



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 in the Saved Data Sources list in in your local copy of tableau, making it readily available the next time you want to use it.

Why Publish Data Sources?

Alternatively, a data source can be published to Tableau Server or Tableau Online. Once published, a 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, 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. We can add a description so others know exactly what this data source is for. And 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. 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 be connected 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 published data source will be refreshed with the new data structure, maintaining a single source of truth.

Publishing to Tableau Server

The process for publishing data sources changes a little depending on if you're using Tableau Server or Tableau Online, and if you're working with a live data source (indicated by a single cylinder) or an extracted, in-memory data source (indicated by a double cylinder). Publishing a live data source to Tableau Server follows exactly the process outlined above. If the data source requires credentials, there's an option to embed or prompt for those credentials. Publishing an extract to Tableau Server has the added option of choosing a refresh schedule. These options are set by the server admin.

Publishing to Tableau Online

Because Tableau Online is in the cloud, and therefore outside the firewall, the process is a little more complex. I'll switch and sign in to my Online site. Tableau Online can directly maintain live connections to cloud-based services such as Google BigQuery and Amazon Redshift.

If we're publishing an extract to Tableau Online, refreshing the extract is handled with the Tableau Bridge client. Now when we publish the data source, we're prompted to sign into the bridge client. Click "Schedule using Tableau Bridge". Select where the client should start—I'll stick with my computer. And we can set a schedule for refreshing the extract—I'll leave the defaults. For more information, refer to the online help. The Bridge

client is now running in the systems tray of my computer

Finally, if the site administrator has enabled live connections in Tableau Online, The bridge client can handle live connections to on-premises data sources. The site admin will be the one to manage the client in those instances. Here, I'm prompted to create an extract upon publishing because the Tableau Online site I'm trying to publish to does not have the Bridge enabled to support live connections. I can either reach out to the site admin and have them add this data source to the bridge, or I can use an extract to publish now.

Managing Published Data Sources

Whether we've published to Tableau Server or Tableau Online, to manage the published data sources, we'll navigate to Content > Data Sources. And here we can see a list of our published data sources, if they're live, or when they were last extracted, who owns them. And metrics around their usage – clearly this is a site that doesn't get much traffic. To manage things such as the owner, permissions, and revision history, open the ellipses menu. Clicking on a data source brings us to its page, where we can manage refresh schedules.

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.