

COMBINING DATA FROM THE SAME FOLDER

BY
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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.

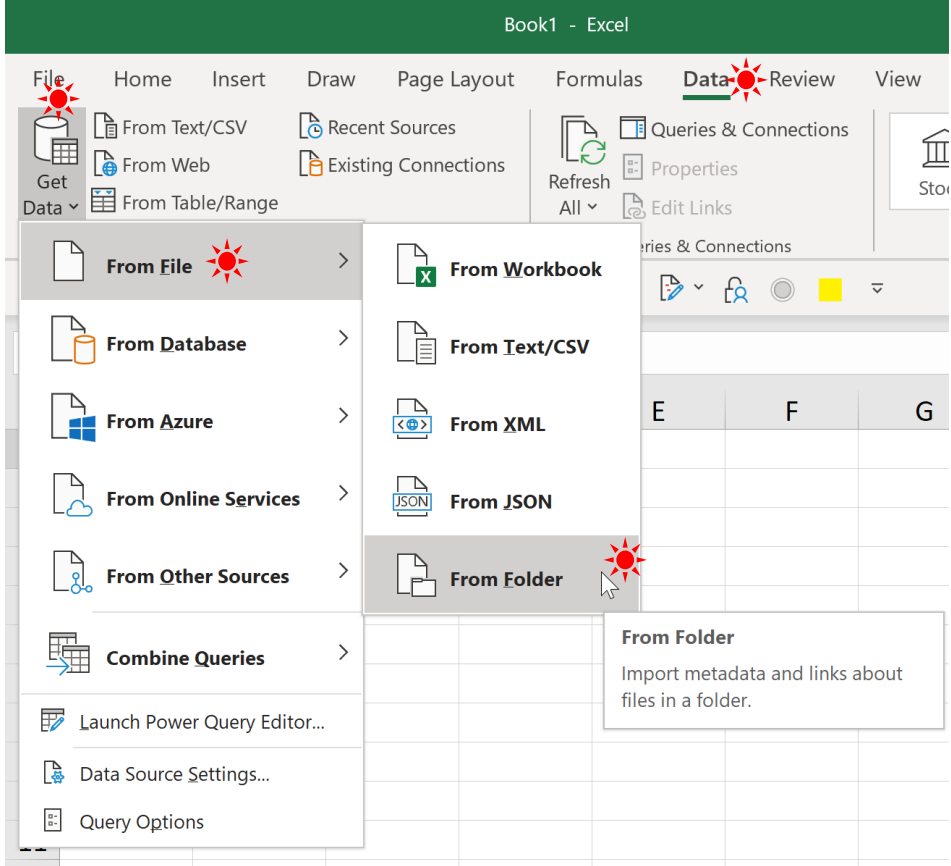
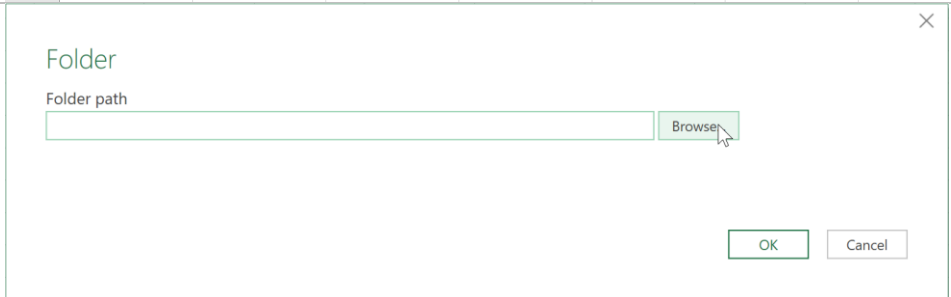
MODULE REQUIREMENTS

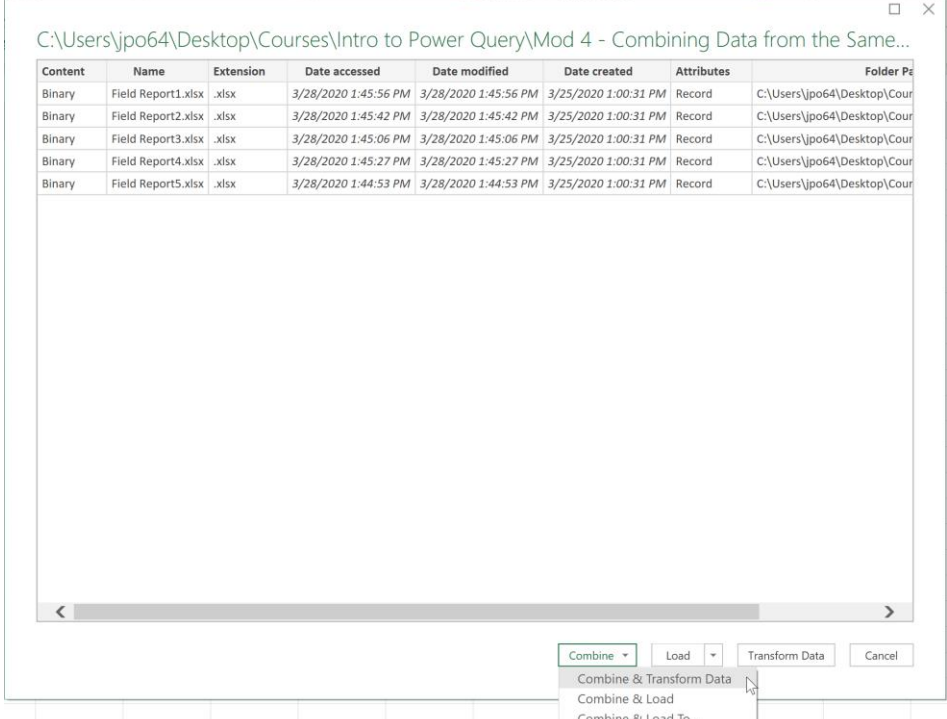
- ▶ Using File from Folder
- ▶ Identifying the sample file and final table
- ▶ Creating a query on the sample file
- ▶ Using transpose
- ▶ Reporting final results

HINTS

Make sure to watch the associated video lessons.

STEP-BY-STEP INSTRUCTIONS

Click Steps	Screen Shots
<ol style="list-style-type: none">1. Start with a fresh, new Excel file.2. From on Data ribbon tab, select Get Data > From File > From Folder	 <p>The screenshot shows the Microsoft Excel interface with the 'Data' ribbon selected. The 'Get Data' dropdown menu is open, and the 'From File' option is selected, which has opened a sub-menu. In this sub-menu, the 'From Folder' option is highlighted with a red sun icon and a mouse cursor. A tooltip for 'From Folder' is visible, stating: 'From Folder: Import metadata and links about files in a folder.'</p>
<ol style="list-style-type: none">3. Click Browse... to select the folder path	 <p>The screenshot shows the 'Folder' dialog box. It has a title bar 'Folder' and a close button. Below the title bar is a text box labeled 'Folder path' with a 'Browse...' button to its right. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.</p>
<ol style="list-style-type: none">4. Brows to ...\Intro to Power Query\Mod 4 - Combining Data from	

Click Steps	Screen Shots																																																
<p>the Same Folder\Data Folder from within the project files. Click OK.</p> <p>5. Click OK once more to set the folder path.</p>																																																	
<p>6. Power Query will then show you the files in that folder in table form.</p> <p>7. Press Combine > Combine & Transform Data to bring them into the Power Query editor.</p>	 <p>The screenshot shows a file explorer window titled "C:\Users\jpo64\Desktop\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...". It displays a table of files with the following columns: Content, Name, Extension, Date accessed, Date modified, Date created, Attributes, and Folder Path. Below the table is a scroll bar and a context menu with the following options: Combine, Load, Transform Data, Cancel, Combine & Transform Data (highlighted), Combine & Load, and Combine & Load To...</p> <table border="1" data-bbox="621 705 1495 840"> <thead> <tr> <th>Content</th> <th>Name</th> <th>Extension</th> <th>Date accessed</th> <th>Date modified</th> <th>Date created</th> <th>Attributes</th> <th>Folder Path</th> </tr> </thead> <tbody> <tr> <td>Binary</td> <td>Field Report1.xlsx</td> <td>.xlsx</td> <td>3/28/2020 1:45:56 PM</td> <td>3/28/2020 1:45:56 PM</td> <td>3/25/2020 1:00:31 PM</td> <td>Record</td> <td>C:\Users\jpo64\Desktop\Cour</td> </tr> <tr> <td>Binary</td> <td>Field Report2.xlsx</td> <td>.xlsx</td> <td>3/28/2020 1:45:42 PM</td> <td>3/28/2020 1:45:42 PM</td> <td>3/25/2020 1:00:31 PM</td> <td>Record</td> <td>C:\Users\jpo64\Desktop\Cour</td> </tr> <tr> <td>Binary</td> <td>Field Report3.xlsx</td> <td>.xlsx</td> <td>3/28/2020 1:45:06 PM</td> <td>3/28/2020 1:45:06 PM</td> <td>3/25/2020 1:00:31 PM</td> <td>Record</td> <td>C:\Users\jpo64\Desktop\Cour</td> </tr> <tr> <td>Binary</td> <td>Field Report4.xlsx</td> <td>.xlsx</td> <td>3/28/2020 1:45:27 PM</td> <td>3/28/2020 1:45:27 PM</td> <td>3/25/2020 1:00:31 PM</td> <td>Record</td> <td>C:\Users\jpo64\Desktop\Cour</td> </tr> <tr> <td>Binary</td> <td>Field Report5.xlsx</td> <td>.xlsx</td> <td>3/28/2020 1:44:53 PM</td> <td>3/28/2020 1:44:53 PM</td> <td>3/25/2020 1:00:31 PM</td> <td>Record</td> <td>C:\Users\jpo64\Desktop\Cour</td> </tr> </tbody> </table>	Content	Name	Extension	Date accessed	Date modified	Date created	Attributes	Folder Path	Binary	Field Report1.xlsx	.xlsx	3/28/2020 1:45:56 PM	3/28/2020 1:45:56 PM	3/25/2020 1:00:31 PM	Record	C:\Users\jpo64\Desktop\Cour	Binary	Field Report2.xlsx	.xlsx	3/28/2020 1:45:42 PM	3/28/2020 1:45:42 PM	3/25/2020 1:00:31 PM	Record	C:\Users\jpo64\Desktop\Cour	Binary	Field Report3.xlsx	.xlsx	3/28/2020 1:45:06 PM	3/28/2020 1:45:06 PM	3/25/2020 1:00:31 PM	Record	C:\Users\jpo64\Desktop\Cour	Binary	Field Report4.xlsx	.xlsx	3/28/2020 1:45:27 PM	3/28/2020 1:45:27 PM	3/25/2020 1:00:31 PM	Record	C:\Users\jpo64\Desktop\Cour	Binary	Field Report5.xlsx	.xlsx	3/28/2020 1:44:53 PM	3/28/2020 1:44:53 PM	3/25/2020 1:00:31 PM	Record	C:\Users\jpo64\Desktop\Cour
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Click Steps

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.

Screen Shots

Combine Files

Select the object to be extracted from each file. [Learn more](#)

Sample File: First file

Display Options

- Parameter1 [1]
- Report**

Report

Preview downloaded on Saturday

Survey Models	Column2	Column3	Colu
null	null	null	null
null	null	null	null
null	null	null	null
null	null	null	null
Location:	Sunny Vale Schools	Humanities Scholars Inc	Micr
Client Pool		9972	5062
Revenues Per Year		6800000	8900000
Last Auidted	8/6/2018	7/23/2016	2/12
null	null	null	null
null	null	null	null
Survey Models LLC		null	null
Result 2117618		null	null

Skip files with errors

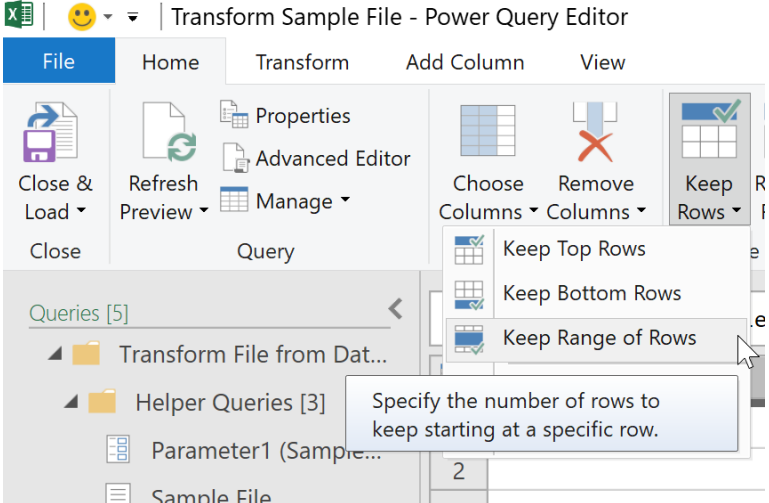
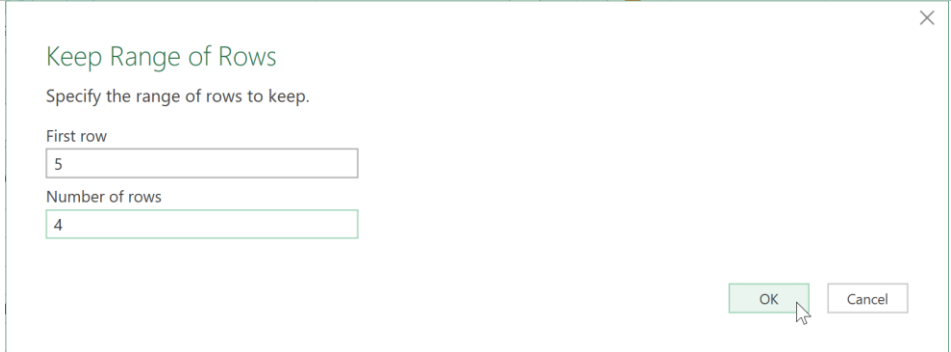
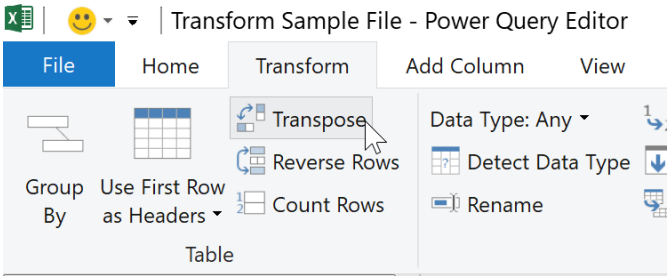
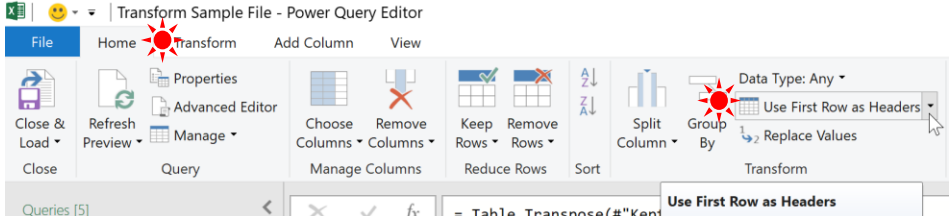
OK Cancel

12. Select Transform Sample File from the query listing on the left.

Queries [5]

- Transform File from Dat...
- Helper Queries [3]
 - Parameter1 (Sample...
 - Sample File
 - Transform File
 - Transform Sample File**
- Other Queries [1]
 - Data Folder

Tran

Click Steps	Screen Shots
<p>13. From on the Home tab, select Keep Rows > Keep Range of Rows</p>	
<p>14. Let's get rid of the rows we don't need. In the First row field enter 5.</p> <p>15. In the Number of rows field type 4.</p> <p>16. Click OK.</p>	
<p>17. Now let's transpose the dataset. From on the Transform tab, select Transpose.</p>	
<p>18. Let's make the first row our headers. From on the Home tab, click use First Row as Headers.</p>	

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.

	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

21. Now let's look at our combined query. Double Click Data Folder to see the combined query. Don't worry about the error.

Queries [5]

- Transform File from Dat...
- Helper Queries [3]
 - Parameter1 (Sample...
 - Sample File
 - Transform File
 - Transform Sample File
- Other Queries [1]
 - Data Folder

22. Click on the red X next to Changed Type to remove the error.

Query Settings

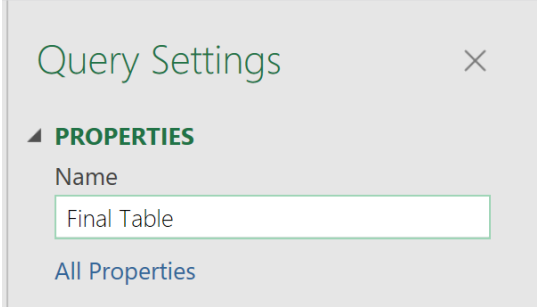
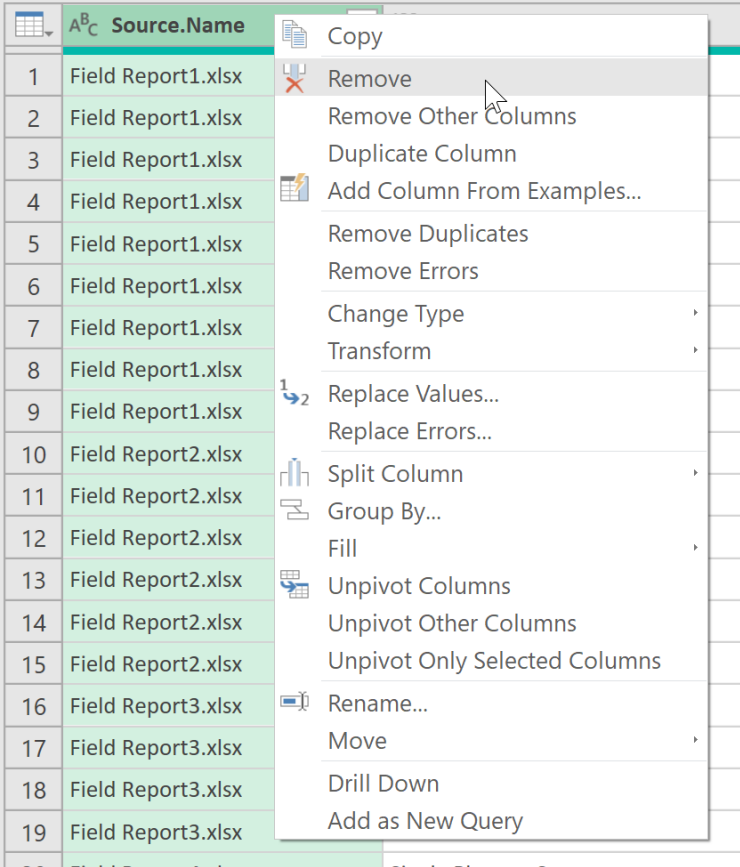
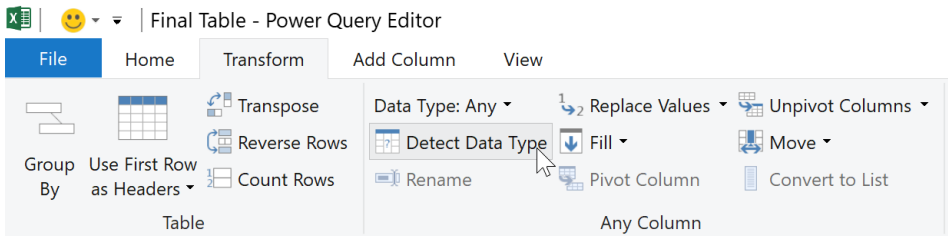
PROPERTIES

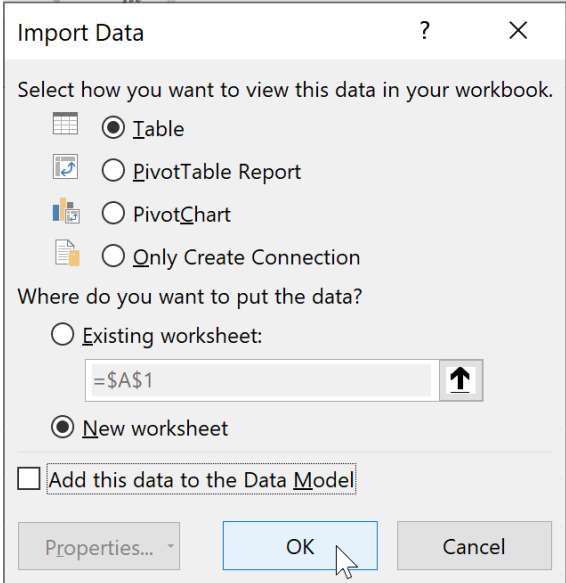
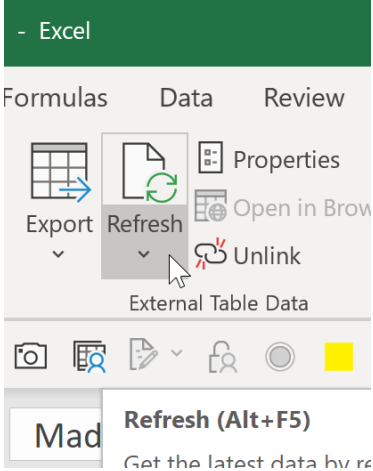
Name: Data Folder

All Properties

APPLIED STEPS

- Source
- Filtered Hidden Files1
- Invoke Custom Function1
- Renamed Columns1
- Removed Other Columns1
- Expanded Table Column1
- Changed Type

Click Steps	Screen Shots
<p>23. Rename the query from Data Folder to Final Table.</p>	
<p>24. Right+Click onto the Source.Name column and select Remove to delete it. We don't need it.</p>	
<p>25. Press Ctrl + A to select all of the columns at once.</p> <p>26. On the Transform ribbon tab, select Detect Data Type to have Power Query automatically detect</p>	

Click Steps	Screen Shots
<p>each column's datatype.</p>	
<p>27. We're done! Select File > Close & Load To...</p> <p>28. Keep the defaults in the Import Data dialog box. Press OK to continue.</p>	
<p>29. Use windows explorer to navigate to the project files folders ...\Intro to Power Query\Mod 4 - Combining Data from the Same Folder.</p> <p>30. Copy Field Report6 (move to Data Folde).xlsx and paste it into the Data Folder</p> <p>31. Go back to Excel and scroll down to the bottom of table. Take note of the current row number.</p> <p>32. From on the Table Design Ribbon Tab select the Refresh button.</p>	

Click Steps	Screen Shots				
<p>33. Now the bottom of the table has automatically added records reflecting the new file added to the folder.</p>	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