

# METADATA GRID

**Metadata Grid** provides the data about the data.

The **metadata grid** displays the **fields in the data source as rows**.

This will allow us to quickly examine the structure of the Tableau data source.

After examining the data source, we can make use of **Metadata grid** for **renaming fields** or **hiding multiple fields** at once.

**NOTE:** In **Tableau versions prior to 2021.3** we could make use of the metadata grid button to navigate to the metadata grid.

From **Tableau version 2021.3** the view for Data and Metadata grid has changed.

# METADATA GRID

## Step 1: Check the Metadata Grid and Data Grid

### For Tableau Ver 2021.3 onwards (NEW)

The screenshot shows the Tableau 2021.3 interface. On the left, the 'Connections' pane shows 'Sample - Superstore\_2021' (Microsoft Excel). The 'Sheets' pane shows 'Orders'. The main view displays the 'Orders' table with a 'DATA GRID' label pointing to the table view. Below the table view, the 'METADATA GRID' is visible, showing the fields and their physical/remote file names.

Type	Field Name	Physical Table	Remote File...
Row ID	Order ID	Orders	Order ID
Order Date	Order Date	Orders	Order Date
Ship Date	Ship Date	Orders	Ship Date
Ship Mode	Ship Mode	Orders	Ship Mode
Customer ID	Customer ID	Orders	Customer ID
Customer Name	Customer Name	Orders	Customer Name

### For Tableau Ver before 2021.3 (OLD)

The screenshot shows the Tableau interface before 2021.3. The 'Returns' table is selected in the 'Data source order' pane. The 'Metadata Grid' is visible, showing the fields and their physical/remote file names. The 'Data Grid' is also visible, showing the first 1,000 rows of the data.

Field Name	Table	Remote Field Name
Row ID	Orders	Row ID
Order ID	Orders	Order ID
Order Date	Orders	Order Date
Ship Date	Orders	Ship Date
Ship Mode	Orders	Ship Mode
Customer ID	Orders	Customer ID
Customer Name	Orders	Customer Name
Segment	Orders	Segment
Country/Region	Orders	Country/Region

D. Data grid - Displays first 1,000 rows of the data contained in the Tableau data source.

E. Metadata grid - Displays the fields in your data source as rows.

# METADATA GRID

**Step 2:** Reduce the size of Data Grid to ensure that Metadata grid is fully visible

The screenshot shows the Tableau Public interface with the 'Orders (Sample - Superstore\_2021)' data source selected. The 'Connections' pane on the left shows 'Sample - Superstore\_2021' as the selected data source. The 'Sheets' pane shows 'Orders' as the selected sheet. The 'Fields' pane displays a list of fields for the 'Orders' table, including Row ID, Order ID, Order Date, Ship Date, Ship Mode, Customer ID, and Customer Name. The 'Metadata Grid' is visible, showing the relationship between the physical table and the remote field names.

Type	Field Name	Physical Table	Remote Field Name
#	Row ID	Orders	Row ID
Abc	Order ID	Orders	Order ID
Abc	Order Date	Orders	Order Date
Abc	Ship Date	Orders	Ship Date
Abc	Ship Mode	Orders	Ship Mode
Abc	Customer ID	Orders	Customer ID
Abc	Customer Name	Orders	Customer Name

The screenshot shows the same Tableau Public interface as the previous one, but with the 'Data Grid' reduced in size. The 'Metadata Grid' is now fully visible, showing the relationship between the physical table and the remote field names. The 'Data Grid' is still present but occupies less space, allowing the 'Metadata Grid' to be seen more clearly.

Type	Field Name	Physical Table	Remote Field Name
#	Row ID	Orders	Row ID
Abc	Order ID	Orders	Order ID
Abc	Order Date	Orders	Order Date
Abc	Ship Date	Orders	Ship Date
Abc	Ship Mode	Orders	Ship Mode
Abc	Customer ID	Orders	Customer ID
Abc	Customer Name	Orders	Customer Name

# METADATA GRID

**Step 3:** If required we can rename the **Field names**  
The **Remote Field Name** cannot be changed since it is linked to the underlying data source

Name		Orders	
Fields			
Type	Field Name		Remote Field Name
#	Row ID		Row ID
Abc	Order ID		Order ID
📅	Order Date		Order Date
📅	Ship Date		Ship Date
Abc	Ship Mode		Ship Mode
Abc	Customer ID		Customer ID
Abc	Customer Name		Customer Name

Name		Orders	
Fields			
Type	Field Name	Physical Table	Remote Field Name
#	Row ID	Orders	Row ID
Abc	Order ID	Orders	Order ID
📅	Order Date	Orders	Order Date
📅	Shipping Date	Orders	Ship Date
Abc	Ship Mode	Orders	Ship Mode
Abc	Customer ID	Orders	Customer ID
Abc	Customer Name	Orders	Customer Name

# METADATA GRID

## Step 4: If required we can hide the **Field names**

Orders

21 fields 9994 rows

100 → rows

Name

Orders

Fields

Type	Field Name		Remote Field Name
Abc	Customer Name		Customer name
Abc	Segment		Segment
🌐	Country/Region	Orders	Country/Region
🌐	City	Orders	City
🌐	State	Orders	State
🌐	Postal Code	Orders	Postal Code
Abc	Region	Orders	Region
Abc	Product ID	Orders	Product ID

Duplicate

Rename

Copy Values

Hide

Aliases...

Create

Pivot (select multiple fields)

Change Data Type

Geographic Role

# METADATA GRID

**Step 5:** Metadata grid provides the below mentioned details

**Type** provides the Datatype of the Fields

**Field Name** is the name of the field/column

**Physical Table** provides the details of actual table of the field

**Remote Field Name** is the name linked to underlying data source

The screenshot shows the Metadata Grid interface for the 'Orders' table. A dropdown menu is open on the left, listing various data types: Number (decimal), Number (whole), Date & Time, Date, String, Spatial, Boolean, Default, and Geographic Role. The main grid displays the following data:

Type	Field Name	Physical Table	Remote Field Name
		Orders	Row ID
		Orders	Order ID
		Orders	Order Date
		Orders	Ship Date
		Orders	Ship Mode
	Customer ID	Orders	Customer ID
	Customer Name	Orders	Customer Name

The screenshot shows the full Metadata Grid interface for the 'Orders' table. The grid displays the following data:

Type	Field Name	Physical Table	Remote Field Name
#	Row ID	Orders	Row ID
Abc	Order ID	Orders	Order ID
📅	Order Date	Orders	Order Date
📅	Shipping Date	Orders	Ship Date
Abc	Ship Mode	Orders	Ship Mode
Abc	Customer ID	Orders	Customer ID
Abc	Customer Name	Orders	Customer Name