



Linking an Excel Workbook to Power BI

Quick Reference Guide



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This guide provides an overview of the essential steps to connect your Excel workbook to Power BI, enabling you to quickly visualise and analyse your data with ease.

Preparation

Before you can load your Excel file into Power BI, you should organise your data in a flat table. In a flat table, each column contains the same data type; for example, text, date, number, or currency.

Your table should have a header row but no columns or rows that display totals.

Header →

	C	D	E	F
	Product	Units Sold	Sale Price	Date
	Carretera	1321	£20.00	01/01/2024
	Carretera	2178	£15.00	01/06/2024
	Carretera	888	£15.00	01/06/2024
	Carretera	2470	£15.00	01/06/2024
	Carretera	1513	£350.00	01/12/2024

Text Number Currency Date

It is recommended you convert your data into a table, to do this, click anywhere in your data range, go to “**Format as Table**” in the **Styles** section of the **Home** tab.

Check your data range & click “**OK**”.

Create Table ? X

Where is the data for your table?

\$A\$1:\$O\$700

☒ My table has headers

OK Cancel

Finally, give your table a name in the top left of the **Table Design** tab.

Save your workbook.

Load your Data

Open Power BI Desktop.

You can either select Excel as your data source from the home page or start with a blank report and import your Excel data:

File Home Ins

Table Name:

SalesData

Resize Table

▼ Select a data source or start with a blank report

Blank report OneLake catalog Excel workbook SQL Se

Home Page

Blank Report or

File Home Insert Modeling View Optimize Help

Import data from Excel

Import data from SQL Server

Paste data into a blank table

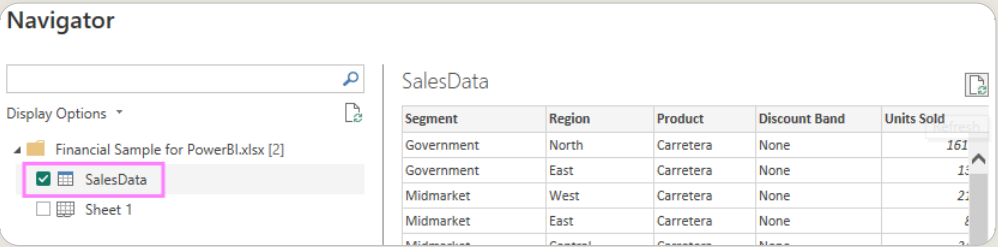
Get data from another source →

Load your Data (cont.)

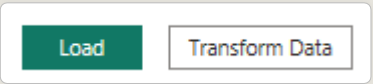
Browse to your file location, select your file and click “Open”.

The Navigator pane will open, select your Data Table on the left-hand side of the pane.

A preview of your data will appear on the right.



Once selected you have 2 options:



Load will load Data directly into Power BI Desktop with no further changes.

Transform Data will load Data into **Power Query Editor** for further changes prior to loading into Power BI.

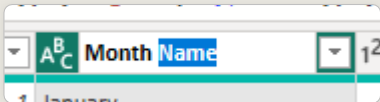
Transform Data

In Power Query Editor you can make further changes to the formatting of your data such as changing column type, amending column names, filtering data and more.

Examples:

Rename Column

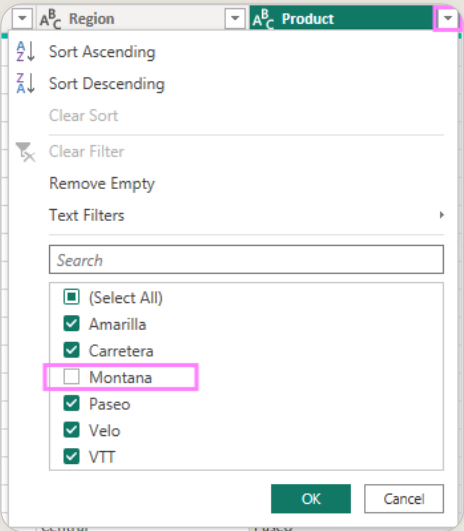
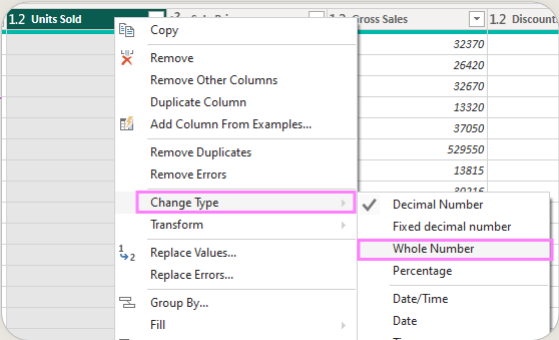
Double-click column header and rename.



Change Column Type

Right-click column header

- ➔ Change Type
- ➔ Select new data type

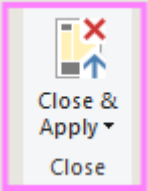


Filter Data

Click down arrow in right of Header.

Unselect Data you do not want included (example shown is an End-of-Life product). Click “OK”.

When ready to finish loading data, click **Close and Apply** top right of the **Home** tab.



You are now ready to start building your report.