



On-Demand Training: Using and Refreshing Extracts

INTRO

Welcome to this Connecting to Data Video on Using and Refreshing Extracts. If you haven't already done so, I recommend watching the first video in this series which covers the basics on Connecting to Data.

We're currently in Tableau Desktop, connected live to Superstore.

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. 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. 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 wouldn't 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. With a data source published to Tableau server, we can also have these extracts refresh on a scheduled basis.

CONCLUSION

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