Lesson 01 Demo 02
Extract vs. Live Connections

Objective: To demonstrate a live connection by updating the Excel data and reflecting those changes in Tableau

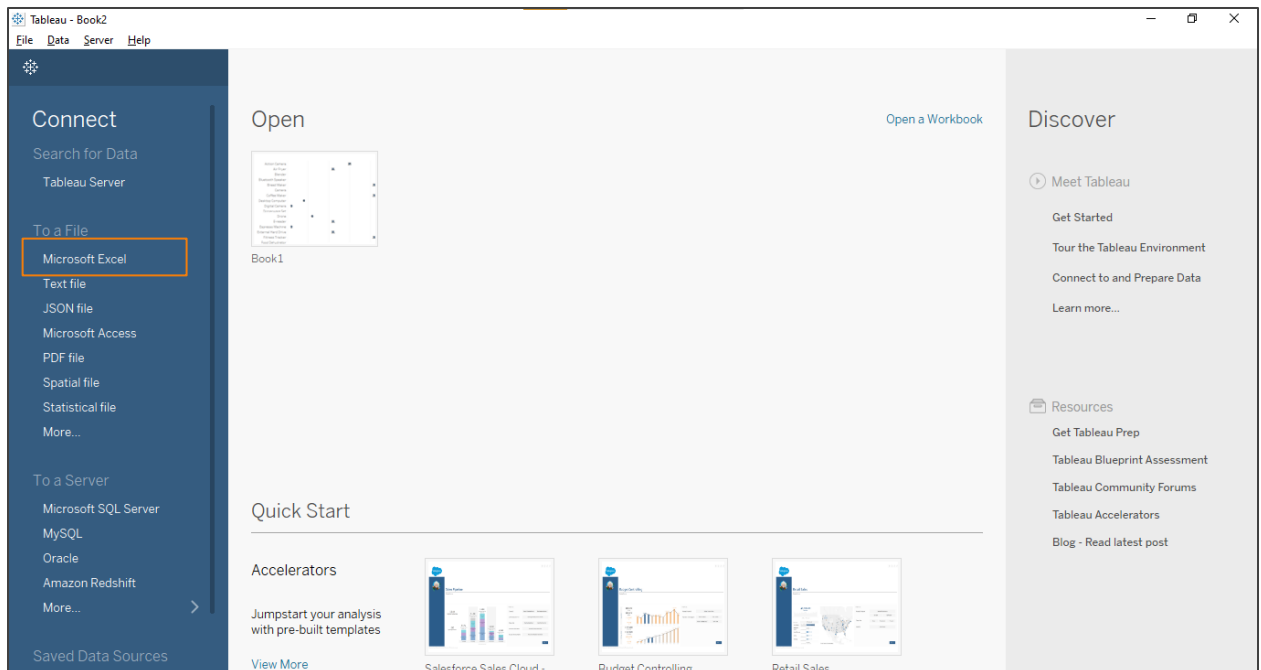**Tools required:** Tableau Desktop

Prerequisites: None

Note: Download the **Sample-superstore** dataset from the reference material of the LMS.

Steps to be followed:

1. Import the Excel file and preview the data
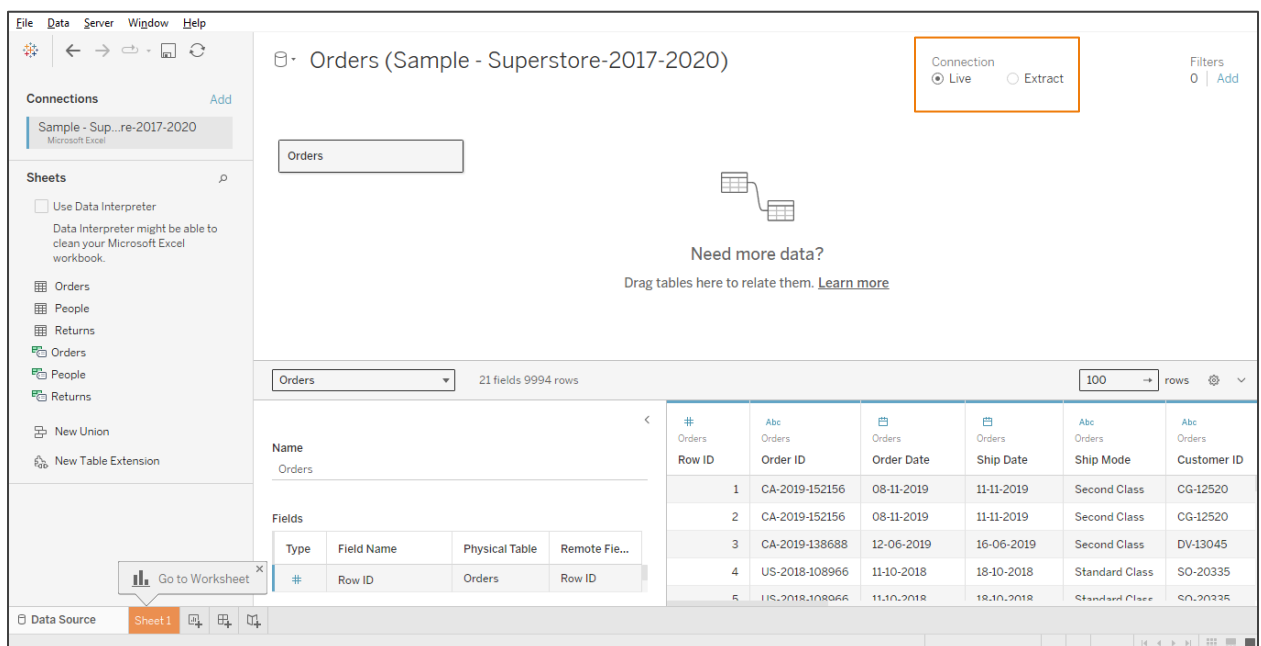2. Explore the Live connection

Step 1: Import the Excel file and preview the data

1.1   Open a new Tableau file and connect the **Sample-superstore** dataset by selecting **Microsoft Excel**

1.2   Drag the **Orders** sheet to the data model section (white canvas in the Data Source view)

> **Note: Live** and **Extract** connection radio button will appear on the top right corner.

> **Note:** When you select **Live** connection, any changes made in the source Excel file get reflected in the data in Tableau.

Step 2: Explore the Live connection

2.1   Go to Excel (source sheet connected) and in the **Ship Mode** variable, remove the class from the column example and change **First Class** to **First** Only. Similarly, repeat the step for other data in the column.

> **Note:** To edit the column, click on **Column E** and select **Sort & Filters** in the **Editing** section. Now click on the dropdown, select the modes one by one, and change the **Second class** to **Second**.

2.2   Save the changes in Excel by **ctrl+s** and close the Excel file

2.3 Refresh the **Tableau file**; all the changes in Excel will be reflected in the Tableau file

> **Note:** Try making such changes by selecting the **Extract** connection. The changes will not be reflected in the Tableau file when you open the Tableau file (with **Extract** connection mode). They will only be reflected when you hit **Refresh Data Source** on the **Connection** pane of the Data Source View.

With these steps, you can effectively showcase the dynamic nature of Tableau's live connections.