

Module 2: Data Connection With Tableau Desktop

Demo Document IV

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Demo IV

Save the created workbook in the following different formats:

- Tableau Workbook (.twb)
- Tableau Packaged Workbook (.twbx)
- Tableau Data Source (.tds)
- Tableau Packaged Data Source (.tdsx)
- Tableau Data Extract (.tde)
- Tableau Bookmark (.tbm)

Demo IV – Solution

Tableau allows you to save your work using several different Tableau Specific file types like workbooks, packaged data files, data connection files, data extracts and bookmarks.

All the file types are discussed below (using the workbook created in last demo):

a) Tableau Workbook

Tableau Workbook files contain all information on each worksheet and dashboard that is present in a workbook. It has a .twb file extension.

To save a workbook in .twb file form:

Step 1: Click on File → Save As → File name → Save as type (.twb) → Save

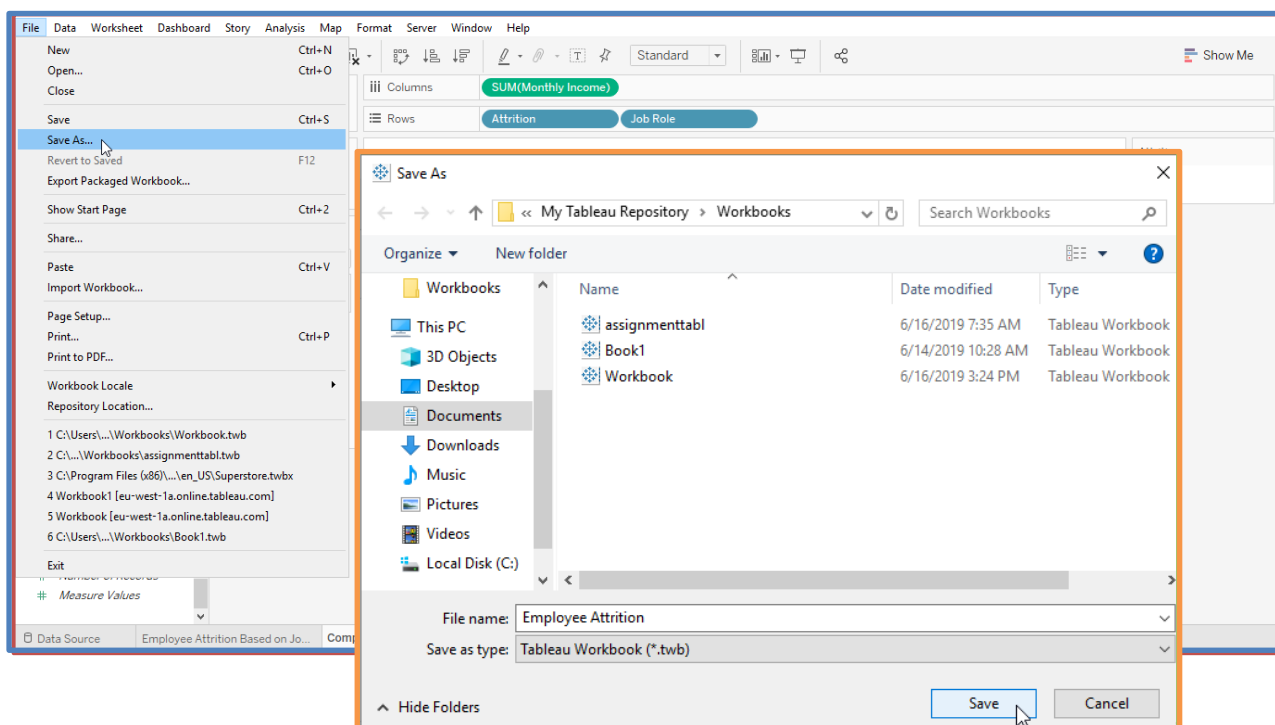
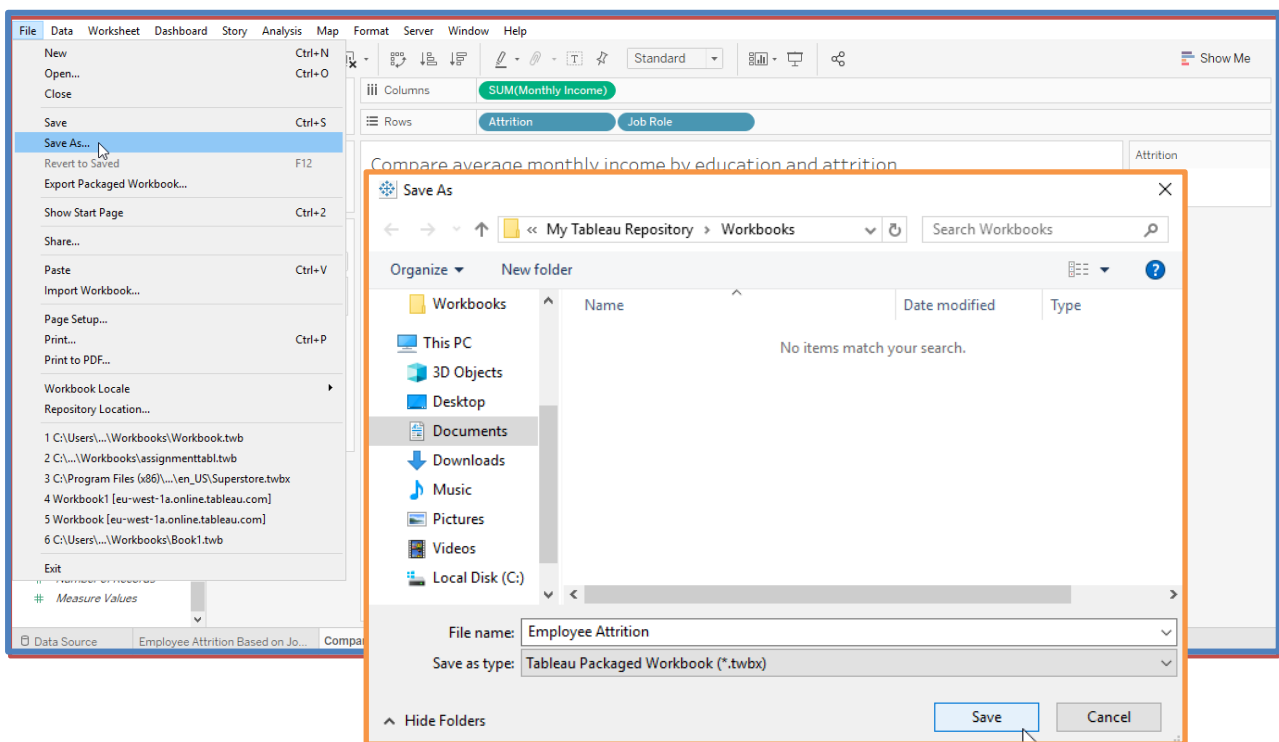
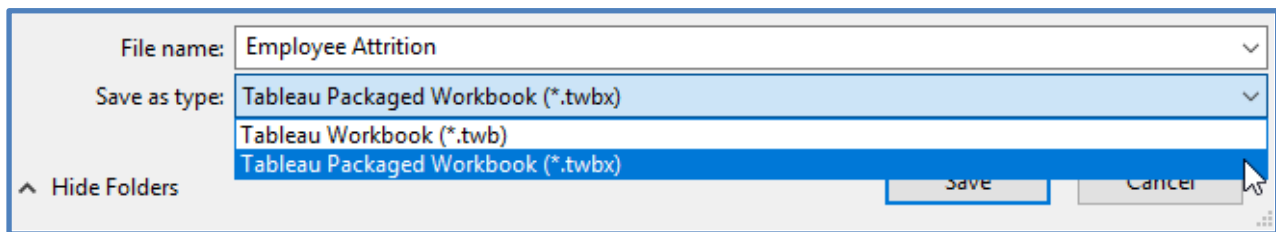


Tableau Packaged Workbook is a zip file which contains all the details of a workbook as well as the local data used to make a visualization. It has a .twbx extension and can be shared easily with another Tableau Desktop and Tableau reader.

To save a workbook in .twbx file form:

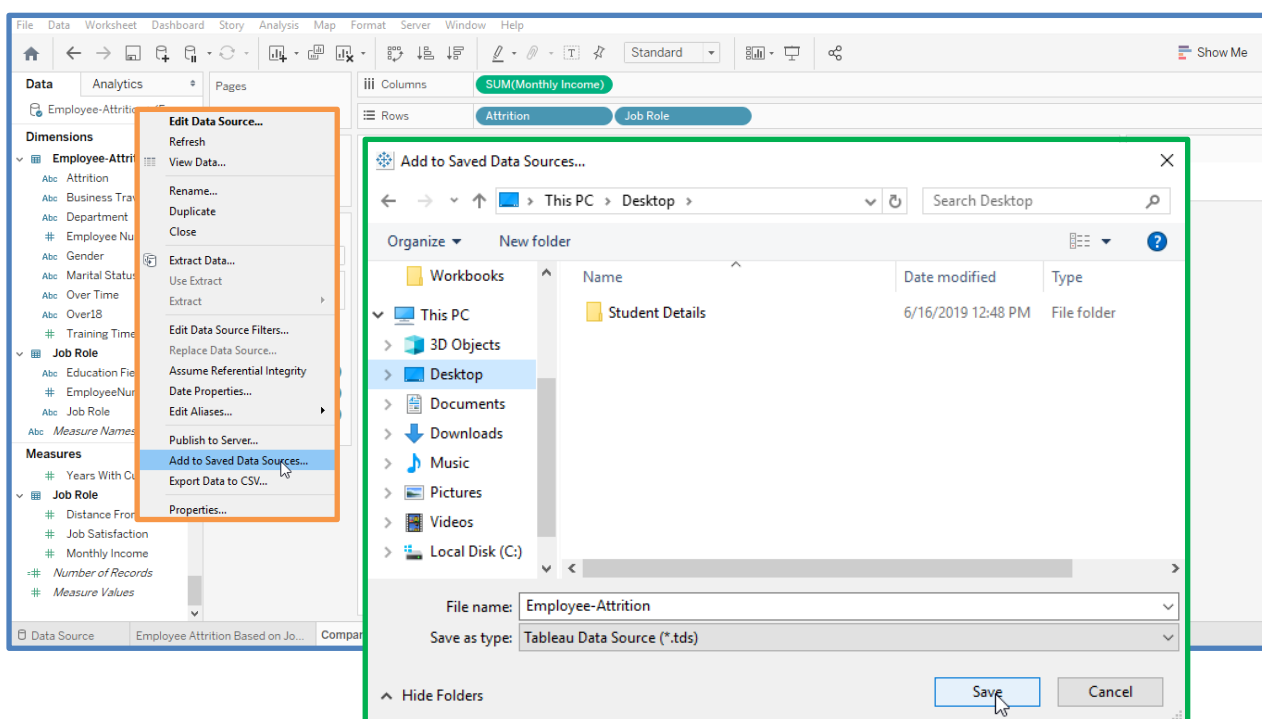
Step 2: Click on File → Save As→ File name → Save as type (.twbx) → Save



c) Tableau Data source (.tds)

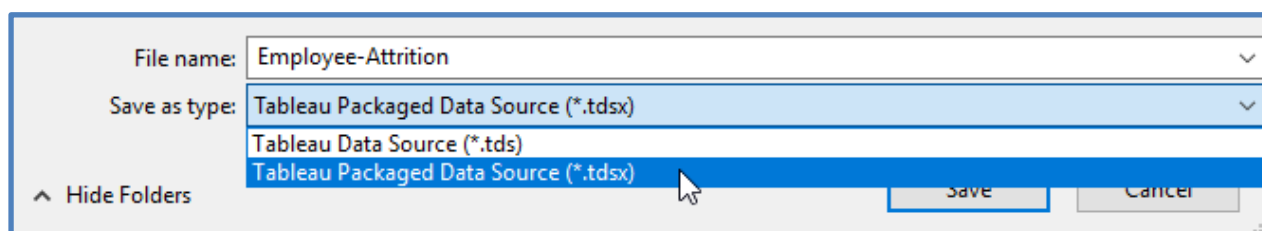
Tableau Data source files contain the information necessary to connect to the actual data as well as any modifications that are made in the actual data. It has a .tds extension and details of connections that are source types (excel/relational/sap etc.) as well as the data types of the columns.

Step 1: Right click on Data Source in Data pane → Add to Saved Data Source → File Name → Save as type (.tds) → Save



d) Tableau Packaged Data Source (.tdsx).

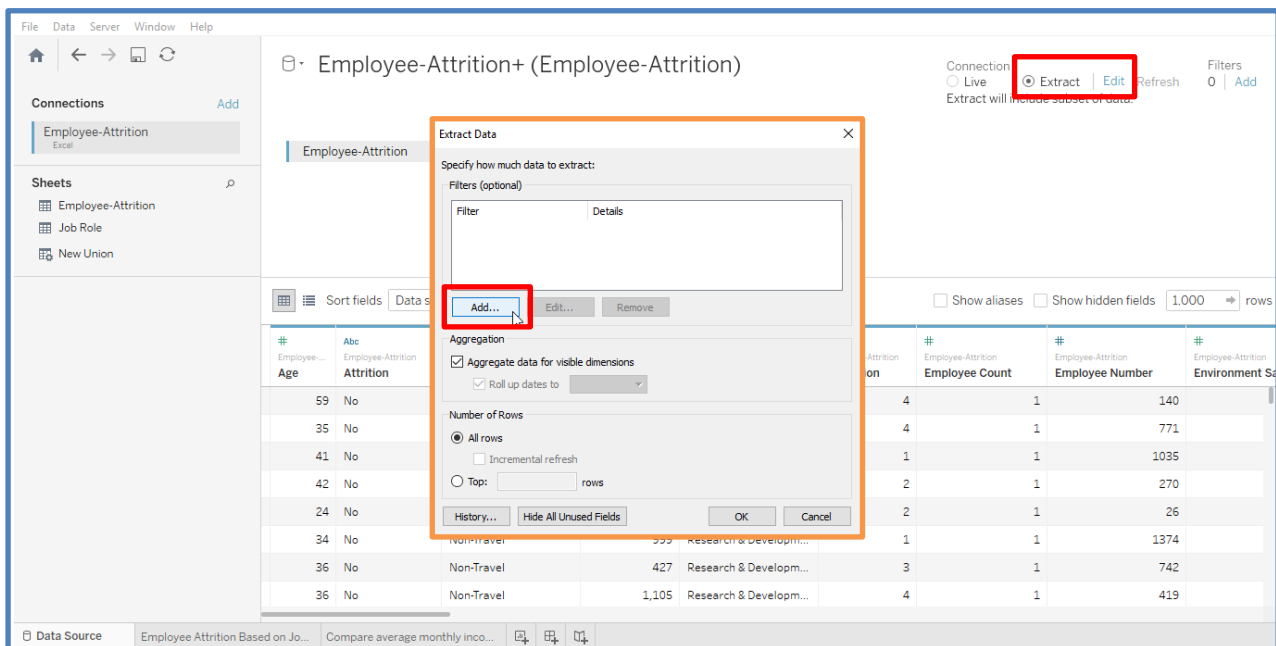
Tableau Packaged Data Source is a zip file that contains the data source file (.tds) described above as well as any local file data such as extract files, text files, Excel files, etc. Using this format, you can create a single file that you can share with other Tableau Desktop users and Tableau Reader users.



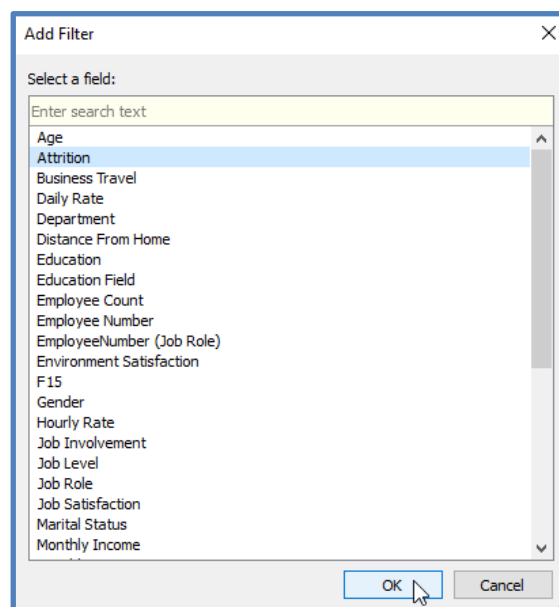
e) Tableau Data Extract (.tde)

Tableau Data Extract file (.tde) can have either a .hyper or a .tde extension. This file contains the data used in a .twb file in a highly compressed columnar data format. This helps in performance optimization. This file should be refreshed to get the updated data form the source.

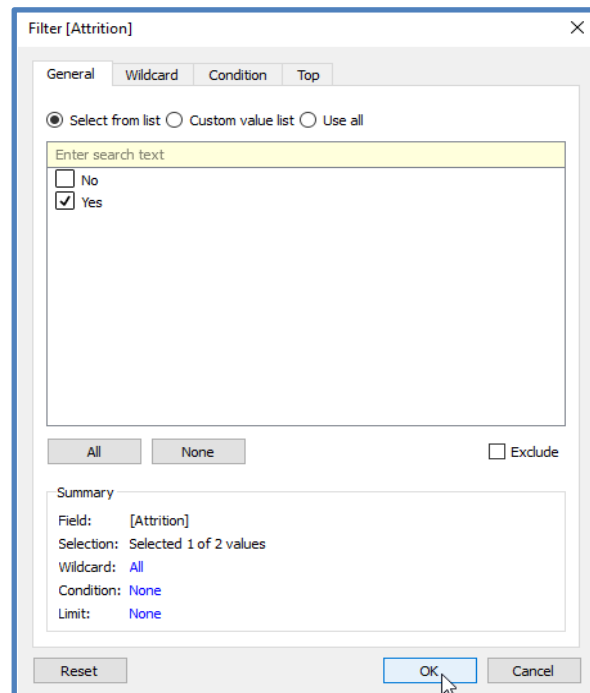
Step 1: Click on Extract → Edit → Add



Step 2: Add → Add Filter → Select a field → Ok







Step 3: Select the desired or required attribute or feature which you want to analyse and click on OK



You get all the data related to the selected feature of the “added filter” in the table.

Step 4: Data only regarding **Attrition → Yes**

FileDataServerWindowHelp



ConnectionsAdd

Employee-AttritionExcel

Sheets

Employee-Attrition

Job Role

New Union

Employee-Attrition+ (Employee-Attrition)

Connection

☐ Live

☒ Extract


Edit

Refresh



Filters0Add

Extract will include subset of data.

Employee-Attrition



Job Role



Sort fields

Data source order

☐ Show aliases

☐ Show hidden fields

237




rows

#	Employee-Attrition Age	Employee-Attrition Attrition	Employee-Attrition Business Travel	Employee-Attrition Daily Rate	Employee-Attrition Department	Employee-Attrition Education	Employee-Attrition Employee Count	Employee-Attrition Employee Number	Employee-Attrition Environment Score
30	Yes	Travel_Frequently	600	Human Resources	3	1	1747		
27	Yes	Travel_Frequently	1,337	Human Resources	3	1	1944		
21	Yes	Travel_Frequently	251	Research & Development...	2	1	1279		
31	Yes	Travel_Frequently	1,445	Research & Development...	5	1	1459		
31	Yes	Travel_Frequently	561	Research & Development...	3	1	1537		
30	Yes	Travel_Frequently	109	Research & Development...	3	1	1017		
33	Yes	Travel_Frequently	827	Research & Development...	4	1	1101		
34	Yes	Travel_Frequently	296	Sales	2	1	555		

Data Source

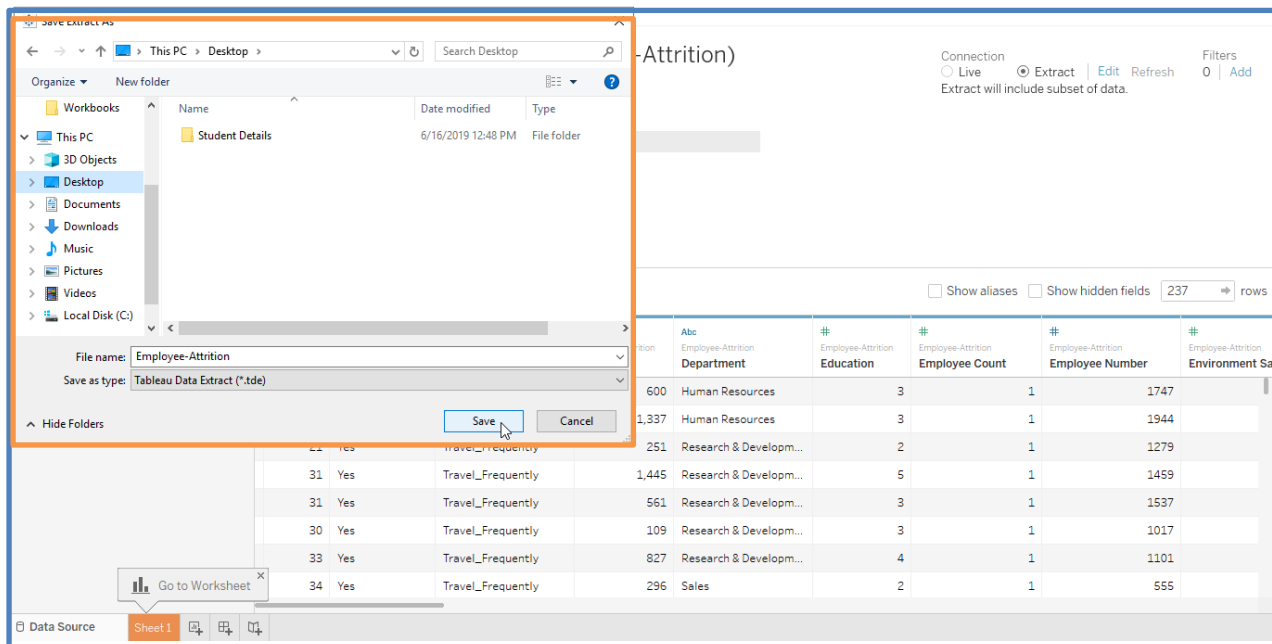
Employee Attrition Based on Jo...

Compare average monthly inco...



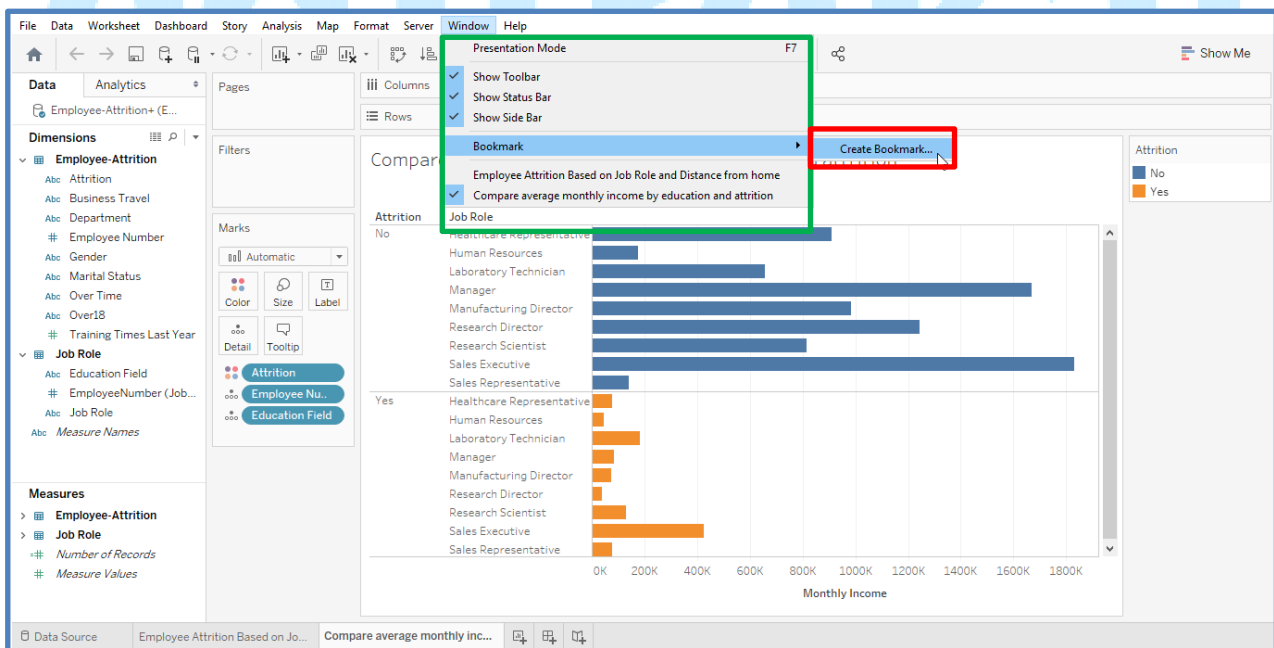
To save this extract:

Step 5: Click on Sheet 1 → File Name → Save as type → Save

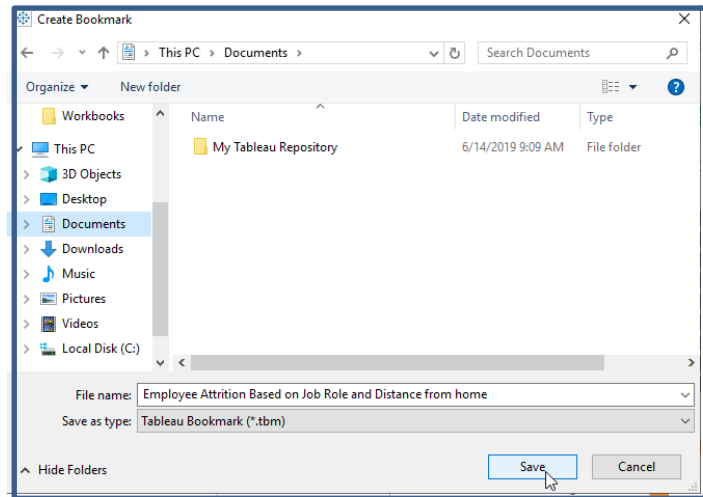


f) Tableau Bookmark (.tbm)

Tableau Bookmark contains a single worksheet which can be easily shared.



Step 1: Create Bookmark... → File Name → Save as type → Save



Step 2: The bookmarked sheet reflects under **Bookmark**.

