VIZUAL
INTELLIGENCE
CONSULTING

TABLEAU
PREP
OVERVIEW

INNOVATIVE. CREATIVE. EFFECTIVE

INPUT

The input step is the first step needed to get started. This is the step where you select your data source. It looks just like the add connection screen in Tableau Desktop where you can select any file or server type. Once you select your data source you can do a union, data sampling, filtering, remove columns, rename columns or change data types. The coolest feature here is the data sampling. In this screen, you can grab a default sample of the data or a random sample of the data to get a more representative sample.

ADD STEP/CLEAN

The Add Step or Clean step is the step you will use to clean up your data. You get a cool profile pane interface that is interactive. In this step, you can do many things such as see an overview of your data, filter, group and replace, split and create calculated fields. The best thing here is the group and replace option, here you can group values by pronunciation or common characters.

ADD AGGREGATE

This is really helpful, it almost like the LOD calculations. Here you can aggregate any value by any dimension. This can be helpful if you want to reduce your data size OR if you want to aggregate some data and join it back in. This will be very helpful and will reduce the need for LOD as much. The interface is very simple, just drag the fields that will be grouped and the ones that will be aggregated.

ADD PIVOT

The pivot step has the same functionality as the way we pivot the data in Tableau Desktop. There is really nothing new here, just a different interface.

ADD JOIN

The Join step is also very similar to the Join option in Tableau Desktop but it has a better interface. In this interface, you can see a summary of the join results which will tell you if values are being excluded by your join. It also shows you which values do not match so you can potentially solve it. I think this is very powerfully and needed since joins can be confusing for some users.

ADD UNION

Nothing really new here, this step just unions tables on top of each other. It does have an option where you can see mismatched fields which can help you solve some data problems. Other than that is the same as Tableau Desktop.

ADD OUTPUT

The final step is to Output the data. In this step, you can save to file or publish as a data source. You then select the location and output type which is a .tde, .hyper or .csv file. Once you have the Output function you hit Run Flow and everything runs and outputs to your file type. The entire process very similar to Alteryx. I believe this will replace Alteryx for many.