Power BI guide

How to set up relative paths for your data sources

What are absolute & relative paths

An **absolute path** is a complete path from the root directory to the target file or folder. Think of it as a full address, including the country, city, street, and house number. In Power BI, an absolute path might look something like this:

C:\Users\YourName\Documents\PowerBI\Report.pbix

Relative Paths

A **relative path** is a path that starts from the current directory and goes to the target file or folder. It's like giving directions from where you currently are, rather than from a fixed starting point. In Power BI, a relative path might look like this:

https \\Documents\PowerBI\Report.pbix.

Why do you need relative paths

- **Portability**: If you move the entire folder to another location or share it with someone else, the relative paths will still work as long as the folder structure remains the same.

- **Collaboration**: Team members can work on the project without needing to manually adjust paths for their specific directory structures.

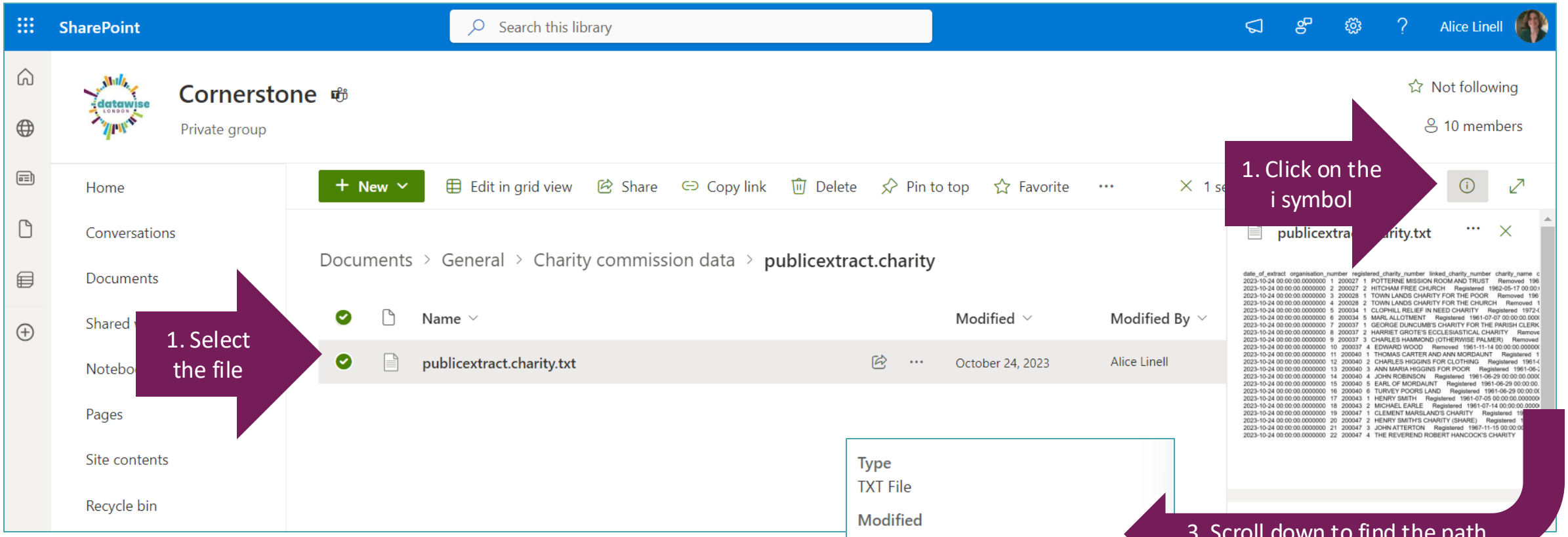
2 methods

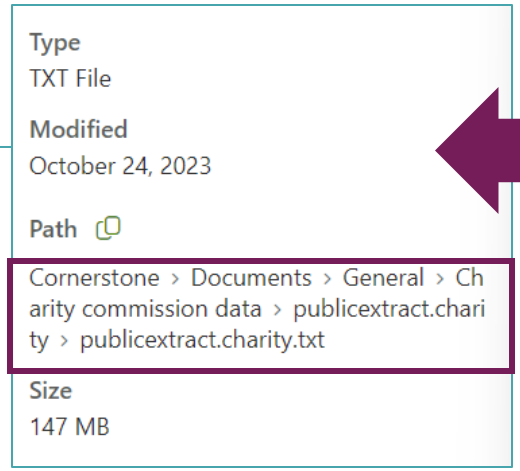
1. To connect a new data source
2. To change the connection of an existing data source

For this guide I am linking to a download of data from the Charity Commission website as the data there is in the public domain. From their site it is possible to download data files on all the charities in England and Wales.

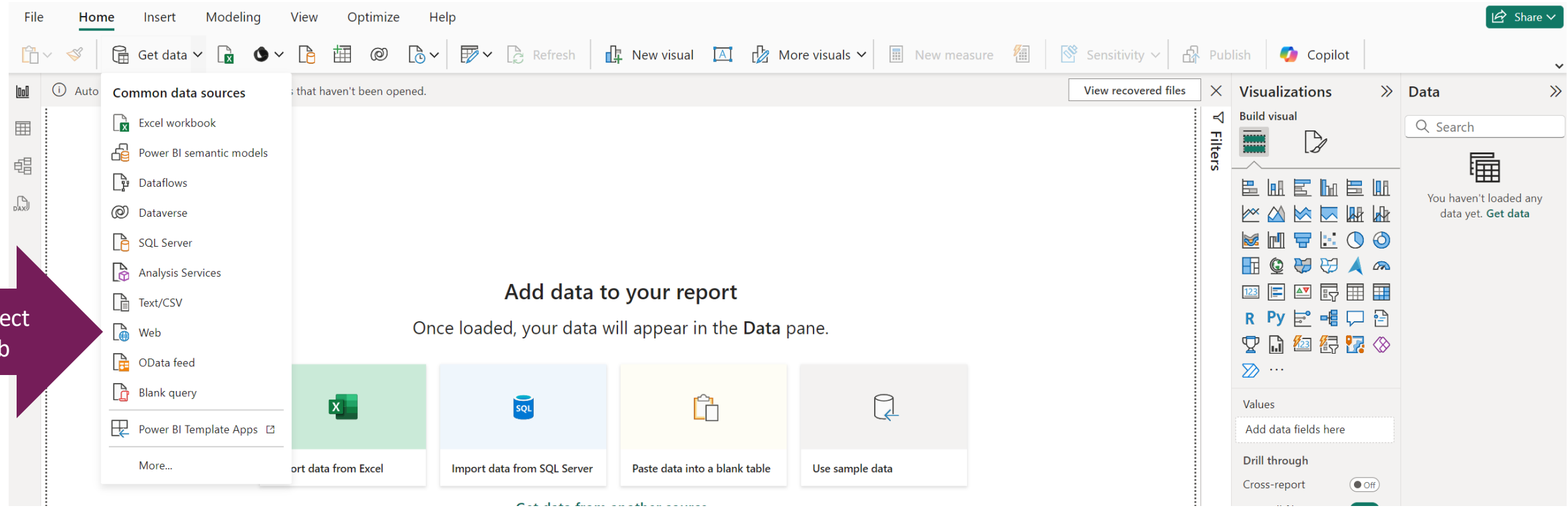
Method 1: Connecting a new data source

Open the file in Sharepoint or One Drive



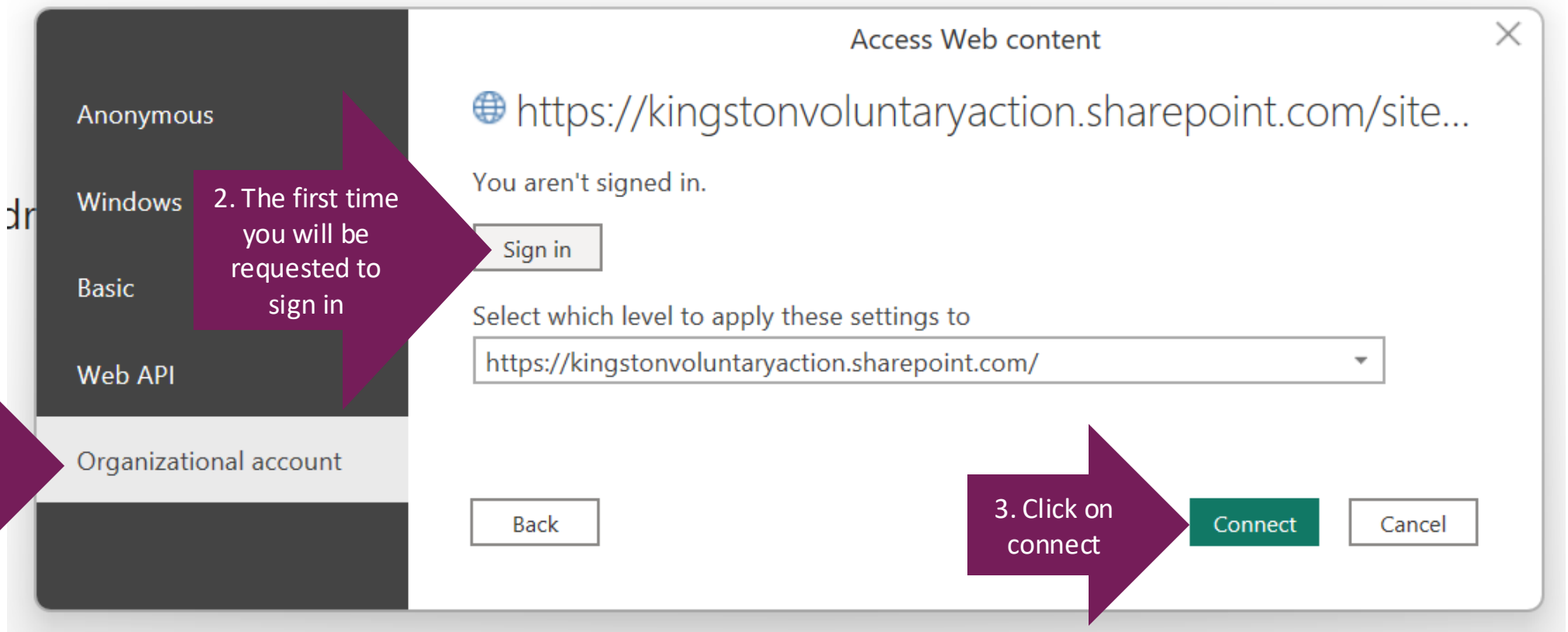


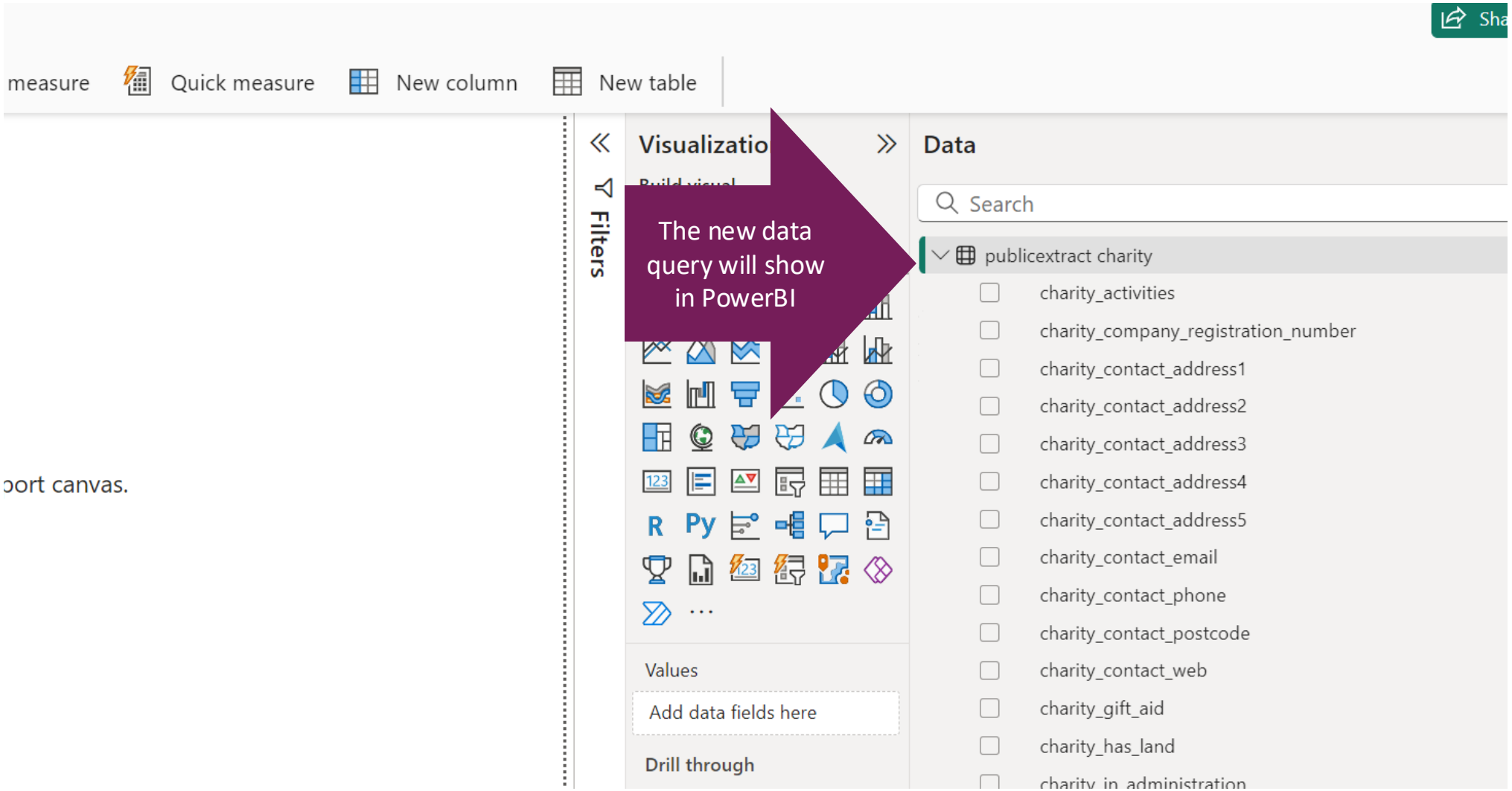
1. Copy the path


File
Home
Insert
Modeling
View
Optimize
Help
Share
Get data
Refresh
New visual
More visuals
New measure
Sensitivity
Publish
Copilot
Common data sources
Excel workbook
Power BI semantic models
Dataflows
Dataverse
SQL Server
Analysis Services
Text/CSV
Web
OData feed
Blank query
Power BI Template Apps
More...
that haven't been opened.
View recovered files
Add data to your report
Once loaded, your data will appear in the Data pane.
ort data from Excel
Import data from SQL Server
Paste data into a blank table
Use sample data
Filters
Visualizations
Build visual
Values
Add data fields here
Drill through
Cross-report
Off
Data
Search
You haven't loaded any data yet. Get data

1. Select Web

From Web
Basic
Advanced
URL
harity%20commission%20data/publicextract.charity/publicextract.charity.txt
1. Paste your URL
2. Click on OK
OK
Cancel

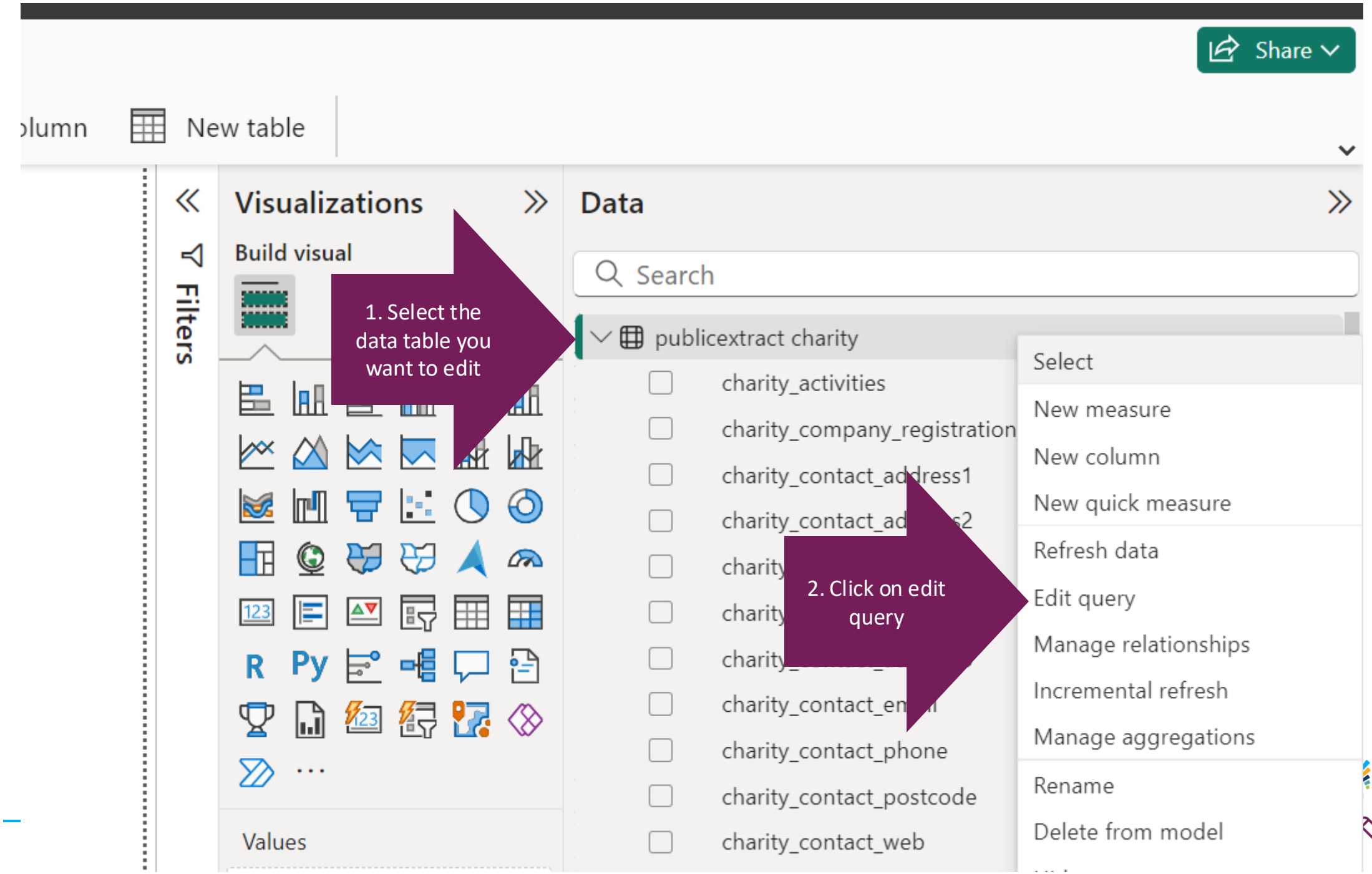

Access Web content
Anonymous
Windows
Basic
Web API
Organizational account
https://kingstonvoluntaryaction.sharepoint.com/site...
You aren't signed in.
Sign in
Select which level to apply these settings to
https://kingstonvoluntaryaction.sharepoint.com/
Back
Connect
Cancel
1. Select Organisational account
2. The first time you will be requested to sign in
3. Click on connect

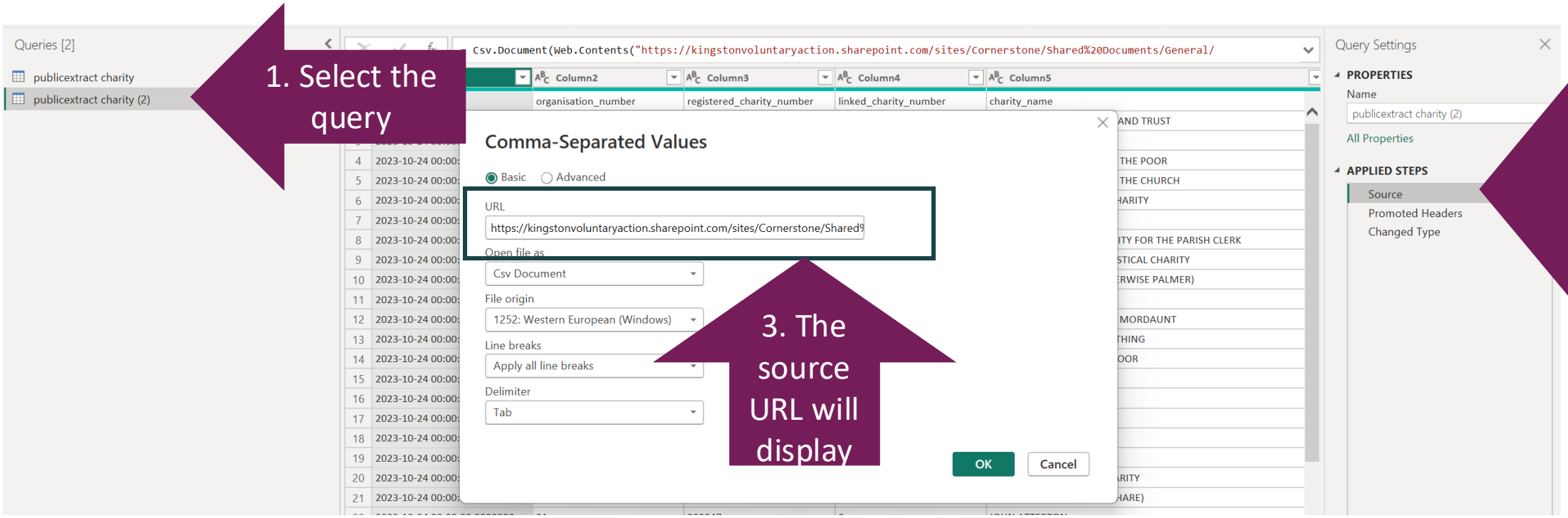

measure
Quick measure
New column
New table
Visualizatio
Filters
Data
Search
publicextract charity
charity_activities
charity_company_registration_number
charity_contact_address1
charity_contact_address2
charity_contact_address3
charity_contact_address4
charity_contact_address5
charity_contact_email
charity_contact_phone
charity_contact_postcode
charity_contact_web
charity_gift_aid
charity_has_land
Values
Add data fields here
Drill through
The new data query will show in PowerBI

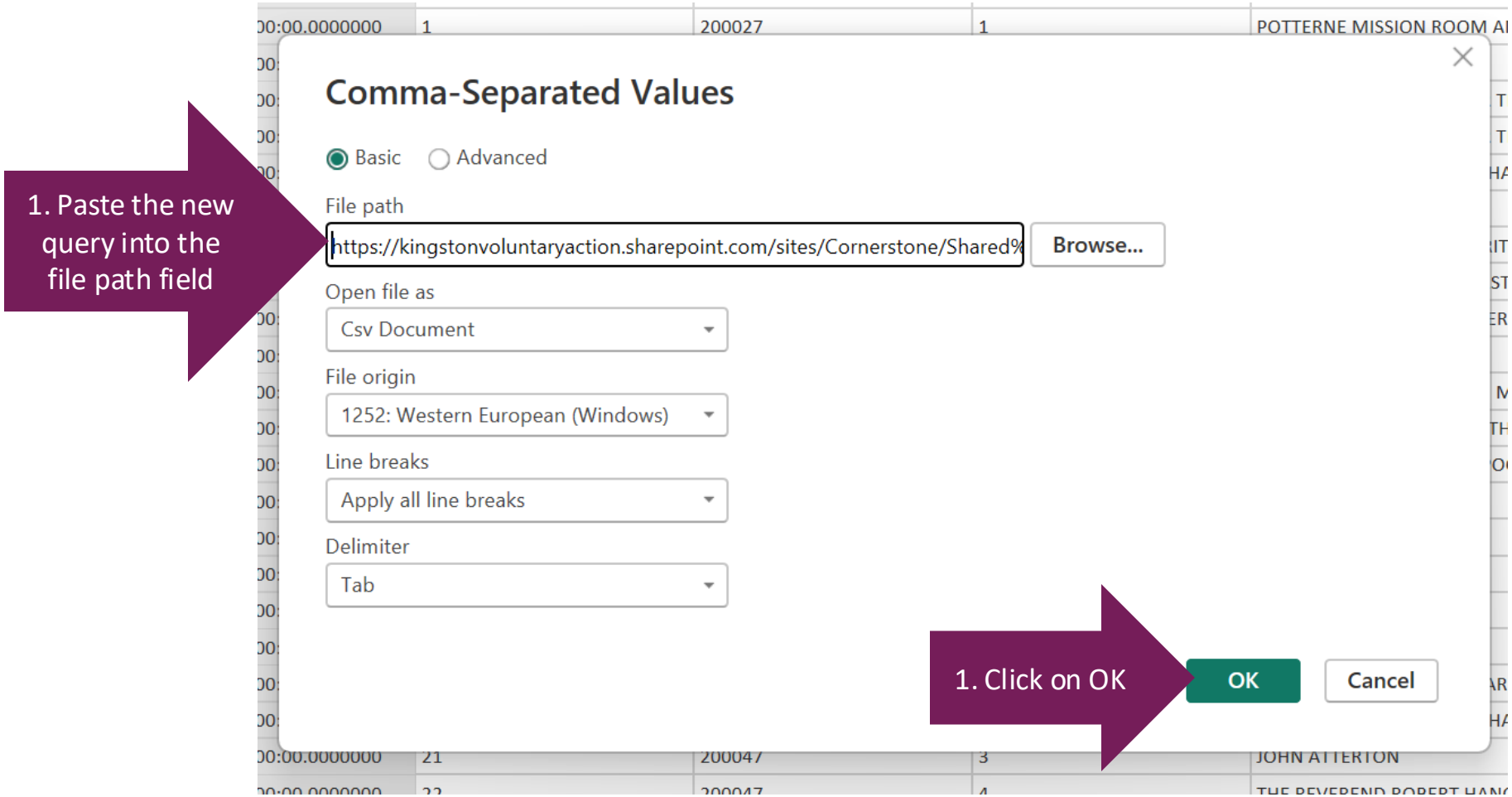
oort canvas.

Method 2: Change the connection of an existing data source

This method can we done when you already have connections to data sources in your PowerBI report but want to change the paths from absolute to relative.


Share
olumn
New table
Visualizations
Build visual
Filters
Values
Data
Search
publicextract charity
charity_activities
charity_company_registration
charity_contact_address1
charity_contact_ad
charity
charity
charity_contact_em
charity_contact_phone
charity_contact_postcode
charity_contact_web
1. Select the data table you want to edit
2. Click on edit query
Select
New measure
New column
New quick measure
Refresh data
Edit query
Manage relationships
Incremental refresh
Manage aggregations
Rename
Delete from model


1. Select the query
Queries [2]
publicextract charity
publicextract charity (2)
Csv.Document(Web.Contents("https://kingstonvoluntaryaction.sharepoint.com/sites/Cornerstone/Shared%20Documents/General/
Column2
Column3
Column4
Column5
organisation_number
registered_charity_number
linked_charity_number
charity_name
Comma-Separated Values
Basic
Advanced
URL
https://kingstonvoluntaryaction.sharepoint.com/sites/Cornerstone/Shared9
Open file as
Csv Document
File origin
1252: Western European (Windows)
Line breaks
Apply all line breaks
Delimiter
Tab
OK
Cancel
3. The source URL will display
Query Settings
PROPERTIES
Name
publicextract charity (2)
All Properties
APPLIED STEPS
Source
Promoted Headers
Changed Type
2. Click on the cog wheel next to Source


1. Paste the new query into the file path field
Comma-Separated Values
Basic
Advanced
File path
https://kingstonvoluntaryaction.sharepoint.com/sites/Cornerstone/Shared%
Browse...
Open file as
Csv Document
File origin
1252: Western European (Windows)
Line breaks
Apply all line breaks
Delimiter
Tab
1. Click on OK
OK
Cancel