



## Getting Started with Tableau Lab#8 Replacing a Data Source

### Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for Tableau. The document focuses on replacing data source runtime. [Join our professional training program and learn from experts.](#)

### History:

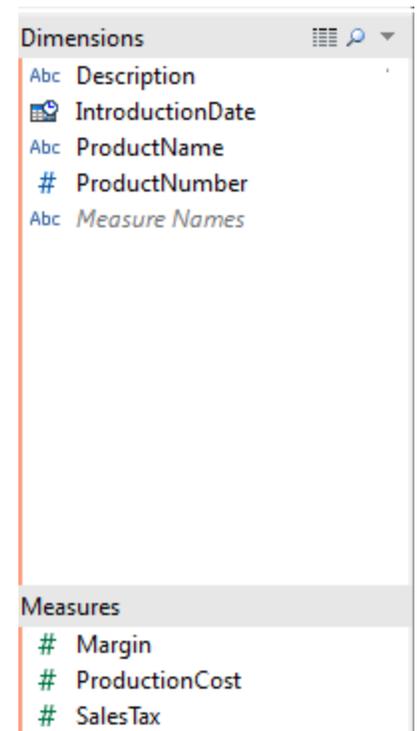
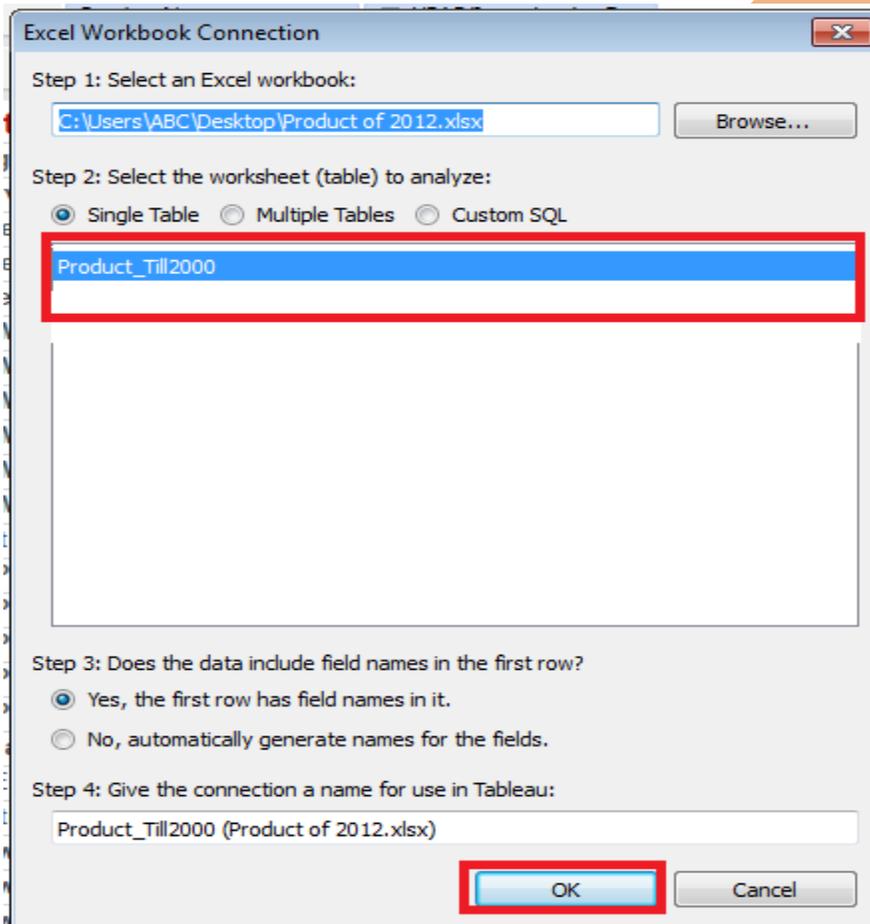
Version	Description Change	Author	Publish Date
0.1	Initial Draft	Surbhi Sahu	21 <sup>st</sup> Aug 2013
0.1	Review#1	Amit Sharma	29 <sup>th</sup> Aug 2013

## Replacing a Data Source

Replacing the data source used in a Tableau workbook allows you to point your workbook to a new data source and re-compute all your results using the new data. This method, however, works only if the new data source shares the same format as the original data source. If the format of the new data source is different than the current data source, you may see changes to custom sets, groups, and calculated fields that depend on the fields in the original data source.

For the clarification we can take an example. Here we have the data model in which the SalesTax till year 2000 is charged differently and after year 2000 the sales tax increased. We are going to prepare a common report for both the data because almost we have to do the same calculations, so, what will be the sense of making the same report twice. For this type of purpose, Tableau gives the facility to replace a data source.

Step 1) Import the excel sheet product\_Till2000 from the excel data source.

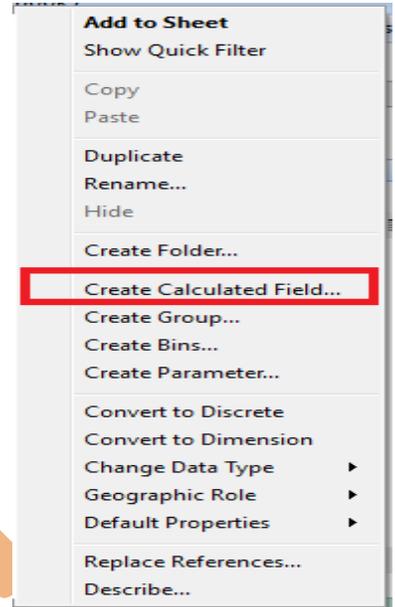


Step 2) Now all the fields will get imported in the worksheet.

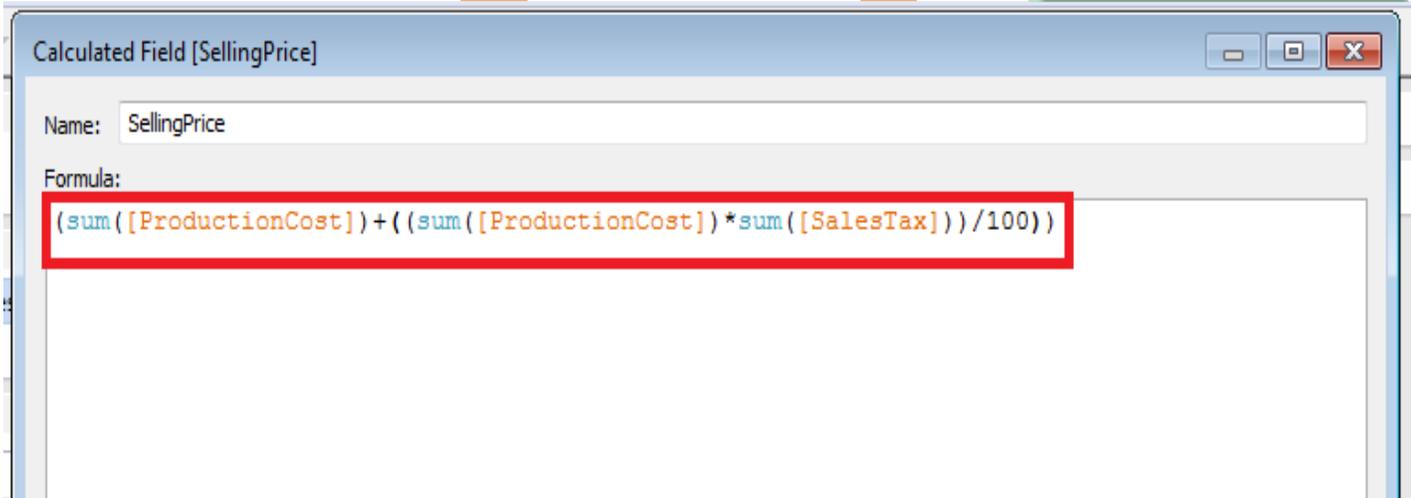
Step 3) Then drag and drop the productname and introductiondate from measures to rows shelf.



Step 4) Now we have to calculate the selling price of the product which will be calculated by including sales tax charged on each product individually.

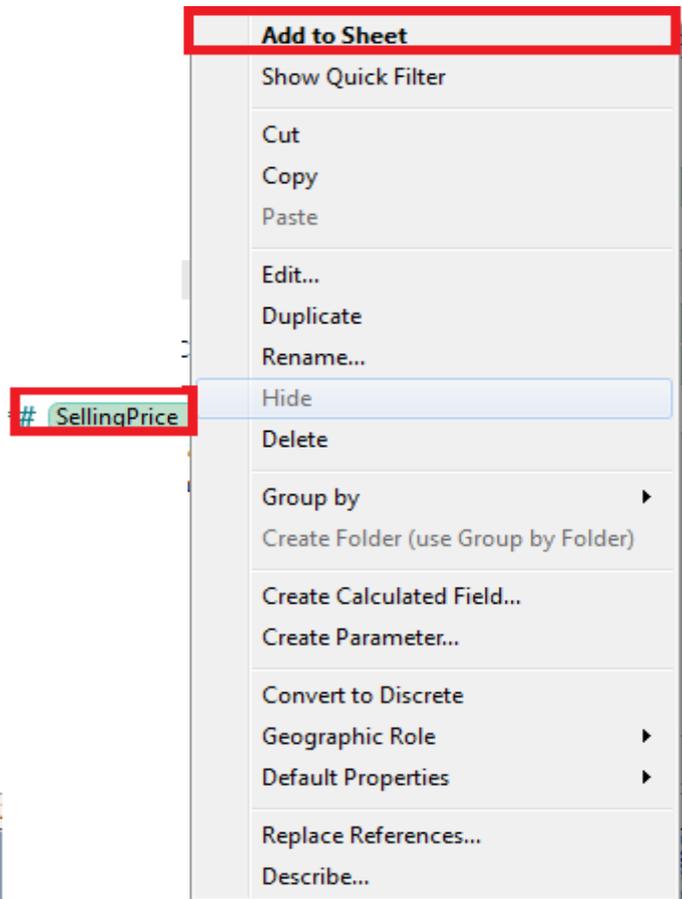


Step 5) Add the expression as given below



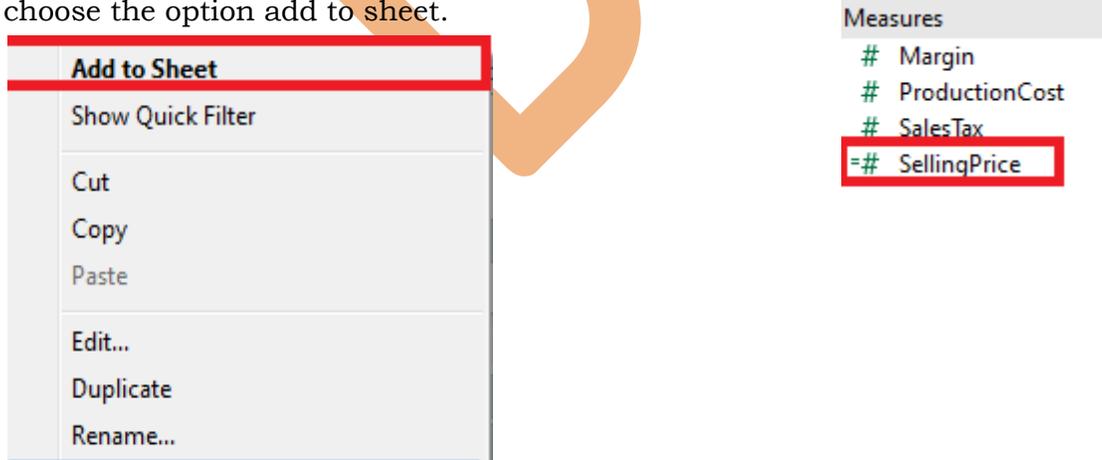
$(\text{sum}(\text{productioncost}) + (\text{sum}(\text{salestax}) * \text{sum}(\text{productioncost}) / 100)$  this will calculate the selling price and an separate field as named Selling price.

Step 6) In order to add this calculated field in the sheet, add right click on the SellingPrice and choose the option add to sheet.



Step 7) This will add the calculation of selling price in the sheet.

The same procedure will be done with the production cost. Click right on the production cost and choose the option add to sheet.

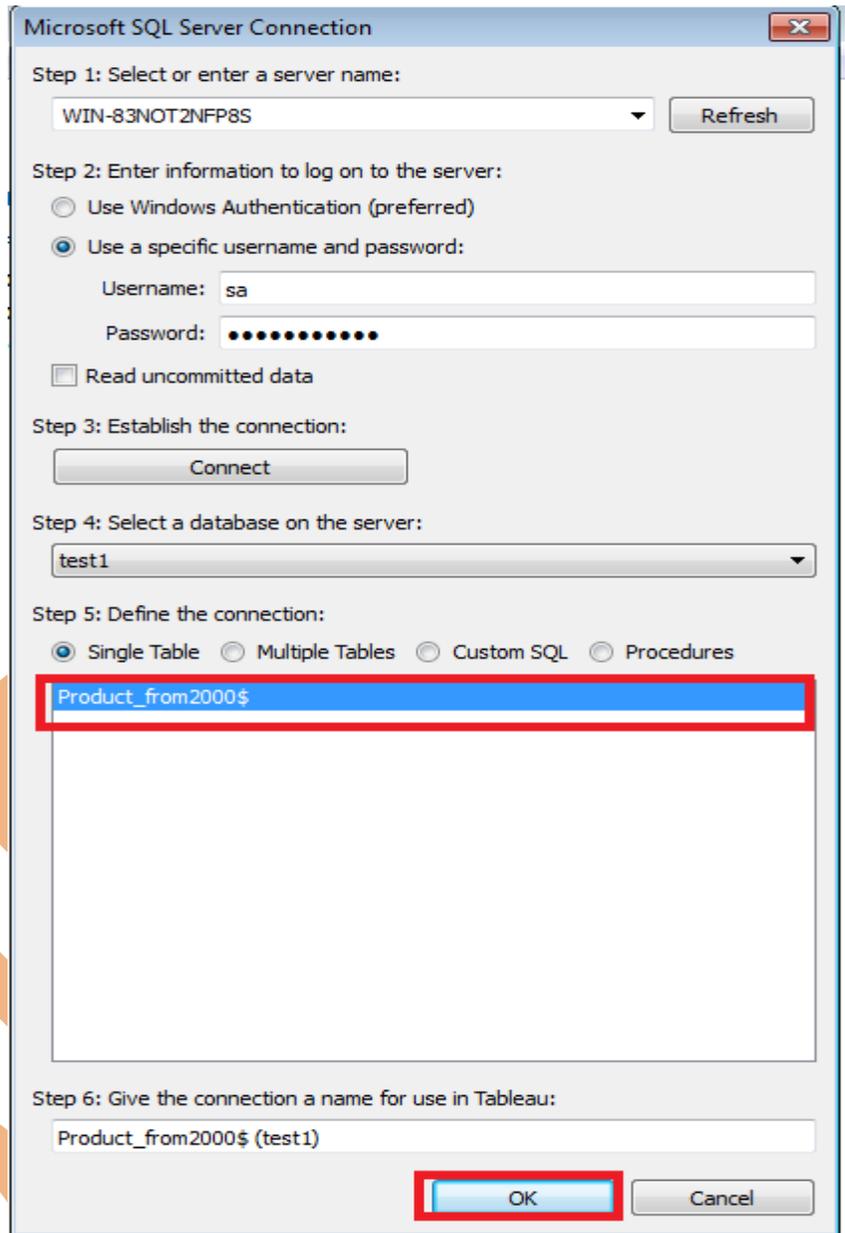


Step 8) Now the table will be created which includes the Product name, introduction date, Production cost and selling price. Till year 2000 the company was charging the sales tax on product

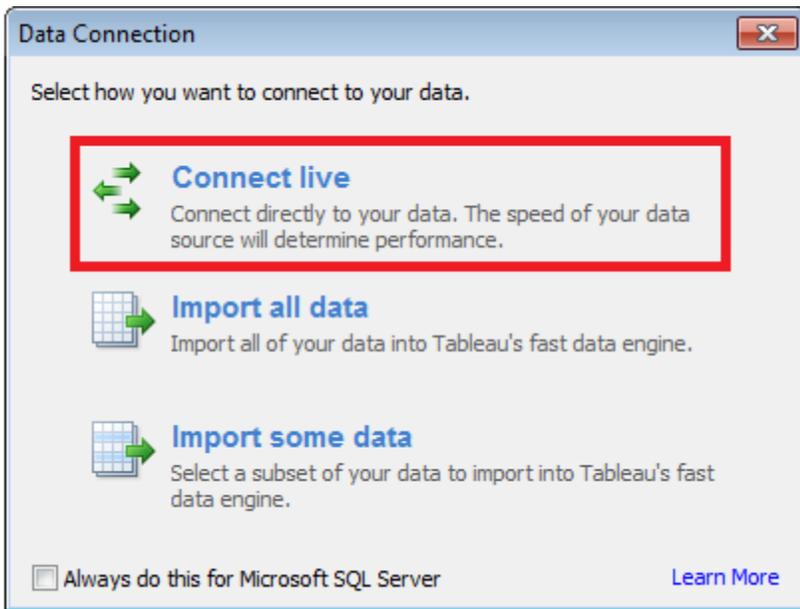
results this chart. From year 2000 company decrease the sales tax on the products. Here is the sheet displaying the selling price ,production cost and introduction year.

Title Selling price Included With Tax(Till Year 2000)			
ProductName	Year of Introdu..	ProductionCost	SellingPrice with SalesT..
Bear Edge	1990	\$23.53	\$24.00
Bear Survival Edge	1995	\$45.00	\$46.80
Blue Steel Max Putter	1998	\$81.80	\$85.07
Blue Steel Putter	1998	\$60.00	\$61.20
Calamine Relief	1990	\$3.00	\$3.12
Canyon Mule Carryall	1992	\$41.18	\$42.83
Canyon Mule Climber ..	1992	\$62.50	\$65.63
Canyon Mule Cooler	1990	\$24.00	\$24.72
Canyon Mule Extreme ..	1992	\$238.88	\$246.05
Canyon Mule Journey ..	1990	\$213.33	\$217.60
Canyon Mule Weekend..	1990	\$166.66	\$169.99
Compact Relief Kit	1990	\$16.43	\$16.92
Course Pro Gloves	1998	\$5.00	\$5.10
Course Pro Golf and T..	1999	\$6.00	\$6.18
Course Pro Golf Bag	1998	\$80.00	\$84.00
Course Pro Putter	1998	\$35.00	\$36.05
Course Pro Umbrella	1999	\$6.00	\$6.24
Deluxe Family Relief Kit	1992	\$25.00	\$25.50
Double Edge	1990	\$11.43	\$11.89
Edge Extreme	1995	\$80.00	\$84.00
EverGlow Butane	1992	\$40.63	\$41.85
EverGlow Double	1992	\$28.75	\$29.61
EverGlow Kerosene	1992	\$20.00	\$20.80
EverGlow Lamp	1990	\$17.07	\$18.22

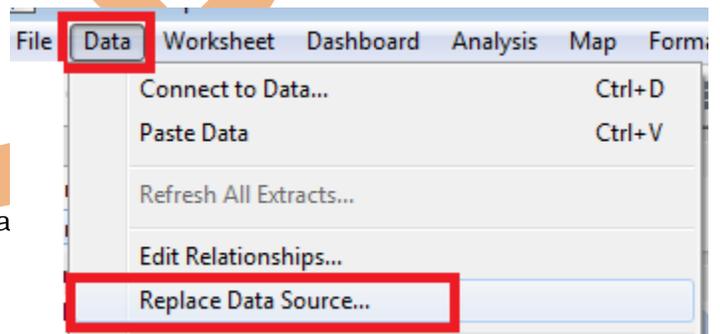
Step 9 )Now we require the data which having entry after the year 2000 which is in the data source MS SQL Server. Select the database Server test1 and select the table Product\_from2000 then click ok.



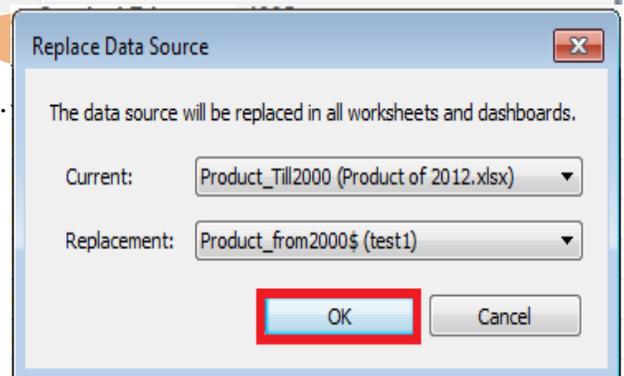
Step 10) Now choose the option connect live.



Step 11) This is the data till 2000, now we have to replace this data source from the Sql Server data source containing the data from the year 2000. We use the data replacing feature of the tableau. For replacing the data source go to the data and choose the option Replace Data



Step 12) In the option, current sheet on which we had made the report of sales tax will be replaced with the report containing the data from the year 2000. This will only replace the data all the design will be similar. Then press ok.

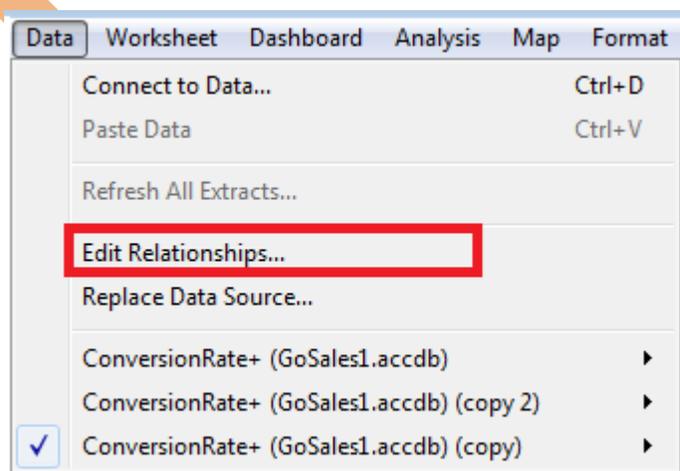


Step 13) Now see the chart the selling price and year of introduction varied. This sheet is displaying the selling price with the increasing sales price.

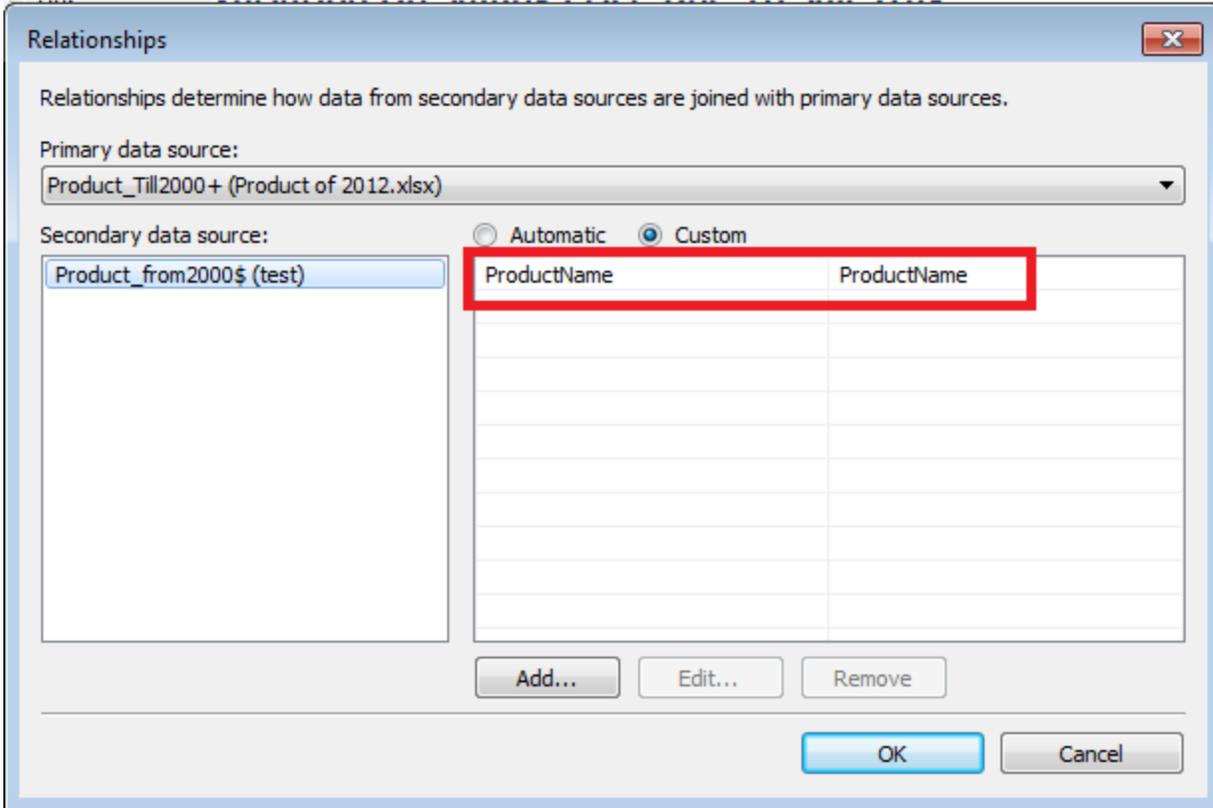
Title Selling price Included With Tax(From Year 2000)				
ProductName	Year of Introdu..	ProductionCost	SellingPrice with SalesT..	
Bear Edge	2001	\$23.53	\$24.47	
Bear Survival Edge	2003	\$45.00	\$47.70	
Blue Steel Max Putter	2004	\$81.80	\$86.71	
Blue Steel Putter	2004	\$60.00	\$62.40	
Calamine Relief	2001	\$3.00	\$3.18	
Canyon Mule Carryall	2002	\$41.18	\$43.65	
Canyon Mule Climber ..	2002	\$62.50	\$66.88	
Canyon Mule Cooler	2001	\$24.00	\$25.20	
Canyon Mule Extreme ..	2002	\$238.88	\$250.82	
Canyon Mule Journey ..	2001	\$213.33	\$221.86	
Canyon Mule Weekend..	2001	\$166.66	\$173.33	
Compact Relief Kit	2001	\$16.43	\$17.25	
Course Pro Gloves	2004	\$5.00	\$5.20	
Course Pro Golf and T..	2004	\$6.00	\$6.30	
Course Pro Golf Bag	2004	\$80.00	\$85.60	
Course Pro Putter	2004	\$35.00	\$36.75	
Course Pro Umbrella	2004	\$6.00	\$6.36	
Deluxe Family Relief Kit	2002	\$25.00	\$26.00	
Double Edge	2001	\$11.43	\$12.12	
Edge Extreme	2003	\$80.00	\$85.60	
EverGlow Butane	2002	\$40.63	\$42.66	

Step 14) If we want to see the change the variation on the selling price of the both data till year 2000 and from year 2000 you can draw a graph for both in a single sheet.

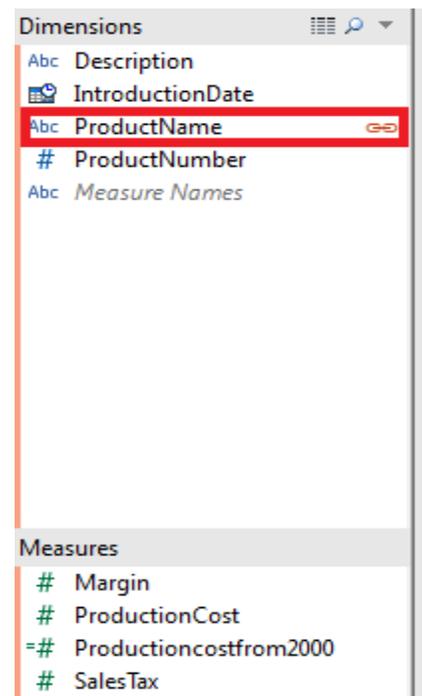
Step 15) For this firstly we have to create the Relation between the both data sources's Data.



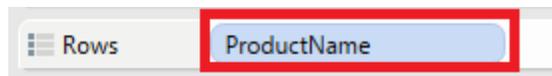
Step 16) This will explore a window which ask for primary and secondary data source. Here Product\_Till2000 will be our primary data source and Product\_from2000 will be our secondary datasource. The join will be created using the productname which is same in both tables.



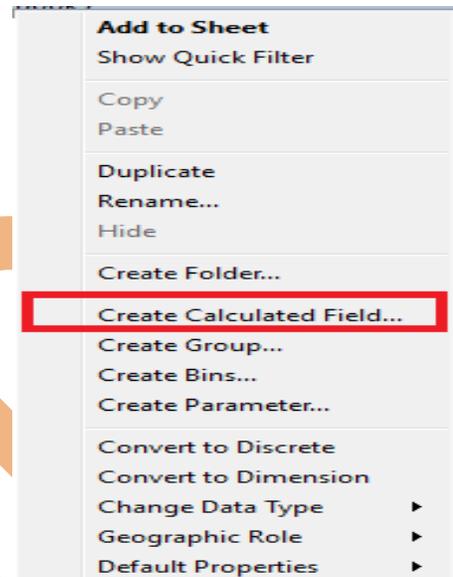
Step 17) Now the join will be created here between the two places.



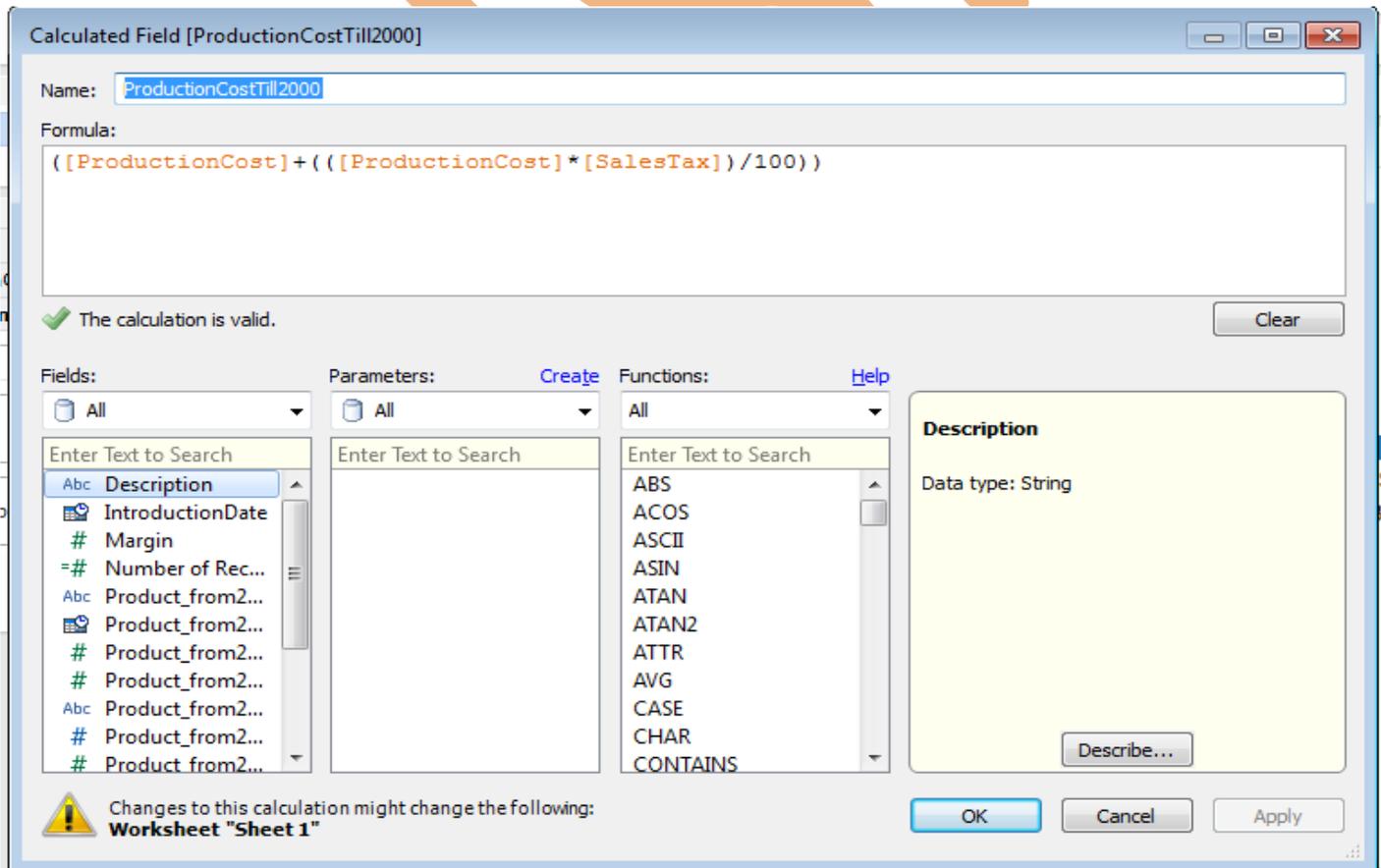
Step 18) Drag and drop productname from measure to column shelf.



Step 19) Then create a calculate field by right click on the sheet and choose the option create calculated field.

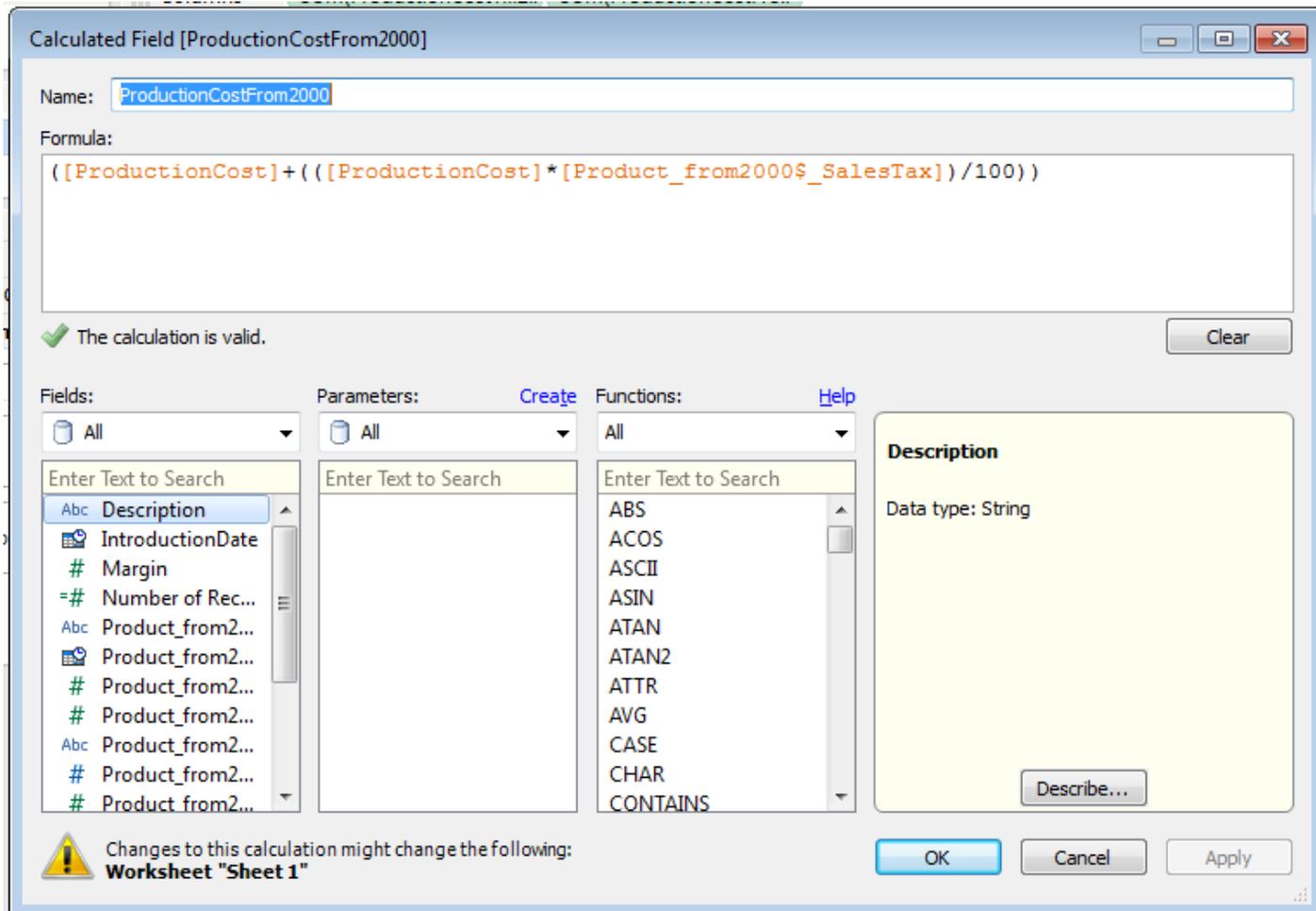


Step 20) For selling price add the expression and give the name productioncosttill2000



$(\text{sum}(\text{productioncost})+(\text{sum}(\text{salestax})*\text{sum}(\text{productioncost}))/100)$  this will calculate the selling price and an separate field as named Selling price.then apply and then ok.

Step 21) Do the same procedure with the field salestax of the product from 2000.

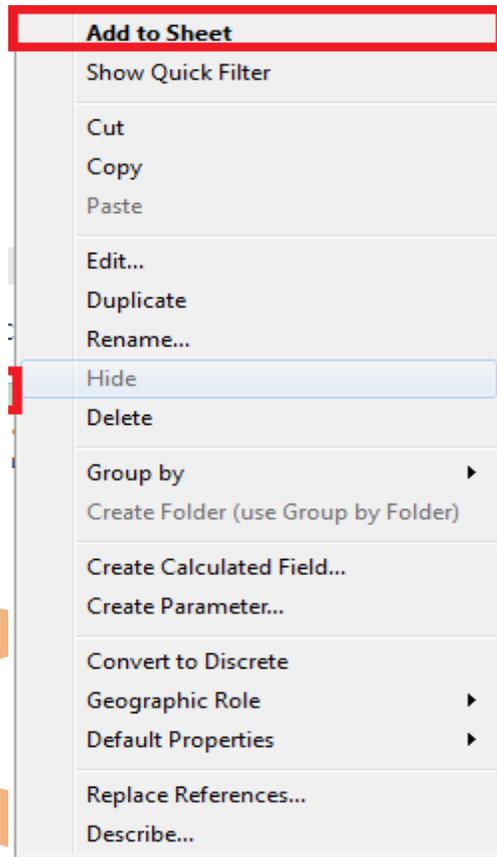


Step 22)The both calculated fields are created here.

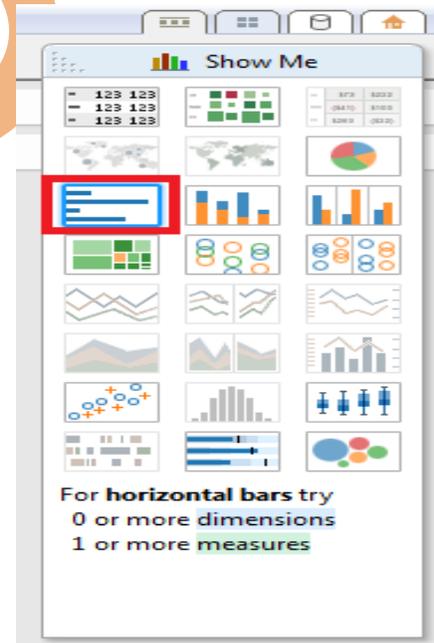
=# ProductionCostFrom2000

=# ProductionCostTill2000

Step 23) By pressing cntrl key select both and right click on the measure shelf and choose the option add to sheet.



Step 24) Now select bar chart from the show me toolbar.



Step 25)The below chats shows data taken from Excel and SQL Server, Selling price revised due to increase in Sales Tax.

