



Free Training Transcript:
Managing Metadata

Welcome to this video on managing metadata in Tableau. You can download the workbook to follow along in your own copy of Tableau.

Editing Metadata

Tableau cannot write changes back to the data source. However, we can modify the metadata for use in Tableau in the data pane. There are a lot of features – we'll just go through a few examples. Fields we don't need can be hidden, like Order Priority. I've already hidden a lot of the fields in the data set. We can rename fields – click twice slowly – let's call this Shipping Date.

We can create a hierarchy by simply dragging a subordinate field onto another field. We'll name this Products. To add another field, simply drag it into the correct spot. Or drag to rearrange the order. 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. A handy thing to know is that Tableau has this search function, which is helpful if fields are in folders.

We can change the data type say, Row ID, change the data type to a string. And we can assign default colors simply by bringing a field such as market to color and editing colors. That choice will be remembered the next time we use the field. 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 Discount into the view, we see it comes out as an average instead of the normal default, sum, and turning on labels shows us that it has been formatted as a percentage.

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. When using a published data source from Tableau Server or Tableau Online, we will not be able to edit or remove existing metadata such as hierarchies, aliases, or calculations, but we can extend metadata, such as authoring new calculations for use in the workbook we're building. This will not write back to modify the original data source.

Editing Data Connections

To easily get back to the data connection window, simply click on the Data Source tab. You may be prompted to reconnect to the data source. Alternatively, if at any time we realize we need to modify the data connection, simply right click on the data source to pull up a menu. This menu lets us control many aspects of the data connection such as: renaming the connection, turning on or off an extracts, refreshing an extract, creating or editing data source filters, publishing data sources or saving a data source.

For more information on publishing and saving data sources, check out that video. For more information on extracts, continue to “Managing Extracts, which builds from this workbook.

Conclusion

Thank you for watching this video on managing metadata. We invite you to continue with the Free Training videos to learn more about using Tableau.