



Free Training Transcript: Saving and Publishing Data Sources

Welcome to this video on saving and publishing data sources. You can download the Exercise workbook to follow along in your own copy of Tableau, but portions of this video require access to Tableau Online or Tableau Server.

Imagine you've put in a lot of effort managing your metadata: re-aliasing fields, creating calculations, setting default colors, etc. You want to keep all those efforts to use again later. You can locally save a data source, making it easily available in your copy of Tableau Desktop. Or, to securely share a data source with others, it can be published to Tableau Online or Tableau Server.

Saving Data Sources

If we want to save a data source, we right click on the data source itself 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). That data source will now be available on the Saved Data Sources list in the Connect Pane.

Why publish data sources?

Alternatively, a data source can be published to Tableau Online or Server. Once published, the data source can be used by anyone with the correct permissions. They don't have to install drivers, or do data prep or curation themselves. All workbooks that use the published data source will be automatically updated when the data is refreshed or changed, maintaining a single source of truth.

Publishing a Data Source

To publish a data source, right click on the data source or open the Server menu. The first thing in the menu is either the information for what Online or Server site you're signed into, or an option to sign in. You can always change where you want to publish the data source. Next, click Publish Data Source, then select which data source you want to publish. Choose the project where the data source should live. If desired, we can rename the data source—naming conventions across your organization can be very helpful. And add a description so others know exactly what this data source is for. We can even add tags.

If the permissions are not locked to the project, they can be defined here. Permissions include the ability to do things like save, download, or just connect to the data source. If credentials are required to connect to the data source, we may be prompted to set them here – either requiring credentials from the user, or embedding your own. There's also this option to update the workbook to use the published data source—a handy way to keep the

workbook up to date if the data source may change. If this box is left unchecked, we can continue to modify the data source in the workbook and use it to edit the published data source.

Editing a Published Data Source

To edit a published data source, we need to connect to the original. We can, say, remove a field from a hierarchy, and add a calculation—then republish the data source, this will overwrite the existing one. Now all workbooks using that data source will be refreshed with the new data structure, maintaining a single source of truth.

Publishing Extracts to Tableau Online

If you're publishing a live connection, you can skip to the next section on Using a Published Data Source. If you're publishing an extract to Tableau Server, please check out the video Understanding Schedules and Subscriptions for additional information. If you're publishing an extract to Tableau Online, refreshing the extract is most easily handled with the sync client. Let's switch to Tableau Online, and select our site. Now when we publish the data source, a dialog will pop up with information about using the sync client. Click "Schedule using Sync Client" to begin. Select where the sync client should start. And we can set a schedule. For more information see the online help.

A note on file types

As a note on file types, we mentioned .tds files earlier. Here's a quick breakdown on Tableau file types as they relate to data:

- A .twb is a workbook—just the information about how to connect to the data and make the views. The data is NOT included. A .tde is a data extract file. They are generated when an extract is created from a .twb workbook, and the user is prompted to choose a location to save the .tde. .tde's can be connected to like any other data source and can stand alone from a workbook. .tde's are simply a local copy of the data in a format that is efficient for analysis in tableau.
- A .twbx is a packaged workbook. Simply saving a .twbx does not automatically include the data. However, if you save the workbook as a .twbx and then extract the data, the packaged workbook will contain that extract without generating a standalone .tde. The data is part of the "package".
- A .tds file is a tableau data source. It doesn't contain the actual data, just the information about the data connection (such as joins and the location of the data source) and metadata (such hierarchies, calculations, and colors.) .tds files are

generated when you “add to saved data sources”. Like a .tde, the user is prompted to choose a location to save the .tds

- When saving a .tds file, the user can choose to change the file type to a .tdsx. This is a packaged data source, essentially a .tds and a .tde. A packaged data source contains all the metadata information AND the data itself. Sending someone a .tdsx sends them both the data (unencrypted) and the metadata

The easiest way to share access to data, however, is just to publish the data source.

Conclusion

Thank you for watching this data sources training video. We invite you to continue with the Free Training videos to learn more about using Tableau.