
On-Demand Training: Connecting to Databases and Advanced Features

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

Databases

Here, we're on the start screen where the Connect pane offers a long list of native connections to various data sources.

- These native connectors are optimized to increase performance, leverage particular capabilities of each data source, and honor and enforce security protocols among other things.
- If a native connector is not available you may still use the ODBC connectors for other data environments that aren't listed here.

In this video I'll connect to Microsoft SQL Server. Note, you will not be able to follow along here unless you have access to a server.

- First, I enter what server I want to connect to.
 - I could change the sign-in information, based on the authentication the database administrator set up for this database, but for now I'll leave it on the default and click OK.
- At this point I can select from any of the databases I have permission to access on this server.
- I'll choose Superstore, and here are the tables in that database.
- When I bring out a table by clicking and dragging, the preview pane gives me the option to Update Now, which loads the preview manually, or Automatically Update.

Joins versus Data Blending

- As a note, Tableau Desktop can bring in data from multiple tables through joins.
- If your desired analysis leverages data from a different data source, Tableau calls this Data Blending.
- To learn more about working with multiple data sources, be sure to check out the video on Data Blending.

Custom SQL

- Custom SQL gives us complete control over what data we're bringing into Tableau.
- This feature isn't about writing analytical queries, rather it should be used to define the data set.
- If your specific use case calls for custom SQL, it can be entered here.

Data Source Filters

- Custom SQL is one way of bringing specific data into Tableau.
- Another way to do that is to use Data Source Filters.
- Again, both of these options are intended only for specific use cases.
- For the most part, connecting to data in a standard manner and using the filters within Tableau will be the best option.

But let's see how Data Source Filters work.

- This data set has Order Priority as a field.
- Perhaps we want a dashboard that tracks only Critical and High priority orders.
- We'd enable a data source filter, which will apply to the entire workbook using this data connection.
- We'll go to filters in the upper right hand corner and click Add, and Add again.
- Tableau populates a list of the fields available.
- Select the field we want to filter on, in this case Order Priority, and say OK.
- Now we see a list of the values that exist in the data for this field.
- Select the ones we want, and say OK.
- This actually filters from the data connection level.

Let's go to the Worksheet.

- Now if we bring data into the view it's only Critical and High.
- It's just as easy to remove the filter by right clicking the data source, editing the data source filter, selecting the one we want, and clicking Remove.

Remember, in most cases, you can simply filter from within Tableau.

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.