On-Demand Training: Editing Metadata and Saving Data Sources

Welcome to this video on Editing Metadata and Saving Data Sources. You can download the Exercises workbook to follow along in your own copy of Tableau.

Editing Metadata

Notice that Tableau has automatically separated the data columns here on the left into dimensions and measures and assigned different data type icons.

Tableau cannot write changes back to the data source. However, we can modify the metadata for use in Tableau by right clicking on a field in the data window. This menu has a lot of features – we'll just go through a few examples.

- We can rename fields let's call this Order Priority

- We can create a hierarchy by simply dragging a subordinate field onto another field. We'll call this Products. This creates the ability to drill down in the view.

- We can also create folders by right clicking and selecting Group by > folder

    - Then right clicking again to create a new folder,

    - We'll call this Customer

    - Then we simply drag other fields into that folder.

    - Collapsing these can help tidy up long lists of dimensions or measures

- We can change the data type say, Row ID, change the data type to a string.

This could also be done on the data source tab, either in the grid view, or in the metadata view

- If we right click on a measure and go to Default Properties , we see that there are several features nested here such as

    - adding a comment

    - editing the default number format

    - and changing the default aggregation

- Hovering over the field Discount shows us a comment has been added for that field. If we bring profit into the view, we see it comes out as an average instead of the normal default, sum, and turning on labels shows us that sales has been formatted as a currency.

The important thing to note here is that all of this is part of the definition of the data connection, not actual changes to the underlying data.

Saving Data Sources

- If we want to save this data source for further use, we right click up here on the data source and say "add to saved data sources".

- This will save the connection as a .tds (note: this is not the data itself, just the information about the connection) and it's saved in the local version of Tableau Desktop.

- It will now be accessible on the Saved Data Sources list when Tableau opens.

To easily share a data connection with other people in the organization, we can right click on the data source and publish it to Tableau Server. Other people can then log in and analyze the data with all the saved metadata changes. For more information on Publishing Data Sources, see the Data Server video.

Conclusion

There's a lot more Tableau can do with data connections. For more information, check out the other videos in in the Connecting to Data series.