

# DATA SOURCES IN TABLEAU

If a **data connection** has been created that needs to be used with other workbooks to be shared with colleagues, we can export (save) the data source to a file.

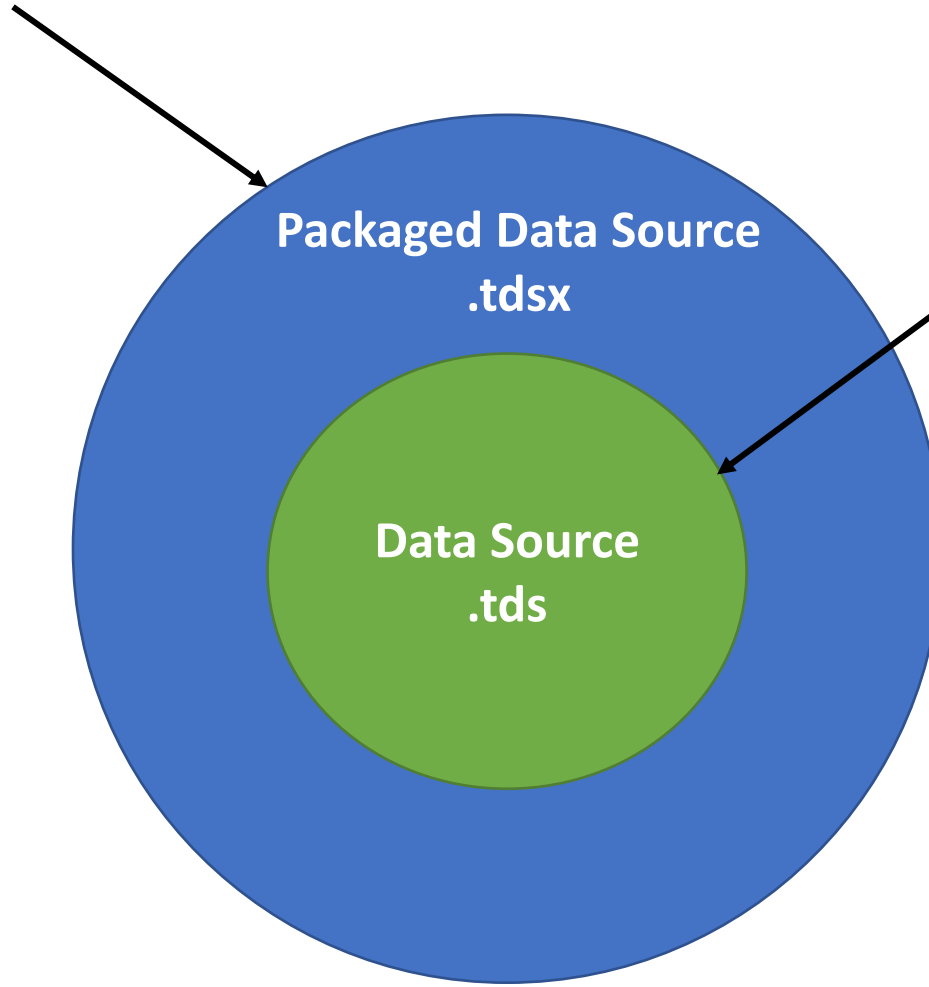
The **data connection** will also include **added joined tables, default properties**, or custom fields—such as **groups, sets, calculated fields, and binned fields**—to the **Data** pane.

**Note:** This topic describes how to save a data source that we reuse locally, if we do not publish to Tableau Server or Tableau Online.

# OPTIONS FOR SAVING LOCAL DATA SOURCES IN TABLEAU

Contains **all information** in the **data source (.tds)** file, as well as a copy of any **local file-based data** or **extracts**.

A packaged data source is a single zipped file. Use this format if data source is to be shared with people **who do not have access to the underlying data** that is defined in the connection information.



- ❑ **Data source type** (.xlsx,.csv etc.)

- ❑ **Connection information** specified on the data source page; for example, **database server address, port, location of local files, tables**

- ❑ **Groups, sets, calculated fields, bins**

- ❑ **Default field properties**; for example, **number formats, aggregation, and sort order**

Use this format if everyone who will use the data source **has access to the underlying file or database** defined in the connection information. For example, the underlying data is a CSV file on your computer, and you are the only person who will use it; or the data is hosted on a cloud platform, and your colleagues all have the same access you do.

**NOTE:** Both **.tds** and **.tdsx** **DO NOT** save any **visualizations** that may have been created

# STEPS FOR SAVING DATA SOURCE IN TABLEAU

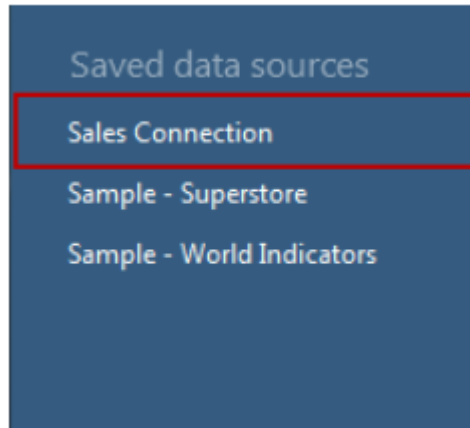
**Step 1:** In Tableau Desktop, open the workbook that has the connection to the data that is to be saved as a file.

**Step 2:** At the top of the **Data** pane, right-click (Control-click on Mac) the name of the data source, and then select **Add to Saved Data Sources** or **Data** menu > **Add to Saved Data Sources**

**Step 3:** Enter a file name, select the **file type (.tds or .tdsx)**, and then click Save.

# STEPS FOR CONNECTING TO DATA SOURCE IN TABLEAU

By default, Tableau saves **.tds** and **.tdsx** files to the **Datasources** folder under the **Tableau repository**. When we use the default location, we can connect to the data source on the Connect pane. i.e., **Connect to Data > Saved Data Sources**



If a specified a different location, we can connect to the data source by selecting **File > Open** and navigating to it.