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

## INTRO

Welcome to this Connecting to Data Video on Editing Data Connections and Data Sources. 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 to Superstore, the Excel file of sample data that ships with Tableau.

## EDITING DATA CONNECTIONS & CHANGING DATA SOURCES

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 extracts, data source filters, replacing data sources, and publishing or saving data sources. Remember – right click to access this menu.

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 where to point.

First, we'll connect to the new file. Click on the Data menu in the ribbon, then click Connect to Data. We'll select Excel, open our new file, bring out the Orders table by double clicking, and go to 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.

Oh no! There's a red pill outlining our sum of sales, and a red exclamation point next to our sales field. Looking below the sales field we see there's another field called "sls". This is the same data as sales, just named something different in the new file. If we right click on our original sales field and select replace references, we can tell Tableau that sales 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 the Connecting to Data series.