

REPLACING THE CONNECTED DATA SOURCE WITH ANOTHER DATA SOURCE FOR THE AN EXISTING CHART OR SHEET

There may be a requirement when we need to update a workbook or sheet to use a different data source.

Instead of building the workbook from scratch using a new data source, we can opt to simply replace the data source.

When we replace a data source does not result in merging or editing the data sources. Rather, replacing a data source simply redirects fields used in the worksheet to map to corresponding fields in the new data source.

Any fields that the user creates in the original data source (for example, calculated fields, groups, sets, etc.), that are included in the view are successfully copied over to the new data source.

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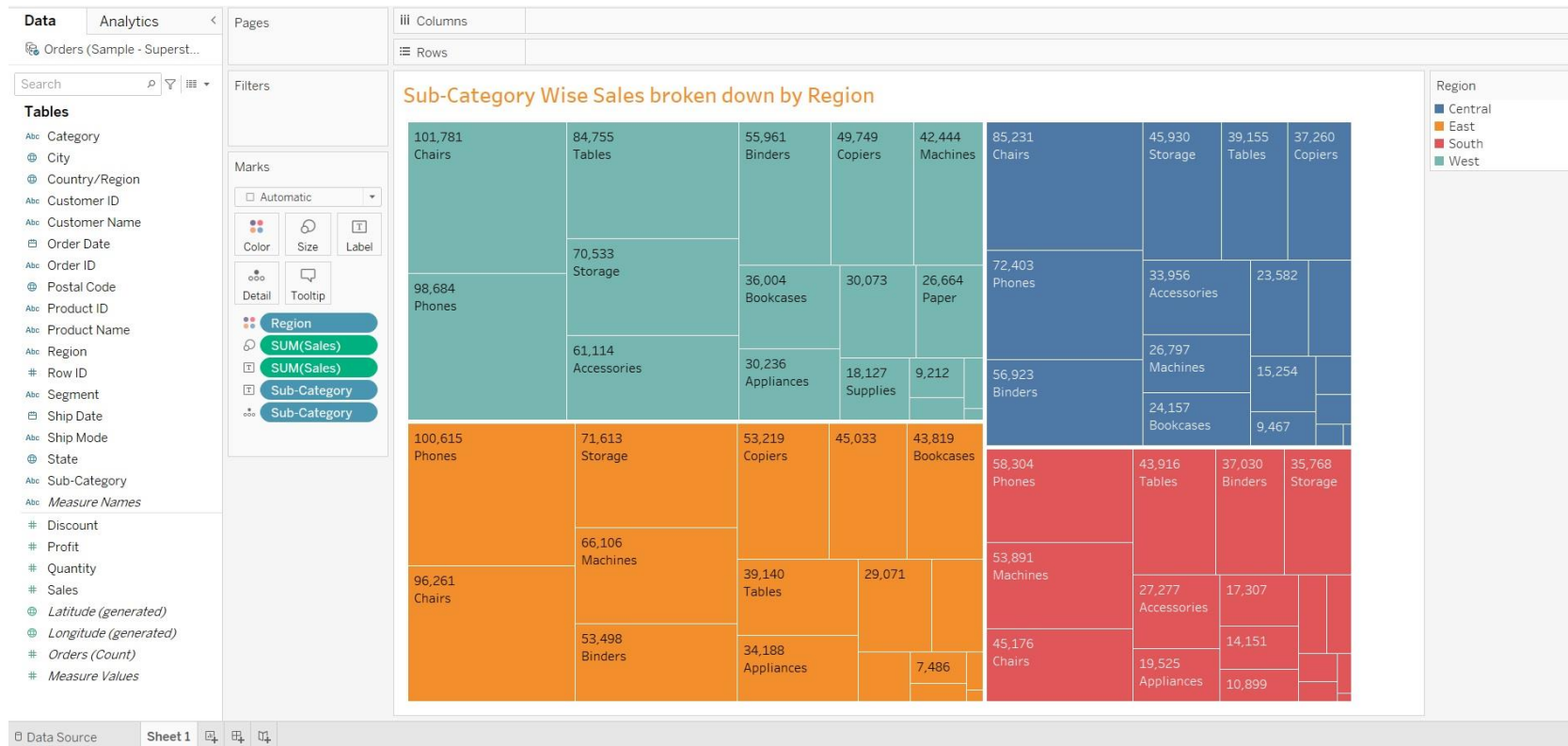
Fields that are not included in the view that don't exist in the new data source are not automatically copied and will need to be manually copied and pasted to the new data source before replacing the old one.

The two data sources need not to be identical, however, any differences between the data sources will affect the sheets in the workbook and the fields in the view.

More specifically, any fields, groups, sets, and calculated fields that do not exist in the new data source (or have a different name) are removed from the Data pane.

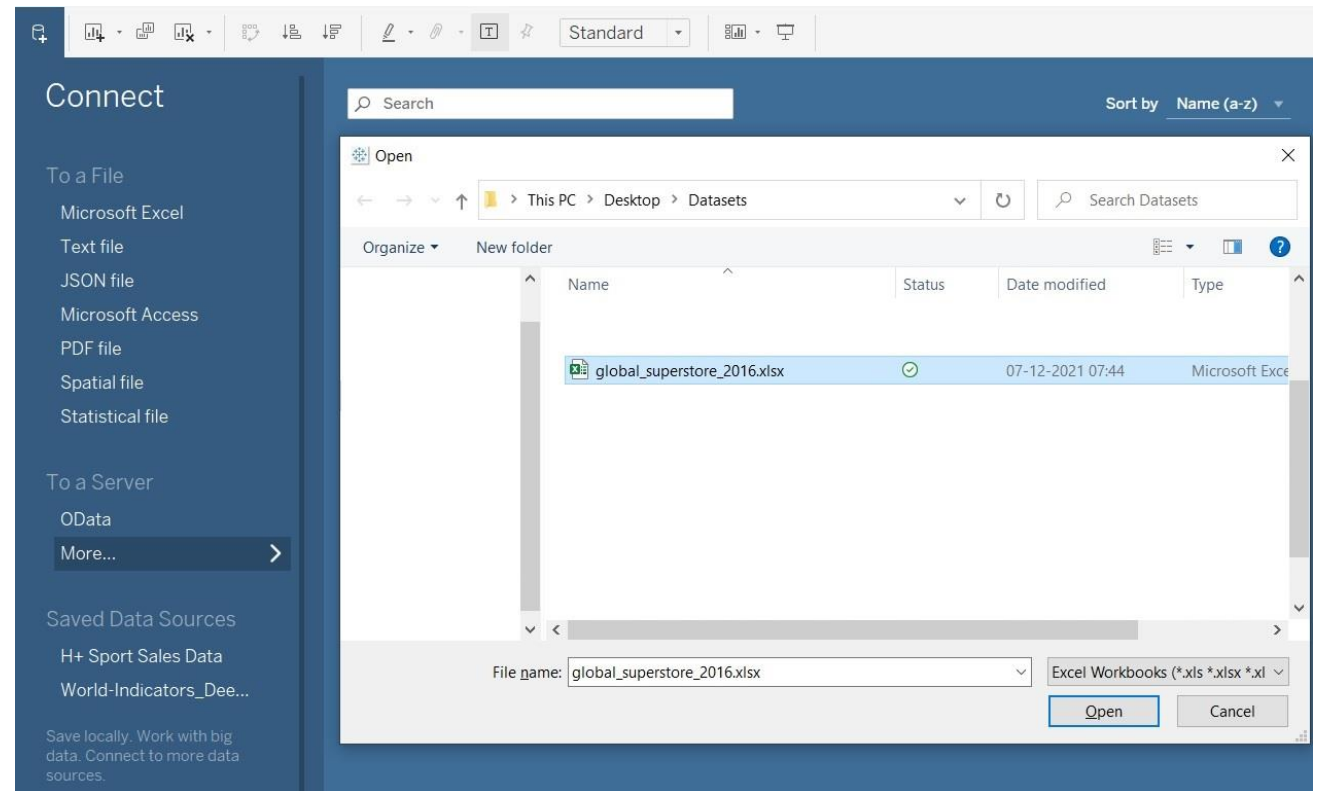
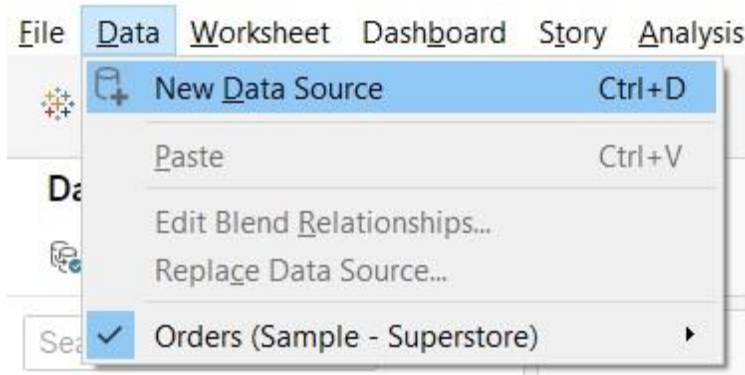
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STEP 1: Let us assume that we have the below mentioned Viz of **Sub-Category Wise Sales** broken down by **Region** using the original data source e.g: **Sample - Superstore.xls**



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STEP 2: Select **Data > New Data Source** and then connect to the new data source
e.g: **global_superstore_2016.xlsx**



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STEP 3: On the **Data Source** page, drag the **Orders** table to the **canvas** to set up the data source

The screenshot shows the Tableau Data Source page. On the left, the 'Connections' pane lists 'global_superstore_2016' (Microsoft Excel). Below it, the 'Sheets' pane shows a list of tables: 'Orders', 'People', and 'Returns'. The 'Orders' table is highlighted. In the center canvas, the 'Orders' table is being added, represented by a small grid icon. Below the canvas, a message says 'Need more data? Drag tables here to relate them. [Learn more](#)'. At the bottom, a preview of the 'Orders' table data is shown, including columns for Row ID, Order ID, Order Date, Ship Date, Ship Mode, Customer ID, and Customer Name.

Orders (global_superstore_2016)

Filters
0 | Add

Connections [Add](#)

global_superstore_2016
Microsoft Excel

Sheets

☐ Use Data Interpreter
Data Interpreter might be able to clean your Microsoft Excel workbook.

Orders
People
Returns

New Union

Orders

24 fields 51290 rows

100 → rows

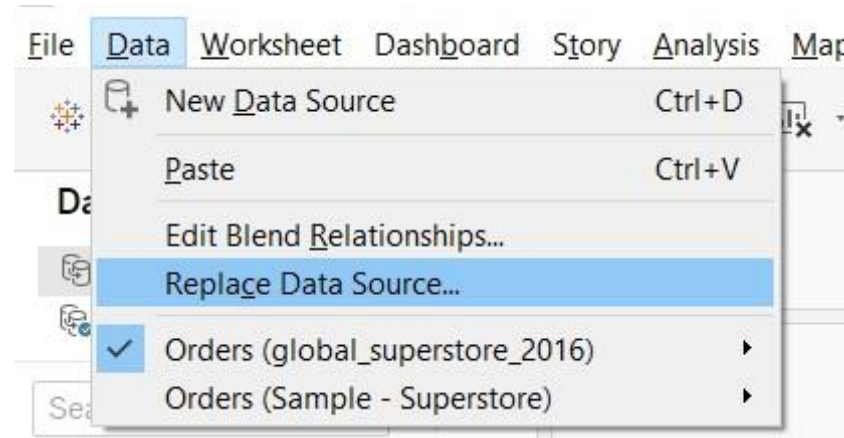
#	Orders	Orders	Orders	Orders	Orders	Orders
Row ID	Order ID	Order Date	Ship Date	Ship Mode	Customer ID	Customer Name
40098	CA-2014-AB10015140-41954	11-11-2014	13-11-2014	First Class	AB-100151402	Aaron Berg
26341	IN-2014-JR162107-41675	05-02-2014	07-02-2014	Second Class	JR-162107	Justin Ritte
25330	IN-2014-CR127307-41929	17-10-2014	18-10-2014	First Class	CR-127307	Craig Reiter
13524	ES-2014-KM1637548-41667	28-01-2014	30-01-2014	First Class	KM-1637548	Katherine M
47221	SG-2014-RH9495111-41948	05-11-2014	06-11-2014	Same Day	RH-9495111	Rick Hanse
22732	IN-2014-JM156557-41818	28-06-2014	01-07-2014	Second Class	JM-156557	Jim Mitchu

Data Source

Sheet 1

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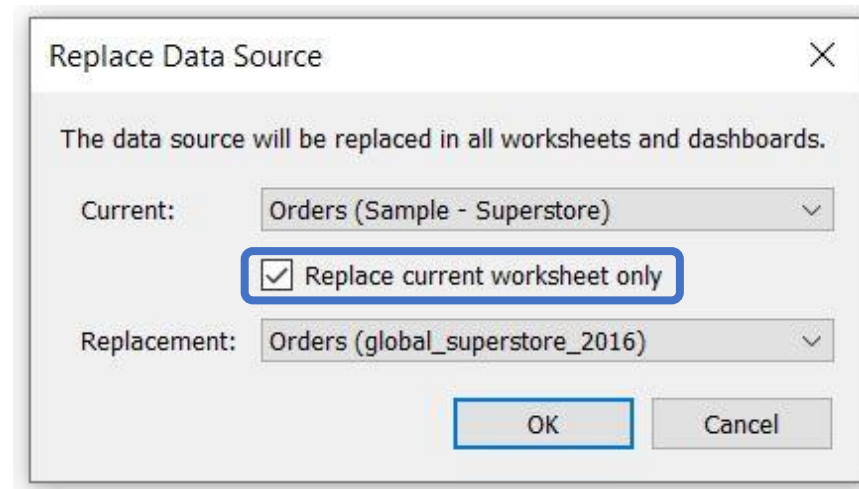
STEP 4: Go to the sheet tab and select **Data > Replace Data Source**



NOTE: There must be at least one field in the view to make the **Replace Data Source** option available (i.e., non-greyed)

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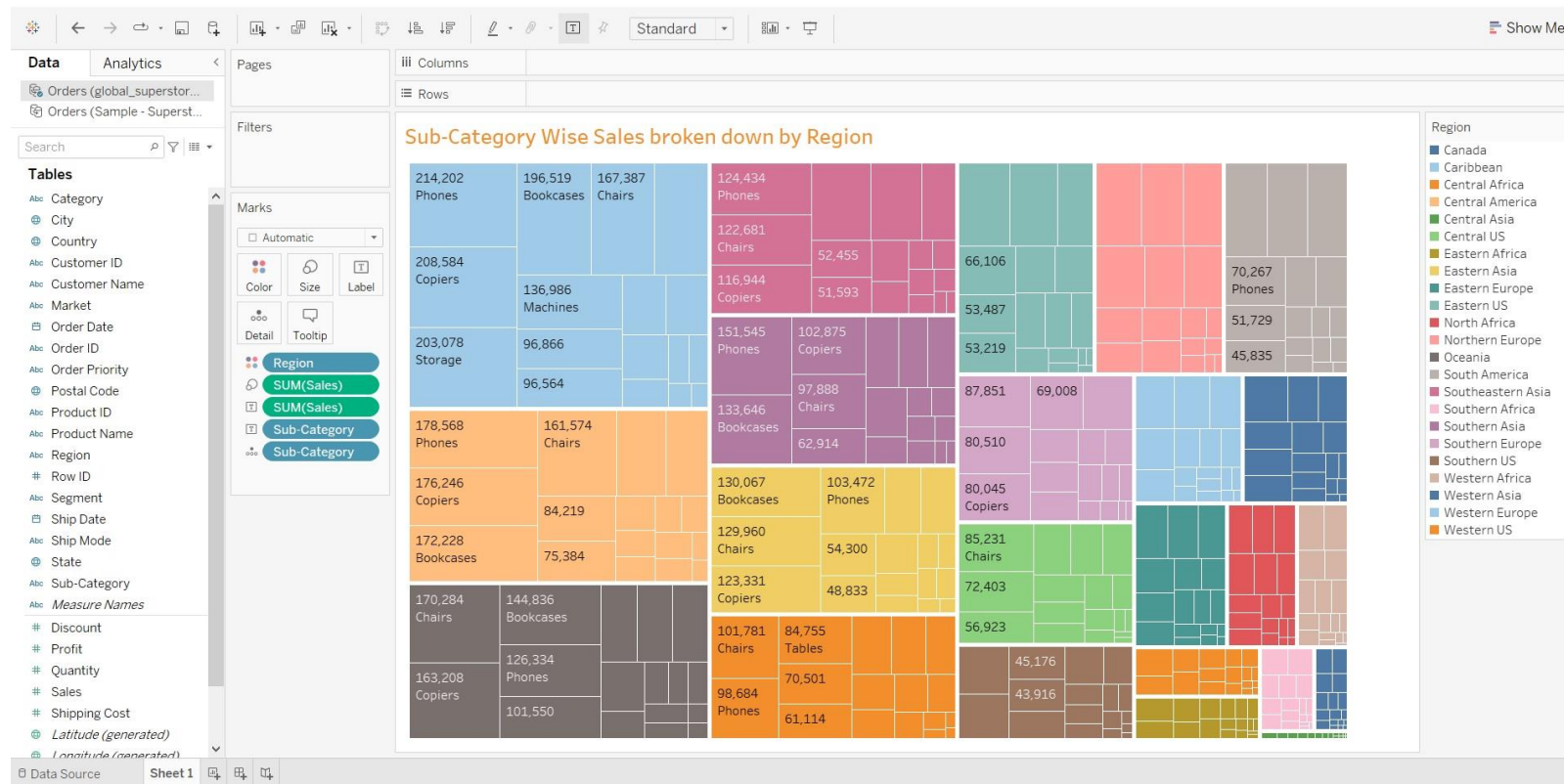
STEP 5: In the **Replace Data Source** dialog box, select the **Current** data source as **Sample - Superstore** and the **Replacement** data source as **global_superstore_2016**
When finished, click **OK**



NOTE: The **Replace current worksheet only** option was newly added in **Tableau Version 2022.4** (release date 14-Dec-2022). Previously, replacing data sources would apply to all worksheets in the workbook using the datasource. Now, we have greater control and can select to apply data source changes to only the current worksheet.

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STEP 6: The view is now updated with respect to the members of the dimensions in the replacement data source i.e., **Region** now has more than 4 members
The view that used the original data source is now updated to use the new data source



The blue check mark is now present for the replaced data source