COMBINING DATA FROM THE SAME FOLDER

BY

JORDAN GOLDMEIER

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.

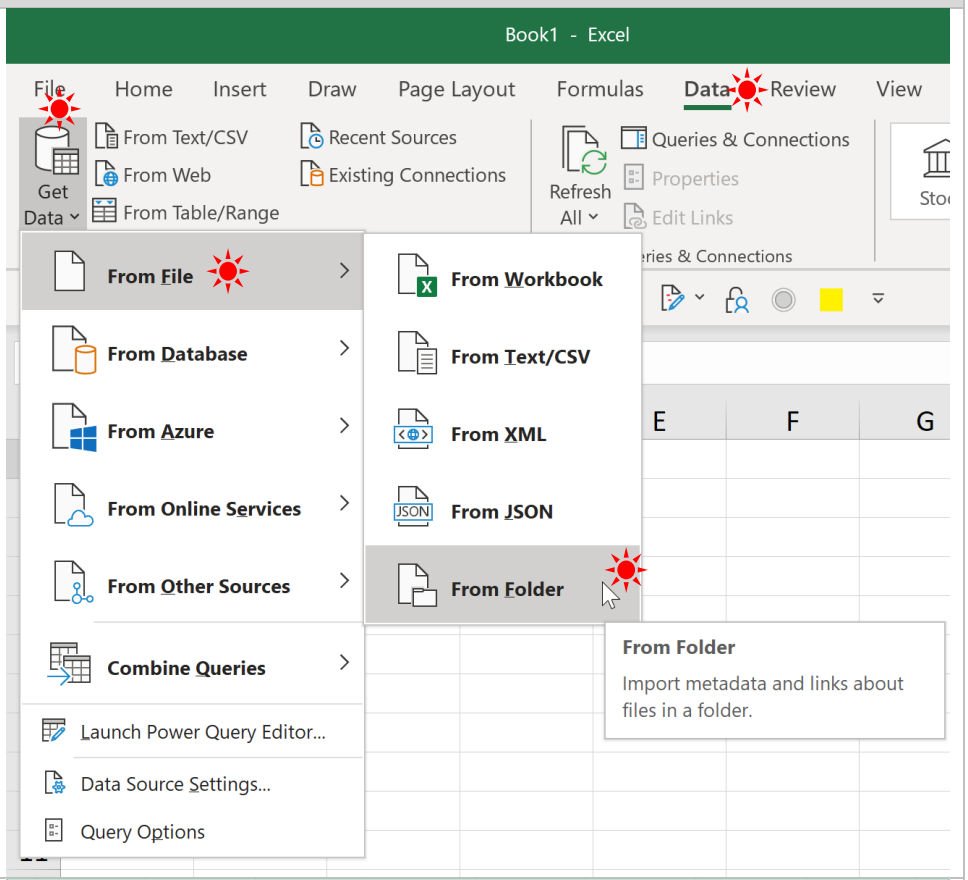
MODULE REQUIREMENTS

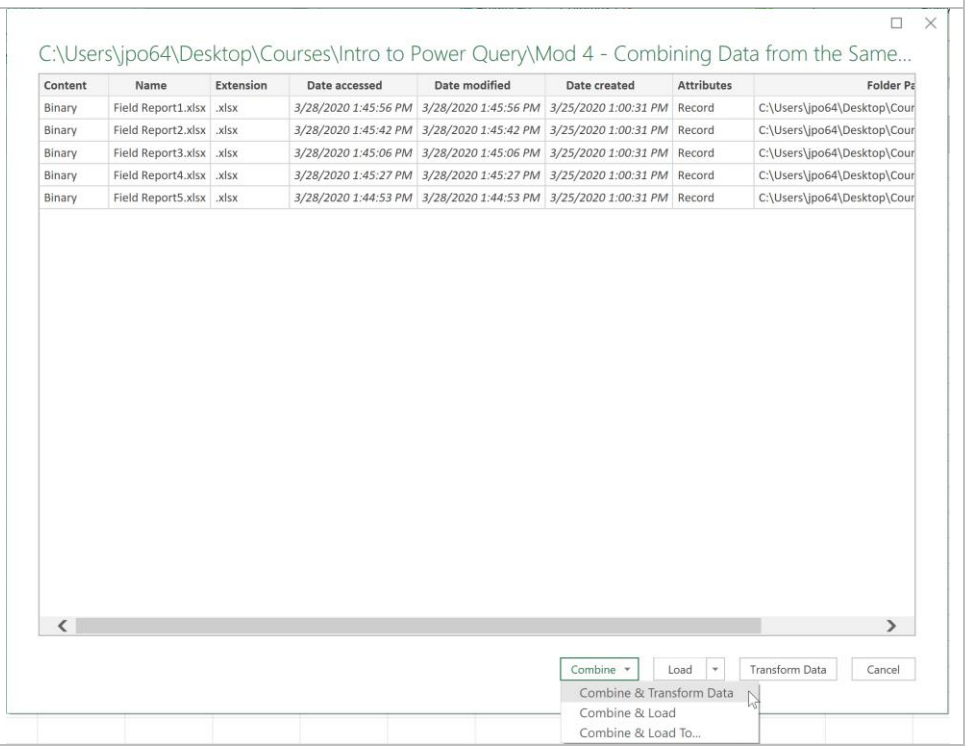
- Using File from Folder
- Identifying the sample file and final table
- Creating a query on the sample file
- Using transpose
- Reporting final results

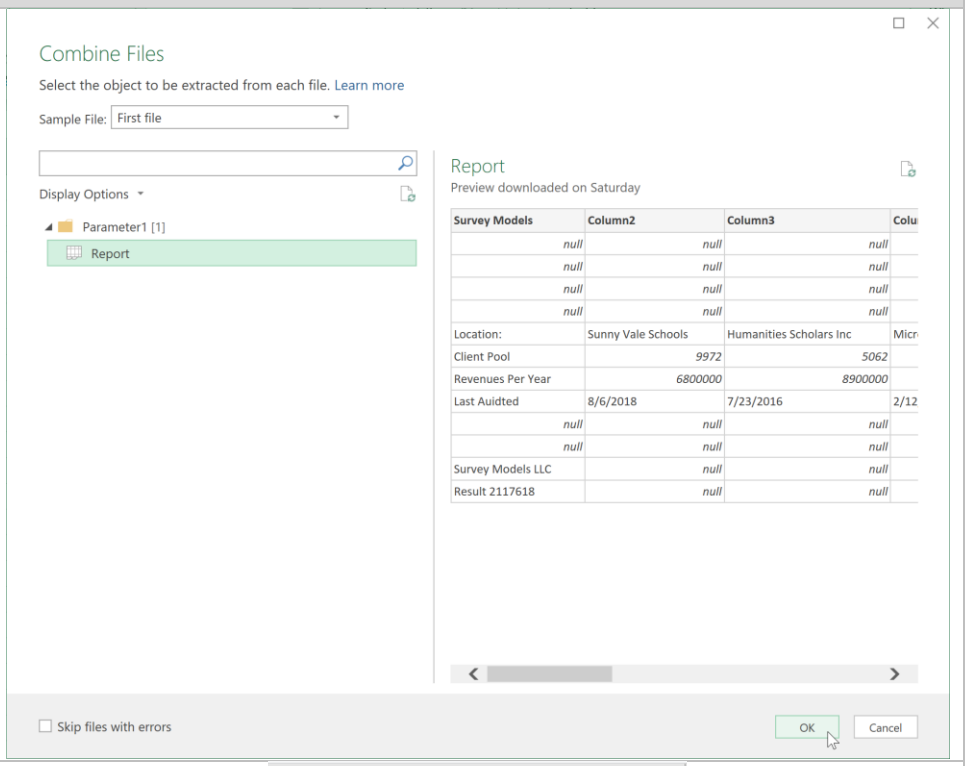
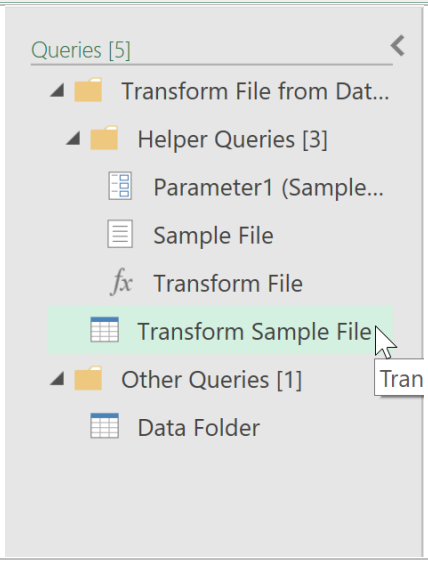
HINTS

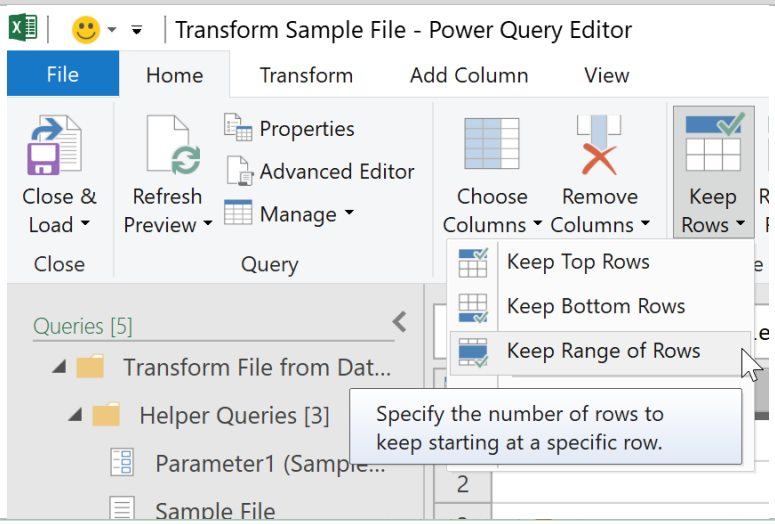
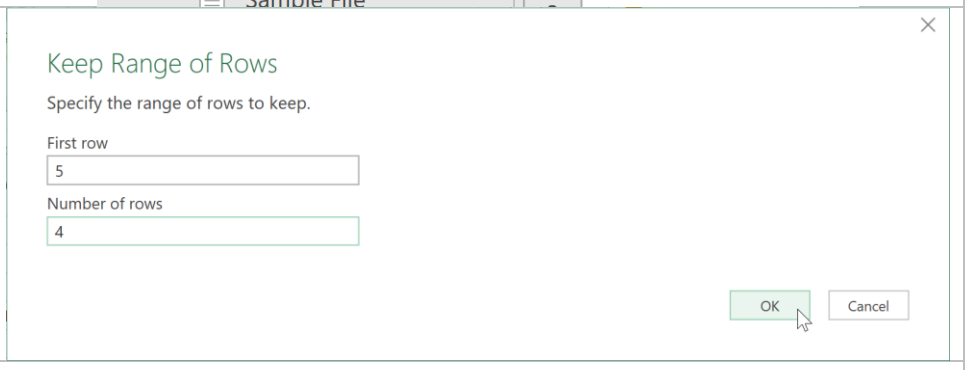
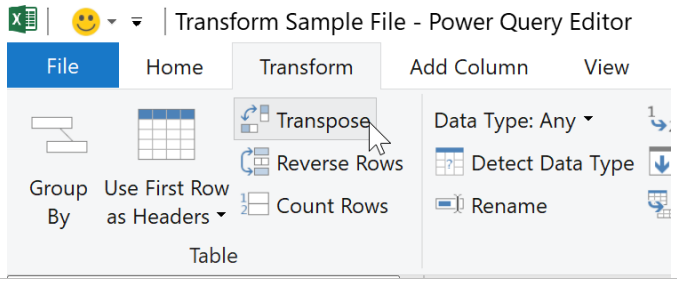
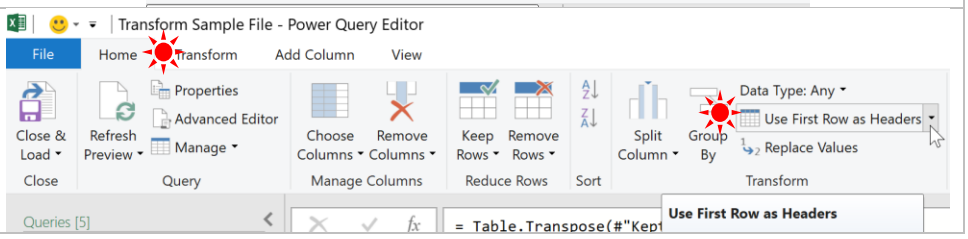
Make sure to watch the associated video lessons.

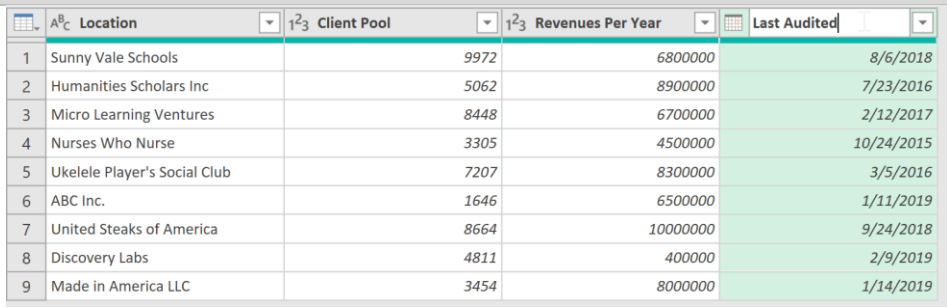
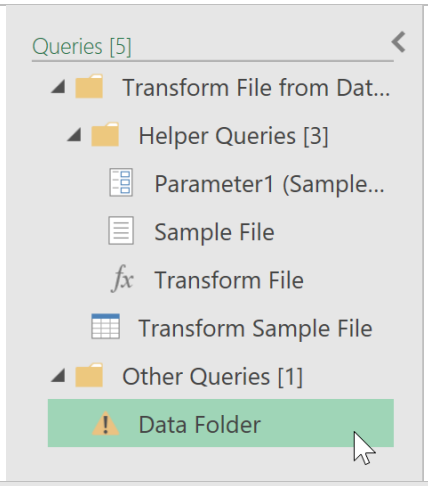
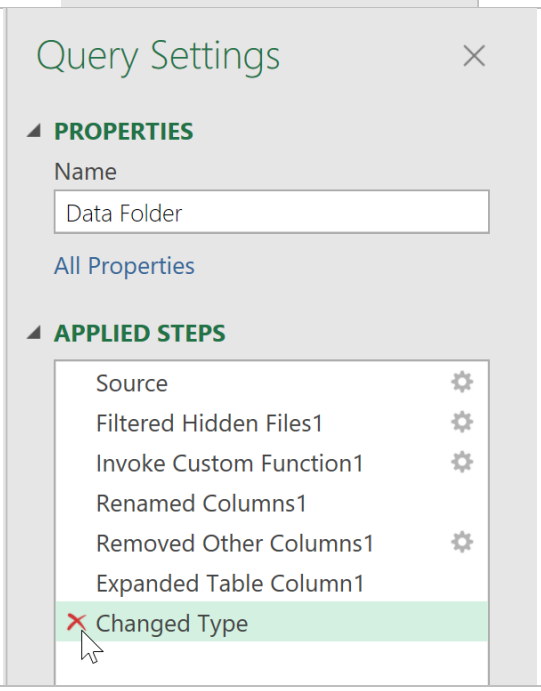
STEP-BY-STEP INSTRUCTIONS

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	

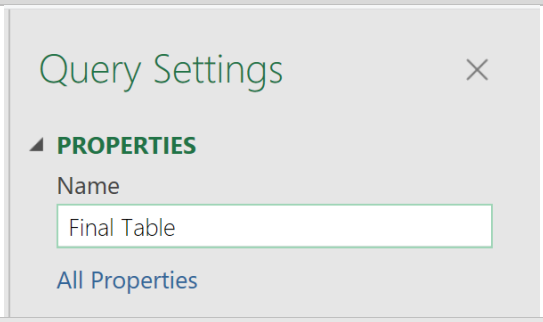
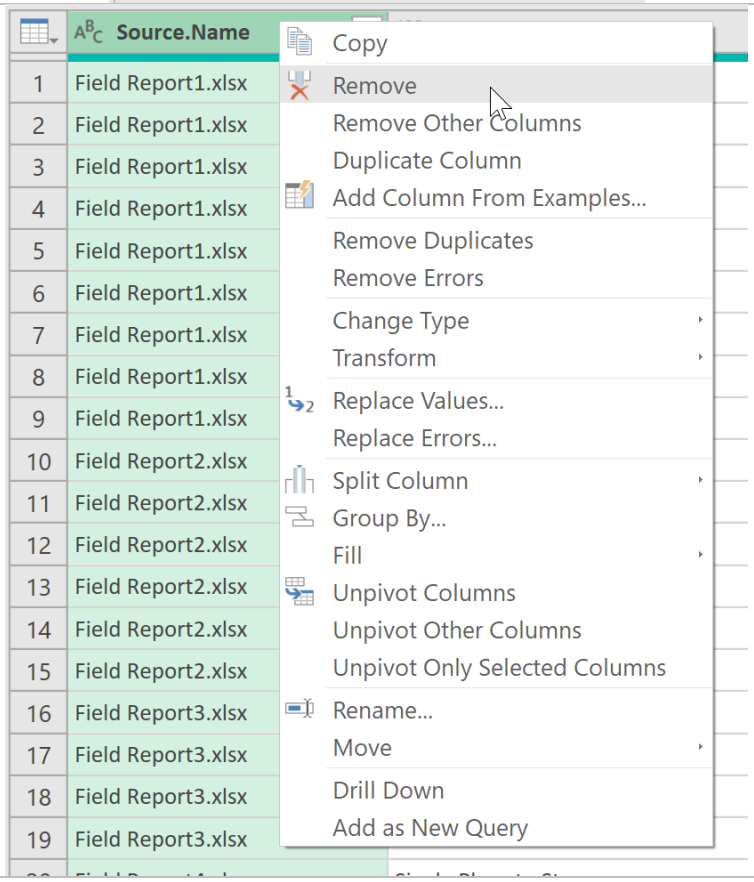
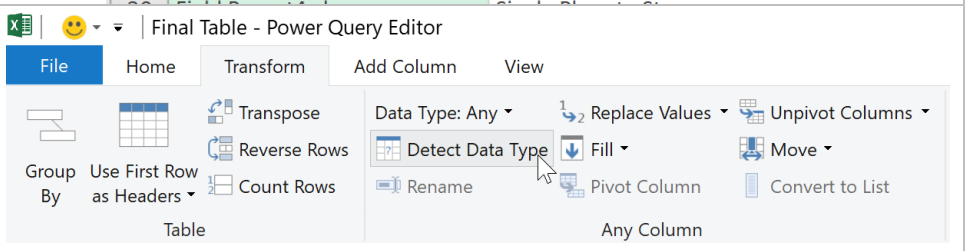
Click Steps	Screen Shots
the Same Folder\Data Folder from within the project files. Click OK. 5. Click OK once more to set the folder path.	
6. Power Query will then show you the files in that folder in table form. 7. Press Combine > Combine & Transform Data to bring them into the Power Query editor.	

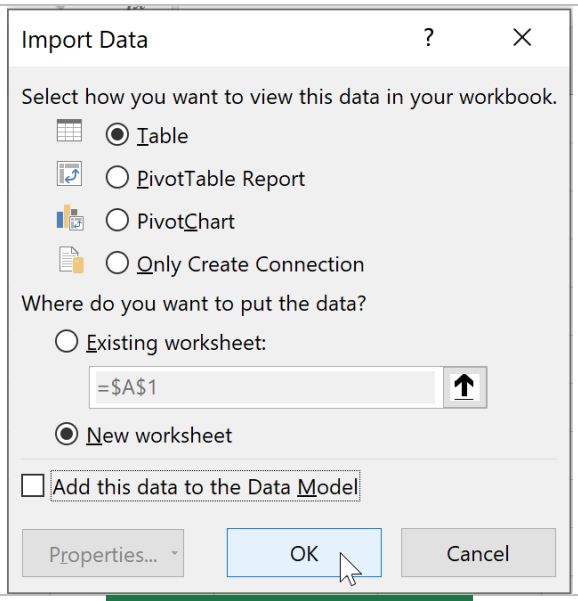
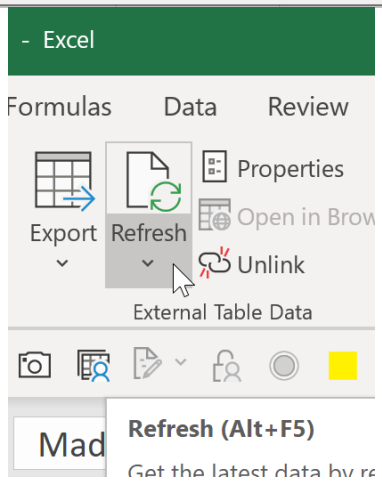
Click Steps	Screen Shots
8. The Combine Files dialog box appears. 9. Make sure First file is in the Sample File Dropdown. 10. Make sure Report is selected. 11. Press OK.	
12. Select Transform Sample File from the query listing on the left.	

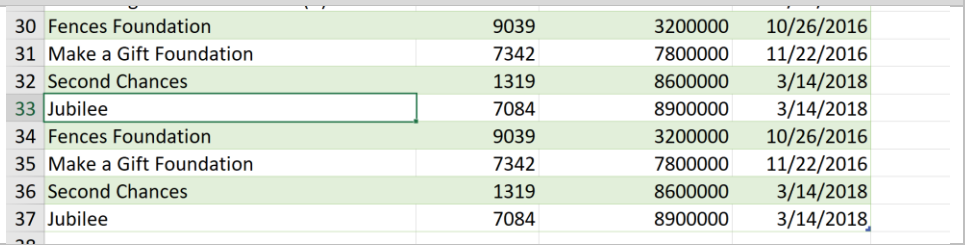
Click Steps	Screen Shots
13. From on the Home tab, select Keep Rows > Keep Range of Rows	
14. Let's get rid of the rows we don't need. In the First row field enter 5. 15. In the Number of rows field type 4. 16. Click OK.	
17. Now let's transpose the dataset. From on the Transform tab, select Transpose.	
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.	
21. Now let’s look at our combined query. Double Click Data Folder to see the combined query. Don’t worry about the error.	
22. Click on the red X next to Changed Type to remove the error.	

	Location	Client Pool	Revenues Per Year	Last Audited
1	Sunny Vale Schools	9972	6800000	8/6/2018
2	Humanities Scholars Inc	5062	8900000	7/23/2016
3	Micro Learning Ventures	8448	6700000	2/12/2017
4	Nurses Who Nurse	3305	4500000	10/24/2015
5	Ukelele Player's Social Club	7207	8300000	3/5/2016
6	ABC Inc.	1646	6500000	1/11/2019
7	United Steaks of America	8664	10000000	9/24/2018
8	Discovery Labs	4811	400000	2/9/2019
9	Made in America LLC	3454	8000000	1/14/2019

Click Steps	Screen Shots
23. Rename the query from Data Folder to Final Table.	
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.	
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.	

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