Free Training Transcript:
Managing Extracts

Welcome to this video on managing extracts. You can download the dataset and workbook to follow along. This video builds on the workbook from Managing Metadata.

Creating Extracts

If we're connected to a data source and decide that we'd like to extract it, 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 more information about these options, check out the online help. For now, we'll leave everything as it is and hit extract. If the workbook has already 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'd be asked where to save the Tableau Data Extract file (.tde).

Using Extracts

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 from its native environment into the fast data engine. The original data is untouched. We can also see that the data has been extracted by right clicking on the data source and noting 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 is back to that single cylinder. Let's turn that extract back on.

Refreshing Extracts

Because we're currently connected to a static copy of the data, if the underlying data were to change, the view 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. Published extracts can have their refreshes handled by Tableau Server or Tableau Online. Check out the Online Help for more information.

Changing Data Sources

We can also create an extract right when we connect to data for the first time. Let's connect to another data source. Click on the Connect to Data icon in the toolbar. We'll select Excel, and choose our file (available for download under the video), and select open. On the Data Source Page, here, we'll click Extract, and then back onto our sheet.

Now that we have two data source, we can explore an important feature in Tableau Desktop – the ability to replace a data source. This process is great to know if for example you're using local extract to build up a proof of concept before switching to a live production environment. We have two data sources – the blue check means this is the primary connection currently being used in the viz. The link icons in the other data source mean we could do a data blend. To swap these out, we'll right click on a data source and select Replace Data Source. We can easily see how the replacement will happen, so we'll click OK.

Since we don't need the original data connection, we can close it by right clicking and selecting Close. I'm sure you've noticed that there's a red pill outlining our average discount, and a red exclamation point next to our discount field. Looking above we see there's another field called "disc %". This is the same data as Discount, just named something different in the second file. If we right click on our original discount field and select replace references, we can tell Tableau that discount field should actually be disc %. Now the warnings are gone—though we need to reestablish the default aggregation.

Conclusion

Thank you for watching this extracts training video. For more information on working with data sources, check out the video on Publishing and Saving Data Sources.