

Creating a query in Excel via Sharepoint

Please note, this requires you to sync the folder to your local pc. This may be dependent on permissions set by your IT department. For assistance in syncing, please contact your IT department.

Open the database you want to pull the information into (your destination file essentially). You won't be able to overlap the two tables so make sure the column you're importing the data into is a blank cell not part of the table.

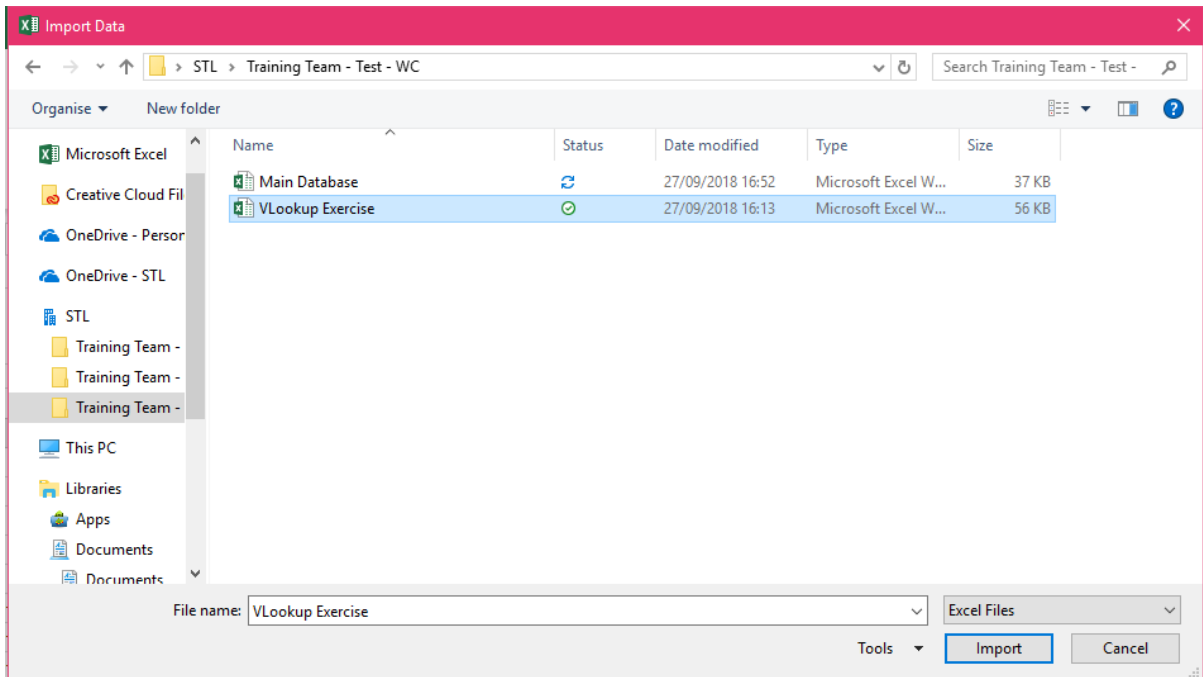
Vlookup

Customer no.	Customer name	Address 1	Address 2	Town/city	Postcode
11158	Lanford Haverrman Travel	80 St. Thomas's Rd	Highbury	London	N4 2QW
11584	ABC Holidays	7/22 Wheler St	Shoreditch	London	E1 6NP
11659	Mindy Sadley Travel	108 Acorn Wlk	Greenwich	London	SE16 5DX
12867	Essence Jardine Holidays	31 Ellerslie Rd	Shepherds Bush	London	W12 7BN
14809	Dorothy Schreckengost	43 Tivoli Gardens	New Charlton	London	SE18 5PD
20058	Jaylin Tours	12 Akerman Rd	South Lambeth	London	SW9 6SW
20337	Coral Tours	164 Macmillan Way	Furzedown	London	SW17 6AU
22680	Monty Sanforth Holidays	35 Trinity Close	Clapham	London	SW4 0JD
22974	Payton Cady Travel	3 Chiswick Mall	Chiswick	London	W4 2QH
25525	Eveline Tours	3/1 Challoner Cres	Earls Court	London	W14 9LE
25871	Chantal Tours	5/154 Randolph Av	Maida Vale	London	W9 1PG
26704	Penelope Cason Travel	20a Sherriff Rd	South Hamstead	London	NW6 2AU
30268	Alec Briner Holidays	55 Havelock St	King's Cross	London	N1 0DA
36954	Braidy Thomlinson Travel	223 New Pk Rd	Streatham Hill	London	SW2 4HN

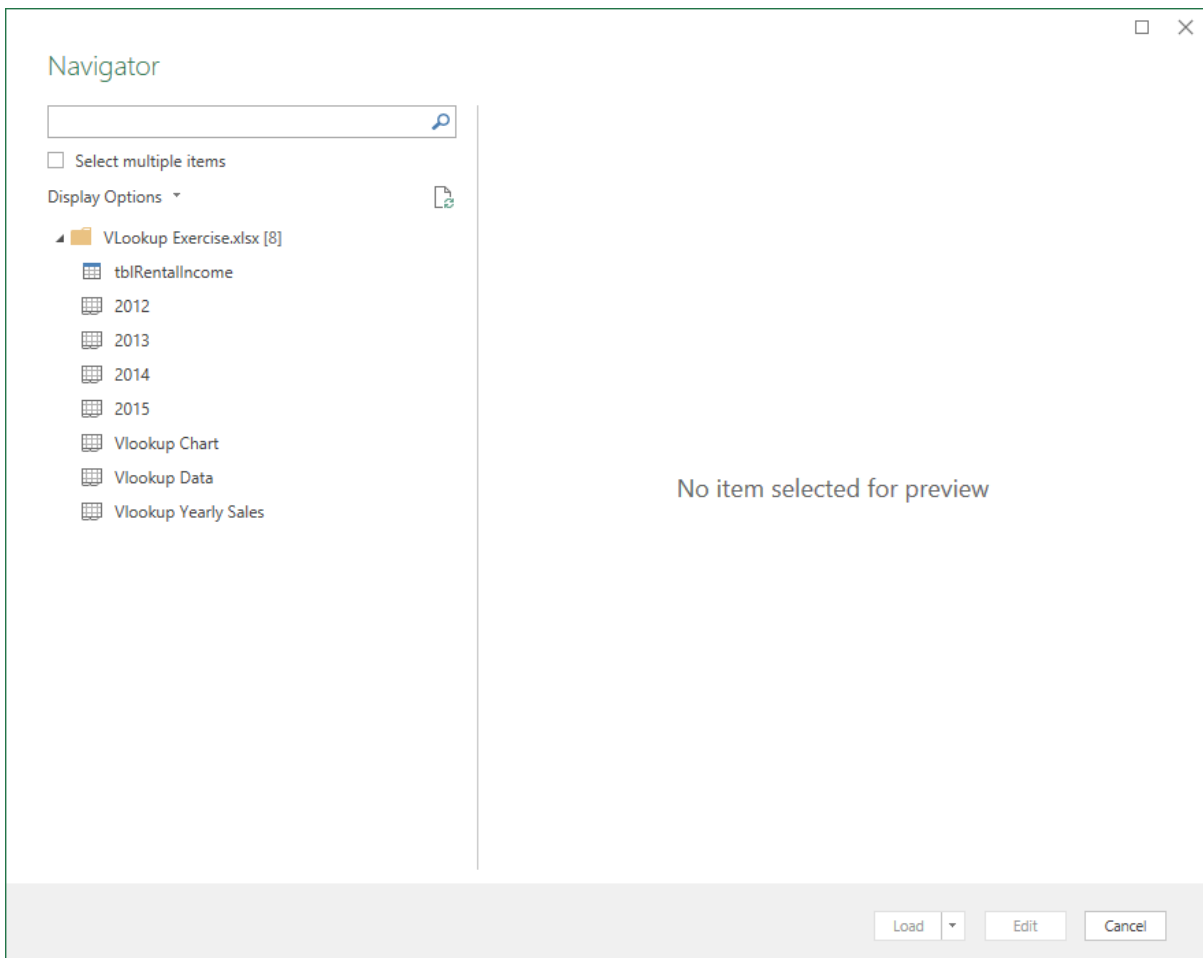
Select Data > Get Data > From File > From Workbook (I use 365 so my label says Get Data, yours might say New Query depending on what version you're working in)

The screenshot shows the Microsoft Excel interface with the 'Data' ribbon active. The 'Get Data' group is expanded to 'From File', which is further expanded to 'From Workbook'. The background shows the data table from the previous image, with the 'Postcode' column highlighted in green.

Browse to where this file is saved and select the file that you want to draw the information **FROM** and select Import



Select the table that you want to draw the column / information from



Once you've selected the correct table, you should see a preview of the table. Select Edit at the bottom to select which columns are required.

The screenshot shows the Power BI Navigator interface. On the left, a tree view shows the file 'Vlookup Exercise.xlsx' with a sub-tree containing 'tblRentalIncome' and several years (2012-2015) and other views. The 'tblRentalIncome' table is selected and highlighted. On the right, a preview of the table is shown with the following data:

Customer no.	Customer name	Rental Income
11158	Lanford Haverman Travel	12616
11584	ABC Holidays	12164
11659	Mindy Sadley Travel	17413
12867	Essence Jardine Holidays	12481
14809	Dorothy Schreckengost	10913
20058	Jaylin Tours	12247
20337	Coral Tours	11415
22680	Monty Sanforth Holidays	10727
22974	Payton Cady Travel	14383
25525	Eveline Tours	12349
25871	Chantal Tours	14396
26704	Penelope Cason Travel	11227
30268	Alec Briner Holidays	16467
36954	Braidy Thomlinson Travel	12457
38547	Linzi Holidays	17423
44117	Brigit Thorley Travel	15617
44156	Porter Holidays	13315
44462	Sheridan Tours	15839
55683	Ian Tillson Travel	19536
58437	Gillian Hunter Holidays	15384
63851	Tripp Tours	15599
64287	Vincent Tours	18560
66874	Jeremiah Tomey	13598
73390	Richter Travel	18112

At the bottom of the preview window, there are buttons for 'Load', 'Edit', and 'Cancel'.

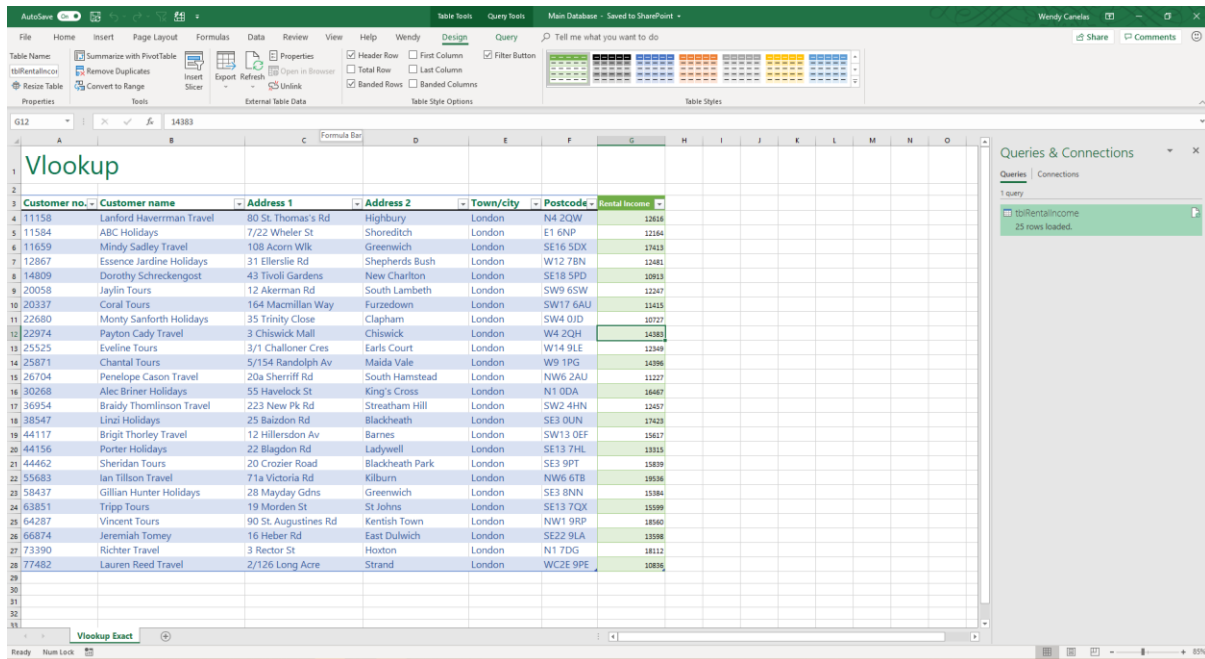
Select Choose Columns on the Home tab and select only the columns you want to create a link with

The screenshot shows the Power BI Desktop interface. The 'Home' tab is active, and the 'Choose Columns' dialog box is open. The dialog box has a search bar and a list of columns to choose from. The columns listed are:

- (Select All Columns)
- Customer no.
- Customer name
- Rental Income

The 'Query Settings' pane on the right shows the 'APPLIED STEPS' section with 'Changed Type' selected. The main data view shows a preview of the data with 3 columns and 25 rows.

Your document should look similar to below:



This won't automatically update the sheet, you will need to refresh the data to see latest updates

When you open the file again, ALWAYS Enable Content. Right click on the column you want to update and select Refresh. This can take a few minutes depending on the size of your file and speed of your network.

This will not update if anyone else has the file open while you are trying to refresh. Please ensure you are the only person using the file when you refresh.

