Types of Steps in Tableau Prep

Tableau Prep Reference Guide

Use this document to learn about and help you remember the types of steps you can use in Tableau Prep.

Flow Pane Steps

The flow pane shows you all the data preparation steps that you applied to your data. Each step in your data preparation process is represented visually in the flow that you create and control.

- To add a new step, click the ⊕ icon to the right of any step.
- You can rename any step in the flow to be more descriptive.
- You can also write a description for the step by right-clicking on a step and then clicking **Add Description**.
- You can insert and remove a step in a flow.
- You can disconnect and reconnect steps in a flow.
- A branch can be used to split a flow.
- Use an output step to save or publish your cleaned data.
- You can save your flow and open it later to add or edit steps.

Types of Steps in a Flow

Steps	Icon	Usage
Input		The input step is always the first step in your flow and allows you to configure your data. • Different types of data are shown with different icons. Each separate input has a unique color. • Hovering over the name of the input step displays the complete table name, if only a portion is showing.
Cleaning		Use a cleaning step to perform many basic cleaning operations, including filtering, renaming fields, and creating a calculation. • Different categories of operations performed in the step are shown with annotations above the step. • Hovering over the annotations displays a summary of the operations.
Union		Add a union step to combine data by appending rows of one table to another table. The tables in the union should have the same structure; however, mismatched fields can be realigned.
Join		Add a join step to combine data related by common fields. • The icon for the join step reflects the join type, for example, an inner join. • A common field can be created using a calculated field.

Pivot		Add a pivot step to shape data by restructuring your data from columns to rows. ·The icon for the pivot step is a visual reminder of the data reshaping
Aggregate	Σ	Add an aggregate step to adjust the granularity of your data. ·The icon is the Greek sigma symbol for summing numbers, but other types of aggregations are available.
Output		Add an output step to save your cleaned data to a file or publish as a data source. Outputs can be a Tableau extract (.hyper and .tde files) or a .csv file.