Flow Pane 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.

In the flow pane, you can:

- Add a new step by clicking the ⊕ icon to the right of any step.
- Insert a new step by clicking the ⊕ icon on the flow line between two steps.
- Split a flow using a branch.
- Remove a step in a flow.
- Disconnect and reconnect steps in a flow.
- Rename any step in the flow to be more descriptive.
- Write a description for the step by right-clicking on a step and then clicking **Add Description**.
- Copy and reuse steps within a flow and save steps to share or reuse later.
- Group steps to compartmentalize sections of large, complex flows.
- Save or publish your cleaned data by using an output step.

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Flow Steps

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.
Clean		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.
New Rows		Use a new rows step to generate missing rows when gaps exist in sequential data (for number and date fields only).
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.
Pivot		Add a pivot step to shape data by restructuring your data from columns to rows or from rows to columns. The icon for the pivot step is a visual reminder of the data reshaping.

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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. If no common field exists, you can create one using a calculated field.
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.
Script		Add a script step to perform more complex cleaning operations or to incorporate predictive modeling data into a flow using an external tool such as R or Python.
Prediction		Add bulk-scoring and predictive analysis data to flows using a prediction step. Available to users with Salesforce licenses and user accounts configured to access Einstein Discovery.
Output		Add an output step to output cleaned and prepared data in several formats, depending on the platform, including: ■ Tableau (.hyper) extract files ■ Comma Separated Value (.csv) text files ■ In a relational database, as a new table, or adding to or replacing data in an existing table