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# On-Demand Training: Using and Refreshing Extracts Transcript

Welcome to this video on Using and Refreshing Extracts. You can download and connect to the Global Superstore Excel file to follow along in your own copy of Tableau.

## Using Extracts

If we decide after connecting live that we'd prefer to extract the data, we can do so by right clicking on the data source and selecting Extract Data.

- Tableau gives us various options for customizing the extract.
- For now, we'll leave everything as it is and hit extract.
  - If the workbook has been saved as a .twbx packaged workbook, the extract will automatically save as part of the packaged workbook
  - If the workbook has been saved as a .twb or hasn't been saved yet, we're now asked to save the Tableau Data Extract file (.tde).
    - I recommend saving it somewhere it can be easily found, such as in "My Tableau Repository" in the Data sources folder.
- Tableau will now extract the data from its native environment into the fast data engine, and we're ready to go.

Notice that the icon here has changed from a single cylinder to two cylinders with an arrow on it.

- This indicates that the data has been extracted.
- We can also see that it's been extracted by right clicking on the data source and noticing that the Use Extract option is checked.
- If we want to switch back to a live connection, we can do so at any time by simply unchecking the Use Extract option.
  - If the underlying file has been altered or moved, unchecking the "Use Extract" option may prompt us to replace the file – simply navigate to the new location of the file.
  - And now note the icon.
- Let's turn that extract back on.

## Refreshing Extracts

- Because we're currently connected to an extract, if the underlying data were to change, the workbook would not update with that new data until the extract is refreshed.
- To do this, we right click on the data source, go to the Extract menu, and click Refresh.
- Do note that refreshing the extract refreshes its contents.
- With a data source published to Tableau server, we can also have these extracts refresh on a scheduled basis. For more information, check out the video on schedules and subscriptions

## Connecting to Extracts

To connect to a saved extract , when connecting to data, choose “other files” .Navigate to the extract on the machine. This is also how we would connect to a .tds or .tdsx file if it’s not yet on the saved data source list.

## 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.