

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.

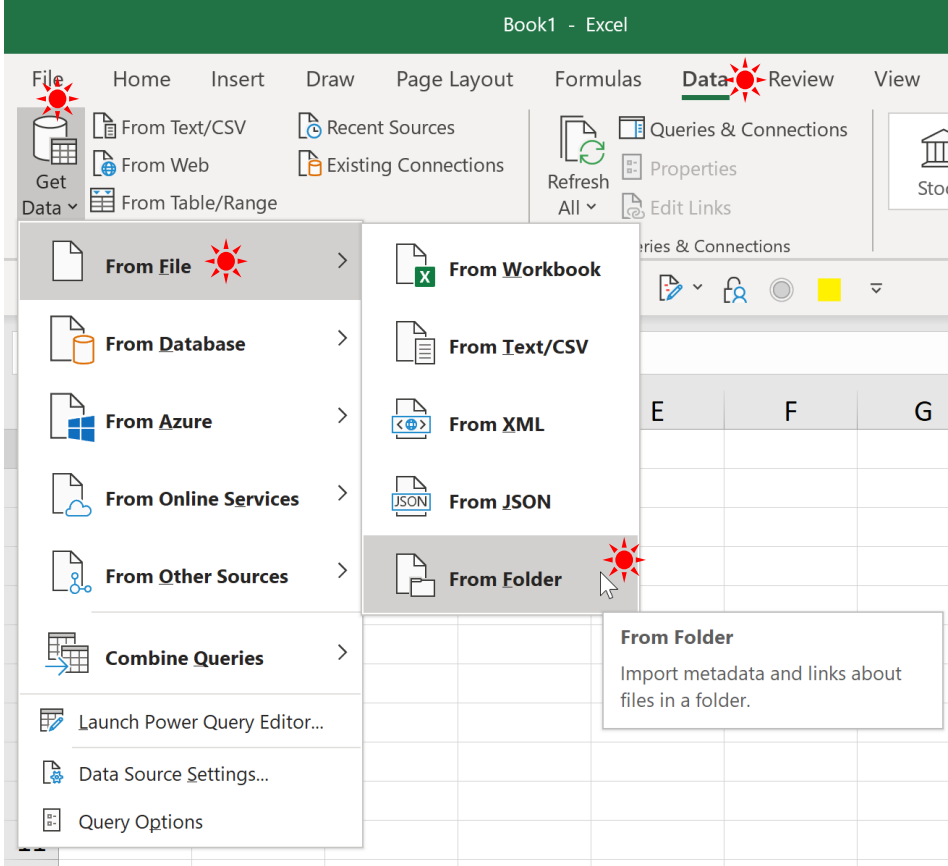
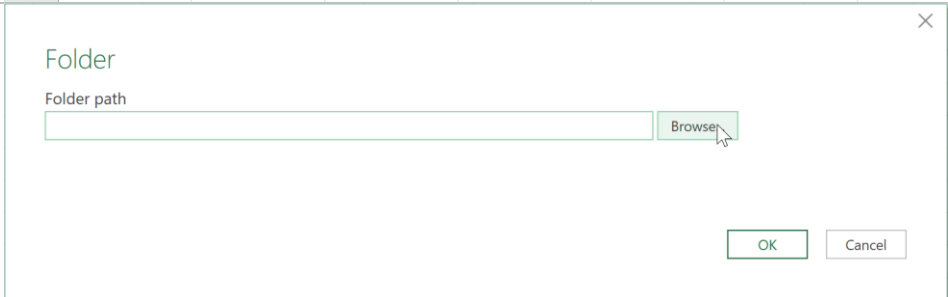
MODULE REQUIREMENTS

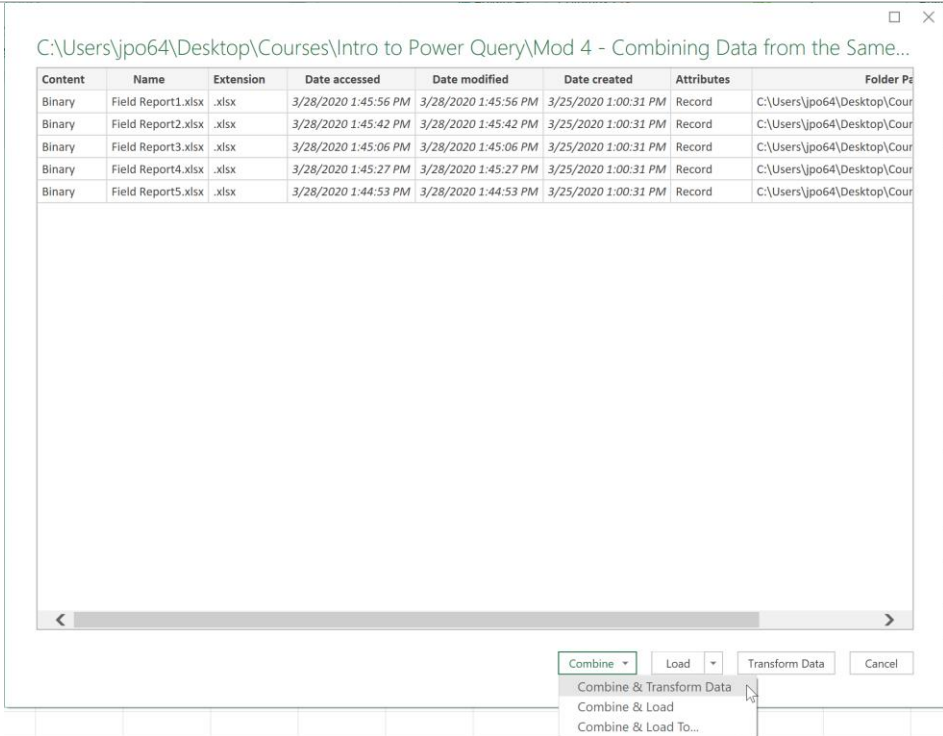
- ▶ Using File from Folder
- ▶ Identifying the sample file and final table
- ▶ Creating a query on the sample file
- ▶ Using transpose
- ▶ Reporting final results

HINTS

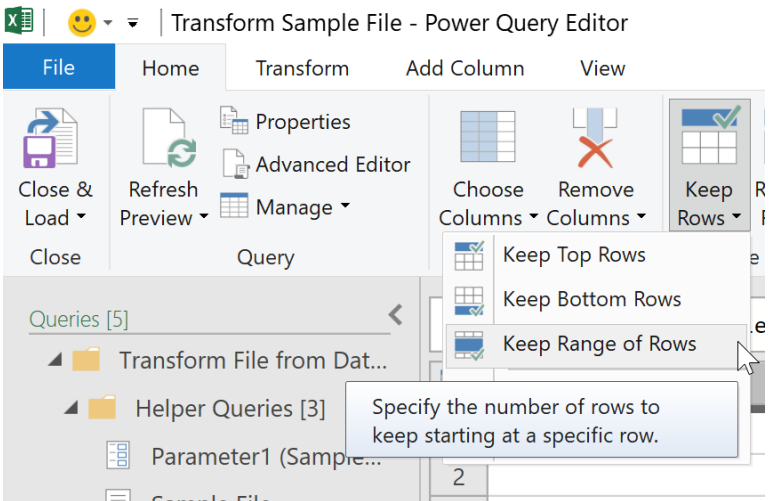

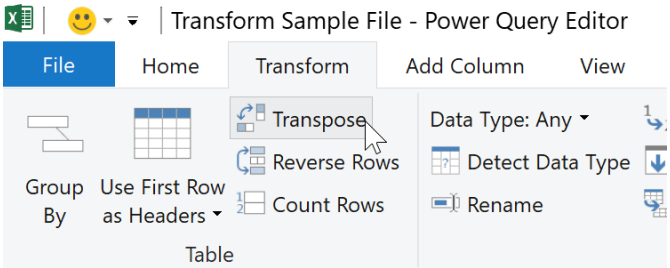
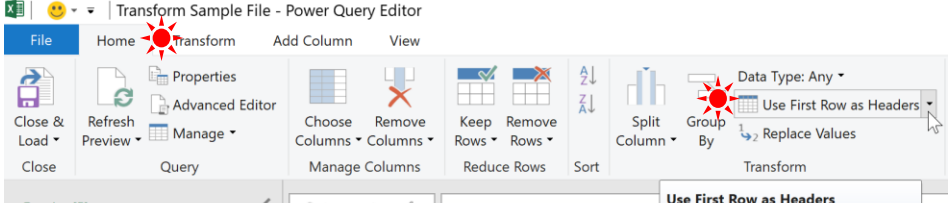
Make sure to watch the associated video lessons.

STEP-BY-STEP INSTRUCTIONS

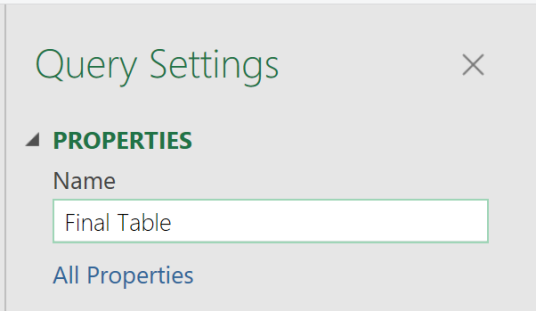
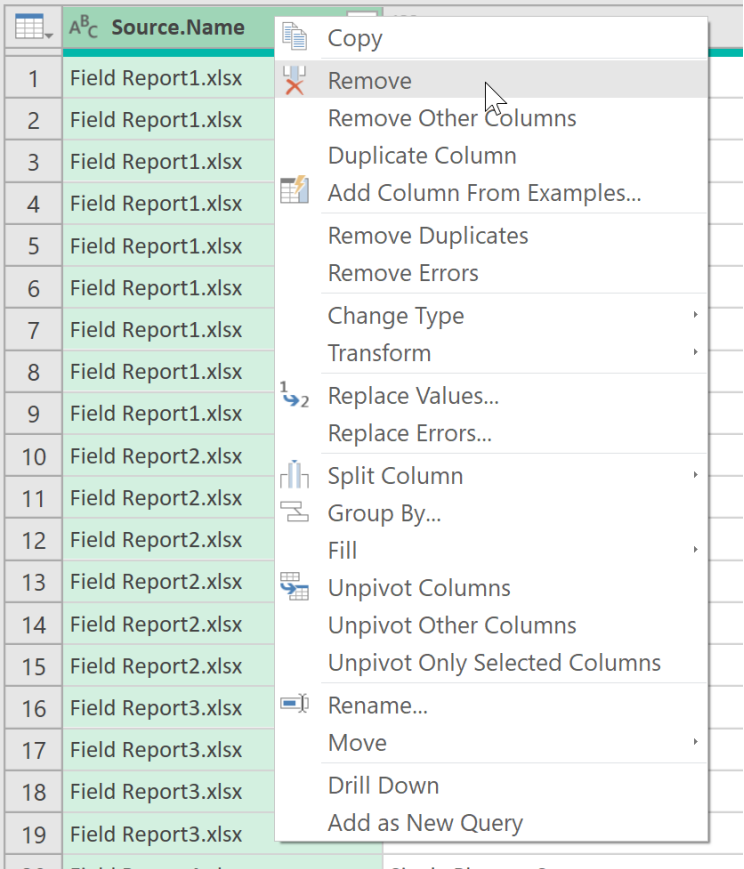
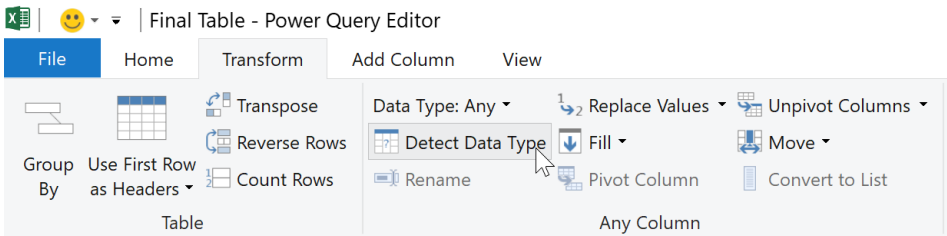
Click Steps	Screen Shots
<ol style="list-style-type: none">1. Start with a fresh, new Excel file.2. From on Data ribbon tab, select Get Data > From File > From Folder	
<ol style="list-style-type: none">3. Click Browse... to select the folder path	
<ol style="list-style-type: none">4. Brows to ...\\Intro to Power Query\\Mod 4 - Combining Data from	

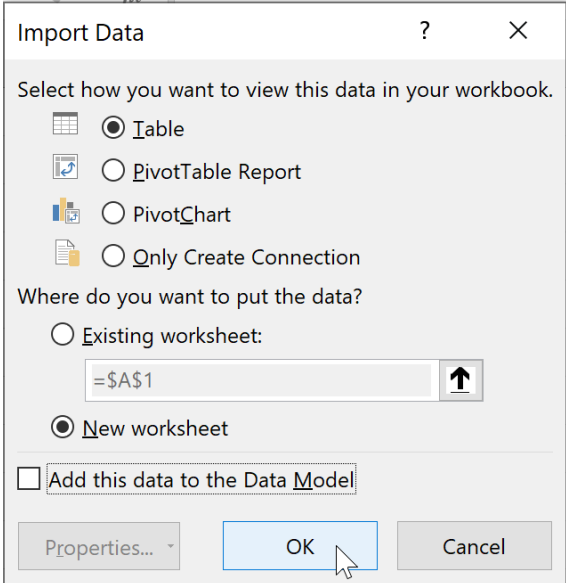
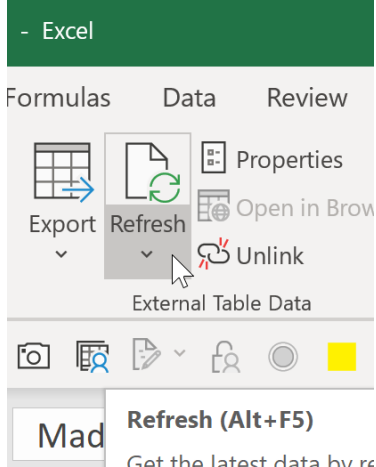
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<p>the Same Folder\Data Folder from within the project files. Click OK.</p> <p>5. Click OK once more to set the folder path.</p>																																																	
<p>6. Power Query will then show you the files in that folder in table form.</p> <p>7. Press Combine > Combine & Transform Data to bring them into the Power Query editor.</p>	 <table><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><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\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...</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\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...</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\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...</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\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...</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\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...</td></tr></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\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...	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\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...	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\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...	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\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...	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\Courses\Intro to Power Query\Mod 4 - Combining Data from the Same...
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<div>8. The Combine Files dialog box appears.</div> <div>9. Make sure First file is in the Sample File Dropdown.</div> <div>10. Make sure Report is selected.</div> <div>11. Press OK.</div>	<div><div><div><div>Combine Files</div><div>Select the object to be extracted from each file. Learn more</div><div>Sample File: <div>First file</div></div><div><div></div><div></div></div><div>Display Options ▾</div><div><div>Parameter1 [1]</div><div>Report</div></div></div><div><div>Report</div><div>Preview downloaded on Saturday</div><table><tr><th>Survey Models</th><th>Column2</th><th>Column3</th><th>Colu</th></tr><tr><td>null</td><td>null</td><td>null</td><td>null</td></tr><tr><td>null</td><td>null</td><td>null</td><td>null</td></tr><tr><td>null</td><td>null</td><td>null</td><td>null</td></tr><tr><td>null</td><td>null</td><td>null</td><td>null</td></tr><tr><td>Location:</td><td>Sunny Vale Schools</td><td>Humanities Scholars Inc</td><td>Micr</td></tr><tr><td>Client Pool</td><td>9972</td><td>5062</td><td></td></tr><tr><td>Revenues Per Year</td><td>6800000</td><td>8900000</td><td></td></tr><tr><td>Last Auidted</td><td>8/6/2018</td><td>7/23/2016</td><td>2/12</td></tr><tr><td>null</td><td>null</td><td>null</td><td>null</td></tr><tr><td>null</td><td>null</td><td>null</td><td>null</td></tr><tr><td>Survey Models LLC</td><td>null</td><td>null</td><td>null</td></tr><tr><td>Result 2117618</td><td>null</td><td>null</td><td>null</td></tr></table></div><div><div><input type="checkbox"/> Skip files with errors</div><div><div>OK</div><div>Cancel</div></div></div></div></div>	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	null	Result 2117618	null	null	null
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<div>12. Select Transform Sample File from the query listing on the left.</div>	<div><div>Queries [5]</div><div><div>Transform File from Dat...</div><div>Helper Queries [3]</div><div>Parameter1 (Sample...</div><div>Sample File</div><div>Transform File</div><div>Transform Sample File</div><div>Other Queries [1]</div><div>Data Folder</div></div><div>Tran</div></div>																																																				

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>	

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<p>19. Change the column header Location: to Location by double clicking the column header.</p> <p>20. Fix the spelling error in “Last Audited” to be Last Audited.</p>	<table><tr><th></th><th>Location</th><th>Client Pool</th><th>Revenues Per Year</th><th>Last Audited</th></tr><tr><td>1</td><td>Sunny Vale Schools</td><td>9972</td><td>6800000</td><td>8/6/2018</td></tr><tr><td>2</td><td>Humanities Scholars Inc</td><td>5062</td><td>8900000</td><td>7/23/2016</td></tr><tr><td>3</td><td>Micro Learning Ventures</td><td>8448</td><td>6700000</td><td>2/12/2017</td></tr><tr><td>4</td><td>Nurses Who Nurse</td><td>3305</td><td>4500000</td><td>10/24/2015</td></tr><tr><td>5</td><td>Ukelele Player's Social Club</td><td>7207</td><td>8300000</td><td>3/5/2016</td></tr><tr><td>6</td><td>ABC Inc.</td><td>1646</td><td>6500000</td><td>1/11/2019</td></tr><tr><td>7</td><td>United Steaks of America</td><td>8664</td><td>10000000</td><td>9/24/2018</td></tr><tr><td>8</td><td>Discovery Labs</td><td>4811</td><td>400000</td><td>2/9/2019</td></tr><tr><td>9</td><td>Made in America LLC</td><td>3454</td><td>8000000</td><td>1/14/2019</td></tr></table>		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
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<p>21. Now let’s look at our combined query. Double Click Data Folder to see the combined query. Don’t worry about the error.</p>	<div><div>Queries [5]</div><div><div>Transform File from Dat...</div><div>Helper Queries [3]</div><div>Parameter1 (Sample...</div><div>Sample File</div><div>Transform File</div><div>Transform Sample File</div><div>Other Queries [1]</div><div>Data Folder</div></div></div>																																																		
<p>22. Click on the red X next to Changed Type to remove the error.</p>	<div><div>Query Settings</div><div><div>PROPERTIES</div><div>Name</div><div>Data Folder</div><div>All Properties</div></div><div><div>APPLIED STEPS</div><div>Source</div><div>Filtered Hidden Files1</div><div>Invoke Custom Function1</div><div>Renamed Columns1</div><div>Removed Other Columns1</div><div>Expanded Table Column1</div><div>Changed Type</div></div></div>																																																		

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23. Rename the query from Data Folder to Final Table.	 A screenshot of the 'Query Settings' dialog box in Microsoft Excel. The 'Name' field is highlighted and contains the text 'Final Table'. Below the field is a link that says 'All Properties'.
24. Right+Click onto the Source.Name column and select Remove to delete it. We don't need it.	 A screenshot of an Excel data table with a right-click context menu open over the 'Source.Name' column. The menu options include 'Copy', 'Remove', 'Remove Other Columns', 'Duplicate Column', 'Add Column From Examples...', 'Remove Duplicates', 'Remove Errors', 'Change Type', 'Transform', 'Replace Values...', 'Replace Errors...', 'Split Column', 'Group By...', 'Fill', 'Unpivot Columns', 'Unpivot Other Columns', 'Unpivot Only Selected Columns', 'Rename...', 'Move', 'Drill Down', and 'Add as New Query'. The 'Remove' option is highlighted.
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	 A screenshot of the Power Query Editor ribbon in Microsoft Excel. The 'Transform' tab is selected. The 'Detect Data Type' button is highlighted. Other buttons visible include 'File', 'Home', 'Add Column', 'View', 'Transpose', 'Reverse Rows', 'Count Rows', 'Group By', 'Use First Row as Headers', 'Table', 'Data Type: Any', 'Replace Values', 'Unpivot Columns', 'Move', 'Convert to List', 'Pivot Column', 'Fill', and 'Rename'.

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	
	38					
	39					