On-Demand Training:
Editing Data Connections
and Changing Data Sources

Welcome to this Connecting to Data Video on Editing Data Connections and Data Sources. You can download the Exercises workbook to follow along in your own copy of Tableau.

Editing Data Connections

To easily get back to the data connection window, simply click on the Data Source tab. Alternatively, if at any time we realize we need to modify the data connection, simply right click on the data source to pull up a menu.

- This menu lets us control many aspects of the data connection such as

- Renaming the connection

- Turning on or off an extracts, refreshing an extract

- Creating or editing data source filters,

- Saving a data source

- Or Publishing data sources.

For more information publishing data sources, check out the Data Server video

Remember – right click to access this menu.

Changing Data Sources
- An important feature is the ability to replace a data source.

    - This process is great to know if for example you're using a flat file to build up a proof of concept before switching to a live production environment.

We can replace the data source by creating a new connection to the new source then telling Tableau which one to use.

- First, we'll connect to the new file.

    - Click on the Connect to Data icon in the toolbar.

    - We'll select Excel, open our new file, bring out the Orders table, and go back to the worksheet.

- Now we have two data connections – the blue check means this is the primary connection currently being used in the viz.

- To swap these out, we'll right click on Superstore and select Replace Data Source.

- We can easily see how the replacement will happen, so we'll click OK.

- Since we don't need the original data connection, we can close it by right clicking and selecting Close

- Notice there's a red pill outlining our sum of sales, and a red exclamation point next to our sales field.

    - Looking below we see there's another field called "sls".

    - This is the same data as sales, just named something different in the second file.

- If we right click on our original sales field and select replace references, we can tell Tableau that sales field

should actually be sls.

Now everything looks right.

Conclusion

There's a lot more Tableau can do with data connections. For more information, check out the other videos in in the Connecting to Data series.