

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

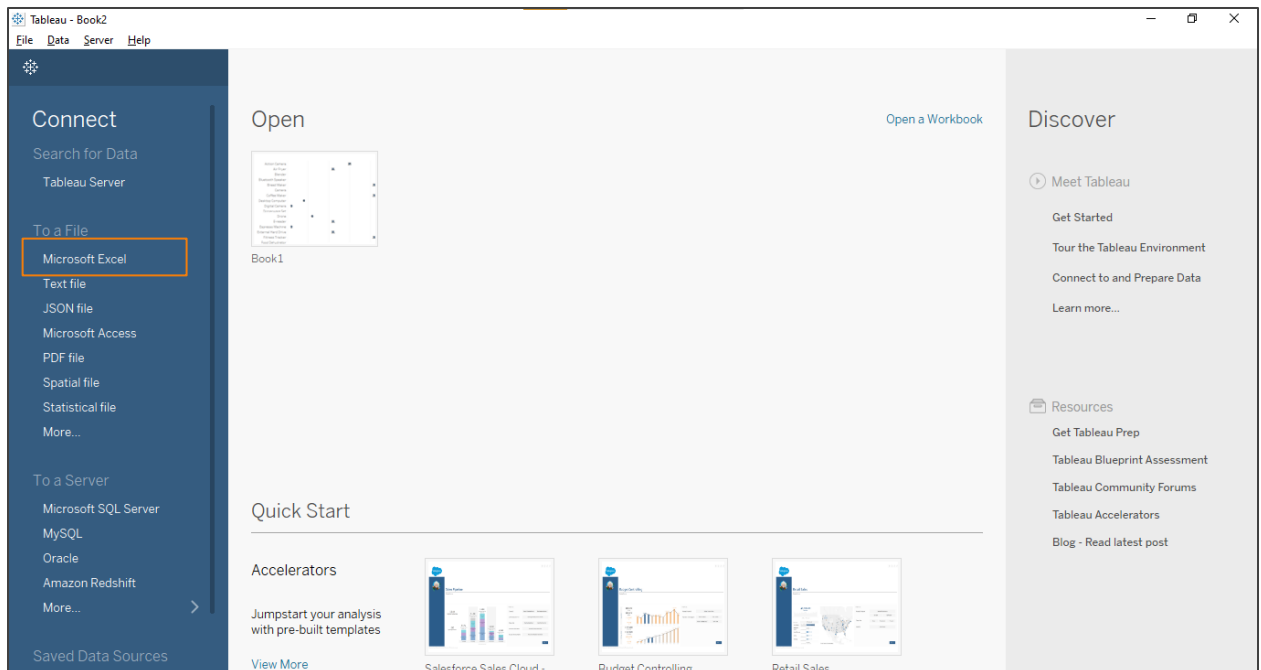
Note: Download the **Sample-superstore** dataset from the reference material of the LMS.

Steps to be followed:

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

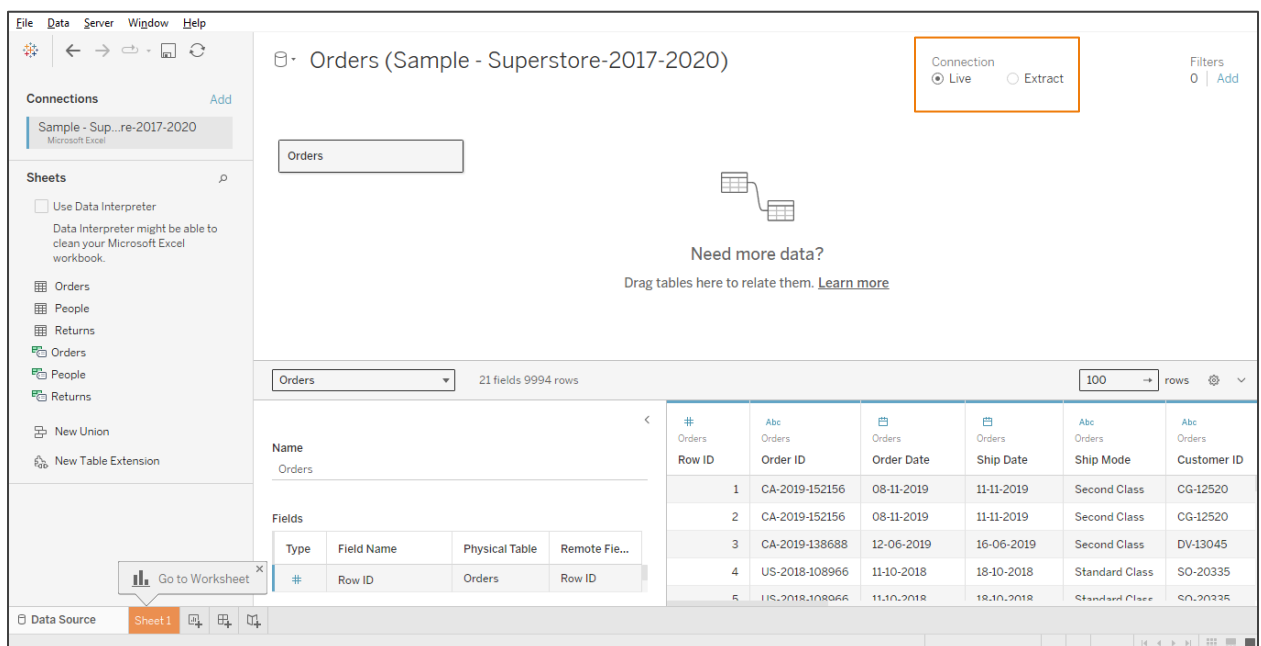
Step 1: Import the Excel file and preview the data

- 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**.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Row ID	Order ID	Order Date	Ship Date	Ship Mode	Customer ID	Customer Name	Segment	Country	City	State	Postal Code	Region
2	1	CA-2016-152156	2016-11-08	2016-11-11	Second Class	CG-12520	Claire Gute	Consumer	United States	Henderson	Kentucky	42420	South
3	2	CA-2016-152156	2016-11-08	2016-11-11	Second Class	CG-12520	Claire Gute	Consumer	United States	Henderson	Kentucky	42420	South
4	3	CA-2016-138688	2016-06-12	2016-06-16	Second Class	DV-13045	Darrin Van Huff	Corporate	United States	Los Angeles	California	90036	West
5	4	US-2015-108966	2015-10-11	2015-10-18	Standard Class	SO-20335	Sean O'Donnell	Consumer	United States	Fort Lauderdale	Florida	33311	South
6	5	US-2015-108966	2015-10-11	2015-10-18	Standard Class	SO-20335	Sean O'Donnell	Consumer	United States	Fort Lauderdale	Florida	33311	South
7	6	CA-2014-115812	2014-06-09	2014-06-14	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West
8	7	CA-2014-115812	2014-06-09	2014-06-14	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West
9	8	CA-2014-115812	2014-06-09	2014-06-14	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West
10	9	CA-2014-115812	2014-06-09	2014-06-14	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West
11	10	CA-2014-115812	2014-06-09	2014-06-14	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West
12	11	CA-2014-115812	2014-06-09	2014-06-14	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West
13	12	CA-2014-115812	2014-06-09	2014-06-14	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West
14	13	CA-2017-114412	2017-04-15	2017-04-20	Standard Class	AA-10480	Andrew Allen	Consumer	United States	Concord	North Carolina	28027	South
15	14	CA-2016-161389	2016-12-05	2016-12-10	Standard Class	IM-15070	Irene Maddox	Consumer	United States	Seattle	Washington	98103	West
16	15	US-2015-118983	2015-11-22	2015-11-26	Standard Class	HP-14815	Harold Pawlan	Home Office	United States	Fort Worth	Texas	76106	Central
17	16	US-2015-118983	2015-11-22	2015-11-26	Standard Class	HP-14815	Harold Pawlan	Home Office	United States	Fort Worth	Texas	76106	Central
18	17	CA-2014-105893	2014-11-11	2014-11-18	Standard Class	PK-19075	Pete Kriz	Consumer	United States	Madison	Wisconsin	53711	Central
19	18	CA-2014-167164	2014-05-13	2014-05-15	Second Class	AG-10270	Alejandro Grove	Consumer	United States	West Jordan	Utah	84084	West

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

File Home Insert Page Layout Formulas Data Review View Automate Developer Help **Table Design** Comments Share

Table Name: Table1

Summarize with PivotTable Remove Duplicates Convert to Range

Insert Slicer Export Refresh Open in Browser Unlink External Table Data

Header Row Total Row Banded Rows Filter Button Last Column Banded Columns Table Style Options

SECURITY RISK Microsoft has blocked macros from running because the source of this file is untrusted. Learn More

E23 Standard

Row ID	Order ID	Order Date	Ship Date	Ship Mode	Customer ID	Customer Name	Segment	Country	City	State	Postal Code	Region	Product ID	Category
1	CA-2016-152156	2016-11-08	2016-11-11	Second	CG-12520	Claire Gute	Consumer	United States	Henderson	Kentucky	42420	South	FUR-BO-100K	Furniture
2	CA-2016-152156	2016-11-08	2016-11-11	Second	CG-12520	Claire Gute	Consumer	United States	Henderson	Kentucky	42420	South	FUR-CH-100K	Furniture
3	CA-2016-138688	2016-06-12	2016-06-16	Second	DV-13045	Darrin Van Hi	Corporate	United States	Los Angeles	California	90036	West	OFF-LA-1000I	Office Furniture
4	US-2015-108966	2015-10-11	2015-10-18	Standard	SO-20335	Sean O'Donn	Consumer	United States	Fort Lauderdale	Florida	33311	South	FUR-TA-1000F	Furniture
5	US-2015-108966	2015-10-11	2015-10-18	Standard	SO-20335	Sean O'Donn	Consumer	United States	Fort Lauderdale	Florida	33311	South	OFF-ST-1000I	Office Furniture
6	CA-2014-115812	2014-06-09	2014-06-14	Standard	BH-11710	Brosina Hoffr	Consumer	United States	Los Angeles	California	90032	West	FUR-FU-1000F	Furniture
7	CA-2014-115812	2014-06-09	2014-06-14	Standard	BH-11710	Brosina Hoffr	Consumer	United States	Los Angeles	California	90032	West	OFF-AR-1000F	Office Furniture
8	CA-2014-115812	2014-06-09	2014-06-14	Standard	BH-11710	Brosina Hoffr	Consumer	United States	Los Angeles	California	90032	West	TEC-PH-1000T	Technology
9	CA-2014-115812	2014-06-09	2014-06-14	Standard	BH-11710	Brosina Hoffr	Consumer	United States	Los Angeles	California	90032	West	OFF-BI-1000S	Office Furniture
10	CA-2014-115812	2014-06-09	2014-06-14	Standard	BH-11710	Brosina Hoffr	Consumer	United States	Los Angeles	California	90032	West	OFF-AP-1000F	Office Furniture
11	CA-2014-115812	2014-06-09	2014-06-14	Standard	BH-11710	Brosina Hoffr	Consumer	United States	Los Angeles	California	90032	West	FUR-TA-1000F	Furniture
12	CA-2014-115812	2014-06-09	2014-06-14	Standard	BH-11710	Brosina Hoffr	Consumer	United States	Los Angeles	California	90032	West	TEC-PH-1000T	Technology
13	CA-2017-114412	2017-04-15	2017-04-20	Standard	AA-10480	Andrew Allen	Consumer	United States	Concord	North Carolina	28027	South	OFF-PA-1000F	Office Furniture
14	CA-2016-161389	2016-12-05	2016-12-10	Standard	IM-15070	Irene Maddox	Consumer	United States	Seattle	Washington	98103	West	OFF-BI-1000S	Office Furniture
15	US-2015-118983	2015-11-22	2015-11-26	Standard	HP-14815	Harold Pawla	Home Office	United States	Fort Worth	Texas	76106	Central	OFF-AP-1000F	Office Furniture
16	US-2015-118983	2015-11-22	2015-11-26	Standard	HP-14815	Harold Pawla	Home Office	United States	Fort Worth	Texas	76106	Central	OFF-BI-1000F	Office Furniture
17	CA-2014-105893	2014-11-11	2014-11-18	Standard	PK-19075	Pete Kriz	Consumer	United States	Madison	Wisconsin	53711	Central	OFF-ST-1000F	Office Furniture
18	CA-2014-167164	2014-05-13	2014-05-15	Second	AG-10270	Alejandro Gr	Consumer	United States	West Jordan	Utah	84084	West	OFF-ST-1000F	Office Furniture
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Orders Returns People +

Ready Accessibility: Unavailable

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

File Data Server Window Help

Orders (Sample - Superstore-2017-2020)

Connections: Sample - Sup...re-2017-2020 (Microsoft Excel)

Sheets: Orders, People, Returns

Need more data? Drag tables here to relate them. [Learn more](#)

Orders 21 fields 9994 rows

#	Orders	Orders	Orders	Orders	Orders
Row ID	Order ID	Order Date	Ship Date	Ship Mode	Customer ID
1	CA-2019-152156	08-11-2019	11-11-2019	Second	CG-12520
2	CA-2019-152156	08-11-2019	11-11-2019	Second	CG-12520
3	CA-2019-138688	12-06-2019	16-06-2019	Second	DV-13045
4	US-2018-108966	11-10-2018	18-10-2018	Standard	SO-20335
5	US-2018-108966	11-10-2018	18-10-2018	Standard	SO-20335

Go to Worksheet

Sheet1

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.