Updating MOCA Smartsheet PowerBi

Weekly / Monthly Update Notes for the Moca Smartsheet Analysis PowerBi Report

- WEEKLY
- MONTHLY

WEEKLY

MONTHLY

Smartsheet

Each month we 'export' the previous Month's Data in the "MOCA Cases - Current" Smartsheet.

Open the "MOCA Cases - Current" Smartsheet
Select File > Save as new... , Then rename the sheet to "MOCA Cases - '_____' " (fill the blank with the previous completed month).
Create a filter to show rows that match:
Date is one of _____ (Dates should only include the current month)
Select all of the rows that have the current month and delete them.

In the 'new' "MOCA Cases - Current", repeat the steps above to delete all previous month rows.

PowerBi - Desktop

Now we need to append the "MOCA Cases - '(previous mo.)' " Smartsheet to the PowerBi Report.

Open the "MOCA Smartsheet Analysis.pbix" PowerBi Report.
Select Transform data
Select "New Source" > More... > (search) Smartsheet (Legacy) > Connect
Find the Smartsheet : Zara Reporting > CX/MOCA Reporting > select the (prior month) Smartsheet checkbox then OK
....Uncheck Enable Load???...

On the left side find & select under Queries > Other Queries > "MOCA Cases"
On the right side find "Append Query" and click on the gear next to it
Select the radio button "Three or more tables" and find the Smartsheet you're adding, click "Add >>" then OK