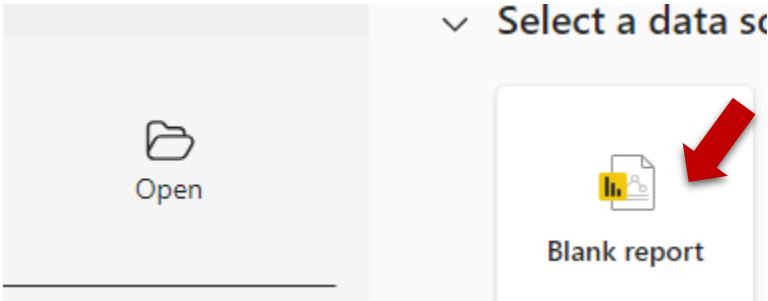
15. Save and close the workbook.

Part-2: Loading Data from Power BI Desktop

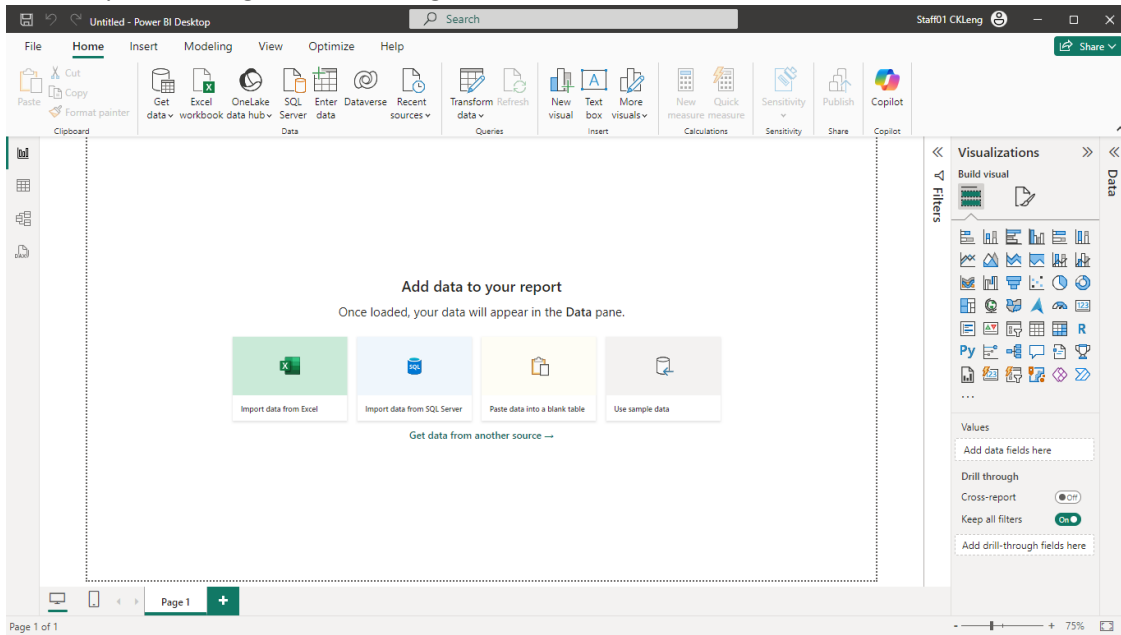
16. Start a new Power BI project. (Ignore the account login for the time being)



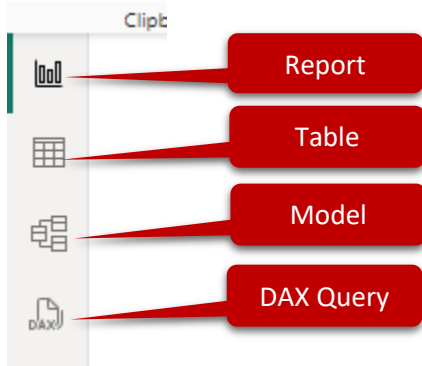
17. Select new Blank Report



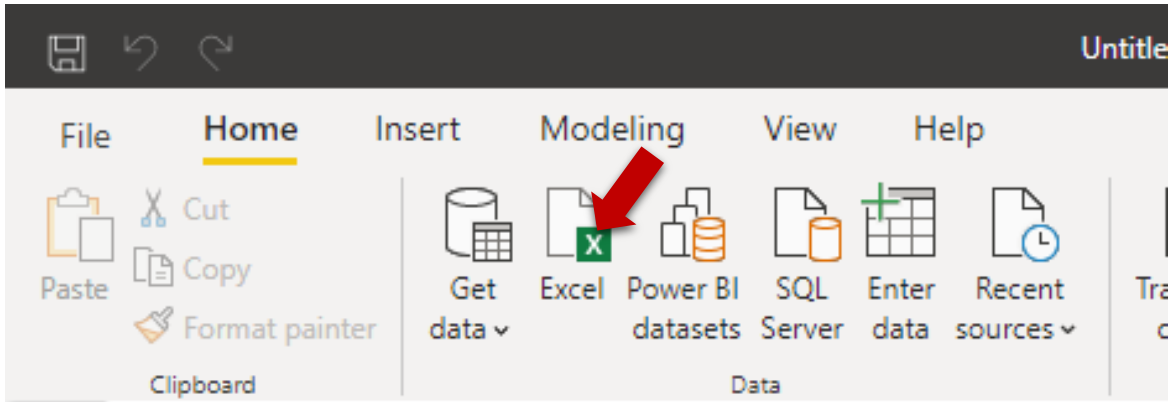
18. Now you should get the following UI:



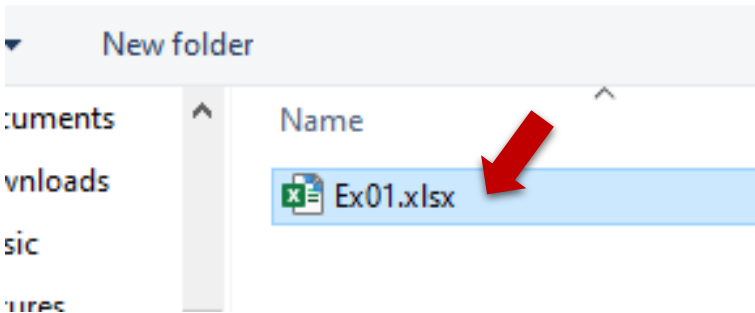
19. The left most panel is for changing the Views:



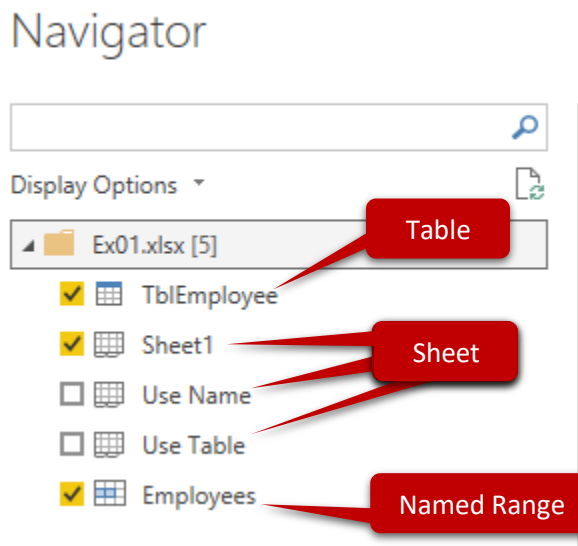
20. We will discuss other parts of this UI in other exercises. Now, we will learn how to pull data from MS Excel workbook. Select “Excel” from “Data” group of “Home” ribbon tab:



21. In the Open dialog box, navigate to the folder you store the previously created “Ex01.xlsx” workbook. Select and press “Open”.

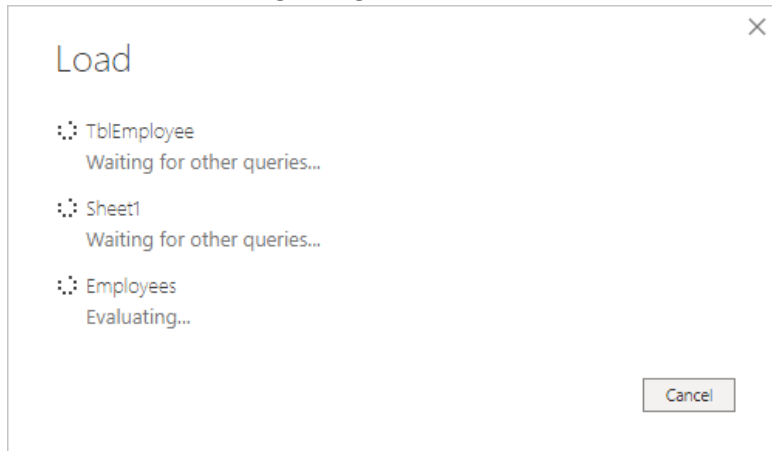


22. A Navigator dialog box appears:

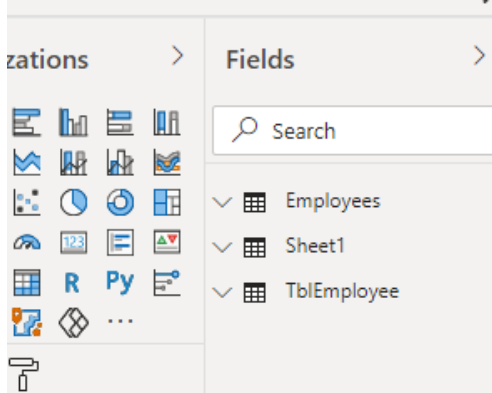


23. Select the TblEmployee, Sheet1 and Employee. Press “Load” to start loading the data. No transformation needed in this exercise.

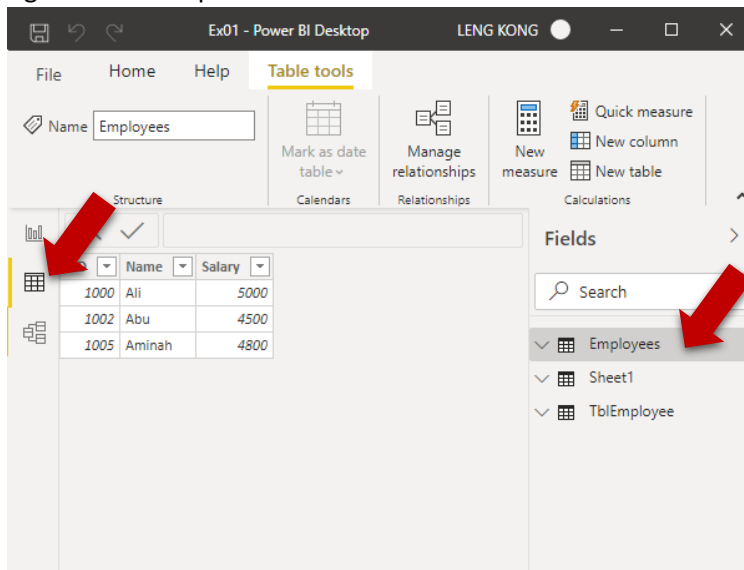
24. Wait until the following dialog box ended:



25. Now you should be able to see 3 tables generated from the right most panel:

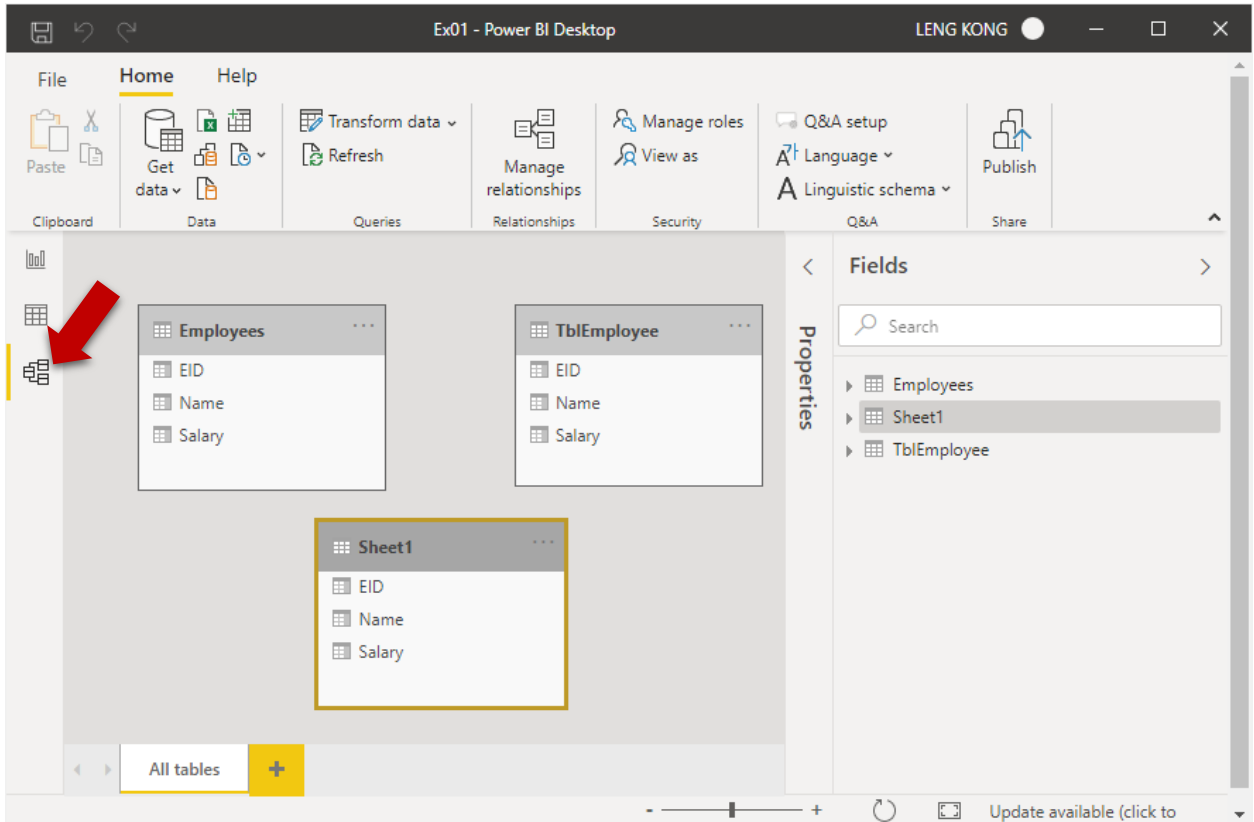


26. Select the left-most panel to select Data View. You can preview the data loaded by selecting the right-most field panel under this view:



Notes: The default name of table generated is based on the source name. However, you can just right-click to rename them as needed. If the table name already exists, the default name assigned will be <name> (#).

27. You should be able to view the Table Schema under Data Model View:



28. We will discuss able the Report View in other exercises.