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# On-Demand Training: Editing Metadata and Saving Data Sources



# INTRO

Welcome to this Connecting to Data Video on Editing Metadata and Saving Data Sources. If you haven't already done so, I recommend watching the first video in this series which covers the basics on Connecting to Data.

We're currently in Tableau Desktop, connected to Superstore, the Excel file of sample data that ships with 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 the field in the data window. This menu has a lot of features – we'll just go through a few examples.

- We can rename fields
- We can create a hierarchy by simply dragging a subordinate field onto another field. This creates the ability to drill down in the view.
- And we can change the data type say, Order ID, change the data type from number to a string.
- There's a sub menu, if we right click and go to Default Properties , we see that there are several features nested here such as
  - adding a comment
  - editing the default number format
  - 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 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. If you're already in a workbook, go to the Home Page to see your Saved Data Sources.

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 where other people can then log in and analyze the data with all the saved metadata changes. This helps ensure one version of the truth. Users who connect to that saved data connection will see all the updates that were made in this data window.

## 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. For further information on Tableau Server, take a look at the Server videos.