Free Training Transcript: Connecting to Data from the Web

Welcome to this video on connecting to data from the web. You can download the data set to follow along in your own Tableau site. Note that you must be a Creator to make new connections to data from a browser.

It's easy to create a workbook from a published data source, or to modify an existing workbook published to a Tableau site. But as a Creator, you can also create a new workbook from your browser with a completely new data connection.

Connect to data from the web

To begin, Click New Workbook, either from inside a project or the Workbooks tab. We're brought to the New Workbook authoring environment, and a window automatically opens to connect to data. There are three tabs: Files, Connectors, and On this site.

If you're only presented with a list of published data sources (no tabs for Files or Connectors), your role doesn't allow for new data connections.

Dashboard Starters

If you're a Creator on a Tableau Online site, you also have access to a fourth tab for Dashboard Starters. Select from the common enterprise applications available, and choose your desired template. When you sign into the application, your data will populate. But let's get back to our workbook.

Files

We can upload excel or text based files directly from our computer. Once connected, we see the same data source tab experience from Tableau Desktop. We can perform joins and unions, use the data interpreter, and perform basic cleaning operations such as splitting and basic pivots.

Let's add another data source to explore the other options. Click the New Data Source icon in the toolbar.

Connectors and On this Site

On the Connectors tab, we see a list of the data sources we can correct to directly from the web. Selecting one will prompt for the connection information, just as with Tableau

Desktop.

The On this site tab, which is also visible to Explorers who can publish, lists the data sources already published to the site. Here we can select which data source we want to connect to, and click "Add data source" to add it to the workbook.

Saving the workbook

Once we do our analysis and save the workbook, we can navigate to the workbook and then to its data sources. Note that while the data is available in the workbook, it is not published as an independent data source. Connecting to data from the web is done in the context of a workbook and is not a substitute for publishing a data connection to the site.

Data Freshness

Note that when we connect to data from the web, files are static and database connections are extracts. If the data needs to be kept fresh, either with live connections or scheduled extract refreshes, it's best to build workbooks off published data sources.

Conclusion

Thank you for watching this video on connecting to data from the web. We invite you to continue with the Free Training Videos to learn more about using Tableau.