REFRESHING LIVE AND EXTRACT CONNECTIONS
IN TABLEAU DESKTOP

If we are connected to a data source that has been modified, we can immediately update Tableau Desktop with the changes by selecting a data source on the **Data menu** and then selecting **Refresh**

Not every connection will behave in the same way
The type of connection is displayed by the icon next to the data source in the Data Pane

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Live Connection

A live connection sends queries to the database and updates the view depending on the results
However, the specific fields queried are defined when the connection is initially created
Refreshing the data source will update any new or changed fields

Extract

Refreshing an extract will query the data source the extract was created from and rebuild the extract. This process might take some time, depending upon the size of the extract.

REFRESHING LIVE AND EXTRACT CONNECTIONS IN TABLEAU DESKTOP

STEP 1: In the **Canvas** of **Data Source** page ensure that **Live** is selected under **Connection**
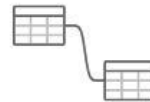
REFRESHING LIVE AND EXTRACT CONNECTIONS IN TABLEAU DESKTOP

STEP 2: Build the below mentioned view

    Rows shelf: Category

    Text on Marks card: Orders(Count)

The workbook is directly connected to a file

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STEP 3: Manually add two rows in the Data Source i.e., **Sample - Superstore_2021.xls**
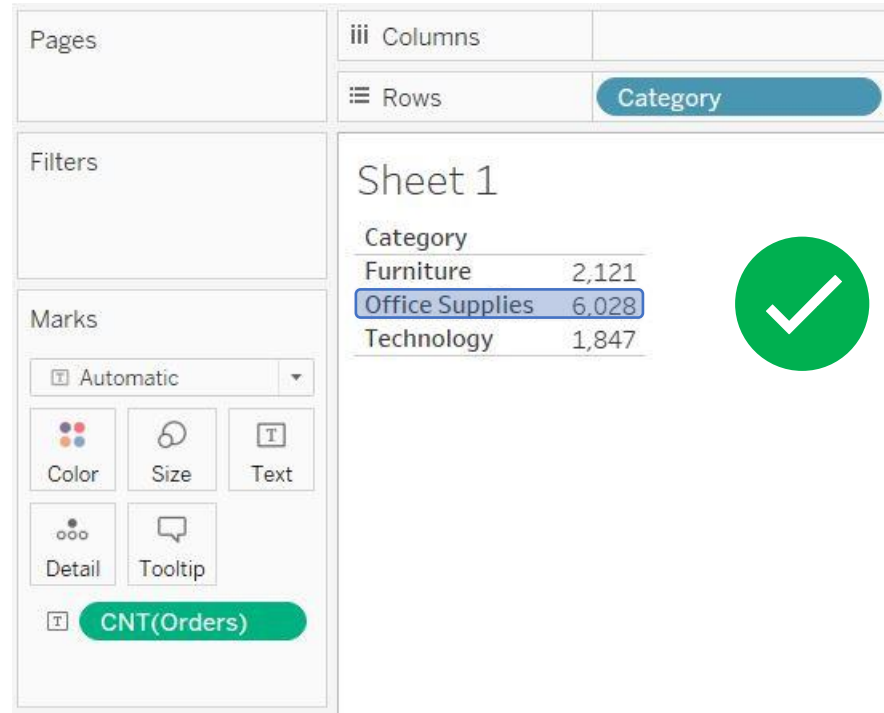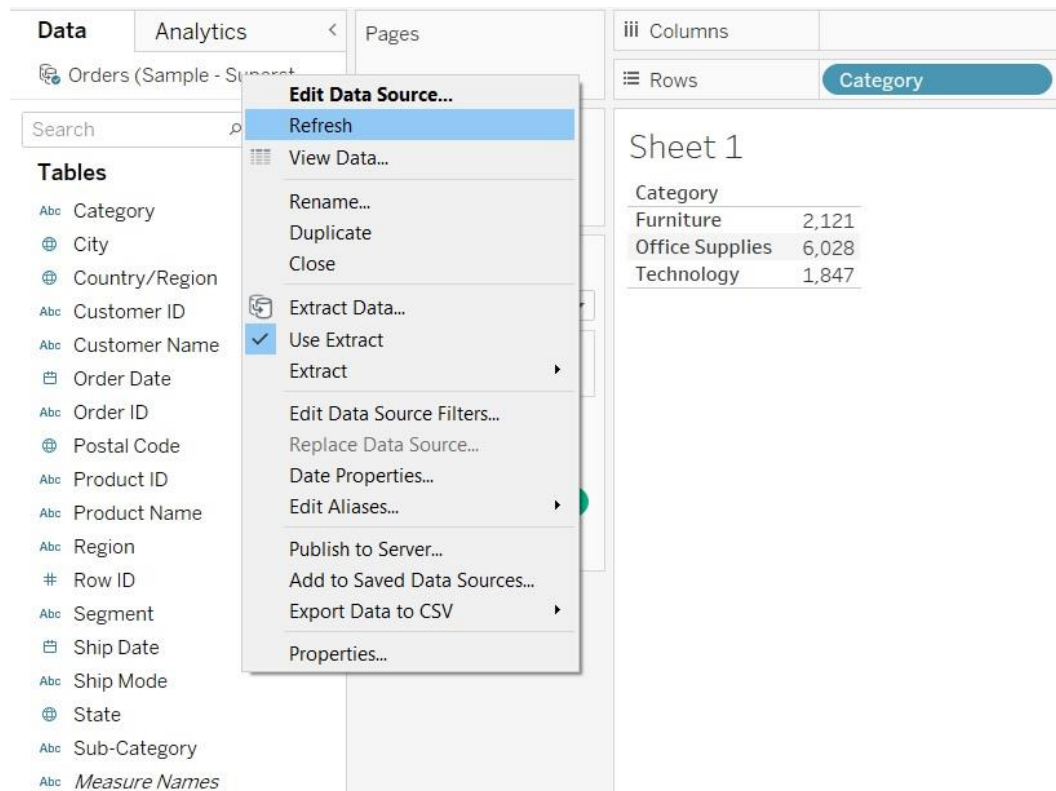**NOTE:** These two rows have the **Category** as **Office Supplies**

REFRESHING LIVE AND EXTRACT CONNECTIONS IN TABLEAU DESKTOP

STEP 4: Select the **Data Source** in **Data Pane, Right-click and Select Refresh**
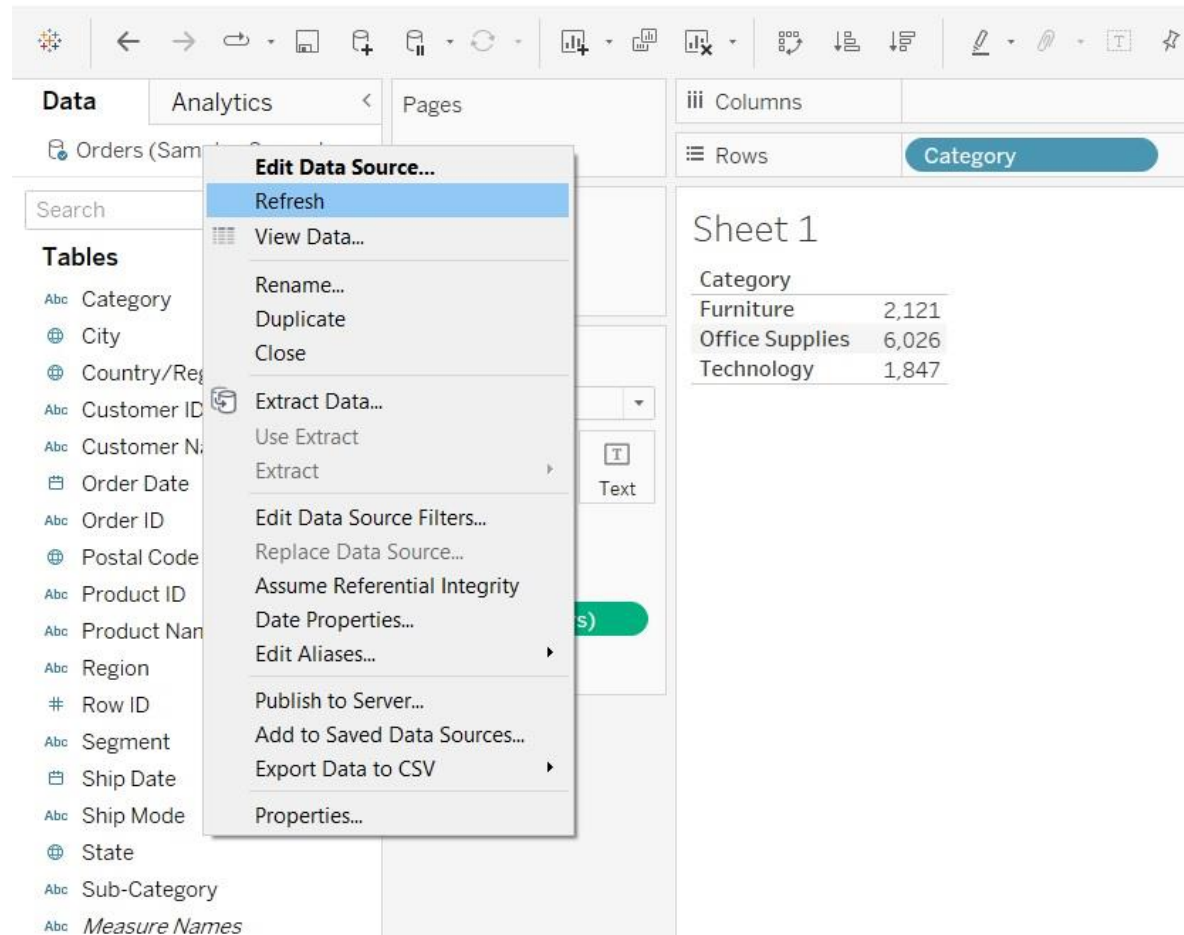
REFRESHING LIVE AND EXTRACT CONNECTIONS IN TABLEAU DESKTOP

STEP 5: The count of Office Supplies is now increased from 6,026 to 6,028

STEP 6: In the **Canvas** of **Data Source** page, Select the **Connection** as **Extract**

REFRESHING LIVE AND EXTRACT CONNECTIONS IN TABLEAU DESKTOP

STEP 7: When we click on **Sheet1** we will be prompted to save the **Hyper** file

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STEP 8: The existing view in **Sheet1**

The workbook is connected to
an extract that still references
the underlying data

REFRESHING LIVE AND EXTRACT CONNECTIONS IN TABLEAU DESKTOP

STEP 9: Manually add two more rows in the Data Source i.e., **Sample - Superstore_2021.xls**
NOTE: These two rows have the **Category** as **Office Supplies**

REFRESHING LIVE AND EXTRACT CONNECTIONS
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STEP 10: Select the **Data Source** in **Data Pane,** Right-click and Select **Refresh**
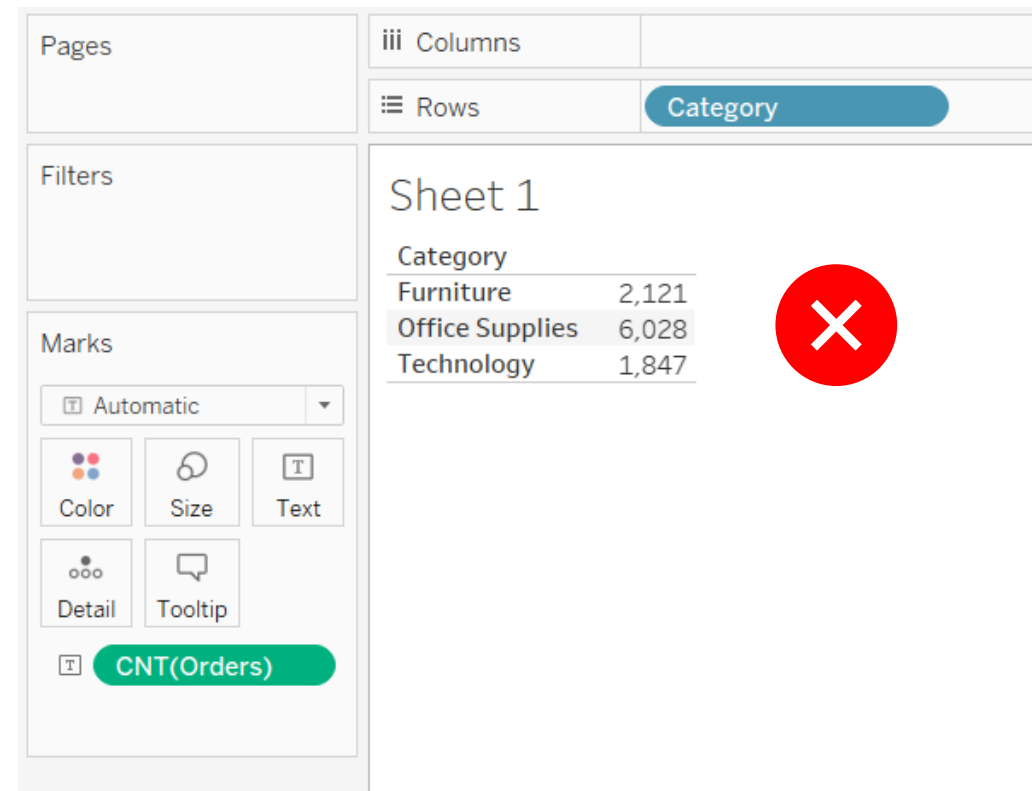There is no change in the count of Office Supplies

REFRESHING LIVE AND EXTRACT CONNECTIONS
IN TABLEAU DESKTOP

STEP 11: Select the **Data Source** in **Data Pane,** Right-click and Select **Extract** > **Refresh**
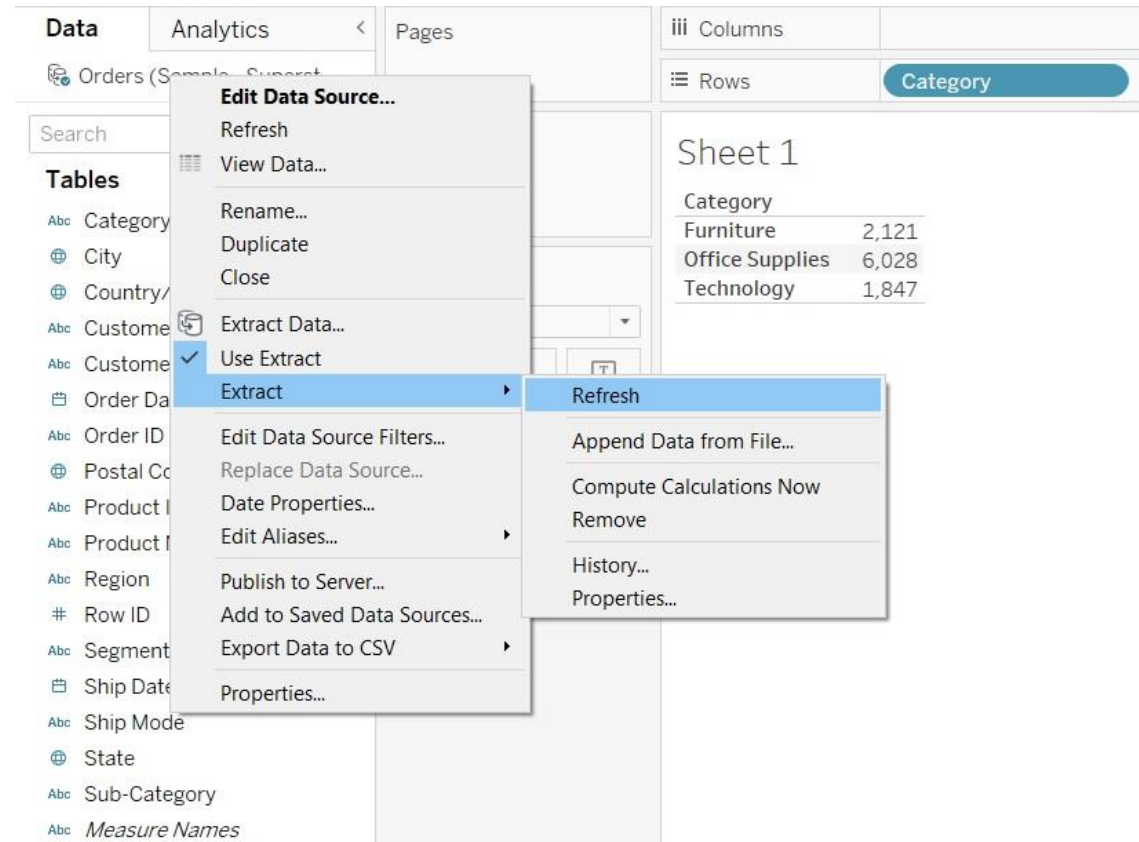
REFRESHING LIVE AND EXTRACT CONNECTIONS IN TABLEAU DESKTOP

STEP 12: Click on **Yes**

REFRESHING LIVE AND EXTRACT CONNECTIONS
IN TABLEAU DESKTOP

STEP 13: The count of Office Supplies is now increased from 6,028 to 6,030