

# Tableau Prep Help



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# What's New in Tableau Prep

Browse summaries of new features for currently supported versions.

[All Tableau Prep Release Notes](#) | [All Known Issues](#)

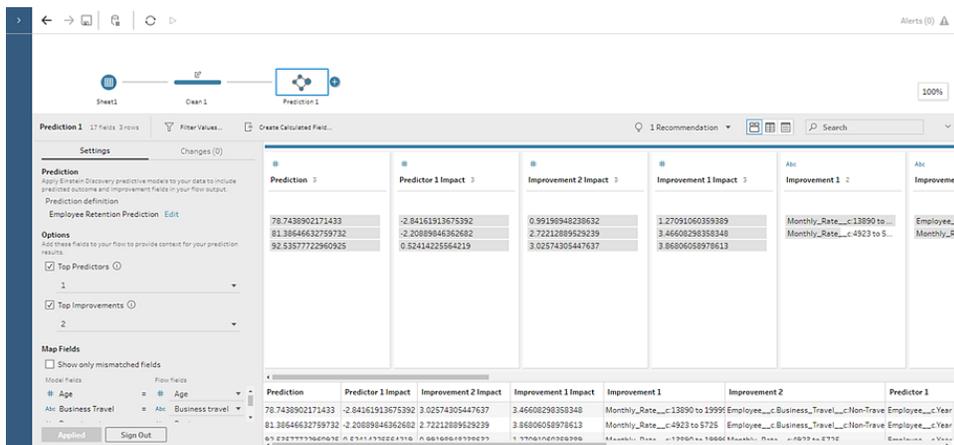
## Added in version 2021.1.3

### Einstein Discovery

#### Embed Einstein Discovery predictions in Tableau Prep Builder

Previously, you could access Einstein Discovery only in Salesforce. Now in Tableau Prep Builder version 2021.1.3, you can bring prediction models built in Einstein Discovery directly into your flows.

With the power of machine learning and artificial intelligence, you can now bulk score your flow data and generate new fields for predicted outcomes at the row level, as well as add top predictors and recommended improvement fields to include data about which fields contributed to the predicted outcome.



Simply add a Prediction step to your flow, sign in to Einstein Discovery and choose from deployed models, and apply them to your flow data. Then generate your flow output and use the new data source to analyze the predicted outcomes in Tableau.

For more information, see [Add Einstein Discovery Predictions to your flow on page 375](#).

**Note:** You must have a Salesforce license and user account that is configured to access Einstein Discovery to use this feature. Flows that include prediction steps are not currently supported on the web.

For related information about Einstein Discovery in Tableau, see [Integrate Einstein Discovery Predictions](#) in the Tableau Desktop help.

## Features Introduced in Previous Versions of Tableau Prep

Browse summaries of features added in previously supported versions.

[All Tableau Prep Release Notes](#) | [All Known Issues](#)

### Added in version 2021.1.2

#### Install and Deploy Tableau Prep

- [Amazon Redshift driver no longer installed automatically](#) below

#### Save and Share Your Work

- [Write your flow output to Microsoft Excel](#) on the facing page

### Install and Deploy Tableau Prep Builder

#### Amazon Redshift driver no longer installed automatically

Tableau no longer automatically installs the Amazon Redshift driver as part of the product install process. If you need this driver, download it from the [Driver Download](#) page.

## Save and Share Your Work

### Write your flow output to Microsoft Excel

When your flow outputs to a file, you can now choose to output your data to a Microsoft Excel spreadsheet. This output type supports the following write options:

- **Create table:** Creates or re-creates (if the file already exists) the spreadsheet with your flow data.
- **Append to table:** Adds new rows to an existing spreadsheet. If the spreadsheet doesn't exist, one is created and subsequent flow runs add rows to that spreadsheet.
- **Replace data:** Replaces all of the data except the first row in an existing spreadsheet with the flow data.

For more information, see [Create an extract to a Microsoft Excel Worksheet \(version 2021.1.2 and later\)](#) on page 390.

## Added in version 2020.4.1

### Install and Deploy Tableau Prep

- [CPU requirement update](#) below

### Tableau Prep on the Web

- [Create and edit Tableau Prep flows on the web](#) on the next page

### Connect to Data

- [Support for connector plugins](#) on the next page
- [Connect to spatial data](#) on page 5

## Install and Deploy Tableau Prep Builder

### CPU requirement update

Beginning with version 2020.4, Tableau requires you to have CPUs that support SSE4.2 and POPCNT instruction sets. These CPUs have been common for more than 10 years and are installed on most newer computers. Tableau products are also not currently compatible with Apple Silicon processors.

If you attempt to install or upgrade Tableau on a computer that does not support these instruction sets or that uses the Apple Silicon processors, the installer will not allow you to continue.

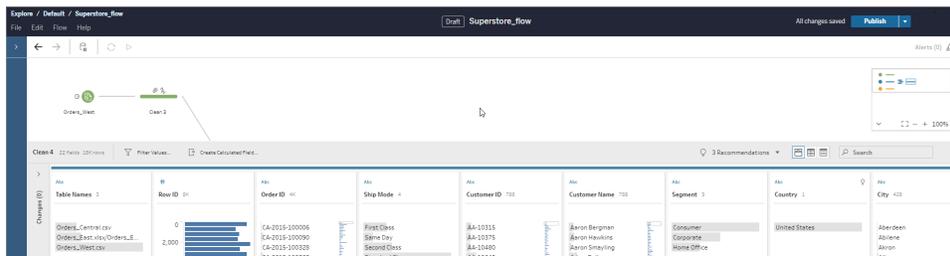
To see a complete list of supported technologies, see [tableau.com/techspecs](https://tableau.com/techspecs).

## Tableau Prep on the Web

### Create and edit Tableau Prep flows on the web

Starting in version 2020.4.1, you can now create flows to clean and prepare your data using either Tableau Prep Builder, Tableau Server, or Tableau Online. The Data Management Add-on is not required unless you want to schedule your flows to run using Tableau Prep Conductor.

You can connect to your data, build a new flow, or edit an existing flow and your work is automatically saved every few seconds as you go. Create draft flows that are only available to you or publish your flow to make it available for others. Run your individual flows right from the web or run your flows automatically on a schedule using Tableau Prep Conductor.



While most features in Tableau Prep Builder will also be available when building and editing flows on the web, some features and connectors may not be available. For more information, see [Tableau Prep on the Web](#) on page 166.

## Connect to Data

### Support for connector plugins

When Tableau Prep doesn't provide a built-in connector for your data, you can now connect to ODBC- and JDBC-based data using connector plugins created with the Tableau Connector SDK, just like Tableau Desktop. Connector plugins are supported when connecting to data in Tableau Prep Builder and on the web in Tableau Server.

**Note:** Connector plugins that use Connection Dialog v2 are not yet supported.

To use connector plugins, download the connector .taco file, and add it to the following directories:

- **Tableau Prep Builder:**
  - Windows: C:\Users\[Windows User]\Documents\My Tableau Prep Repository\Connectors
  - MacOS: /Users/[user]/Documents/My Tableau Prep Repository/Connectors
- **Tableau Server** (Flow web authoring): [Tableau\_Server\_Installation\_Directory]/data/tabsvc/flowqueryservice/Connectors
- **Tableau Server** (Tableau Prep Conductor): [Tableau\_Server\_Installation\_Directory]/data/tabsvc/flowprocessor/Connectors

For more information about connector plugins, see [Use connector plugins to connect to ODBC- and JDBC-based data on page 202](#).

## Connect to spatial data

You can now connect to, clean, and shape spatial files data in Tableau Prep both in Tableau Prep Builder and when creating flows on the web. With this feature, you can:

- Connect to Spatial File formats
  - Tableau Prep Builder: Esri Shapefiles, Esri File Geodatabases, KML, TopoJSON, GeoJSON, extracts, MapInfo MID/MIF, TAB files, and zipped shapefiles.
  - Tableau Server and Tableau Online: Zipped shapefiles, KML, TopoJSON, GeoJSON, Esri File Geodatabases, and extracts.
- Connect to spatial databases (Amazon Redshift, Microsoft SQL Server, Oracle, and PostgreSQL).
- Combine spatial tables with non-spatial tables using standard joins.
- Output spatial data to an extract (.hyper) file.

Spatial functions, spatial joins through intersects, and visualizing spatial data on a map view in Tableau Prep is not currently supported. For more information about connecting to spatial data, see [Connect to Spatial files and databases on page 196](#).

## Added in version 2020.3.3

### Install and Deploy Tableau Prep

- [Automatically recover your flow after a crash](#) below

### Build and Organize your Flow

- [Faster on-boarding for new users](#) on the facing page
- [Group steps](#) on page 8

### Clean and Shape Data

- [Use a custom fiscal year when converting date fields](#) on page 9
- [Configure Rserve and TabPy globally from the top menu](#) on page 10

### Save and Share your Work

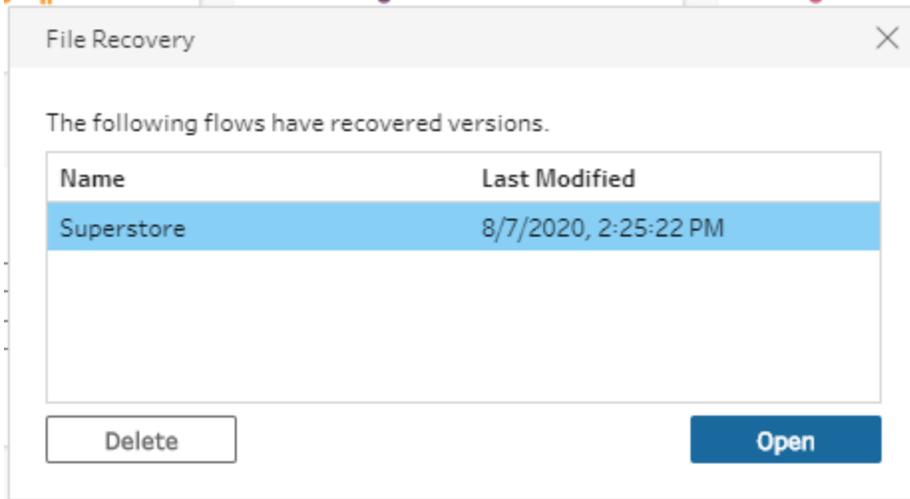
- [Save and reuse your incremental refresh configuration](#) on page 11

## Install and Deploy Tableau Prep Builder

### Automatically recover your flow after a crash

Tableau Prep Builder automatically saves your flow in the event of a crash, just like Tableau Desktop. The next time you open the application, a dialog is shown with a list of the recovered flows to select from. You can open a recovered flow and continue where you left off, or delete the recovered flow file if you don't need it. Recovered flows are saved in your **Recovered Flows** folder in your **My Tableau Prep repository**. This dialog will show every time you open Tableau Prep Builder if there are draft flows saved in your **Recovered Flows** folder.

This feature is enabled by default, but can be turned off during or after install by an administrator.

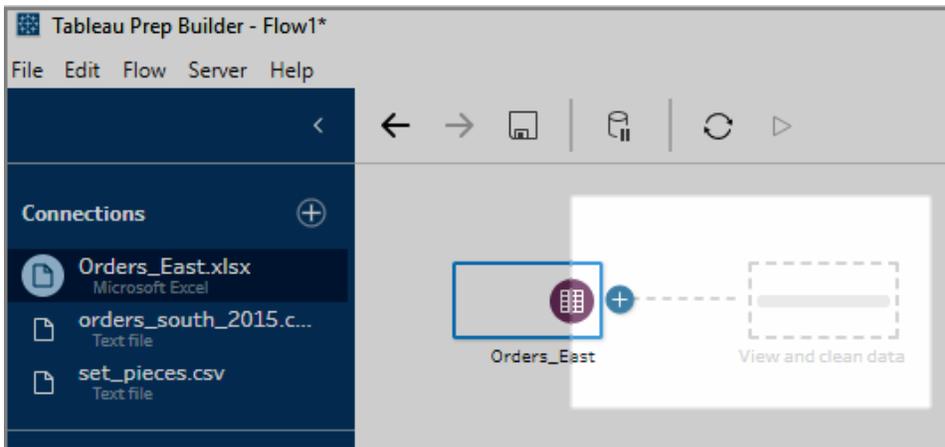


For more information, see [Save a flow](#) on page 383.

## Build and Organize your Flow

### Faster on-boarding for new users

Now when you connect to a data source and drag it onto the workspace, Tableau Prep Builder shows you where your next cleaning step can be added by showing an imaginary Clean step next to your Input step. Simply click on the suggested Clean step and it's added in one click, helping you see the details of your data so you can start examining and cleaning your data right away.



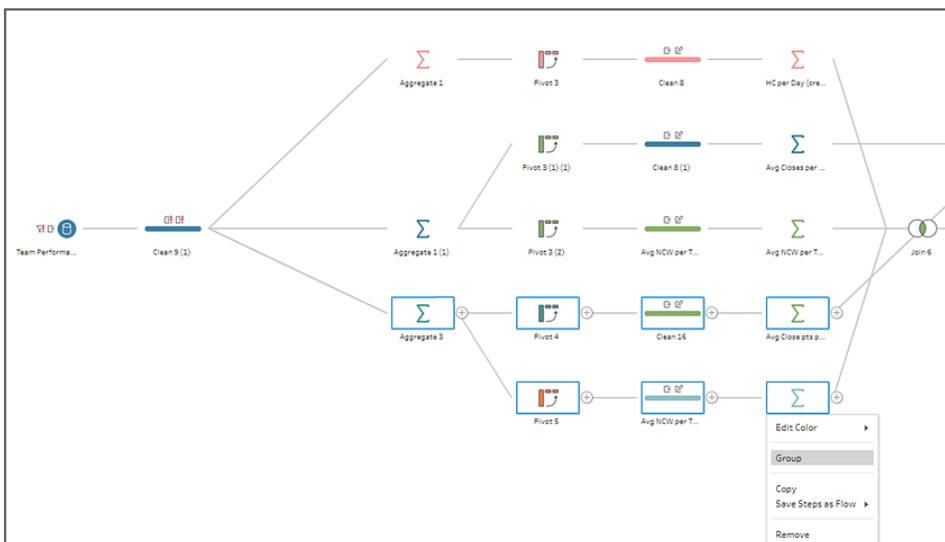
For more information, see [Build and Organize your Flow](#) on page 226.

## Group steps

Use the new **Group** option when organizing your flow to select a set of connected steps and collapse them into a folder. With this new feature, large complex flows become easier to navigate, examine, and share with others. Instead of having to understand an entire flow, other users can focus on only the group of steps that pertain to them.

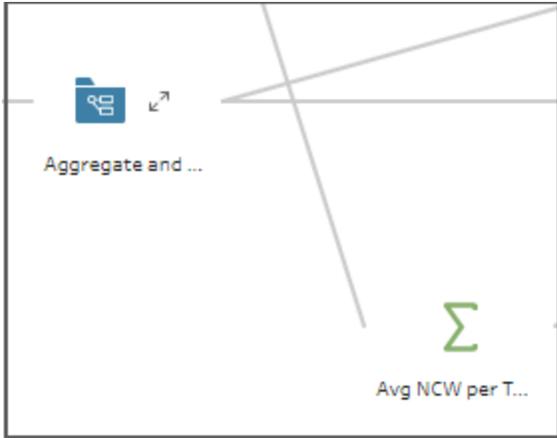
You can change the color of the group, add a description, copy and paste the grouped steps to other areas of your flow, or save the grouped steps to a file on your server to reuse them in other flows.

Simply select the set of steps that you want to group and select **Group** from the menu.



The selected steps are collapsed into a folder that you can name. You can add more steps to the group or remove steps from the group at any time, however, only steps that are directly connected to each other with a flow line can be included in the same group. Click the double

arrows to expand  or collapse  the group at any time.



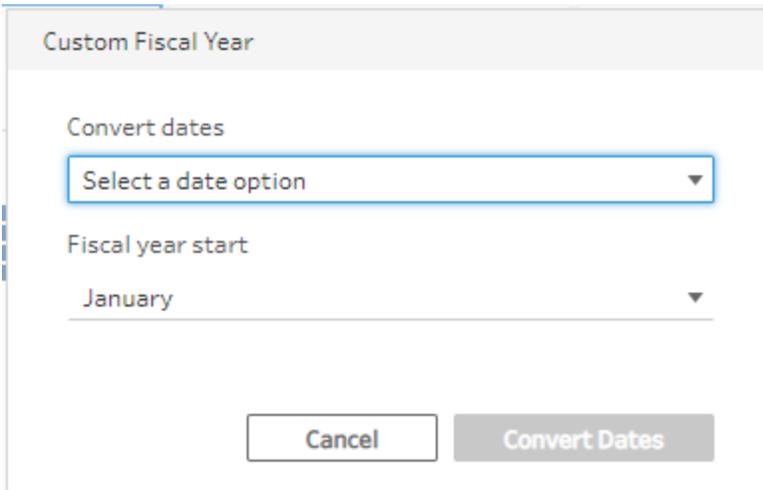
For more information, see [Build and Organize your Flow](#) on page 226.

## Clean and Shape Data

### Use a custom fiscal year when converting date fields

If your fiscal year doesn't start in January, you can now set a custom month and Tableau Prep Builder will use that start month when converting your Date or Date & Time field values to a different date part. Simply select **Convert Dates > Custom Fiscal Year** on the **More options**

... menu for your field and set the custom fiscal year start month and the date part you want to convert your field values to in one easy step.



For more information, see [Apply cleaning operations](#) on page 286.

## Configure Rserve and TabPy globally from the top menu

In prior releases when you wanted to include a script step in your flow, you would need to configure your connections to R or TabPy in each script step for each flow that included them. Now, you can set up your configurations for these analytics extensions once, from the top Help menu, just like Tableau Desktop and the configuration can be applied to any flow you work with.

Simply select **Help > Settings and Performance > Manage Analytics Extension Connection** and select **Rserve** or **Tableau Python (TabPy)** from the drop-down list and enter your connection information. If you use both analytics extensions, you can use the same dialog to enter the connection information for each server.

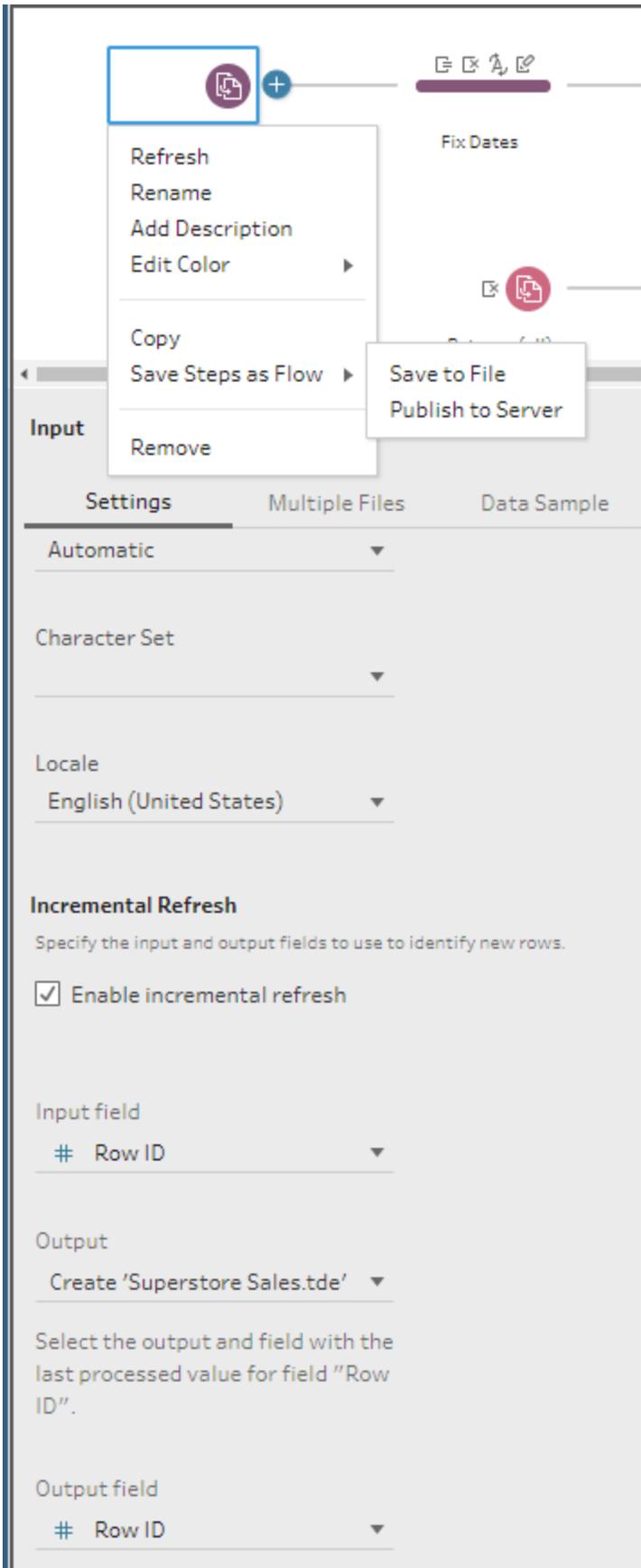
**Important:** When opening older flows in Tableau Prep Builder version 2020.3.3 and later that include script steps, you'll need to reconfigure your server connections using this new dialog.

For more information about using Rserve and Tableau Python (TabPy) in your flows, see [Use R and Python scripts in your flow on page 342](#).

## Save and Share your Work

### Save and reuse your incremental refresh configuration

Now when you configure your input and output steps for incremental refresh, you can preserve that configuration and reuse it. You can copy and paste these steps or save them for reuse later. Then, when you apply them to your new flow, the incremental refresh configuration information is preserved, saving you from having to set up your configuration again from scratch.



For more information about setting up and using incremental refresh, see [Refresh Flow Data Using Incremental Refresh](#) on page 400.

## Added in version 2020.3.1

### Save and Share your Work

- [Save flow output data to external databases](#) below
- [Tableau Data Extract \(.tde\) files are no longer supported](#) on the next page
- [Creating a .json credentials file for running flows from the command line just got easier](#) on the next page

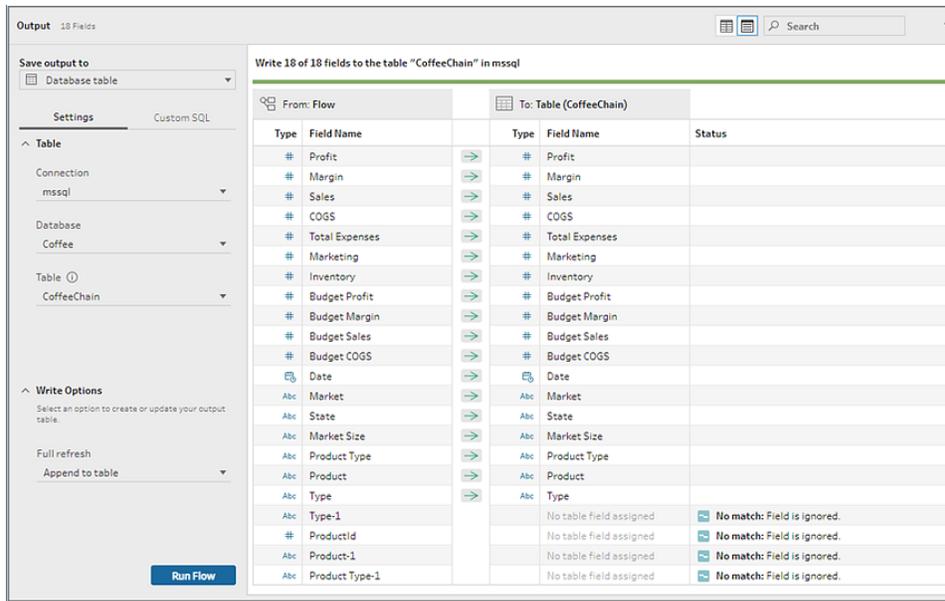
## Save and Share your Work

### Save flow output data to external databases

You can now output your full or incremental flow results to supported databases and create, replace, or append the table data with your clean, prepared flow data. Tableau Prep Builder supports saving flow data to the following databases:

- Amazon Redshift
- Microsoft SQL Server
- MySQL
- Oracle
- PostgreSQL
- Snowflake
- Teradata

In your output step, in the **Save output to** drop-down menu, select **Database table**. Then, select the database and table where you want to save your flow output. You can also enter a table name to create a new table in the database. A field comparison preview shows the matching status between fields in your flow and fields in your table. A status field shows details about mismatched fields.



You can also add SQL scripts that can run before or after the data is loaded to the database table. You can use these scripts to create a copy of your table data before running the flow, add an index, add database constraints to the database table, and so on.

For more information about saving flow outputs to tables, see [Save flow output data to external databases](#) on page 394.

## Tableau Data Extract (.tde) files are no longer supported

Starting in version 2020.3.1, Tableau Data Extract (.tde) files are no longer supported for flow outputs. Any flows that are published to a server version 2020.3 and later that output to a Tableau Data Extract (.tde) file format must be converted to a Hyper Extract (.hyper) file, otherwise the flow will fail to run. Tableau Data Extract (.tde) files are still supported for flow input.

For more information about creating and publishing data extracts, see [Create data extract files and published data sources](#) on page 387.

## Creating a .json credentials file for running flows from the command line just got easier

If you run your flows using the command line, and connect to or output to a server or database, you can now use a more simplified syntax when creating your .json credential file. In previous versions, you needed to specify separate "inputConnection" and "outputConnection" arrays with your connection credentials. Starting in version 2020.3.1, you no longer need to differentiate between an "inputConnection" or an

"outputConnection". Instead you only need to enter the credentials for your server connection or database connection once using the new "tableauServerConnections" or "databaseConnections" arrays.

Legacy .json credentials files that use the "inputConnection" and "outputConnection" arrays will continue to be supported.

For more information, see [Refresh flow output files from the command line](#) on page 409.

## Added in version 2020.2.3

### Connect to Data

- [Use OAuth authentication when connecting to data using Snowflake](#) below

### Connect to Data

Use OAuth authentication when connecting to data using Snowflake

Now when you connect to your data using Snowflake you can use any of the following authentication methods, just like Tableau Desktop:

- Username and Password
- SAML IdP

- OAuth

Snowflake

Snowflake

Server:

Role:

Enter information to sign in to the server:

Authentication:

Username:

Password:

[Show Initial SQL](#)

For more information about connecting to your data source using this connector, see [Snowflake](#) in the Tableau Desktop help.

## Added in version 2020.2.2

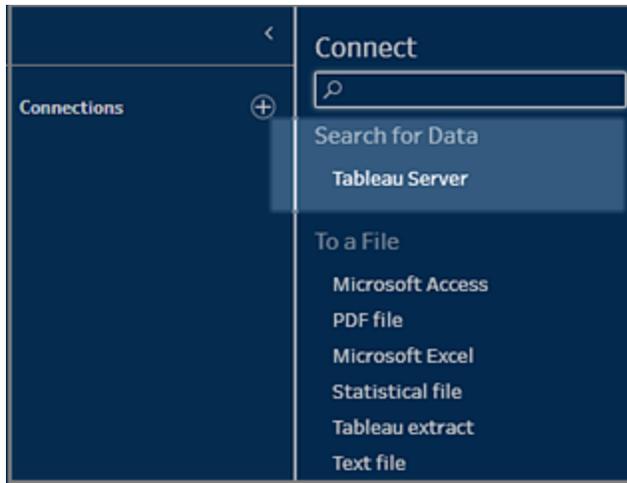
### Connect to Data

- [Connect to data using Tableau Server or Tableau Online](#) on the facing page
- [Connect to data using Alibaba MaxCompute](#) on page 18

## Connect to Data

### Connect to data using Tableau Server or Tableau Online

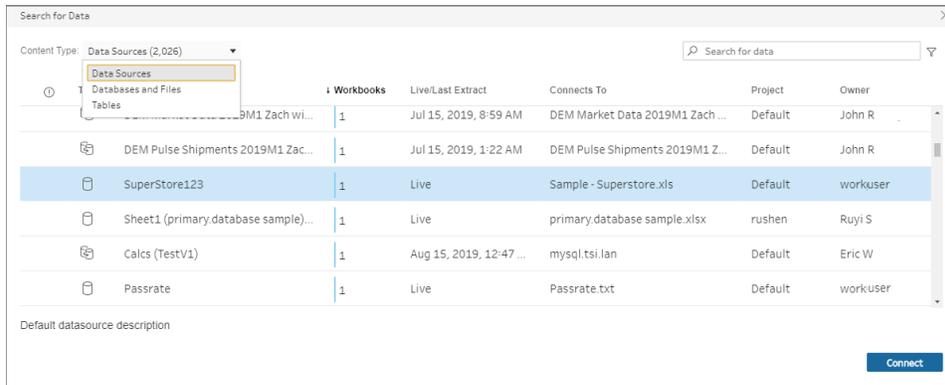
In previous versions you could connect to published data sources stored on Tableau Server or Tableau Online. Now, if you have the **Data Management Add-on** with Tableau Catalog enabled you can also search for and connect to databases and tables stored in Tableau Server or Tableau Online.



Simply select **Tableau Server** in the new **Search for Data** section of the Connect pane and sign into your server. The **Search for Data** dialog opens and you can search for and select from curated data sources.

Additional meta data such as a description of the data source, data quality warnings, and certifications help you find the data source you are looking for without ever leaving Tableau Prep Builder. You can also use the filter option in the top right corner to filter your results by connection type, data quality warnings, and certifications.

If you don't have the Data Management Add-on with Tableau Catalog enabled, only published data sources are shown and you won't be able to view the meta data.



For more information about connecting to data, see [Connect to published data sources on page 184](#).

### Connect to data using Alibaba MaxCompute

If your data is stored in a data warehouse, you can now connect to this data source using Alibaba MaxCompute. For more information about connecting to your data source using this connector, see [Alibaba MaxCompute](#) in the Tableau Desktop help.

## Added in version 2020.2.1

### Connect to Data

- [Connect to your Salesforce.com data](#) below

### Keep Flow Data Fresh

- [Process only your newest data using incremental refresh](#) on the facing page

## Connect to Data

### Connect to your Salesforce.com data

Tableau Prep Builder can now connect to your Salesforce data so you can clean and prepare it for analysis in Tableau. Using custom SOQL and creating a standard connection are not yet supported.

For more information see [Connect to Salesforce data](#) on page 191.

## Keep flow data fresh

### Process only your newest data using incremental refresh

If your flow data is constantly changing, you can now save time and resources by using incremental refresh to retrieve and process only the newest rows of data since the flow was last run. Just configure incremental refresh parameters for your flow to tell Tableau Prep Builder how to detect and retrieve the new rows from your input data. You can also configure how you want to update your output tables when the flow is run in the Output step.

**Input**

Settings   Multiple Files   Data Sample   Changes (0)

**Connection**  
Text file  
Orders\_Central.csv [Edit](#)  
Original Table Name: Orders\_Central

**Text Options**

First line contains header  
 Generate field names automatically

Field Separator  
Comma ▼

Text Qualifier  
Automatic ▼

Character Set  
▼

Locale  
English (United States) ▼

**Incremental Refresh**  
Specify the input and output fields to use to identify new rows.

Enable incremental refresh

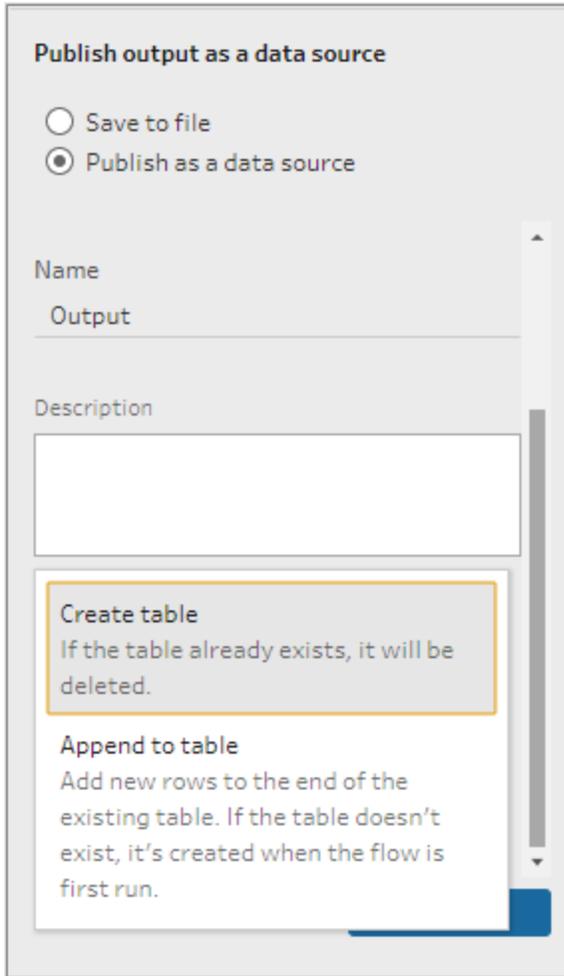
Input field  
# Row ID ▼

Output  
Create 'Superstore Sales.hyper' ▼

Select the output and field with the last processed value for field "Row ID".

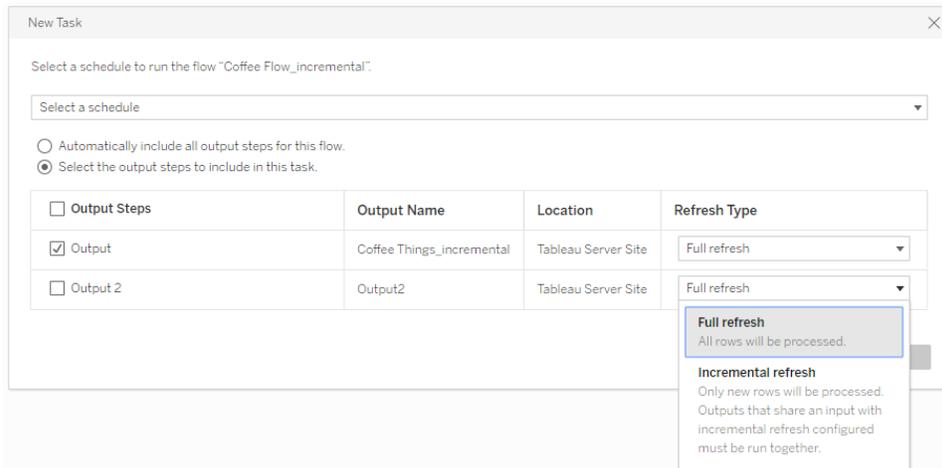
Output field  
# Row ID ▼

New options in the Output step enable you to choose to append new data to your existing tables or use Tableau Prep Builder's existing functionality and replace your table data with the new data. This option is available for both incremental and full refresh types.



Set up and run your flows on a schedule using Tableau Prep Conductor or run individual flows incrementally in Tableau Prep Builder or through the command line interface.

**Note:** Tableau Server version 2020.2 and later is required (with Tableau Prep Conductor enabled) to schedule flows using incremental refresh.



For more information about setting up and running flows using incremental refresh, see [Refresh Flow Data Using Incremental Refresh](#) on page 400.

## Added in version 2020.1.4

### Connect to Data

- [Connect to data with Impala](#) below

### Clean and Shape Data

- [Convert date values in a single click](#) on the facing page

### Save and Share your Work

- [Stay connected to your server](#) on the facing page

## Connect to Data

### Connect to data with Impala

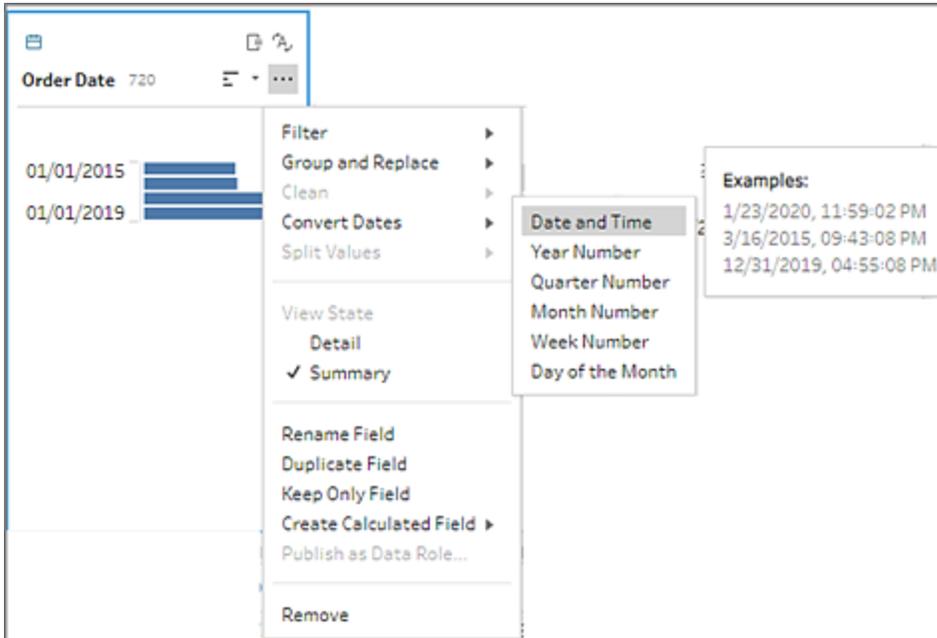
Just like Tableau Desktop, you can now easily connect to your larger data sets using Impala.

For more information about connecting to your data source using Impala, see [Impala](#) in the Tableau Desktop help.

## Clean and Shape Data

### Convert date values in a single click

To help make data cleaning even easier, Tableau Prep Builder has added another quick cleaning menu for dates. If you need to convert your date values to show a DATEPART like year, month or day, you can select one of the following menu options from the new **Convert Dates** menu instead of writing a complex field calculation.

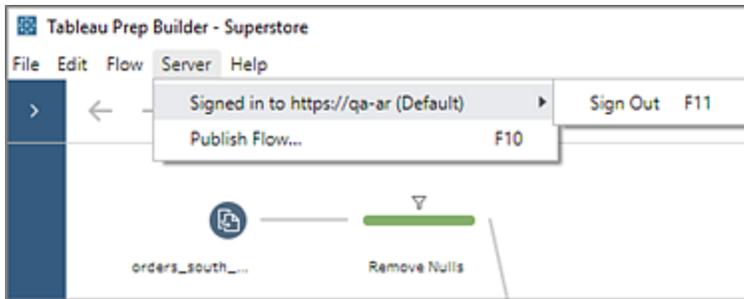


For more information about applying cleaning operations to your dates, see [Apply cleaning operations](#) on page 286.

## Save and Share your Work

### Stay connected to your server

You no longer need to sign into Tableau Server or Tableau Online every time you open Prep Builder. Now, Tableau Prep Builder remembers your server name and login information when you close the application so that the next time you open the application you are already logged into your server.



This time saving option will help you seamlessly connect to publish data sources or insert saved flow steps and if you need to know if a certain feature is compatible with your server version, compatibility warnings will show instantly without you having to sign into your server first.

For more information, see [Create a published data source](#) on page 392.

## Added in version 2020.1.3

### Install and Deploy Tableau Prep

- [Support for login-based license management](#) below

### Connect to Data

- [Pass parameters to your data source using Initial SQL](#) on the facing page

### Clean and Shape Data

- [Use Level of Detail \(LOD\), Rank and Row Number calculations to clean your data](#) on the facing page

## Install and Deploy Tableau Prep Builder

### Support for login-based license management

Login-based license management, helps you manage licensing for users with Creator roles on Tableau Server and Tableau Online. Users with Explorer or Viewer roles cannot use this

feature. If you're using Role Based Subscriptions with Tableau Server or Tableau Online, you can simplify your license management using login-based license management to eliminate separate Tableau Desktop and Tableau Prep Builder product keys. You only need to manage one or more product keys for on-premises Tableau Server, or in the case of Tableau Online, you don't need to manage any product keys at all.

## Connect to Data

### Pass parameters to your data source using Initial SQL

Now you can pass parameters to your data source using Initial SQL to provide more details about your Tableau Prep application, version and flow name. Tableau Prep Builder supports the following parameters:

- **TableauApp** - Returns the application being used to access your data source - Prep Builder or Prep Conductor.
- **TableauVersion** - Returns the application version number. For Tableau Prep Builder it will return the exact version number, for example 2020.1.1. For Tableau Prep Conductor, it will return the major server version where Tableau Prep Conductor is enabled, for example 2020.1.
- **FlowName** - Returns the name of the .tfl file.

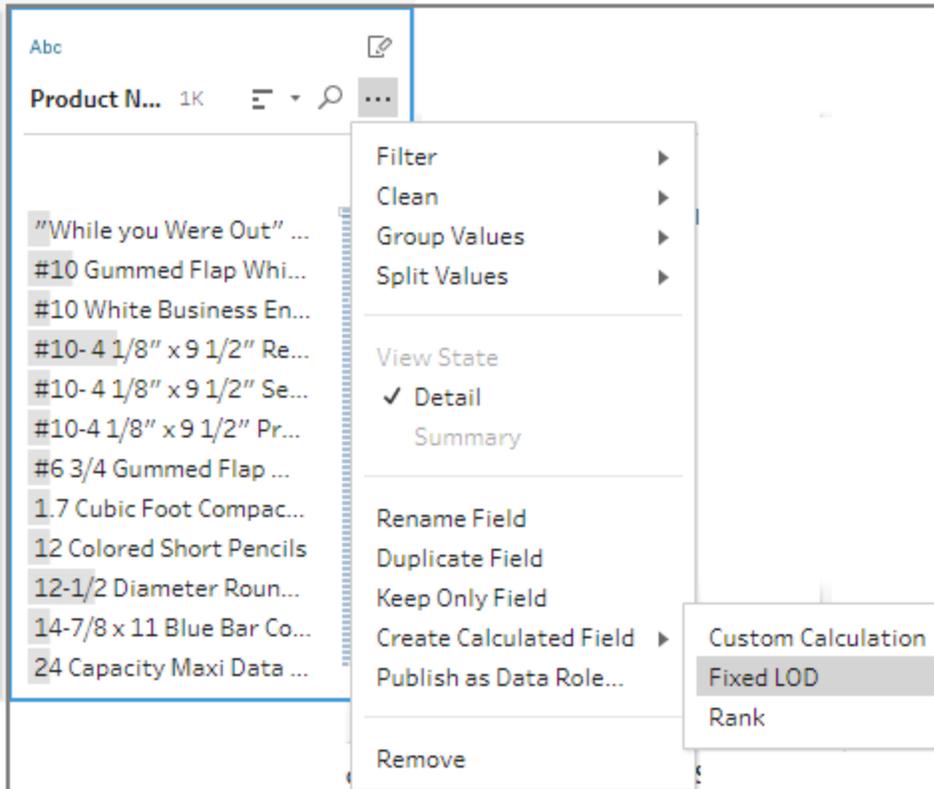
For more information about using parameters when connecting to your data source using Initial SQL, see [Include parameters in your Initial SQL statement](#) on page 206.

## Clean and Shape Data

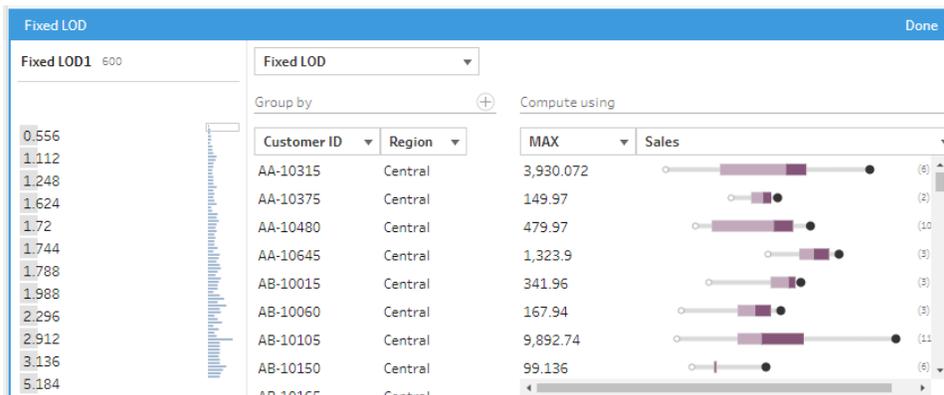
Use Level of Detail (LOD), Rank and Row Number calculations to clean your data

If your data is aggregated at a different level than what you need or if you need to perform calculations across a set of rows you can now use FIXED Level of Detail (LOD) and RANK and ROW\_NUMBER analytic function calculations to create the data that you need in your data set.

For example, add a FIXED LOD calculation to change the granularity of fields in your table. Use the new ROW\_NUMBER () analytic function to quickly find duplicate rows, or use one of the new RANK () functions to find the top N or bottom N values for a selection of rows with similar data.



If you want a more guided experience when building these types of expressions, you can use the new visual calculation editor.



For more information about using these calculated fields to clean your data, see [Create level of detail and rank calculations](#) on page 319.

Added in version 2020.1.1

### **Connect to Data**

- **Map Flow inputs back to their original connection**  
below

### **Clean and Shape Data**

- **Pause data updates to boost performance** on the  
next page

### **Version Compatibility with Tableau Prep**

- **Detect and enable incompatible features** on page 29

### **Keep Flow Data Fresh**

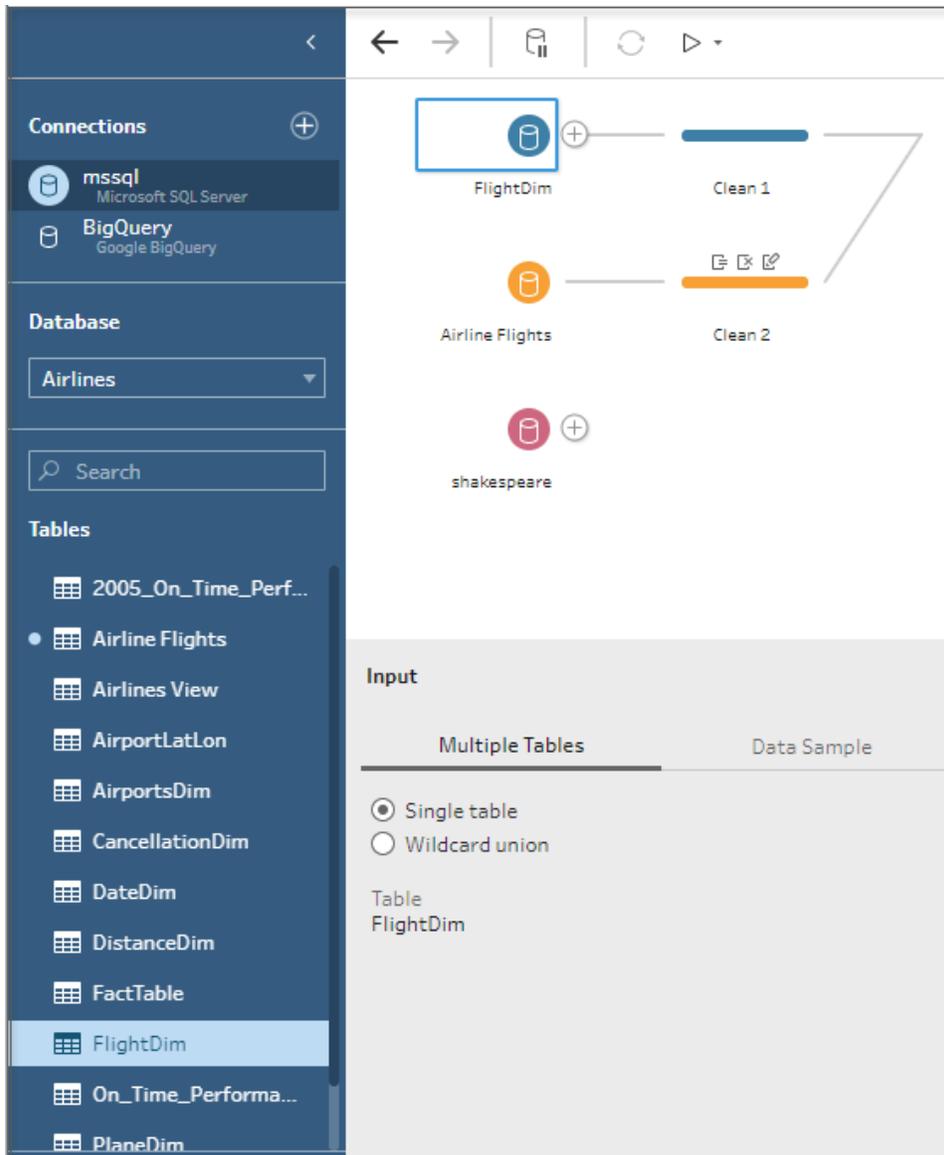
- **Add or embed credentials for cloud connectors**  
when publishing your flow on page 31

## Connect to Data

### Map Flow inputs back to their original connection

If you use multiple inputs to build your flows, trying to find the individual tables or data sources you used for the different inputs when you need to make updates or swap out a connection isn't always obvious. To make finding your flow inputs and tables easier, we've added a new feature that highlights the connector and table for a selected input in the Connections pane.

Simply select one or more Input steps in the Flow pane and the related connector and tables are highlighted in the Connections pane.



For more information about how to connect to your data to build a flow see [Connect to Data](#) on page 177.

## Clean and Shape Data

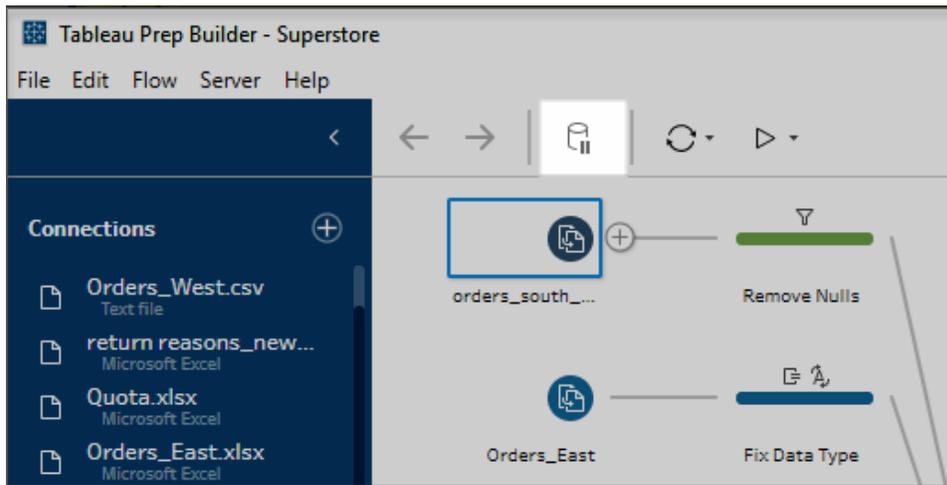
### Pause data updates to boost performance

Every time you apply cleaning operations to your data, Tableau Prep Builder refreshes your view so you can instantly see the results of your changes. While building new flows, this constant feedback helps you quickly know which steps to take next, but sometimes applying

these changes can take time. To boost performance and make applying changes to your data faster, you can now pause these constant data updates and apply your changes in bulk.

Simply select the **Pause data updates** button on the top menu and Tableau Prep Builder pauses your data updates and switches the Profile pane view into List view so you can quickly apply your changes.

Instead of refreshing your view with every change, only the field metadata is shown. When you finish your changes and want to see the results on your field values, click the **Resume data updates** button to switch back to the standard data update mode.



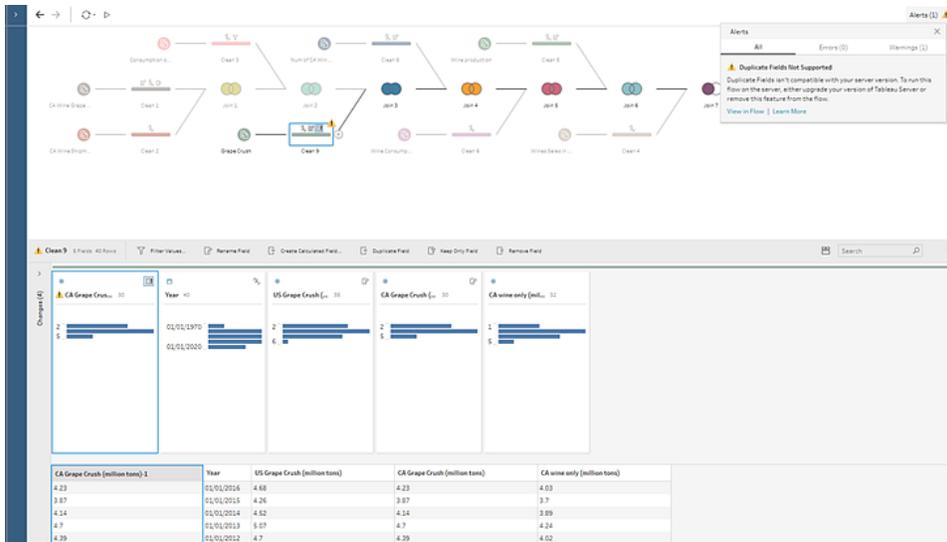
**Note:** Any cleaning operations that require data values to perform the task are disabled while data updates are paused.

For more information about pausing data updates to apply cleaning operations in bulk, see [Pause data updates to boost performance on page 284](#).

## Version Compatibility with Tableau Prep

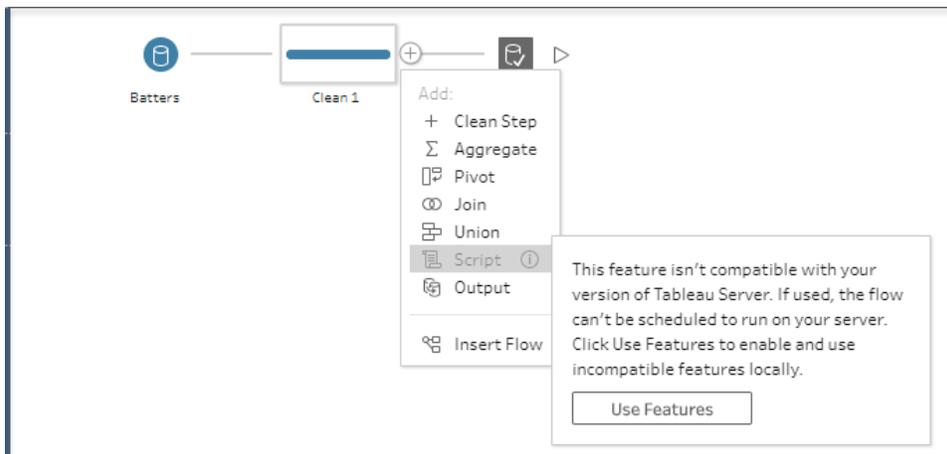
### Detect and enable incompatible features

In Tableau Prep Builder version 2019.3.1, we added warning icons and tooltips so that you could more easily see which features were incompatible with your version of Tableau Server as you built your flow to help you make informed decisions about which features you included in your flow if you planned to publish the flow and run it on a schedule.



In this release we have added even more transparency when working with new features that might not be compatible with your server version.

Now, after you sign into your server, Tableau Prep Builder can detect which features aren't compatible with your version of Tableau Server, and disable those features. This takes the guess work out of which features you can include if you plan to publish your flow and run it on a schedule.



If you still want to use the feature and run your flows manually using Tableau Prep Builder or from the command line, you can enable the feature right from the menu. Just click the **Use Features** button, and that feature is applied to your flow and all incompatible features are enabled and available to use.

The warning options introduced in Tableau Prep Builder version 2019.3.1 will still identify which features are incompatible with your server so that you can easily find and remove them if you want to run the flow using a schedule in Tableau Server.

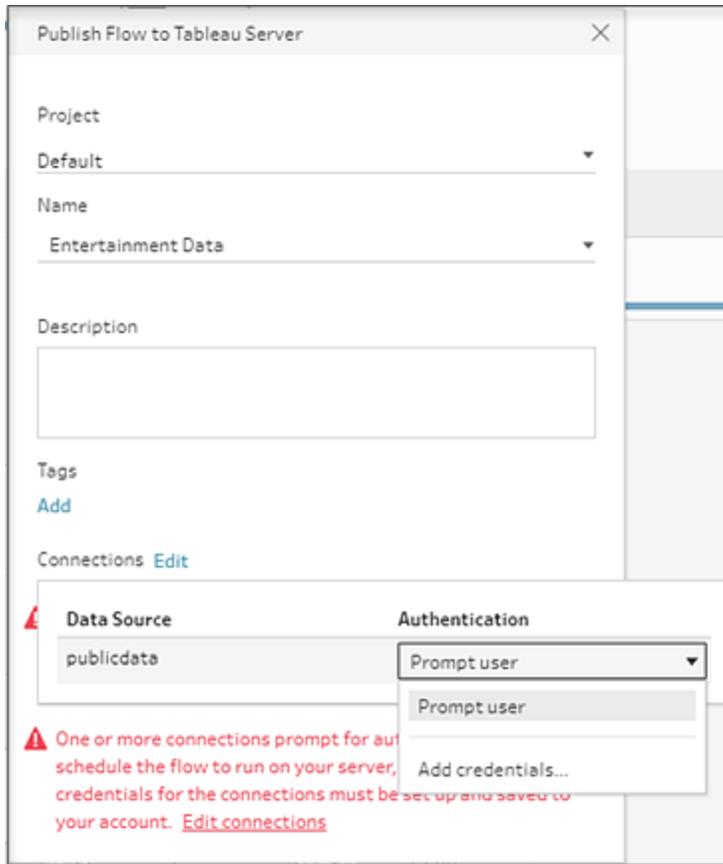
For more information about working with incompatible features, see [Version Compatibility with Tableau Prep](#) on page 427.

### Keep Flow Data Fresh

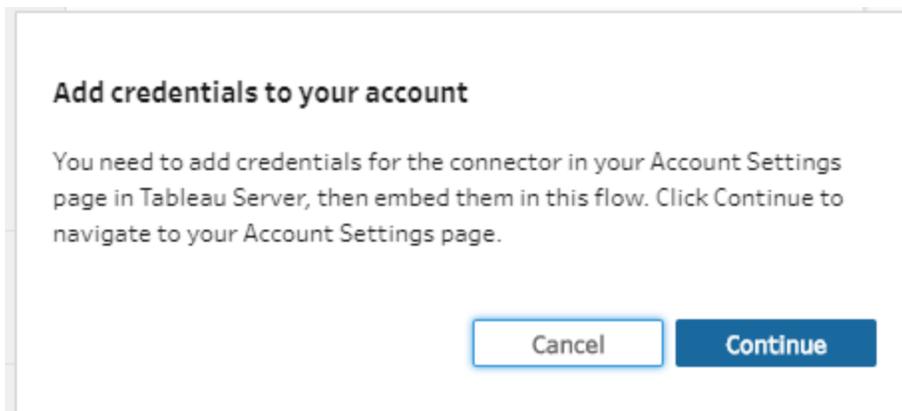
#### Add or embed credentials for cloud connectors when publishing your flow

In previous versions, if you wanted to publish and schedule a flow that included cloud connectors, you would need to configure your credentials in Tableau Server or Tableau Online ahead of time. Otherwise, Tableau Prep Conductor couldn't detect your credentials and the flow would fail to run. Now you can add and embed your credentials for your cloud connectors directly from the Publish dialog in Tableau Prep Builder in a few simple steps.

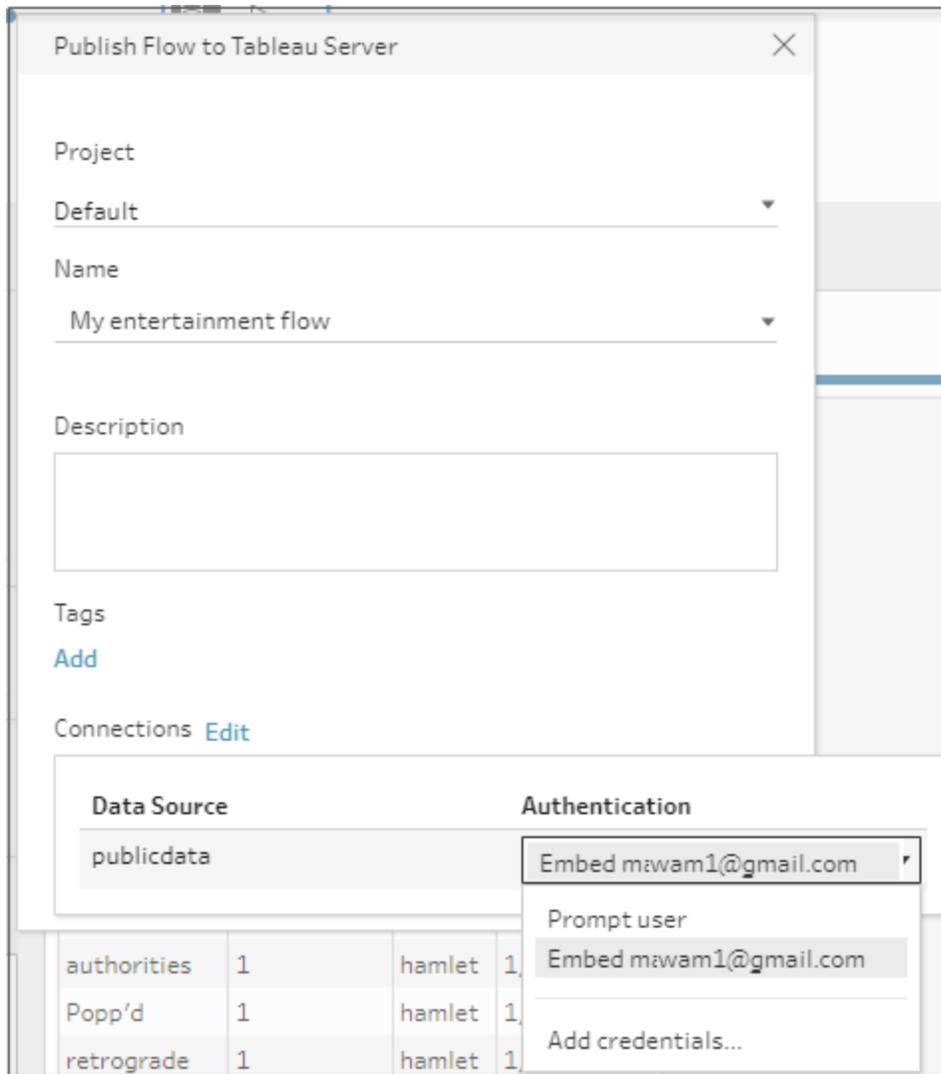
Simply sign into your server and select **Server > Publish Flow**. In the Publish Flow dialog, a new warning text shows, telling you that you have input connections that require authentication. Click the **Edit connections** link in the message or the Edit link in the Connections section, then in the Authentication drop-down, select **Add credentials**.



A secondary message confirms your selection. Click **Continue** to go to your **Account Settings** page in Tableau Server or Tableau Online, and add your credentials.



When you are finished, return to Tableau Prep Builder, click **Done** and your new credentials are automatically embedded in your flow.



For more information about adding credentials for cloud connectors during publish, see [Publish a flow from Tableau Prep Builder](#) on page 486.

## Added in version 2019.4.2

### Connect to Data

- [Connect to more data with new connectors](#) on the next page

## Clean and Shape Data

- [Pivoting columns to rows just got easier](#) below

## Additional Enhancements

- [See feedback for long-running operations](#) on page 36
- [Support for login-based license management](#) on page 36

## Connect to Data

### Connect to more data with new connectors

In this release we've added the following new data connectors:

- Alibaba AnalyticDB for MySQL
- Alibaba Data Lake Analytics
- Databricks
- Kyvos
- Qubole Presto

For more information about how to connect to your data using these connectors, see [Supported Connectors](#) in the Tableau Desktop and Web Authoring help. For general information about connecting to data to build a flow see [Connect to Data on page 177](#).

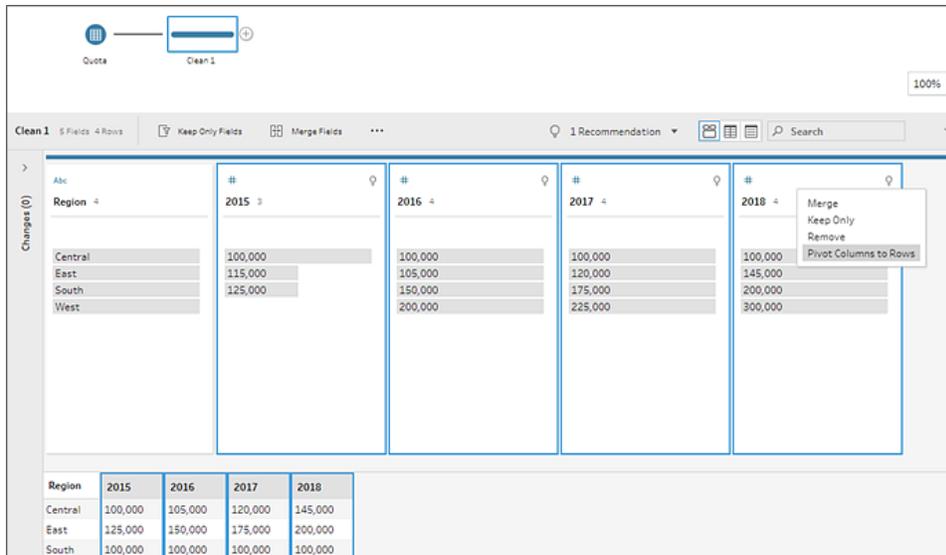
## Clean and Shape Data

### Pivoting columns to rows just got easier

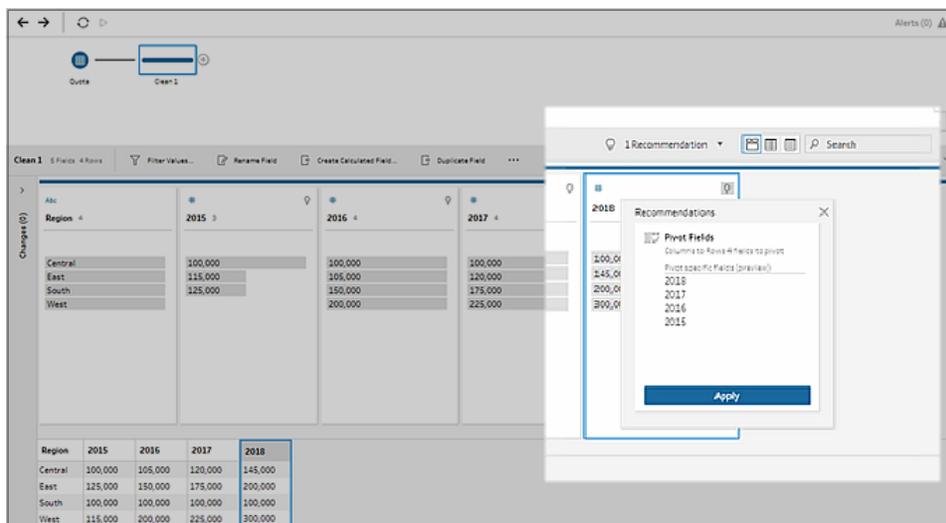
When you need to pivot your data from columns to rows, you can now manually select fields in the profile pane to pivot them or Tableau Prep Builder can recommend the fields to pivot and create the pivot for you. Both options automatically generate your pivot step so you can quickly perform any additional pivot actions like renaming the pivoted fields or pivoting on additional fields.

To manually pivot columns to rows from the Profile pane, simply select the fields you want to pivot, then right-click or Ctrl-click (MacOS) and select **Pivot Columns to Rows** from the menu to create the new pivot step and pivot your fields.

## Tableau Prep Help



If Tableau Prep Builder detects fields that can be pivoted, a recommendation option will show in the Profile pane toolbar. Click the light bulb  icon in the toolbar and select the pivot recommendation. The recommendation shows which fields it will pivot. Simply click **Apply** to generate the Pivot step and pivot your fields.

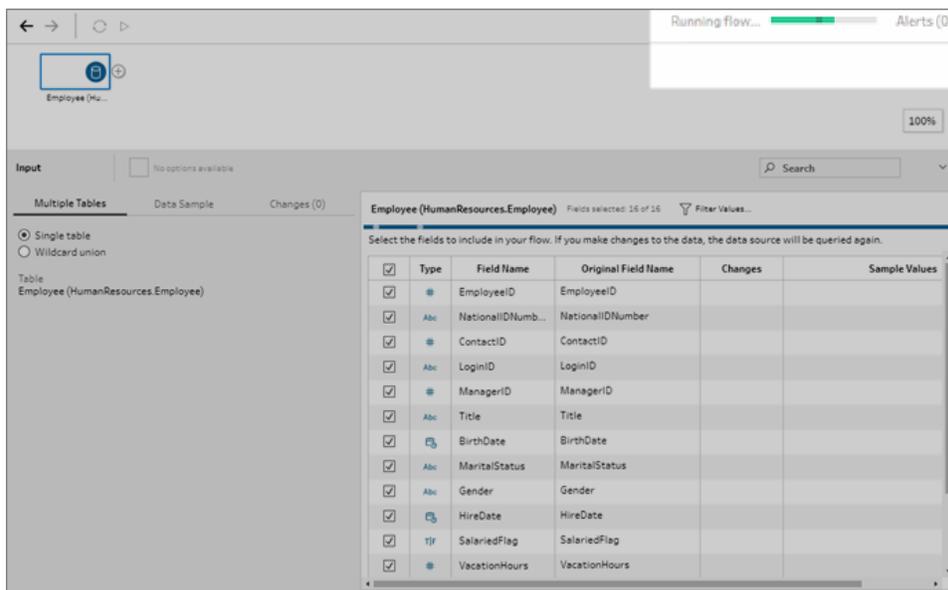


For more information about pivoting your data, see [Pivot Your Data on page 333](#). For more information about how to use recommendations to clean your data, see [Apply cleaning operations using recommendations on page 292](#).

## Additional Enhancements

### See feedback for long-running operations

To give you more visibility when processing large data sets or flows, we've added a progress indicator at the top of the Flow pane to give you status updates as Tableau Prep Builder processes your data. Now you can have more visibility into what Tableau Prep Builder is doing behind the scenes so you no longer have to wonder whether your data is still being processed or if a problem has occurred.



### Support for login-based license management

Login-based license management, helps you manage licensing for users with Creator roles on Tableau Server and Tableau Online. Users with Explorer or Viewer roles cannot use this feature. If you're using Role Based Subscriptions with Tableau Server or Tableau Online, you can simplify your license management using login-based license management to eliminate separate Tableau Desktop and Tableau Prep Builder product keys. You only need to manage one or more product keys for on-premises Tableau Server, or in the case of Tableau Online, you don't need to manage any product keys at all.

### Added in version 2019.4.1

## Connect to Data

- [Connect to more data in the cloud](#) below

## Additional Enhancements

- [Share usage data with Tableau](#) below
- [Default database drivers no longer automatically installed for MacOS](#) on the next page

## Connect to Data

### Connect to more data in the cloud

In this release we've added the following cloud connectors:

- Box
- DropBox
- Google Drive
- OneDrive

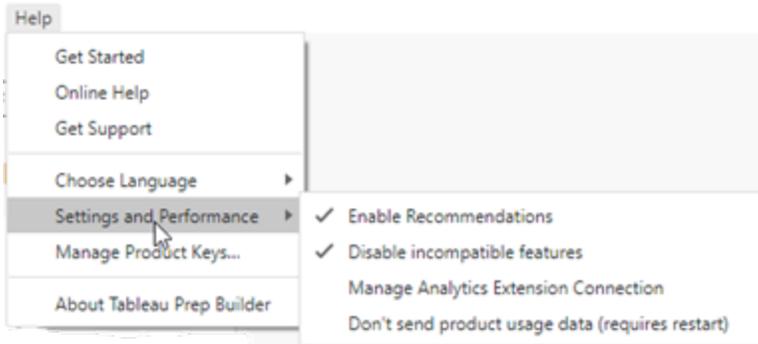
Additional configuration may be needed to save your credentials for these connectors if you plan to publish your flows to Tableau Server or Tableau Online. For more information about connecting to cloud data connectors, see [Connect to cloud data sources](#) on page 190.

## Additional Enhancements

### Share usage data with Tableau

Tableau collects data that helps us learn how our products are being used so we can improve existing features and develop new ones. All usage data is collected and handled according to the [Tableau Privacy Policy](#). But you can opt out if you don't want to participate.

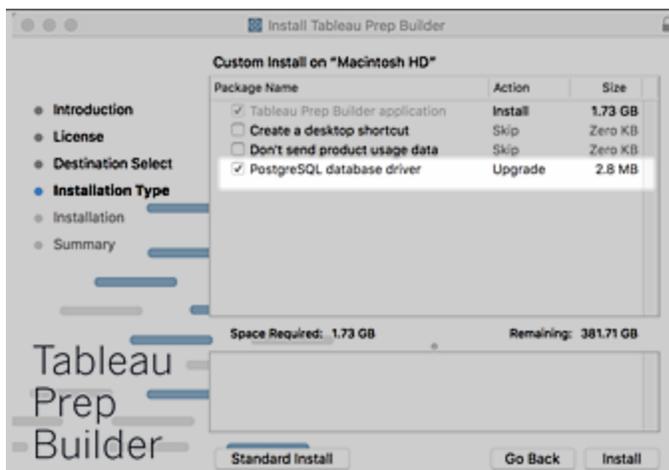
The opt out option has changed. Usage data collection is enabled by default. If you don't want to participate, select the **Don't send product usage data** check box from the installer or Customize installer (MacOS) dialog or from the Help menu after installation.



For more information, see [Turn off usage reporting](#) in the Tableau Desktop and Tableau Prep Deployment Guide.

## Default database drivers no longer automatically installed for MacOS

When installing Tableau Prep Builder on Mac, we only install the PostgreSQL database driver automatically. If you need other drivers to connect to your data, you can install them from the [Driver Download](#) page.



Added in version 2019.3.2

**Build and Organize Your Flow**

- **Insert steps where you want them with one click** below
- **Easily review large flows with the flow navigator** on the next page

#### **Examine and Filter Your Data**

- **Group similar values using custom data roles** on page 41

#### **Clean and Shape Data**

- **Apply cleaning actions to fields using the new list view** on page 42
- **Leverage your work and the work of others with reusable steps** on page 43

#### **Save and Share your Work**

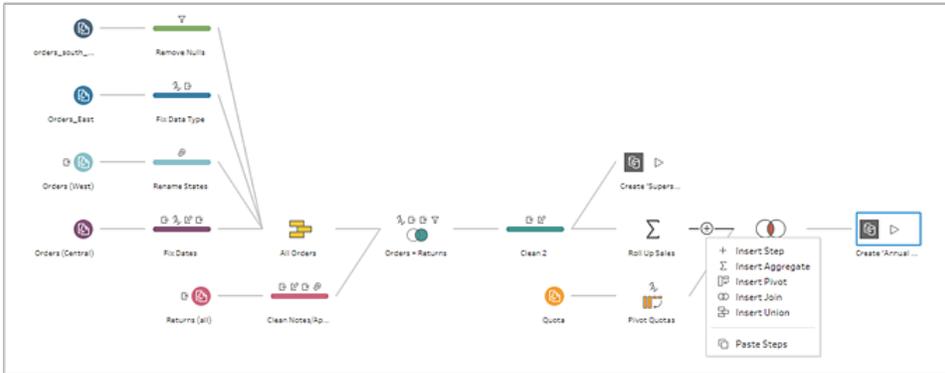
- **Disable the keychain dialog for Mac OS when running flows from the command line** on page 44

## Build and Organize your Flow

### Insert steps where you want them with one click

In prior versions you could insert a cleaning step after an existing step in a flow and the flow would extend to the right to make room for the new step. But adding any other step types after existing steps resulted in creating a branch to your flow that you would then have to reconnect by removing and adding flow lines.

In this release, we've added a new insert menu that lets you insert any step type (even copied steps) between existing steps in one click. Simply hover on the flow line where you want to insert a step and use the new Insert menu to select and insert the step type you want, right where you want it.

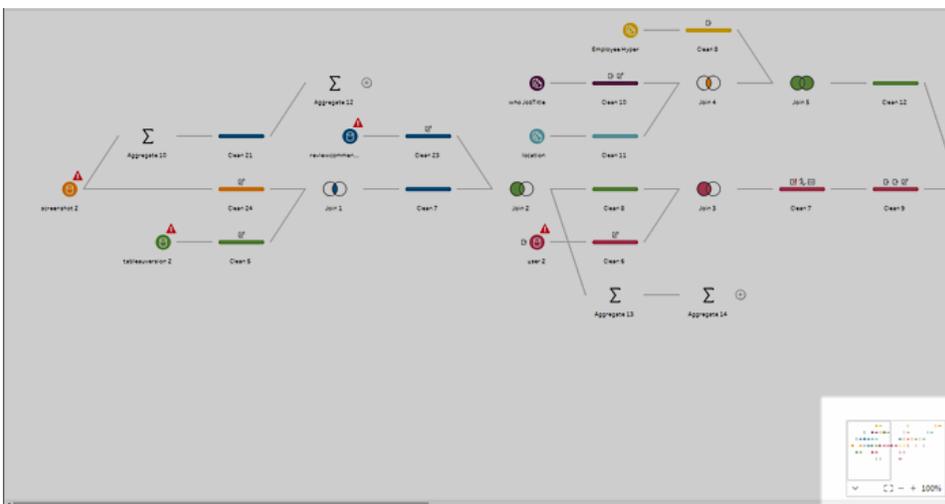


**Note:** The **Insert Step** menu item from the **Add** menu was moved to this new menu. This option is not available for Input and Output step types.

For more information about adding and inserting steps in a flow, see [Add or insert steps on page 226](#).

### Easily review large flows with the flow navigator

When working with large flows it can be difficult to scroll back and forth to find and fix a step or change. The new flow navigator tool shows in the lower right corner of the flow pane. This tool is a miniature image of your entire flow. You can use it to zoom in and out, click on parts of the image to navigate directly to that part of your flow, adjust your flow size and more. If you don't want to show the tool you can minimize it or restore it in a single click.



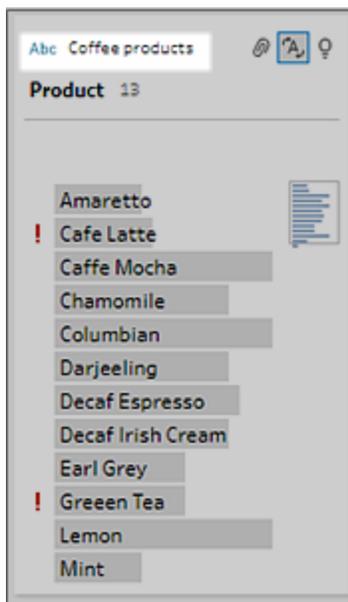
For more information about connecting to data and building a flow, see [Use the flow navigator tool on page 242](#).

## Examine and Filter Your Data

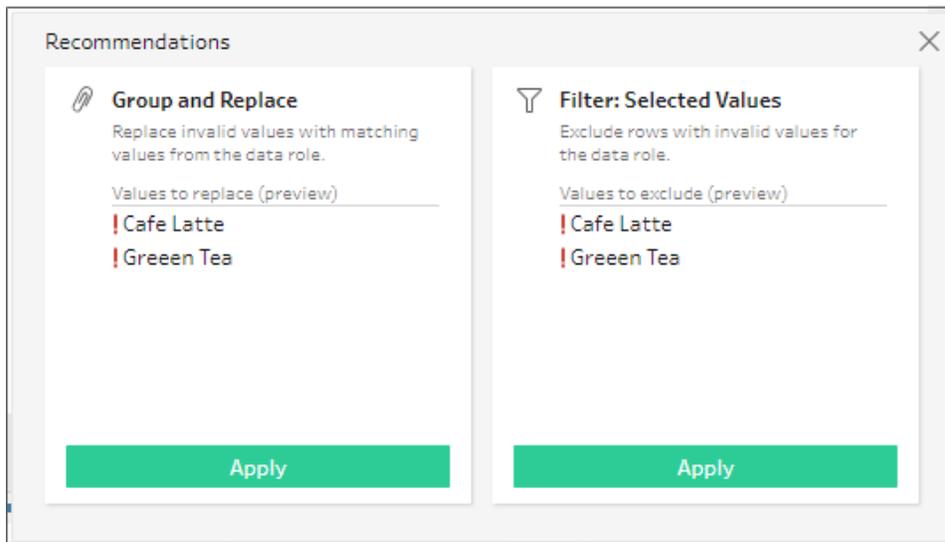
### Group similar values using custom data roles

In Tableau Prep Builder version 2019.3.1 we introduced the ability to create your own custom data roles using the field values in your data sets. In this release you can now use those custom data roles to group values in a field based on spelling and pronunciation to automatically fix invalid values by matching and replacing them with the closest valid one.

Simply apply the custom data role to your field and any values that don't match the standard values are marked with a red exclamation mark.



To fix the invalid values, you can click on the **Recommendations**  icon on the field to apply the recommendation to group and replace the invalid values with valid ones or select **Group and Replace > Spelling** or **Pronunciation + Spelling** from the **More options**  menu to select how you want to fix your invalid values.

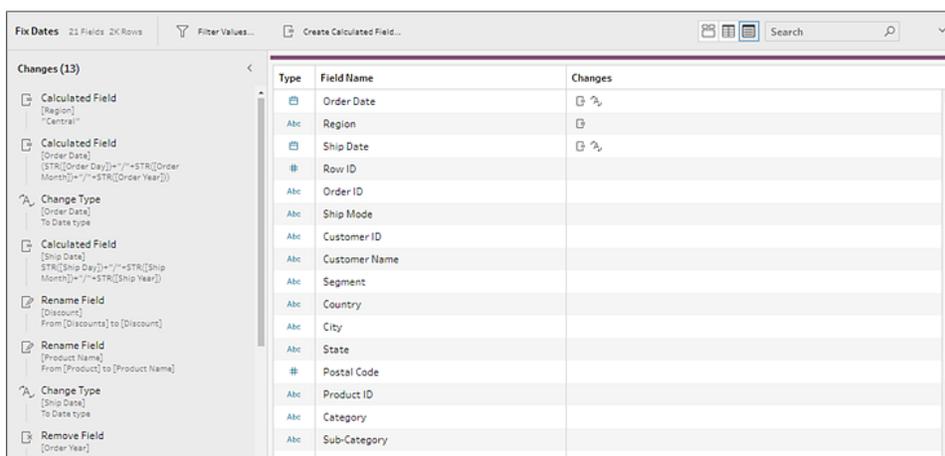


For more information about creating and using custom data roles see [Group similar values by data role](#) on page 273.

## Clean and Shape Data

### Apply cleaning actions to fields using the new list view

Currently you can apply cleaning operations in the profile pane, results pane, or data grid. But the number of fields you can see at one time is limited by the size of your screen. To make scanning all your fields and taking action easier, we've added a new list view that lets you convert the profile pane or results pane into a list. After you select this option, this view state persists across all steps in your flow but you can change it at any time.



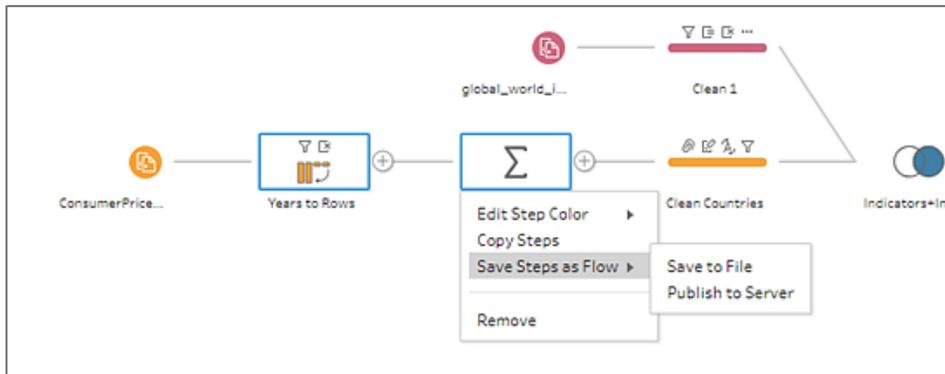
In this view you can apply operations to multiple fields like **Remove** or **Keep Only** or quickly apply cleaning operations like **Rename Field** or **Duplicate Field**. You can also apply other cleaning operations from the **More options** ... menu, but operations like **Group and Replace**, **Filter**, or **Split Values** will return you to the Profile pane or Results pane view to complete your actions.

For more information about cleaning fields in the list view, see [Select your view on page 282](#).

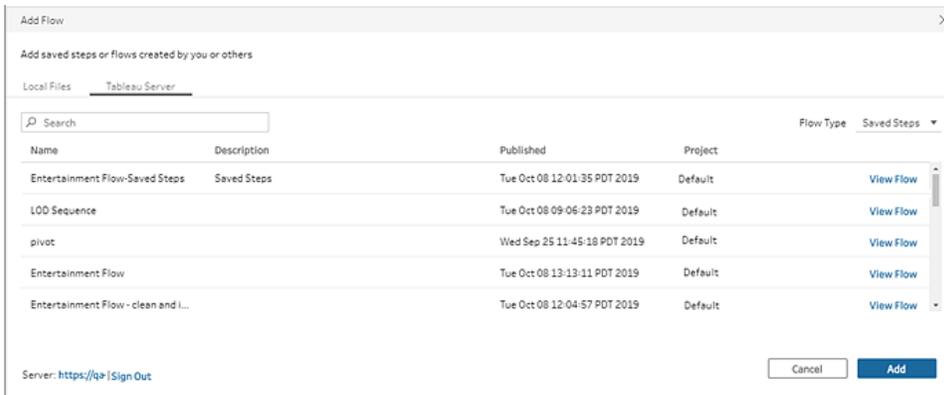
### Leverage your work and the work of others with reusable steps

If you commonly perform the same actions over and over again with your data you can select one or more flow steps and their associated actions, or the entire flow, and save it to reuse in other flows you create and manage. You can save your steps locally or publish them to Tableau Server or Tableau Online to share with others.

To create reusable steps, simply select the steps that you want to save, right-click and select **Save Steps as Flow** and select whether to save the steps to your local file or to a server. A **Saved Steps** tag is added automatically when publishing flow steps to your server to make it easy to find the flow steps later.



Once saved, you can open and insert any flow. Right-click or Ctrl-click (MacOS) anywhere in the flow pane canvas and select **Insert Flow**, or select **Edit > Insert Flow** from the top menu. In the **Add Flow** dialog, you can select and insert saved flow steps from a file or your server. The dialog automatically filters to show all flows with the **Saved Steps** tag, but you can change the filter and insert any flow that you have permissions to access.



The selected flow is added to the flow pane and you can then move and connect your steps where you want them in your flow. For more information about creating and using reusable flow steps, see [Clean and Shape Data on page 277](#).

## Save and Share your Work

Disable the keychain dialog for Mac OS when running flows from the command line

When running flows from the command line on the MacOS, we've eliminate the need for a user to manually enter their MacOS keychain credentials every time the flow runs.

For more information, see the Disable SSL validation (MacOS) command option in [Refresh flow output files from the command line on page 409](#)

## Added in version 2019.3.1

### Connect to Data

- [Connect to data using Google BigQuery on the facing page](#)
- [Connect to published data sources for flow input on the facing page](#)

### Examine and Filter Your Data

- [Create custom data roles on page 47](#)

### Clean and Shape Data

- [Use R and Python scripts in your flow](#) on page 50

### Save and Share your Work

- [Spot incompatible features as you build your flow](#) on page 50

### Keep Flow Data Fresh

- [Tableau Data Management Add-on Includes Tableau Prep Conductor](#) on page 51
- [Publish flows to Tableau Online](#) on page 51

### Additional Enhancements

- [Tableau Prep Builder now in Italian](#) on page 52

## Connect to Data

### Connect to data using Google BigQuery

Connect to even more of your data in the cloud using Google BigQuery. Like Tableau Desktop, you can now connect to data stored in Google BigQuery and publish flows to Tableau Server and Tableau Online if Google OAuth connections are configured.

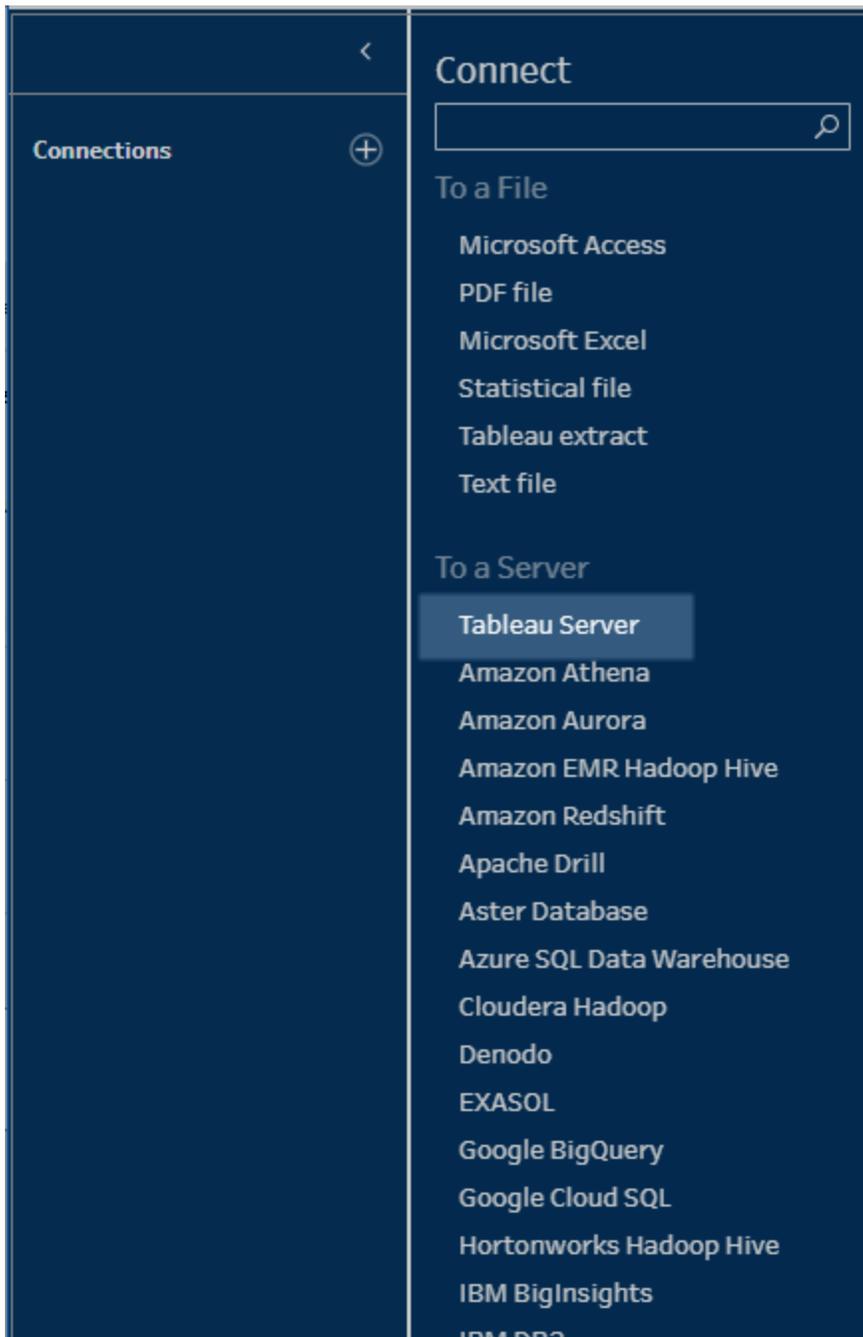
**Note:** Tableau Prep Builder doesn't currently support using Google BigQuery customization attributes. Also flows that include Google BigQuery connectors can't be run from the command line. Instead run the flow manually or run the flow on a schedule in Tableau Server or Tableau Online.

For more information about how to connect to Google BigQuery, see [Google BigQuery](#) in the Tableau Desktop help. For more information about connecting to data, see [Connect to Data on page 177](#).

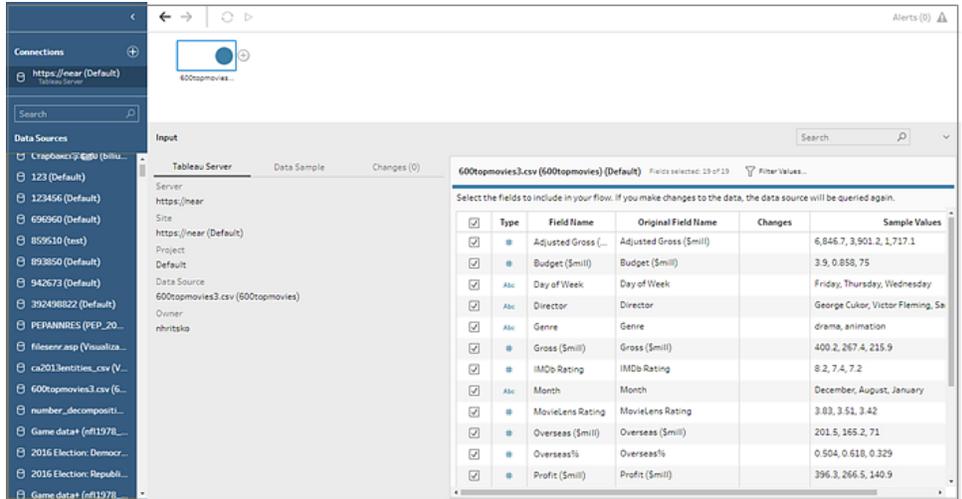
### Connect to published data sources for flow input

Whether you generate a published data source from Tableau Desktop or as output from Tableau Prep Builder and publish it to Tableau Server or Tableau Online, you can now connect to your published data sources and use them as an input data source for your flow.

Simply select **Tableau Server** from the **Connect** pane, then sign in to your server or site.



After you sign in, a list of available data sources are shown. Select your data source, or use the search option to find your data source and drag it to the flow pane to start your flow.



**Note:** Published data sources that include user filters aren't currently supported.

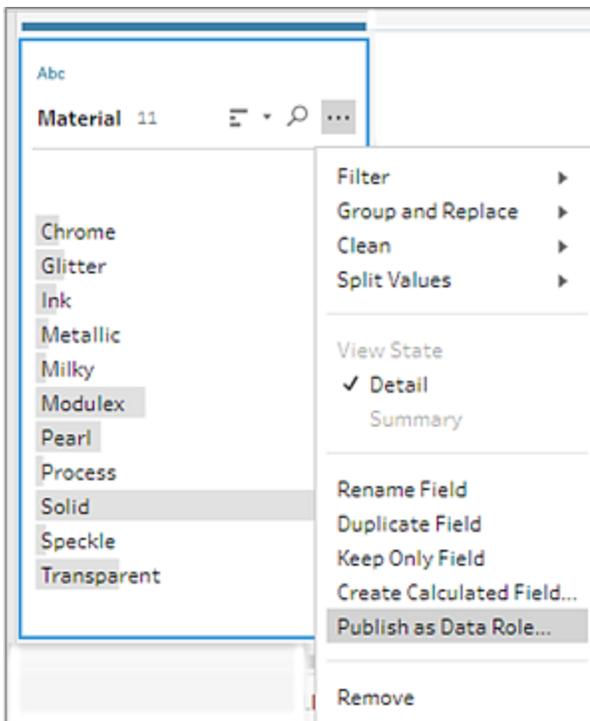
For more information about connecting to data and building a flow, see [Connect to Data on page 177](#).

## Examine and Filter Your Data

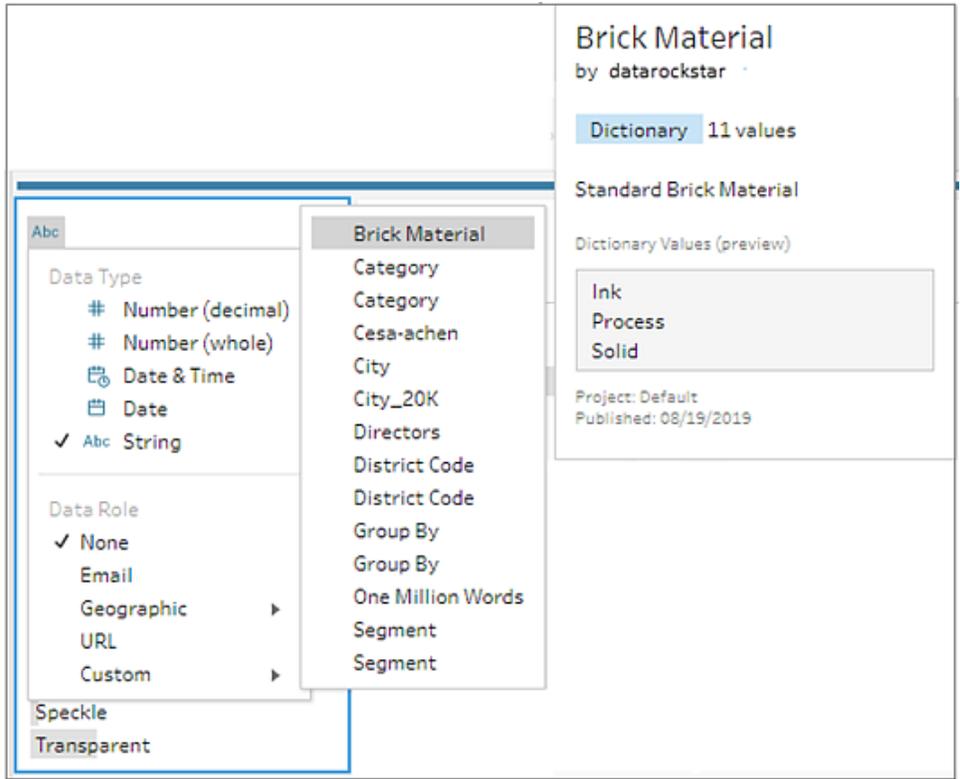
### Create custom data roles

You can use data roles to identify and validate field values. In prior releases, Tableau Prep Builder provided a set of standard data roles that you could apply to your fields to quickly identify invalid values. In this release, you can now create your own custom data roles using the field values in your data sets, then publish them to Tableau Server or Tableau Online to use them in your flow or share your data roles with others to make identifying and cleaning invalid values easier than ever.

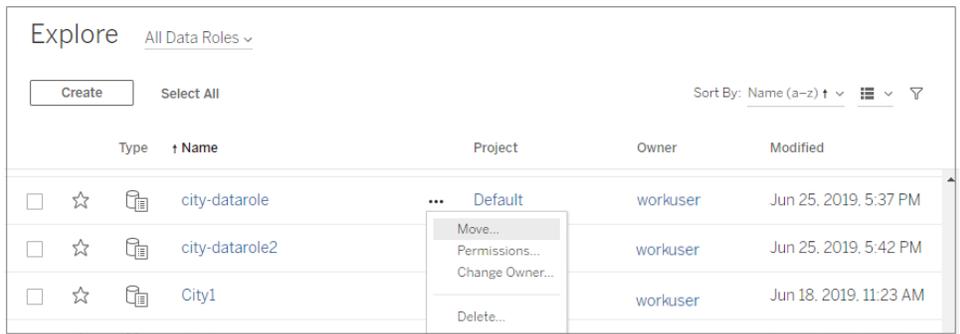
Simply select the field that you want to use and select **Publish as Data Role** from the **More options**  $\dots$  menu.



After the custom data role is published, once you sign into the site or server where the custom data role is published, you can select it from the new **Custom** menu option to apply it to your fields.



You can view and manage your published custom data roles on Tableau Server and Tableau Online. View all custom data roles published to your site or server, move them to a different project, change permissions or delete them.



For more information about creating and using custom data roles see [Create custom data roles](#) on page 265.

## Clean and Shape Data

## Use R and Python scripts in your flow

You can now use R and Python scripts to perform more complex cleaning operations or incorporate predictive modeling data into your flow. Data is passed from the flow as input through the R or Python script step using Rserve or TabPy, then returned as output data that you can continue cleaning using the features and functions in Tableau Prep Builder.

The screenshot displays the Tableau Prep Builder interface. The top pane shows a data flow starting with 'Input' data, which is split into 'Data to Encode' and 'Raw Data'. 'Data to Encode' goes through 'Label Encoding', then 'Join 1', 'Join 2', and 'Join 3' steps. 'Raw Data' goes through 'Join 1', 'Join 2', and 'Join 3' steps. The output of 'Join 3' is 'Join 3 Data', which is then processed by 'Predictor', 'Model', and 'Score' steps, finally leading to 'Get User Names'. The bottom pane shows the 'Label Encoding' step settings, including 'Connection Type' (Tableau Python (TabPy) Server), 'File Name' (encode.py), and 'Function Name' (encode). The 'Label Encoding' step is also shown in a detailed view with columns for 'Region Encoded', 'Supplies Subgroup Encoded', 'Competitor Type Encoded', 'Route to Market Encoded', 'Supplies Group Encoded', 'Opportunity Result Encoded', and 'Opportunity No. Encoded'.

Region Encoded	Supplies Subgroup Encoded	Competitor Type Encoded	Route to Market Encoded	Supplies Group Encoded	Opportunity Result Encoded	Opportunity No. Encoded
1	8	0	2	2	0	1,675,224
2	1	0	0	1	1	1,641,954
3	2	2	2	0	0	1,658,010
4	5	2	2	2	1	1,674,727
5	6	0	2	2	0	1,675,224

For more information about how to include scripts in your flow, see [Use R and Python scripts in your flow](#) on page 342.

## Save and Share your work

### Spot incompatible features as you build your flow

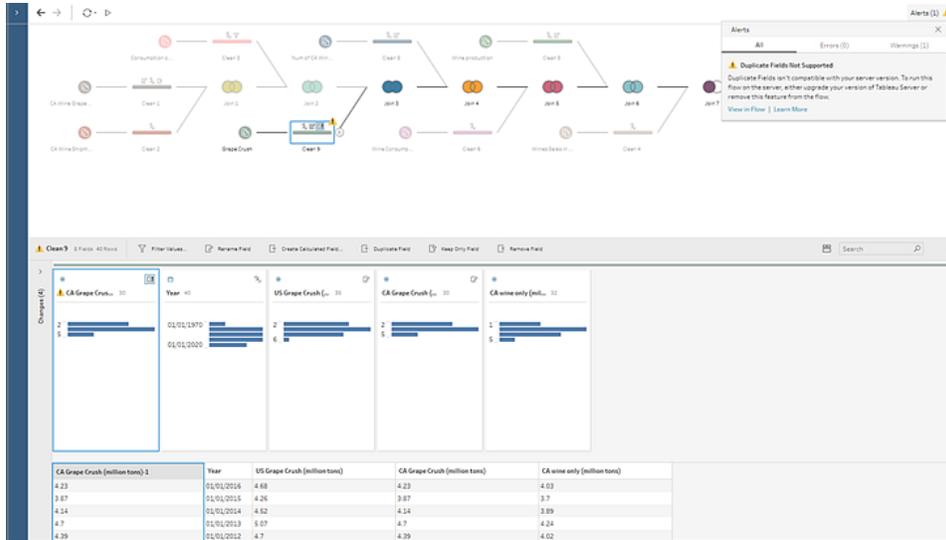
Tableau Prep Builder releases new versions every month. If new features or connectors are introduced in a new version and you plan to publish your flow to an older version of Tableau Server or Tableau Online, compatibility may be an issue. Currently you can see if you have incompatible features when you publish your flow, but at that point you've already built your flow, so going back to remove incompatible features can take time.

In this release, compatibility alerts are more transparent. You can now see any incompatible features as you build your flow, so that you can make informed decisions about the features you include in the moment.

Simply sign into your Tableau Server, then as you build your flow, alerts will display if you choose a feature that isn't supported in your version of Tableau Server. Click **Alerts** in the top right corner of the canvas to view all alerts and errors or hover on the alert on the step or annotation in the flow pane to view the alert details.

## Tableau Prep Help

Click the **View in Flow** link to quickly navigate to the step, annotation, field, or change the warning is associated with. The step, field and change are all marked with an alert icon and are highlighted so you can quickly find and address the issue and continue with your flow.



For more information about resolving compatibility issues, see [Version Compatibility with Tableau Prep](#) on page 427.

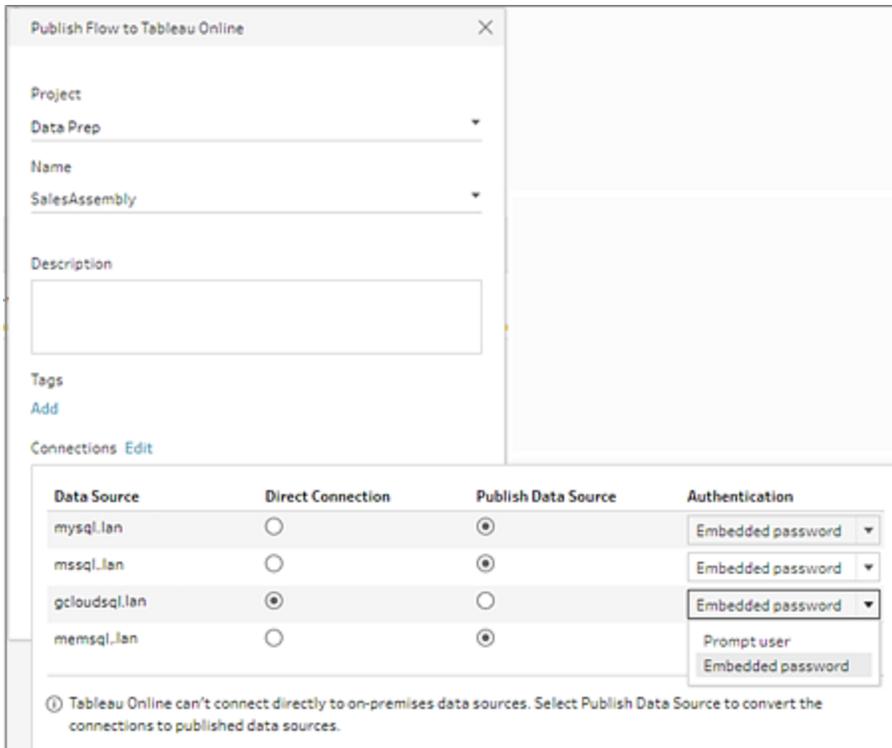
## Keep Flow Data Fresh

### Tableau Data Management Add-on Includes Tableau Prep Conductor

Tableau Prep Conductor is included in the separately licensed Data Management Add-on for Tableau Server or Tableau Online. For more information, see [Licensing Tableau Prep Conductor](#) on page 449.

### Publish flows to Tableau Online

You can now publish your flows to either Tableau Server or Tableau Online and run them on a schedule to keep data fresh. Tableau Online doesn't support direct connections to on-premises data sources. If you publish a flow to Tableau Online that connects to an on-premises data source, you can edit your connection to automatically convert the connection to a published data source.



Publish Flow to Tableau Online

Project  
Data Prep

Name  
SalesAssembly

Description

Tags  
Add

Connections Edit

Data Source	Direct Connection	Publish Data Source	Authentication
mysql.tan	<input type="radio"/>	<input checked="" type="radio"/>	Embedded password
mssql.tan	<input type="radio"/>	<input checked="" type="radio"/>	Embedded password
gcloudsql.tan	<input checked="" type="radio"/>	<input type="radio"/>	Embedded password
memsql.tan	<input type="radio"/>	<input checked="" type="radio"/>	Prompt user Embedded password

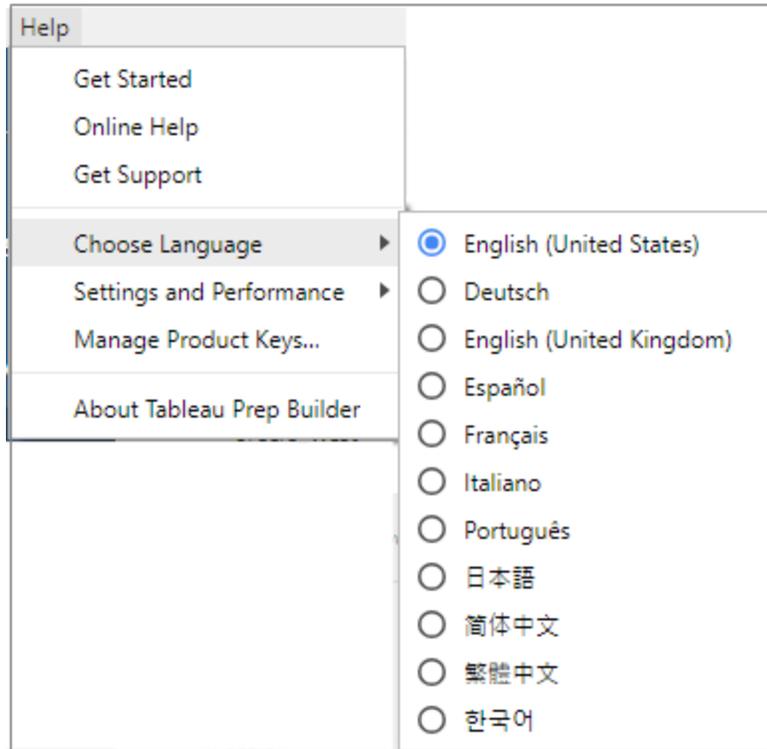
ⓘ Tableau Online can't connect directly to on-premises data sources. Select Publish Data Source to convert the connections to published data sources.

For more information about publishing flows to Tableau Online, see [Publish a Flow to Tableau Server or Tableau Online](#) on page 479.

## Additional Enhancements

### Tableau Prep Builder now in Italian

You can now configure your user interface (menus, messages, etc.) in one of 11 different languages. For more information about configuring your display language, see [Set your display language](#) in the Tableau Desktop and Tableau Prep Builder deployment guide



## Added in version 2019.2.3

### Examine and Filter Your Data

- **Select specific values to filter** on the next page
- **Duplicate fields in one click** on page 55

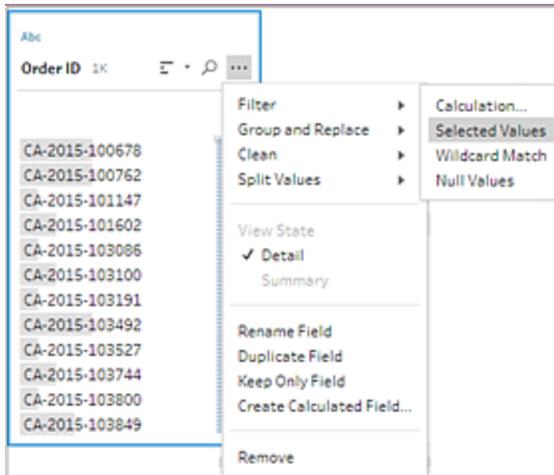
### Clean and Shape Data

- **Fix invalid data role values with fuzzy matching and cleaning recommendations** on page 56

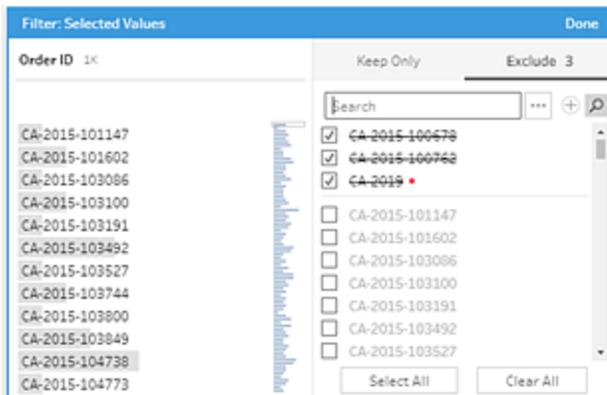
## Examine and Filter Your Data

### Select specific values to filter

With the new **Selected Values** filter, you can now pick and choose the values that you want to keep or exclude for a field, even values that aren't in your sample. In the Profile pane, Results pane or data grid click the **More options** ... button then select **Filter > Selected Values**.



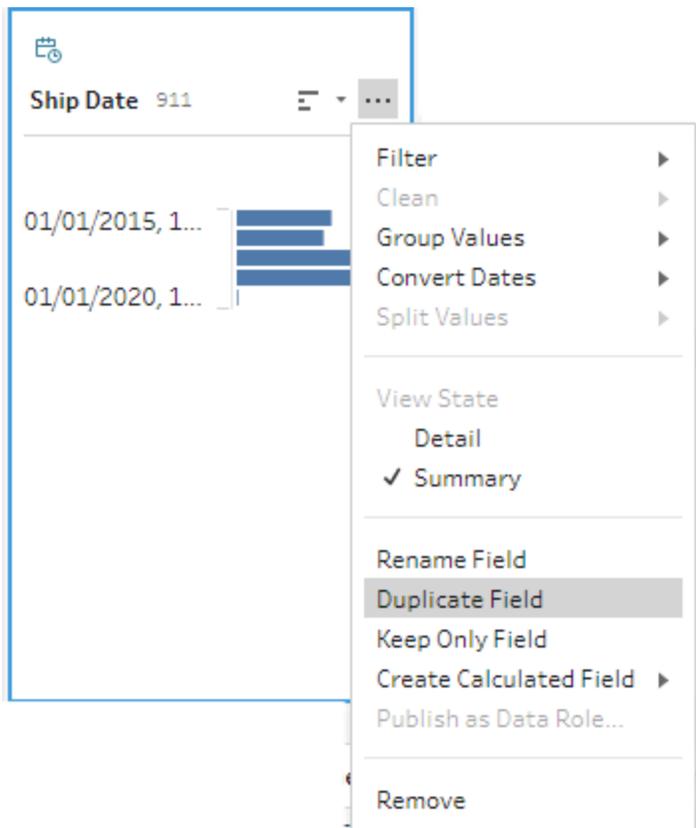
This new visual indicator lets you select the values that you want to keep or exclude and visually shows you what you've selected. If you are working with a sample of your data and want to include or exclude values that aren't in the sample you are working with, simply add the values you need and Tableau Prep Builder applies the keep or exclude option to these new values too.



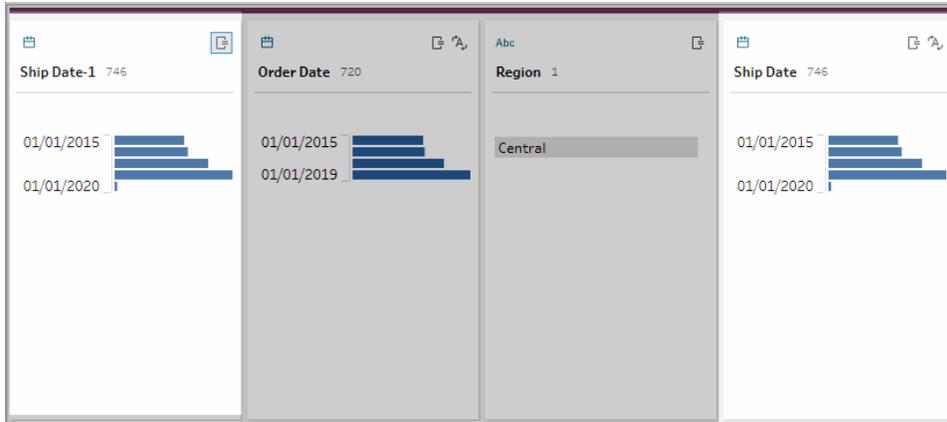
For more information about filtering field values, see [Examine Your Data](#) on page 245.

## Duplicate fields in one click

In prior releases if you wanted to experiment with your cleaning operations on a field but didn't want to change the original data, you would have to write a calculation to duplicate the field. Now you can easily duplicate your fields in one click. Select the field you want to duplicate, then from the **More options** menu, select **Duplicate Field**.



A new field is created and placed in the far left of the Profile pane, data grid, or Results pane with the same name and a modifier. For example, "Ship Date -1".

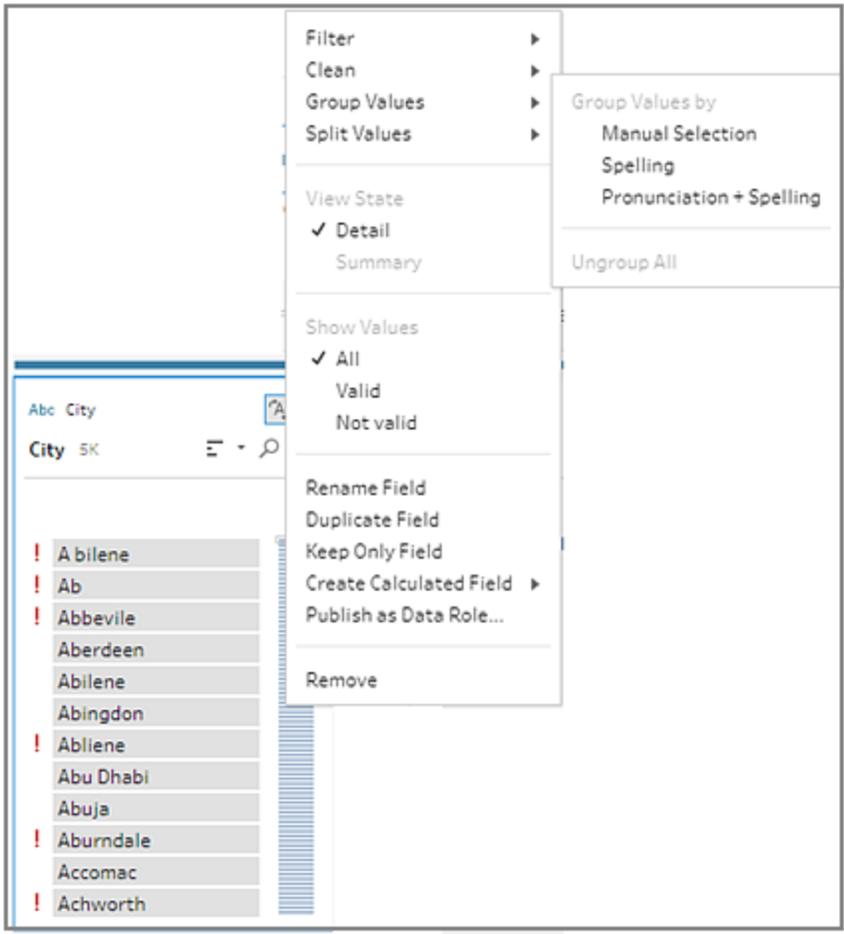


For more information about duplicating fields and other cleaning options, see [Clean and Shape Data](#) on page 277 [Apply cleaning operations](#) on page 281

## Clean and Shape Data

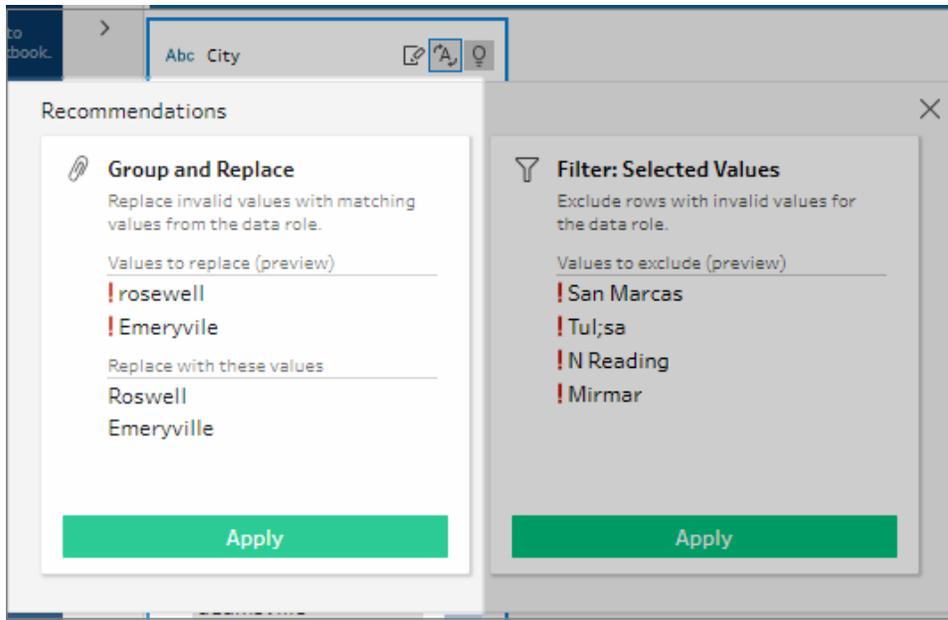
Fix invalid data role values with fuzzy matching and cleaning recommendations

You can use data roles to quickly identify field values that aren't valid. After you assign the data role you can use one of two fuzzy matching algorithms; **Spelling** and **Spelling + Pronunciation** to quickly group and match invalid values for the data role to similar standardized values for that data role.



In addition to suggesting data roles for your fields. Tableau Prep Builder can now also suggest how to automatically fix invalid values for fields assigned to a data role using the **Spelling** and

**Spelling + Pronunciation** algorithms. If a suggested fix is detected, a light bulb  icon appears on the profile card. Click the icon and apply the suggested change to automatically group and replace invalid values with similar standardized values for that data role.



This feature is only available for the following data roles:

- Airport
- City
- Country/Region
- County
- State/Province

For more information about applying data roles to your fields and using group and replace to fix invalid values for data roles, see [Use Data Roles to Validate your Data](#) on page 262.

## Added in version 2019.2.2

### Connect to Data

- [Connect to more data with the Other Databases \(ODBC\) connector](#) on the facing page
- [Specify an Initial SQL command when connecting to your data](#) on the facing page

### Examine and Filter your Data

- **Keep only the fields you need while cleaning your data** on the next page

### Clean and Shape Data

- **Rearrange steps in your flow** on the next page

## Connect to Data

### Connect to more data with the Other Databases (ODBC) connector

If you need to connect to data sources that aren't listed in the **Connections** pane, you can connect to any data source using the **Other Databases (ODBC)** connector that supports the SQL standard and implements the ODBC API. Connecting to data using the **Other Databases (ODBC)** connector works similarly to how you might use it in Tableau Desktop, however there are a few differences:

- You can only connect using the DSN (data source name ) option.
- To publish and run your flow in Tableau Server, the server must be configured using a matching DSN.
- There is a single connection experience for both Windows and MacOS. Prompting for connection attributes for ODBC drivers (Windows) isn't supported.
- Only 64-bit drivers are supported by Tableau Prep Builder.

For more information about connecting to data using the Other Databases ODBC connector, see [Connect to Data on page 177](#).

### Specify an Initial SQL command when connecting to your data

You can now specify an Initial SQL command, when connecting to databases that support it, that will run when a connection is made to the database. For example when connecting to Amazon Redshift, you can enter a SQL statement to apply a filter when connecting to the database just like adding filters in the Input step. The SQL command will apply before data is sampled and loaded into Tableau Prep Builder.

If you change the Initial SQL command and refresh the Input step, the Initial SQL command is run again and the Input step is updated. When you run the flow, the initial SQL command is run before processing all of the data and if you schedule flows on Tableau Server, the initial SQL is run every time as part of the data loading experience.

For more information, see [Connect to Data on page 177](#).

Amazon Redshift

Amazon Redshift

Server:  Port:

Database:

Enter information to sign in to the database:

Username:

Password:

Require SSL (recommended)

Hide Initial SQL

Sign In

Initial SQL

Add SQL statements to be run at connect time.  
Learn more

Insert

- FlowName
- TableauApp
- TableauVersion

**Note:** Parameters are not yet supported for Initial SQL in Tableau Prep Builder.

## Examine and Filter Your Data

### Keep only the fields you need while cleaning your data

In prior releases you could remove unwanted fields in the Input step by clearing the check boxes after connecting to your data, In a cleaning or action step you could select one or more fields and simply right-click to remove them. Now, you can select one or more fields in the Profile pane or data grid and right-click to keep only the selected fields and all other fields are removed.

For more information, see [Keep or remove fields on page 256](#).

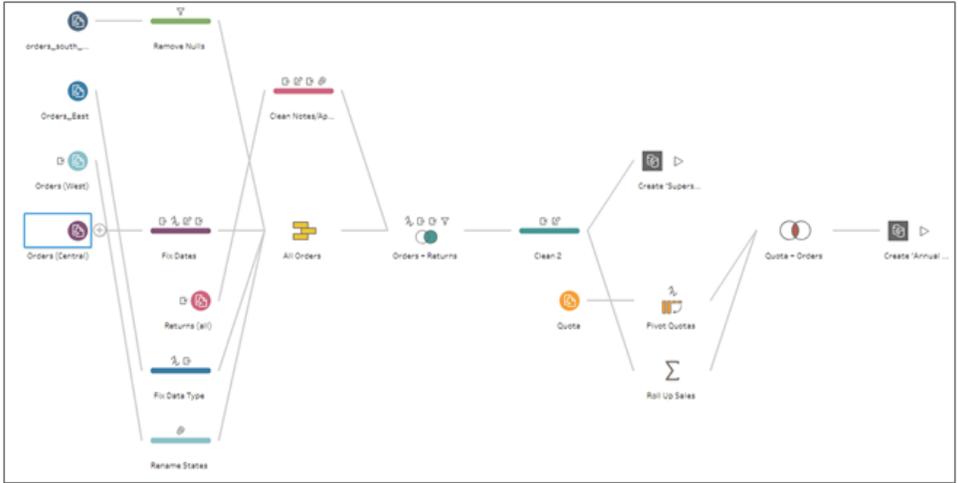
## Clean and Shape Data

### Rearrange steps in your flow

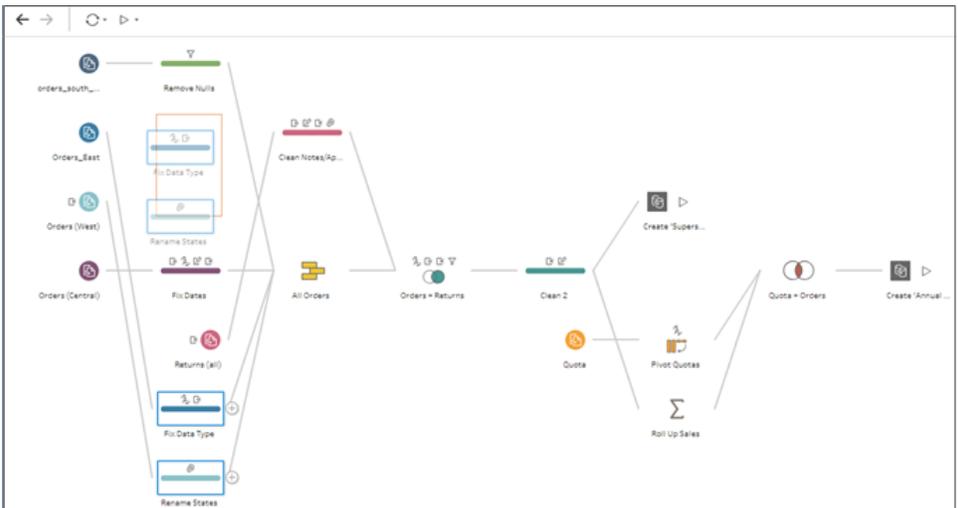
Have you ever built a large complicated flow, but the default layout that Tableau Prep Builder uses makes your flow hard to follow? Well now you can select and move your steps in the canvas to organize your flow in a way that makes sense to you. For example, you can fix crossed flow lines, move your flow steps to clean up extra white space, or rearrange your flow steps to show a clear sequence of events.

The following flow is confusing and hard to follow:

# Tableau Prep Help



Using this new feature, you can select one or more steps in the flow and drag them up, down, left or right and drop them right where you want them.



**Note:** Some restrictions do apply and flow steps can't be moved to a position that disrupts the left-to-right process flow. When dragging flow steps to an allowed location, an orange box displays. If the location isn't allowed, no orange box displays and the steps return to their original location when you try to drop them.

For more information , see [Build and Organize your Flow](#) on page 226.

Added in version 2019.2.1

### Connect to Data

- [Connect to more data with the Other Databases \(ODBC\) connector](#) on page 59

### Keep Flow Data Fresh

- [View file safe list locations when publishing a flow](#) below

### Additional Enhancements

- [Select from 10 different languages for your user interface](#) on the facing page
- [Quickly find your flow on Tableau server with flow thumbnail views](#) on page 64

## Connect to Data

### Connect to more data with new database connectors

We've added more connectors to help you connect to and clean your data. Now you can connect to data stored in the following databases:

- Amazon Athena
- Other Databases (JDBC)

For more information about connecting to specific connectors, see [Supported Connectors](#) in the Tableau Desktop and Web Authoring help. For more information about connecting to data to build a flow see [Connect to Data](#) on page 177.

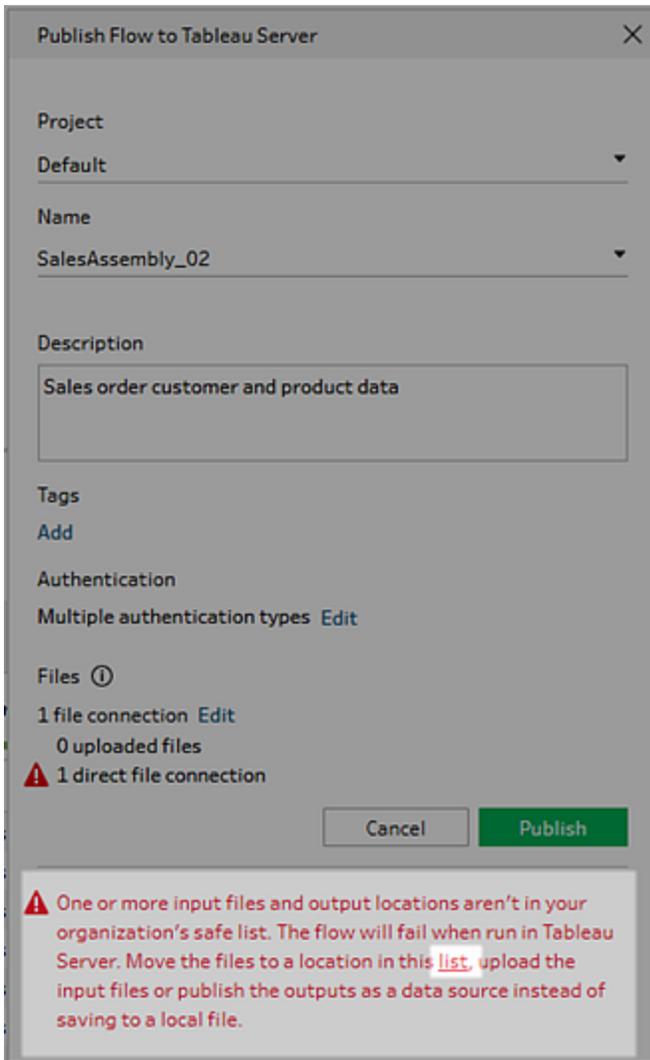
## Keep Flow Data Fresh

### View file safe list locations when publishing a flow

You can publish a flow to Tableau Server to automatically run your flows on a schedule and refresh the flow input or output using Tableau Prep Conductor. If your flow includes input or output steps with connections to a network share, your system administrator must include the file locations in your organization's safe list ahead of time, otherwise when you try to run the flow in Tableau Server, it will fail.

In Tableau Prep Builder version 2019.2.1 and later, if you publish a flow that includes input or output steps with connections to a network share, you are notified at publishing time if the files

need to be included in your organization's safe list. To see safe listed locations, simply click the link in the warning message and move your files to one of the locations shown.



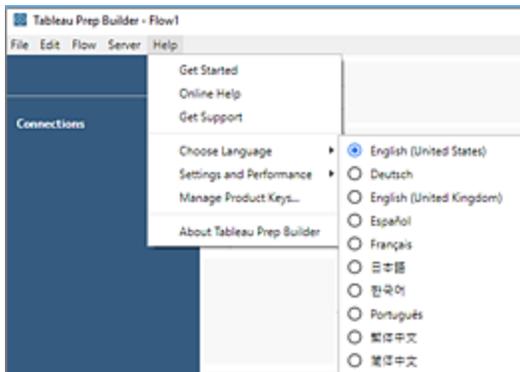
For more information about publishing flows, see [Publish a Flow to Tableau Server or Tableau Online](#) on page 479. For more information about how to add file locations to your organization's safe list, see [Step 4: Safe list Input and Output locations](#) on page 474.

## Additional Enhancements

Select from 10 different languages for your user interface

Tableau has added two additional languages that you can choose from to configure your user interface (menus, messages, etc.):

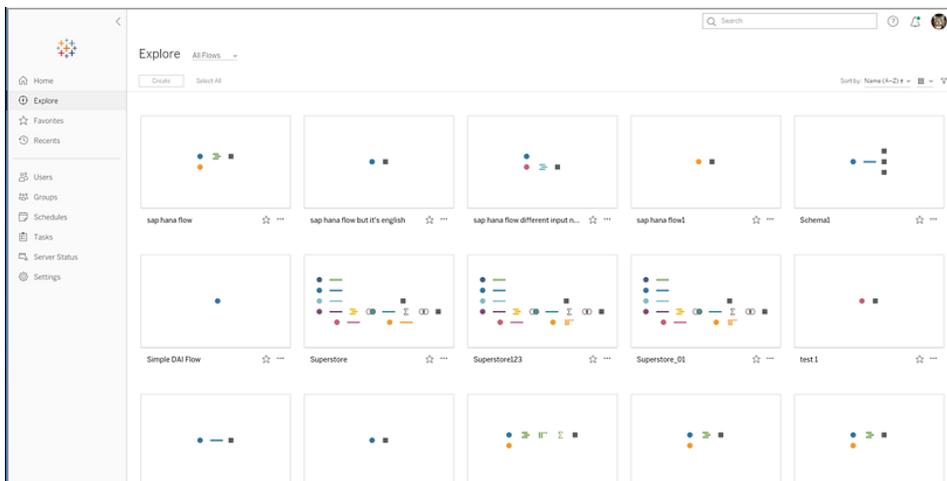
- en\_GB (British English)
- zh\_TW (Traditional Chinese)



For more information about configuring your display language, see [Set your display language](#) in the Tableau Desktop and Tableau Prep Builder deployment guide.

### Quickly find your flow on Tableau server with flow thumbnail views

When you publish your flows to Tableau Server, you can now switch to the thumbnail view and view a graphic representation of your flow layout to help you quickly spot your flow at a glance.



Added in version 2019.1.4

### Connect to Data

- [Connect to more data with new database connectors](#) below

### Clean and Shape Data

- [Group similar values in a field by data role](#) below
- [Adjust your results when grouping field values](#) on page 67

## Connect to Data

### Connect to more data with new database connectors

We've added even more connectors to help you connect to and clean your data. Now you can connect to data stored in the following databases:

- SAP HANA
- Azure SQL Data Warehouse
- MariaDB

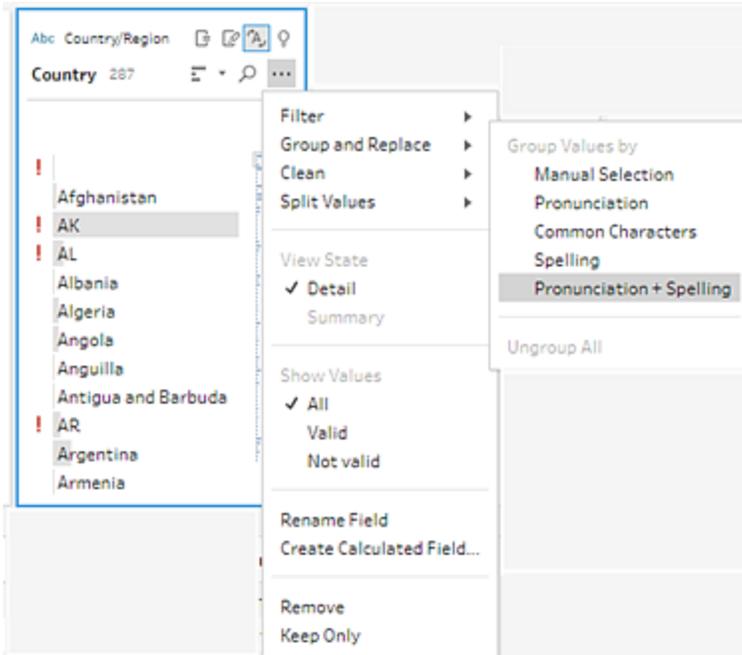
**Note:** When connecting to data using SAP HANA, prompting for variables and parameters when opening a flow and using Initial SQL to query the connection isn't supported.

For information about connecting to specific connectors, see connection details in the [Supported Connectors](#) section of the Tableau Desktop and Web Authoring help. For more information about connecting to data to build a flow see [Connect to Data on page 177](#).

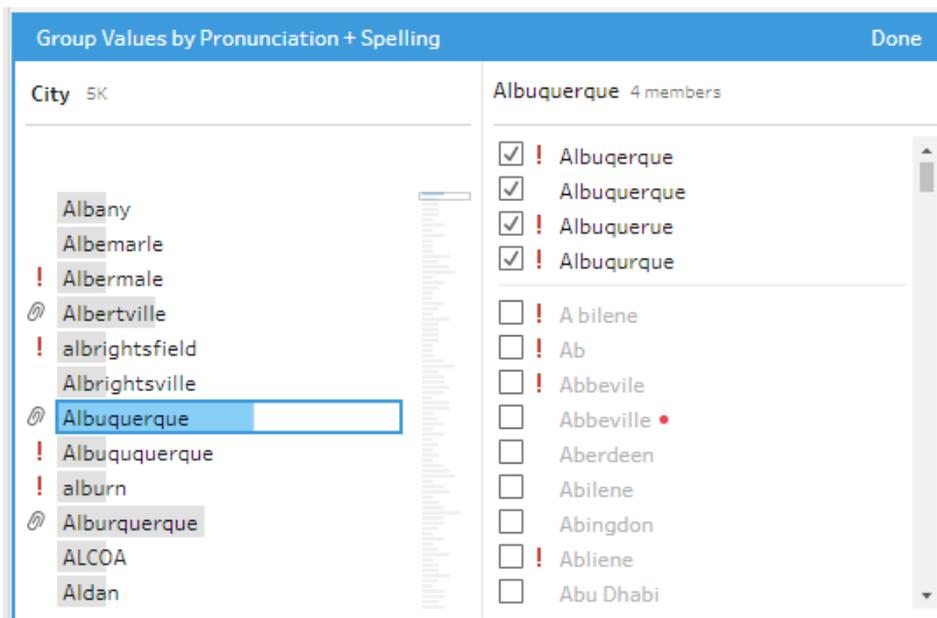
## Clean and Shape Data

### Group similar values in a field by data role

In Tableau Prep Builder version 2018.2.3 we introduced data roles to help you standardize field values and quickly find values that weren't valid. Now if you assign a data role to your fields, you can use that data role to match and group values with the standard value defined by your data role. Simply assign a data role to your field, then select **Data Role Matches** from the **Group and Replace** menu. This new option then matches invalid values to the most similar valid value based on spelling and pronunciation.



For example if you have a field that lists countries/regions such as Saint Martin and Saint Maarten, and you assign the **Country/Region** data role to the field, you can group fields using the new **Data Role Matches** option and map these values to the standardized data role value "Saint-Martin". If the standardized spelling of the value doesn't exist in your data set, Tableau Prep Builder automatically adds it to the group for you and groups the matching values using this standard value.



This feature applies to the following data roles and is currently only supported for U.S.English.

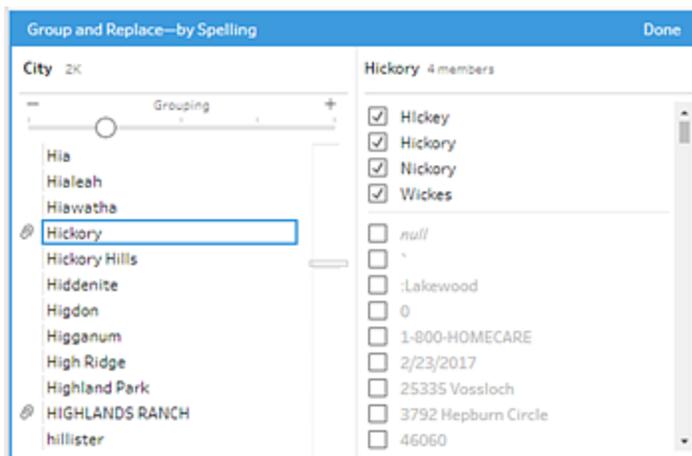
- Airport
- City
- Country/Region
- County
- State/Province

For more information about assigning data roles to a field or using data roles to group values, see [Use Data Roles to Validate your Data](#) on page 262.

### Adjust your results when grouping field values

When you use the **Group and Replace** cleaning option to group similar values by **Spelling** or **Pronunciation**, you can now use a simple slider on the field to adjust how strict the grouping parameters are, giving you more control over your results.

Select from 5 threshold settings to control the number of values included in a group and the number of groups that get created.



For more information about grouping fields using fuzzy matching, see [Edit field values](#) on page 295.

## Added in version 2019.1.3

**Connect to Data**

- **Quickly join your data based on table relationships** below

### Clean and Shape Data

- **See all cleaning recommendations in the toolbar** on page 70

### Additional Enhancements

- **Find specific changes in your flow** on page 70
- **Manage recently viewed flows from the Start page** on page 71

## Connect to Data

### Quickly join your data based on table relationships

When you connect to databases that include tables where table relationships are defined, such as Vertica or Microsoft SQL Server, Tableau Prep Builder can now detect and show this information.

For example, you can now see which fields in a table are unique identifiers and which fields are related fields (foreign key) as well any related tables for these fields.

A new column called **Linked Keys** shows in the Input pane with an icon next to the fields that are unique identifiers, related fields or a combination of both.

Linked keys identify one or more fields that link to other tables.

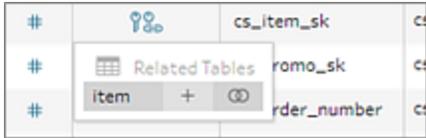
Fields can be:

- A unique identifier (primary key) in this table.
- Related fields (foreign key) to a unique identifier in another table in the database.
- Both a unique identifier and related fields.

field name	original field name	changes	sample
cs_sold_date_sk	cs_sold_date_sk		2,450,816, 2,41
cs_sold_time_sk	cs_sold_time_sk		33,151, 29,066
cs_ship_date_sk	cs_ship_date_sk		2,450,886, 2,41
cs_bill_customer_sk	cs_bill_customer_sk		96,466, 49,302

In the **Linked Keys** field, click on a related field or combination field to view related tables, then in one click, add the related table to your flow or create a join.

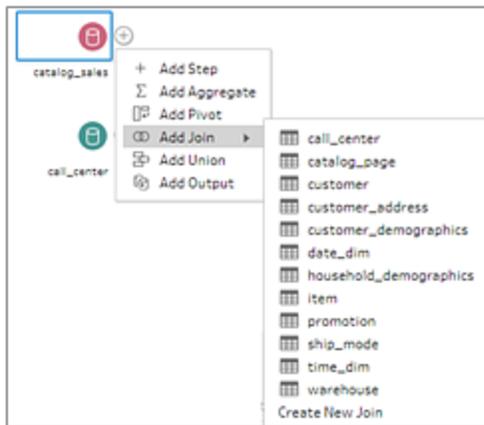
## Tableau Prep Help



When creating a join, Tableau Prep Builder uses the defined field relationship to join your tables and shows a preview of the fields that define the join clause. From there you can click on the new Join step to clean and edit your join conditions as needed.



For tables that contain related fields, you can also see a list of all related tables and create a join from the menu in the Flow pane. From the **Add Join** menu option, select the table that you want to join on from the list and Tableau Prep Builder creates the join based on the fields that make up the relationship between the two tables.



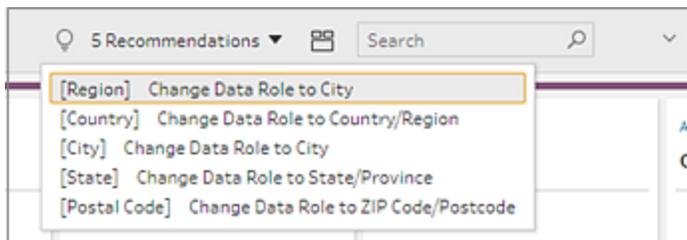
This feature is available for any supported database connector where table relationships are defined. For more information about using **Linked Keys** to add or join tables, see [Join data in the Input step](#) on page 223.

## Clean and Shape Data

## See all cleaning recommendations in the toolbar

If Tableau Prep Builder detects and provides cleaning recommendations for your fields, a light

bulb  icon appears on the Profile card for the field. Now you can see all cleaning recommendations for any field from the toolbar in a selected step in one convenient list.



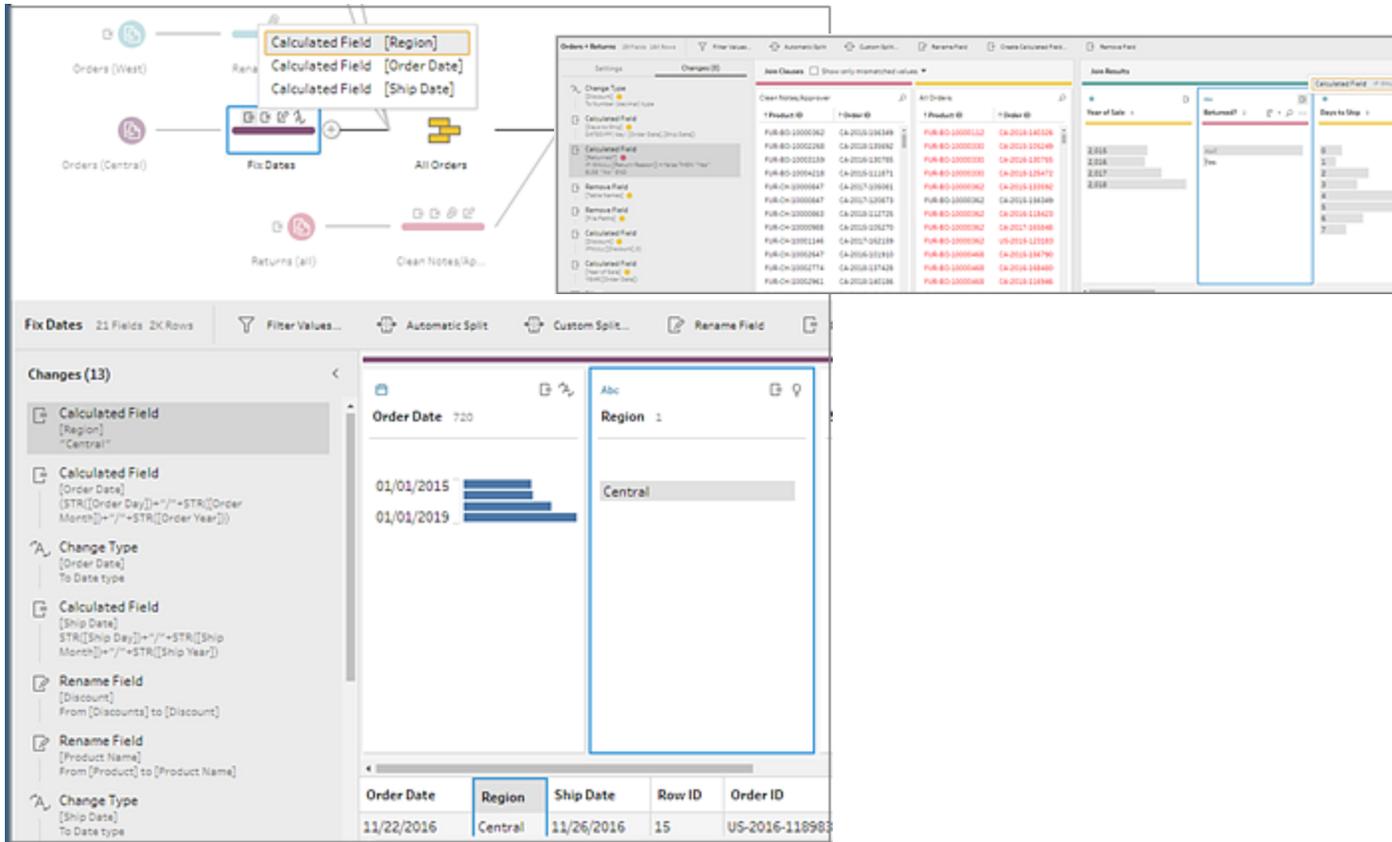
Simply click on an item in the list and Tableau Prep Builder takes you right to the field where you can apply the suggested change. For more information about cleaning recommendations, see [Apply cleaning operations using recommendations](#) on page 292.

**Note:** This option isn't available for Join, Input and Output step types.

## Additional Enhancements

### Find specific changes in your flow

You can now quickly find specific changes that you made in a flow by clicking on the change icon on a step in the Flow pane or on a profile card in the Profile or Results pane. Simply click on the icon that represents the change you are looking for then select the annotation from the list of changes. The change is highlighted in the **Changes** pane, **Profile** or **Results** pane and data grid if applicable.

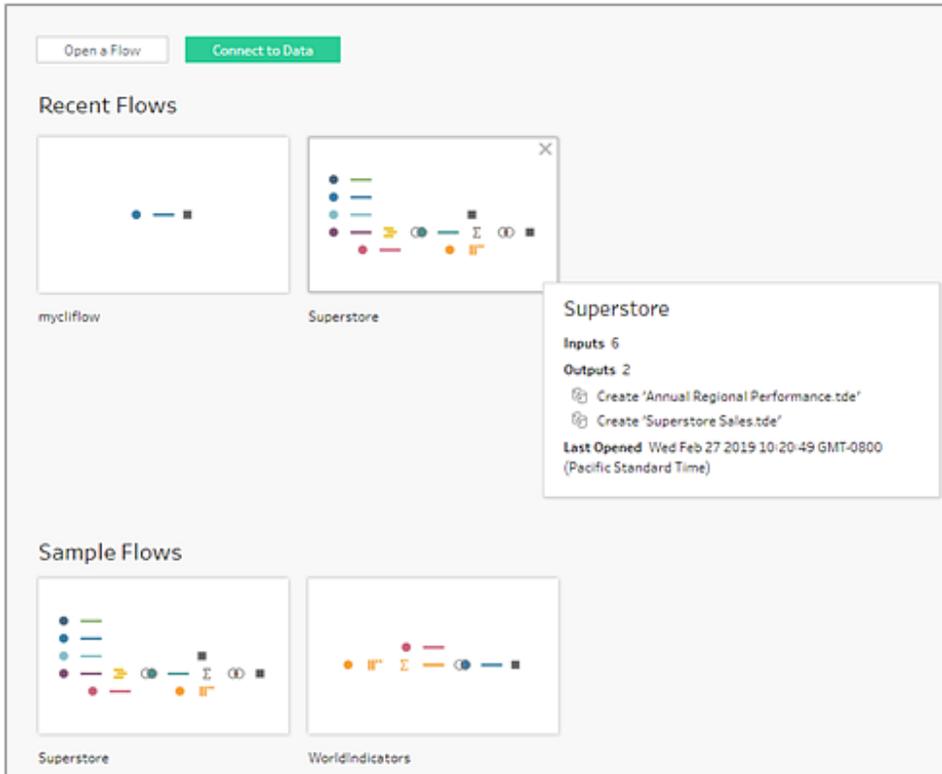


For more information about viewing your changes, see [View your changes on page 288](#).

### Manage recently viewed flows from the Start page

When you save a flow and close Tableau Prep Builder, a thumbnail for the flow is saved to your Start page so you can quickly find your most used flows. But as a data prep rock star, your Start page can get crowded fast! To help you quickly find the flow you need and reduce the clutter when you're finished working with a flow, we've added a few new features to the Start page.

- Improved graphics on the flow thumbnail more accurately represents the flow layout to help you spot your flow at a glance.
- If the graphic doesn't give you enough information, hover over a flow thumbnail to instantly view the input and output details for the flow as well as when it was last opened.
- Clear the clutter by removing recently viewed flows from the start page that you no longer need. This option removes the flow from the **Recent Flows** view only and won't delete the flow.



## Added in version 2019.1.2

### Keep Flow Data Fresh

- [Schedule flows to run automatically in Tableau Server](#) below

### Additional Enhancements

- [Help redesign](#) on the facing page

## Keep Flow Data Fresh

### Schedule flows to run automatically in Tableau Server

Add the new Data Management Add-on to Tableau Server version 2019.1 and later and you can use Tableau Prep Conductor to schedule and manage your flow runs. Publish a flow to Tableau Server, then schedule tasks to run the flow and automatically update your flow inputs

and outputs. Use the error and alert options and Administrative views to track and manage your flow processing health.

For more information, see [Keep Flow Data Fresh](#) on page 440.

## Additional Enhancements

### Help redesign

Updates have been made to help you navigate our content, including a new right-hand menu to quickly scan and select different topics on a page.

## Added in version 2019.1.1

### Clean and Shape Data

- [Pivot rows to columns](#) below
- [Use wildcard search to pivot fields](#) on the next page
- [Use descriptions to add context to changes](#) on page 75
- [Use cleaning recommendations to quickly split data in fixed-width text files](#) on page 77

## Clean and Shape Data

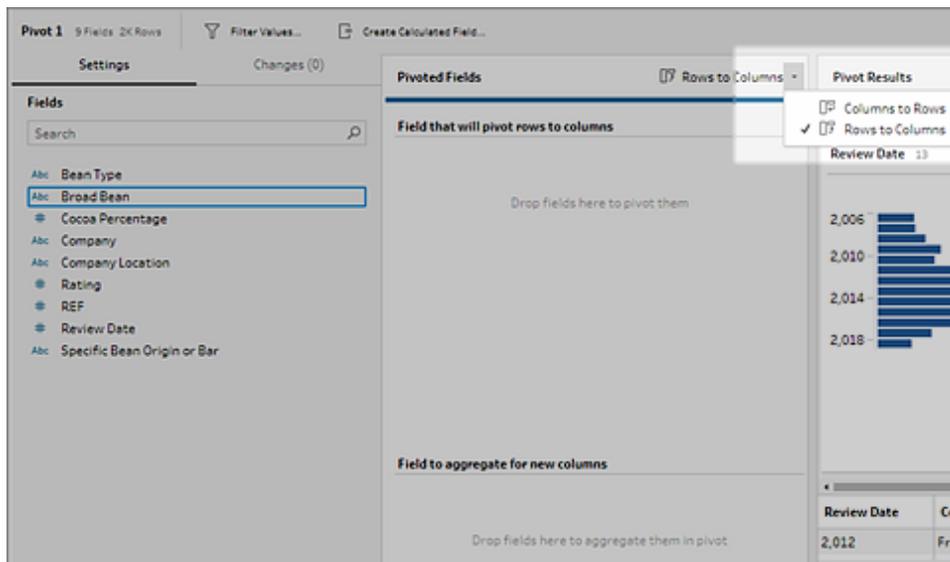
### Pivot rows to columns

If you work with data in a cross-tab or spreadsheet it might not be in the format you need to easily analyze it in Tableau. Sometimes your data may have many columns of data that need to be converted into rows, or you may have fewer columns but the data values represent multiple things.

To make shaping your data easier than ever, you can now choose the pivot option that is right for you. In a pivot step, you can now select one of the following options:

- **Columns to Rows:** Drag one or more fields to the **Pivoted Fields** pane to pivot columns to rows.
- **Rows to Columns:** Drag a field to the **Pivoted Fields** pane to create new columns

using the field values, then drag in the field to use to populate those columns and choose how you want to aggregate them.



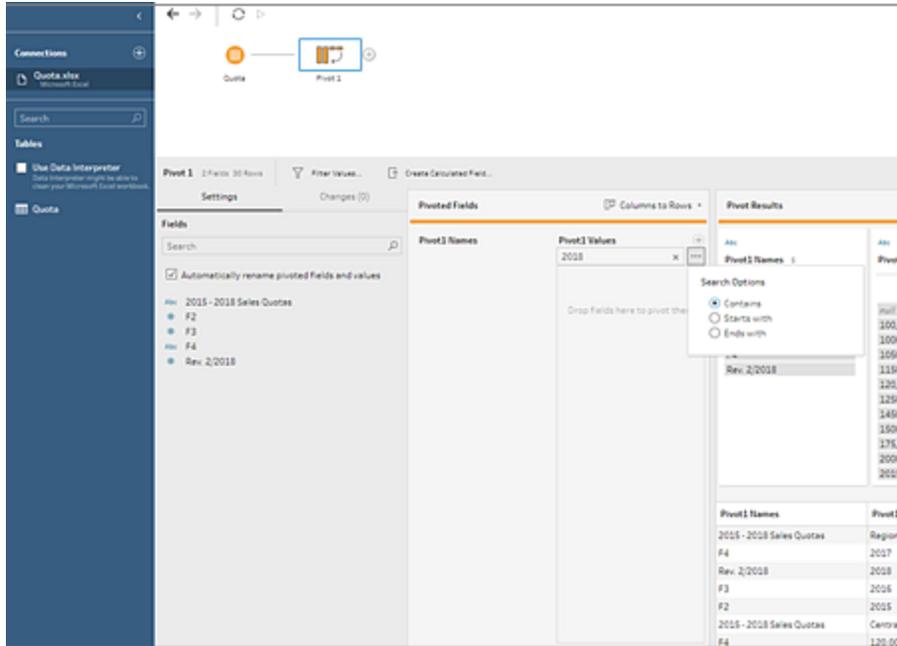
For more information, see [Pivot Your Data](#) on page 333

### Use wildcard search to pivot fields

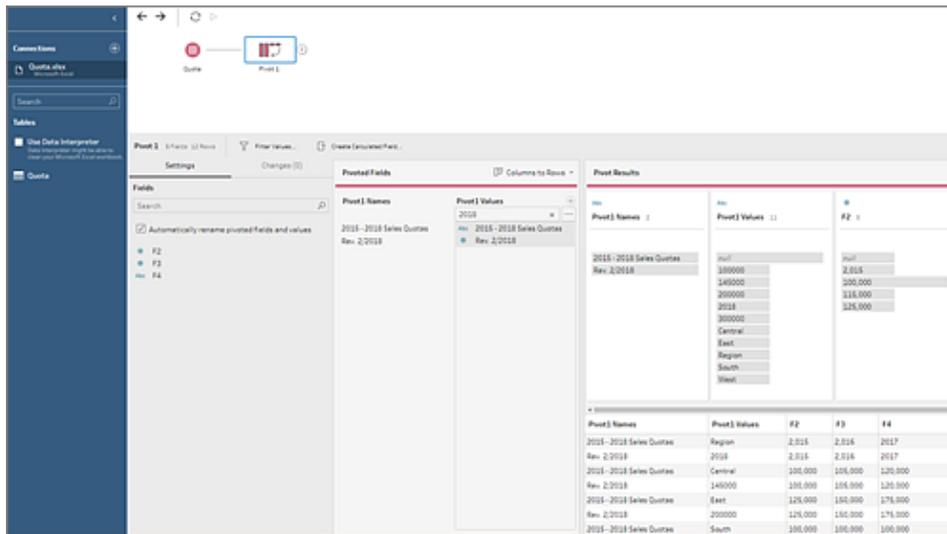
If you have a data set with a large number of fields or if fields are frequently added or removed over time, you can use a wildcard search when pivoting columns to rows to instantly pivot your data based on a wildcard pattern match. If new fields are added or removed that match the pattern, Tableau Prep Builder detects the schema change when you run the flow and the pivot results are automatically updated.

To use wildcard search to pivot your data, add a pivot step then click the **Click here to create wildcard pivot** link to open the wildcard search field. Enter a wildcard search pattern to find fields with names that match the values you entered. Click the **Search Options...** button to select whether you want to include fields that contain, start with or end with the pattern you entered.

# Tableau Prep Help



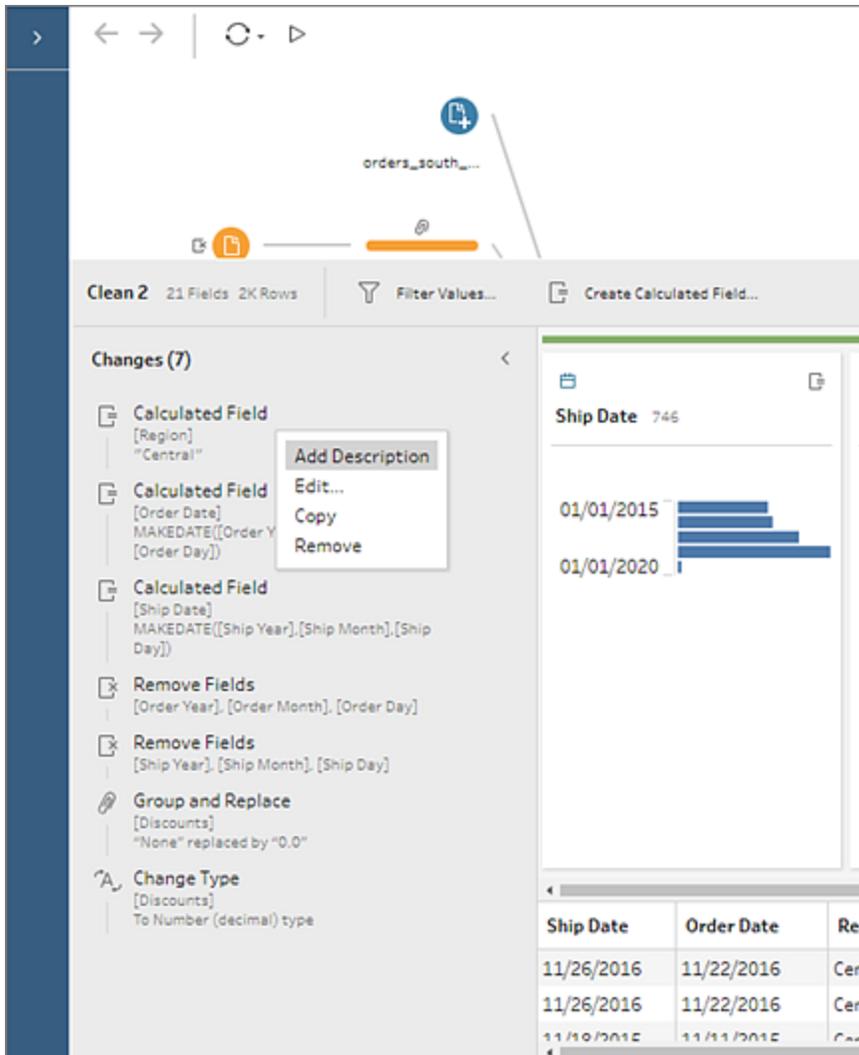
Click enter to apply the pattern and Tableau Prep Builder automatically pivots the fields.



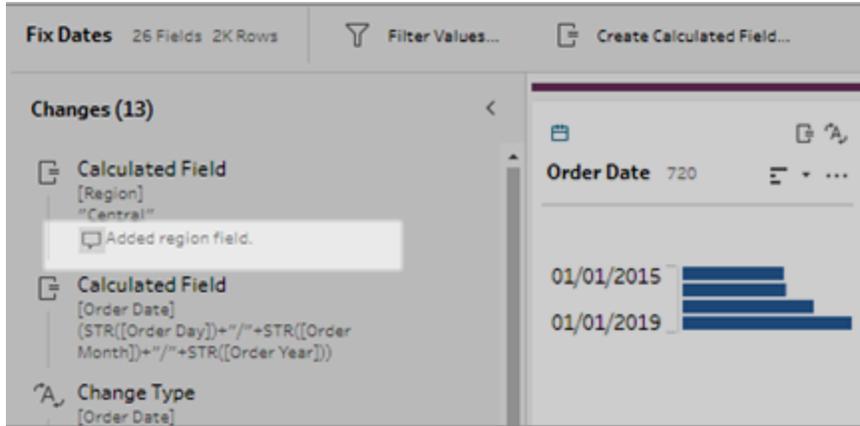
For more information, see [Pivot Your Data](#) on page 333

## Use descriptions to add context to changes

Add descriptions to any change in the **Changes** pane to add context to your cleaning operations. Simply open the **Changes** pane, right-click or Ctrl-click (Mac) on a change in the list and select **Add Description**. Then type a description in the text field that appears.



The description appears below the generated text for the change with a comment  icon.

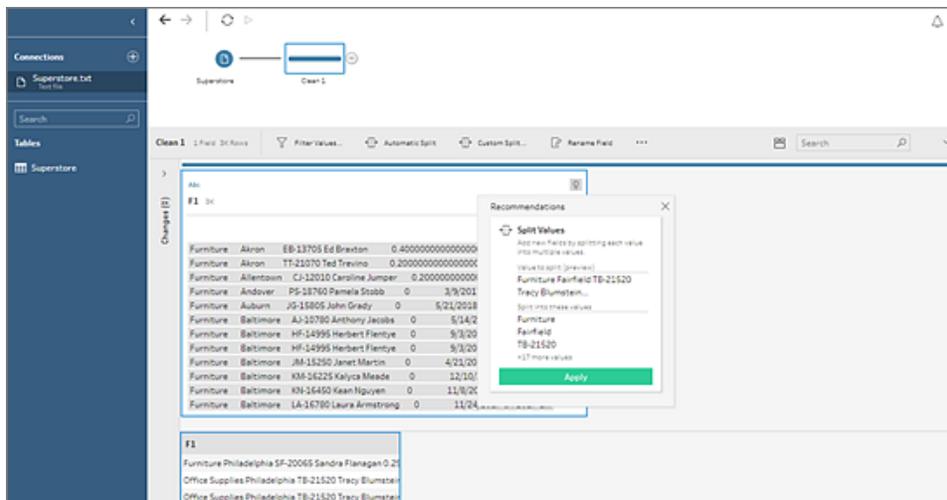


For more information see [Add descriptions to flow steps and cleaning actions on page 237](#).

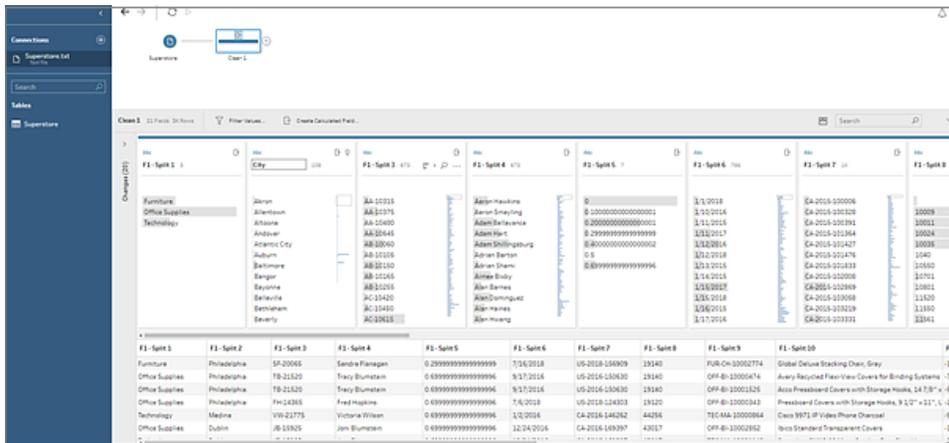
### Use cleaning recommendations to quickly split data in fixed-width text files

In prior releases if you work with data stored in fixed-width text files, files that contain strings of data values in a single column constrained by a fixed character limit, you might have had to perform some pre-cleaning on the file or use complex calculations to separate out the values into separate columns.

Now when you connect to this type of data source, the cleaning recommendations feature detects these types of columns and suggests split options for you. Simply connect to your data source then add a cleaning step. In the Profile pane, click on the recommendation icon on the profile card.



Click **Apply** to split the fields, then check the results and clean or rename each new field as needed.



For more information, see [Apply cleaning operations using recommendations](#) on page 292.

## Added in version 2018.3.3

### Connect to Data

- **Automatically refresh input unions when new files are added** on the facing page

### Clean and Shape Data

- **Reuse cleaning operations** on the facing page
- **Remove extra whitespace** on page 80

### Examine and Filter your Data

- **Quickly find where fields are used in a flow** on page 80

### Additional Enhancements

- [Open multiple windows of Tableau Prep Builder at once on page 81](#)
- [Turn off usage reporting after install on page 81](#)

## Connect to Data

### Automatically refresh input unions when new files are added

If you use a wildcard pattern to find and union Microsoft Excel or text (.csv) files in the input step, new files that are added to the same folder that match the pattern are automatically included in the union the next time you open the flow or run it from the command line.

**Note:** Packaged flow files (.tflx) won't automatically pick up new files because the files are already packaged with the flow. To include new files, open the flow file (.tfl) to pick up the new files then repackage the flow to include the new file data.

For more information about unioning files in the Input step, see [Union files and database tables in the Input step on page 217](#).

## Clean and Shape Data

### Reuse cleaning operations

When cleaning your data you often perform the same cleaning operations or actions over and over throughout your flow. To help make cleaning and shaping your data more efficient, we've added the ability to copy and paste these operations or actions throughout your flow so you can perform a cleaning operation or action once, then reuse it where you need it.

- Copy one or more steps to use them in another area of your flow. This option is not available for Input steps that include a wildcard union.
- Copy an operation from the **Changes** pane in one step and paste it in the **Changes** pane for another step to apply that same operation in that step.
- Drag and drop an operation from the **Changes** pane to a field in the **Profile** pane to apply that operation to a different field. You can also copy an operation in the **Changes** pane and drag and drop it to other fields in the step to apply that operation to multiple fields. This option is not available for operations that impact multiple fields, such as calculated fields.

For more information, see [Clean and Shape Data on page 277](#).

## Remove extra whitespace

We've added two new quick cleaning operations to help you remove extra whitespace in your field values:

- **Remove Extra Spaces:** Use this option with text fields values to remove leading and trailing whitespace and replace extra whitespace in-between characters with a single space.
- **Remove All Spaces:** Use this option to remove all whitespace from text values, including leading and trailing whitespace and any whitespace in between characters.

For more information, see [Edit field values](#) on page 295.

## Examine and Filter Your Data

### Quickly find where fields are used in a flow

When building your flow, if you aren't seeing all the field values that you expect, you can now easily trace everywhere a field was used - even back to where a field originated. Just select a field in the **Profile** pane or **Results** pane in a step and the steps in the flow pane will highlight. This shows you the path that field has taken in your flow, making troubleshooting your flow easier than ever.

The screenshot displays the Tableau Prep interface. At the top, a flow diagram shows data sources like 'Orders (Sales)' and 'Returns (Sales)' being joined and processed through steps such as 'All Orders', 'Orders + Returns', 'Clean 2', 'Join Sales', and 'Create Annual...'. Below the flow, the 'Orders + Returns' pane is active, showing a table of data with columns for Product ID, Order ID, and Order Date. The 'Clean 2' step is highlighted, and its 'Join Clauses' pane shows the 'Product ID' and 'Order ID' fields from both sources. The 'Join Results' pane shows a table with columns for 'Year of Sale', 'Returned?', and 'Days to Ship', with data for the years 2015, 2016, 2017, and 2018.

For more information, see [Trace fields in a flow](#) on page 253.

## Additional Enhancements

## Open multiple windows of Tableau Prep Builder at once

In Windows or on the Mac click **File>New** to open a new window for a flow instead of replacing the current window you are working in. When opening a flow file (.tfl or .tflx) this also opens a new window so you can easily work on or compare multiple flows at the same time.

## Turn off usage reporting after install

To help us improve Tableau Prep Builder, you can share usage pattern data with us. We never collect any specific user data, only anonymous usage data. For example data source connection types (such as .csv, sql or Amazon Redshift), large data sets versus small data sets, number of steps in a flow or types of operations used (but no data specifics such as step names or formulas used), and so on.

Your data is confidential and we will never share this information with anyone. But if you want to turn this option off after installation, you can. Go to **Help >Settings and Performance** and click on **Share Usage Data To Improve Tableau Prep Builder** to clear the check mark. For more information, see [Usage reporting](#) in the Tableau Desktop and Tableau Prep Builder Deployment guide.

## Added in version 2018.3.2

### Clean and Shape Data

- [Improve data quality fast using cleaning recommendations](#) below

### Additional Enhancements

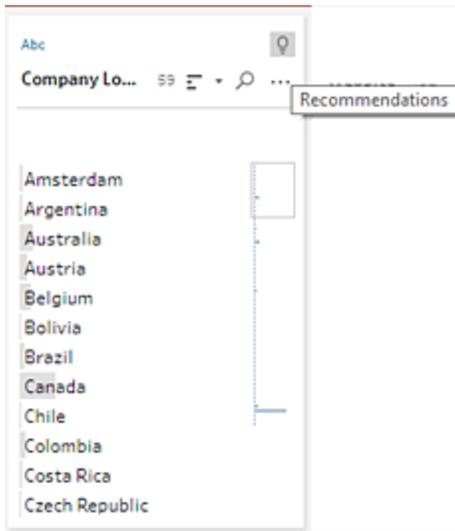
- [Added flexibility when running flows from the command line](#) on page 83
- [Performance improvements](#) on page 83

## Clean and Shape Data

### Improve data quality fast using cleaning recommendations

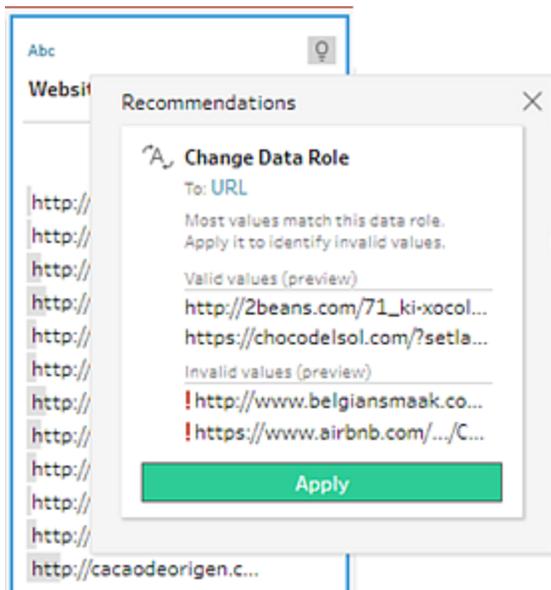
To help you find and fix problems with your data fast, Tableau Prep can now examine your data fields and suggest changes you can make to fix the problem. Tableau Prep examines your data

fields and when a recommended change is identified, a light bulb icon appears on the Profile card for the field.



Click the light bulb icon to see the recommended changes, then hover over the recommendations card and click **Apply** to automatically apply them to the field. The change is recorded in the **Changes** pane and can be removed at any time.

In the example below Tableau Prep identified the field values as URL's and recommends applying a data role to the field to help identify values that aren't valid.



This feature is available in all step types except Input, Output and Join step types. In this release, recommendation types include:

- Data roles
- Filter
- Replace invalid values with Null values
- Remove fields
- Trim spaces

For more information, see [Apply cleaning operations using recommendations on page 292](#).

## Other Enhancements

### Added flexibility when running flows from the command line

When running flows from the command line, if you connect to databases or publish output files to a server, you need a credentials .json file that includes all required credentials. In past releases if you only connected to databases or published the flow output to a server, you would still need to include the empty array in the credentials .json file or the process would fail.

Now you no longer need to include the empty array in the credentials .json file. For example, if you only connect to databases you no longer need to include the outputConnection array in the .json file.

For more information about running flows from the command line, see [Refresh flow output files from the command line on page 409](#).

### Performance improvements

To help make working with your flows faster and more efficient, we've made the following enhancements:

- Shutting down the product returns the memory space Tableau Prep was using right away.
- If you receive an unexpected error you can now retry your action or process to keep you in the flow.
- Improved performance when loading data or viewing data in a flow to reduce processing time.
- If you connect to the following connectors, you can now use a search field to quickly find your schema:

- Amazon EMR Hadoop Hive
- Cloudera Hadoop
- Hortonworks Hadoop Hive
- MapR Hadoop Hive
- Presto
- Spark SQL

## Added in version 2018.3.1

### Install and Deploy Tableau Prep

- [Change your default repository location](#) below

### Connect to Data

- [Clean data stored in PDF files](#) on the facing page
- [Wildcard union for database tables](#) on the facing page

### Clean and Shape Data

- [Replace field values with Null](#) on page 86
- [Apply cleaning operations in any step](#) on page 87

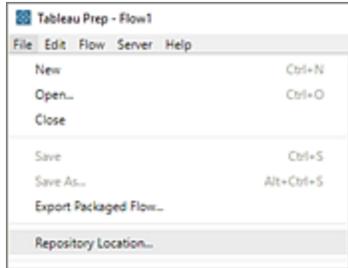
## Install and Deploy Tableau Prep

### Change your default repository location

By default, when you install Tableau Prep, the **My Tableau Prep Repository** is automatically installed in your Documents folder on your computer. But if you have restrictions about where you can store your flows and data sources, you can now move your My Tableau Repository to a different directory after Tableau Prep is installed.

To move your directory, open Tableau Prep, then from the top menu, select **File > Repository Location**. Select the folder where you want to move the repository.

## Tableau Prep Help



For more information, see [Change your My Tableau Prep Repository location](#) in the Tableau Desktop and Tableau Prep Deployment Guide.

## Connect to Data

### Clean data stored in PDF files

Analyzing data stored in PDF files can be difficult to work with. Now you can connect directly to your PDF files and clean your data using Tableau Prep.

For more information about how to connect to your data in PDF files, see [PDF file](#) in the Tableau Desktop help.

**Note:** Data connectors are not backward compatible. Flows that include these connectors may open in a prior version of Tableau Prep, but will have errors or can't run unless the data connections are removed.

### Wildcard union for database tables

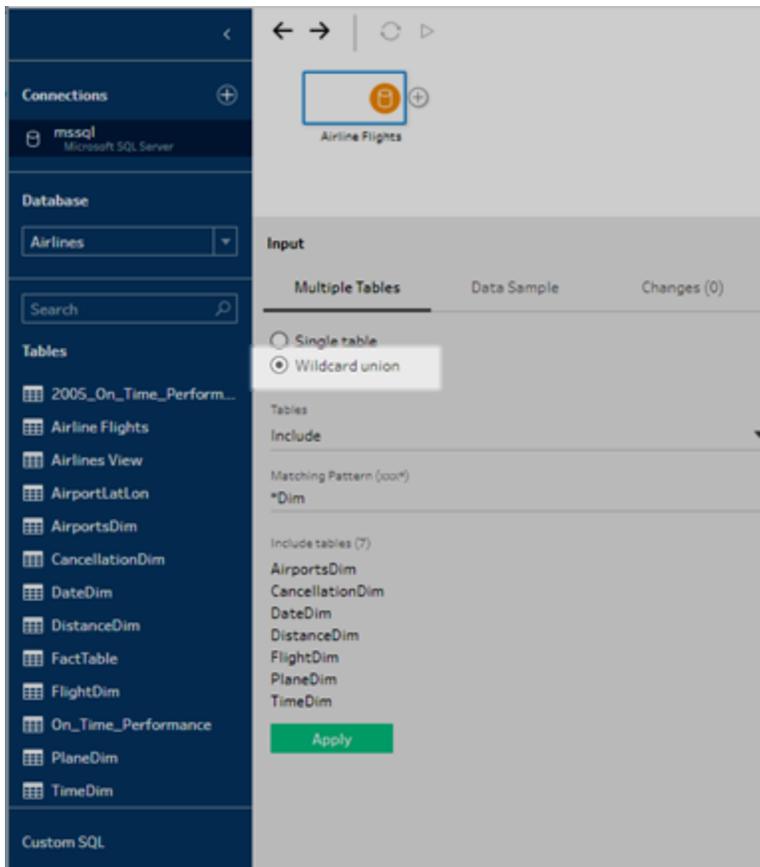
If you work with database tables stored in a single data source you can now union your tables in the input step using a wildcard search. You can then include all of the data from the selected tables in the Input step using the same process that you use to union multiple files in the Input step.

To use this type of union, the tables must be in the same data source and you must connect to a data source that supports wildcard union.

The following data sources support this type of union:

- Amazon Redshift
- Microsoft SQL Server
- MySQL

- Oracle
- PostgreSQL

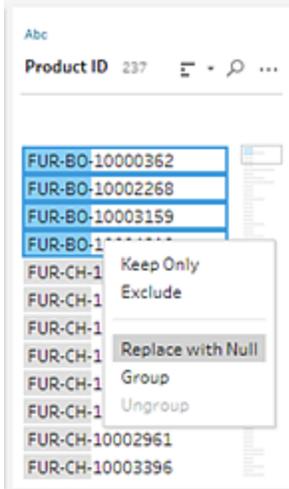


For more information, see [Union files and database tables in the Input step](#) on page 217.

## Clean and Shape Data

### Replace field values with Null

If you have data rows that you want to include in your analysis but you want to exclude certain field values you can change them to a Null value. Simply select the field values that you want to replace, then right-click (Ctrl+click on Mac) on the selected value and select **Replace with Null** from the menu.

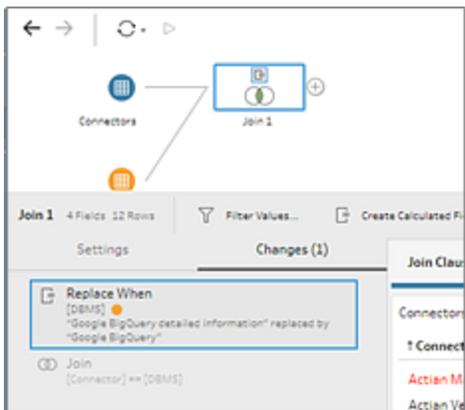


For more information about replacing field values, see [Edit field values](#) on page 295.

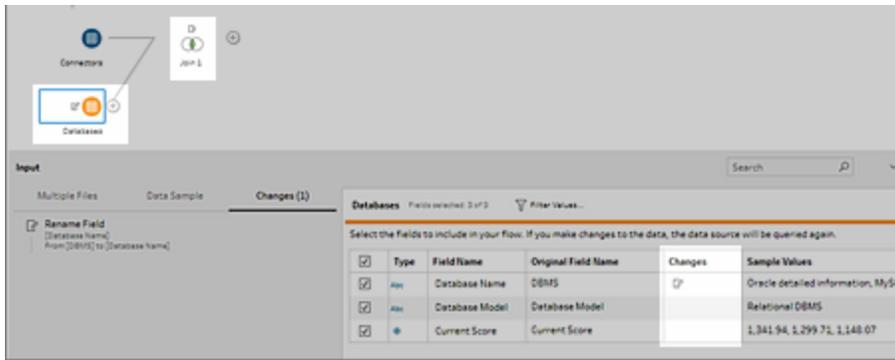
### Apply cleaning operations in any step

Fixing problems in your flow just got more efficient. Now if you spot problems in your data as you join, union, pivot or aggregate, you can fix these problems directly in that step without having to add an additional cleaning step.

Since the order of operations matters, the cleaning operation is placed either before or after the join, union, pivot or aggregate and this information is tracked in the **Changes** pane for that step.



Annotations for the change are also added to the step in the Flow pane. For Input steps, annotations show to the left of the step and are added to the Input field list so you can easily see which field had changes applied. For all other step types, the annotations show above the step in the Flow pane.



Some cleaning operations must still be performed in a cleaning step and only some cleaning operations are available for Input and Output steps. The table below lists the cleaning operations available for each step type:

	Input	Clean	Aggregate	Pivot	Join	Union	Output
Filter	X	X	X	X	X	X	
Group and Replace		X	X	X	X	X	
Clean		X	X	X	X	X	
Split Values		X	X	X	X	X	
Rename Field	X	X	X	X	X	X	
Edit Value		X	X	X	X	X	
Change Data Type	X	X	X	X	X	X	
Create Calculated Field		X	X	X	X	X	
Remove Field	X	X	X	X	X	X	

For more information, see [About cleaning operations](#) on page 277.

## Added in version 2018.2.3

### Connect to Data

- [Connect to data stored in MongoDB Business Intelligence \(BI\) below](#)

### Examine and Filter Your Data

- [Specify a data role for your field values below](#)

### Join or Union Data

- [Fix mismatched fields directly in the join clause on page 91](#)

## Connect to Data

### Connect to data stored in MongoDB Business Intelligence (BI)

If you store your data in Mongo DB Business Intelligence, you can now connect to your data and clean it with Tableau Prep.

For more information about how to connect to your data using Mongo DB Business Intelligence, see [MongoDB BI Connector](#) in the Tableau Desktop help.

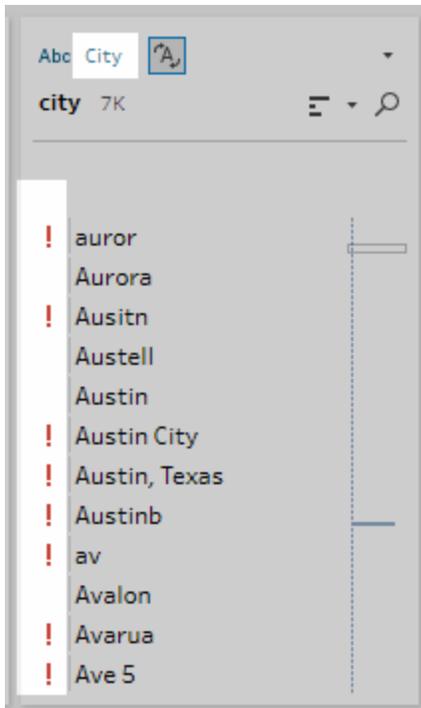
**Note:** Data connectors are not backward compatible. Flows that include these connectors may open in a prior version of Tableau Prep, but will have errors or can't run unless the data connections are removed.

## Examine and Filter Your Data

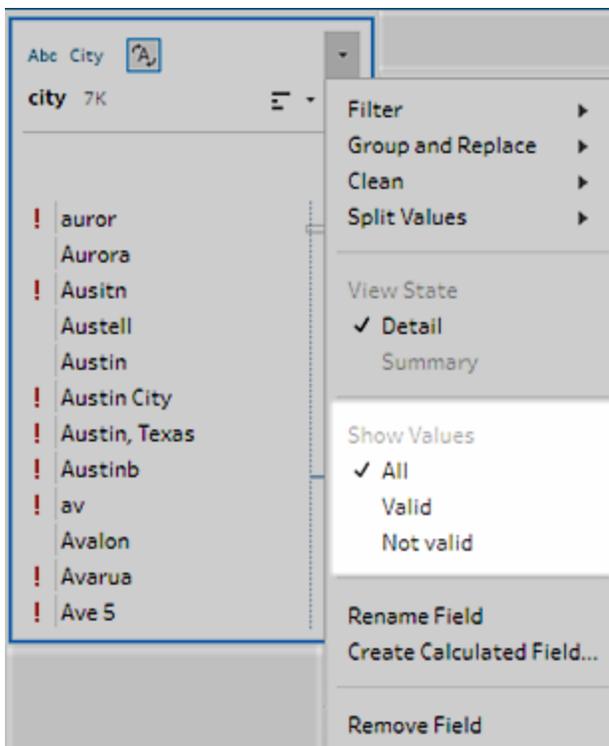
### Specify a data role for your field values

You can now assign a data role to your field values and use Tableau Prep to help you find inaccuracies or outliers in your data set.

Data roles tell Tableau Prep what the field values mean or represent, for example email addresses or a geographic role such as city or zip code. When a data role is assigned to a field, Tableau Prep examines the field values and flags the values that don't match so that you can take a closer look.



To view only the values that are valid or not valid, use the new filter option on the drop-down menu:



In this release we support the following data roles:

- Email
- URL
- Geographic roles (Based on current geographic data and is the same data used by Tableau Desktop)
  - Airport
  - Area code (U.S.)
  - CBSA/MSA
  - City
  - Congressional District (U.S.)
  - Country/Region
  - County
  - NUTS Europe
  - State/Province
  - Zip code/Postal code

For more information see [Use Data Roles to Validate your Data](#) on page 262.

## Join or Union Data

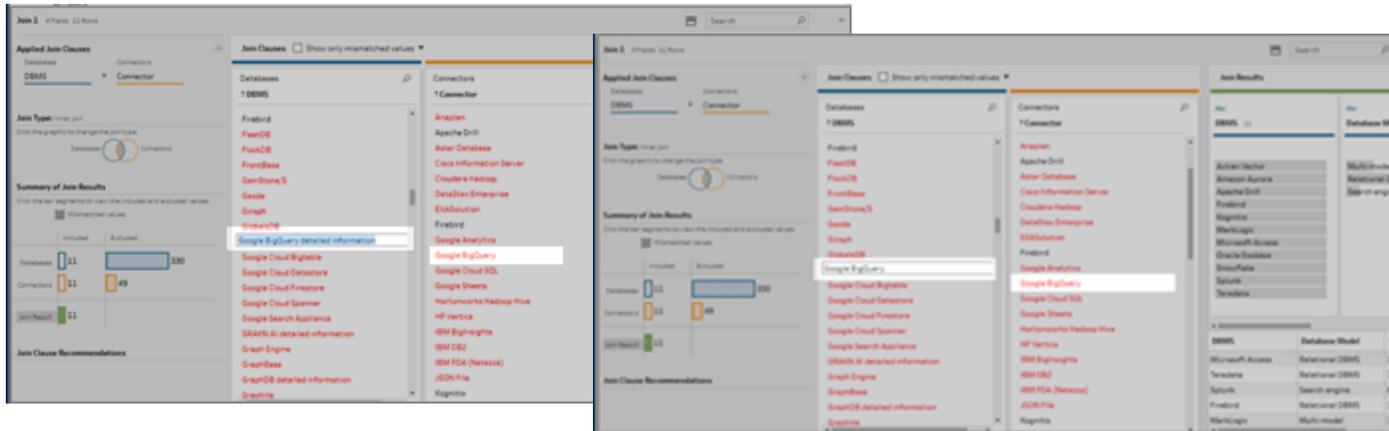
### Fix mismatched fields directly in the join clause

When you join two tables of data you will often have field values that are the same but are mismatched due to data entry errors. Tableau Prep helps identify mismatched fields in your join clauses by turning the mismatched field values red. But wouldn't it be great if you could just fix those field values right in your join clause? Well now you can.

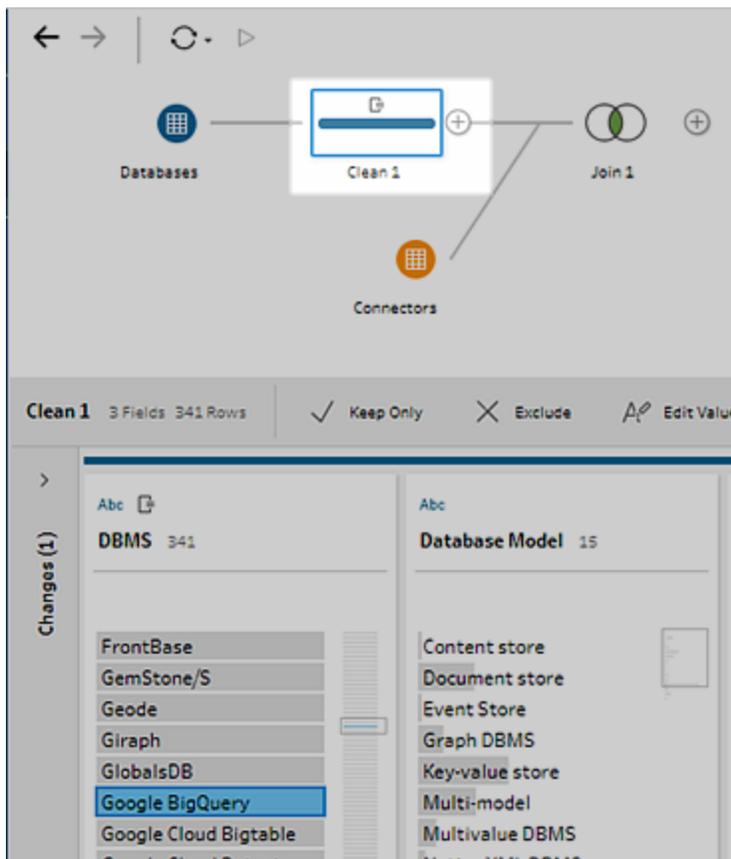
Now when you join two data sets you can edit the field values that you join on, right in the join clause to fix them. Simply double-click in a field value to edit it.

**Select field to change**

**Edit in-line**



The cleaning action is automatically pushed back to the previous cleaning step in the flow for the appropriate join data set.



No cleaning step before the join step? No problem. Tableau Prep automatically adds one for you to capture the cleaning operation from the join.

For information about how to clean field values directly in a join clause, see [Aggregate, Join, or Union Data](#) on page 360.

## Added in version 2018.2.2

### Install and Deploy Tableau Prep

- [Set your display language](#) below

### Connect to Data

- [Connect to data stored in Microsoft Access](#) on the next page

### Clean and Shape Data

- [Change the color scheme for your flow steps](#) on the next page
- [Add descriptions to your steps](#) on page 95
- [Use fuzzy match to find and fix spelling errors](#) on page 96

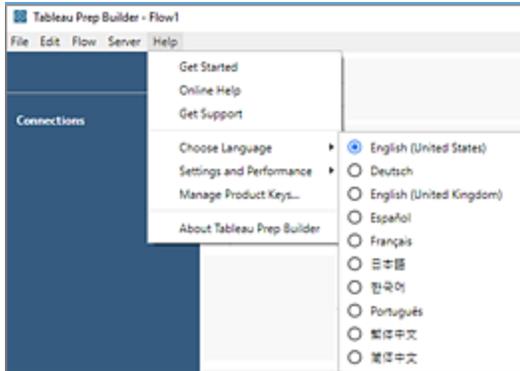
### Save and Share your work

- [Run flows from the command line](#) on page 96

## Install and Deploy Tableau Prep

### Set your display language

When you start up Tableau Prep, it now detects the locale set on your computer and displays the user interface, dates, and number formats in the appropriate language. If you want to change the display language for the user interface you can select from the supported languages from the top menu under **Help > Choose Language**.



For more information see [Set your display language](#) in the Tableau Desktop and Tableau Prep deployment guide.

## Connect to Data

### Connect to data stored in Microsoft Access

If you use Microsoft Access for data entry or to store your data tables you can now connect to your access files (from version 2007 or higher) through a file browser and clean your data with Tableau Prep.

This connector requires a 64-bit driver.

For more information about how to connect Tableau Prep to your data, see [Access](#) in the Tableau Desktop help.

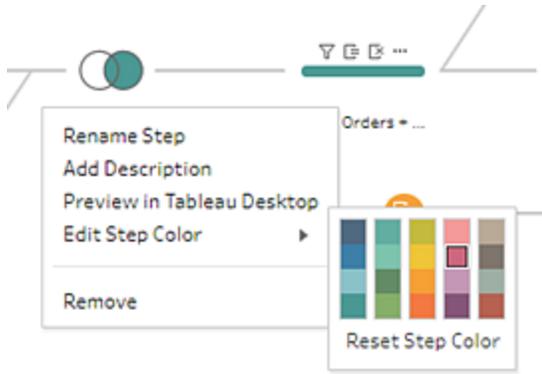
**Note:** Data connectors are not backward compatible. Flows that include these connectors may open in a prior version of Tableau Prep, but will have errors or can't run unless the data connections are removed.

## Clean and Shape Data

### Change the color scheme for your flow steps

By default, Tableau Prep assigns each step in your flow a color to help you easily track the changes you make to your data as you build your flow. But you have choices when it comes to this color scheme.

You can now pick from a color palette to change the color scheme for one or more steps. Just select the steps in the Flow pane that you want to change, right-click the selected steps and select **Edit Step Color** from the context menu.

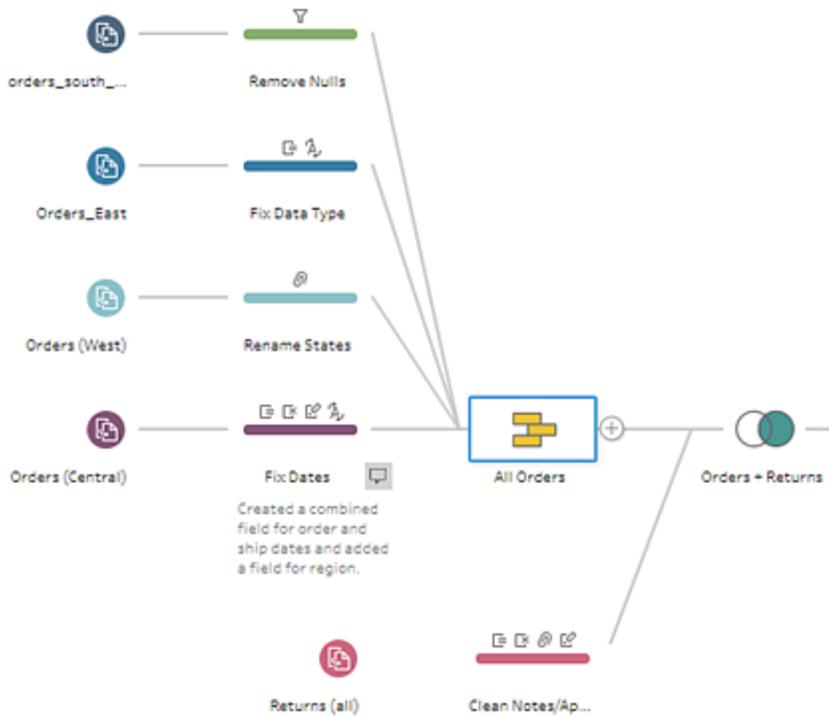


Don't like how it looks? Click **Undo** from the top menu or select **Reset Step Color** from the color palette menu.

For more information, see [Change the flow color scheme on page 236](#).

### Add descriptions to your steps

If you share your flows with others, communicating the changes that you made and why can be cumbersome. To make it easier, you can now add a short description to any individual step in your flow and it displays right in the flow pane.



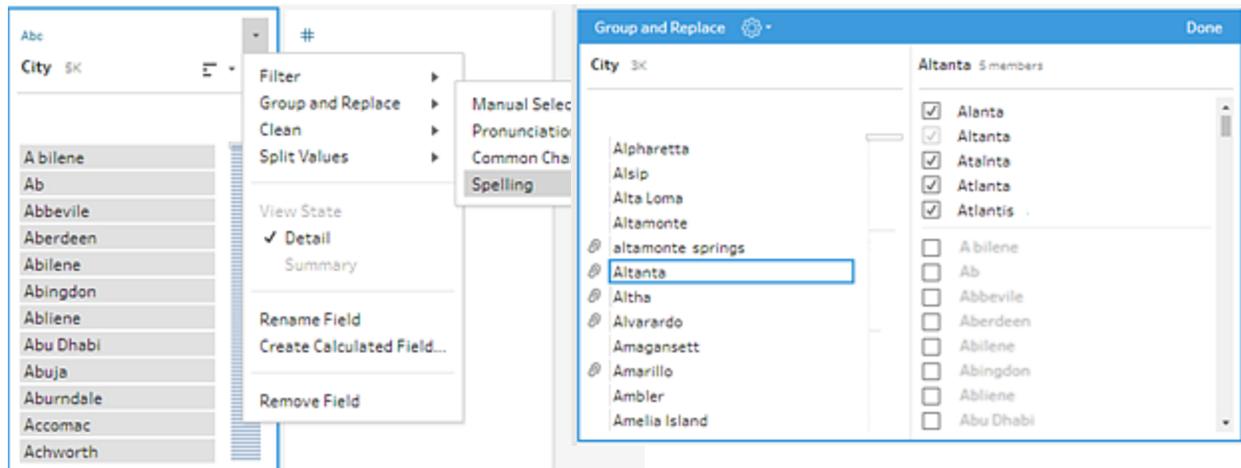
For more information about adding descriptions to flow steps, see [Add descriptions to flow steps and cleaning actions on page 237](#).

## Use fuzzy match to find and fix spelling errors

To help you quickly identify and clean up multiple variations of the same value due to spelling errors, we've added another option to our fuzzy match cleaning feature. Use the new **Spelling** option to find and group text values that differ because of additional or missing letters. This option works in any supported language.

The **Spelling** option uses the Levenshtein distance algorithm to compute an edit distance between two text values and then groups them together when the edit distance is less than a default threshold value.

For more information, see [Edit field values on page 295](#).



## Save and share your work

### Run flows from the command line

To keep data fresh in Tableau Prep you run your flow. However, opening Tableau Prep every time you want to run flows can take time. To help streamline this process, you can now run flows from the command line without having to open it in Tableau Prep.

To run a flow from the command line, you'll need:

- The path to the flow (.tfl) file that you want to run.
- A .json file that contains the database credentials for any databases that the flow

connects to for its input steps and the credentials for the server where the output is published.

If your flow connects to or publishes to local files or files that are stored on a network share for inputs or outputs, then this file isn't needed.

**Note:** Connecting to or publishing files that are stored on a network share that are password protected isn't supported.

- Administrator permissions on the machine where you are running the flow.

This option is available on both Windows (Task Scheduler is supported) and Mac machines. To use this process, you need an activated version of Tableau Prep and the process must be run on the same machine where Prep is installed.

For information about how to run flows from the command line, see [Refresh flow output files from the command line](#) on page 409.

## Added in version 2018.2.1

### Install and Deploy Tableau Prep

- [Deactivate Tableau Prep from the command line](#) on the next page
- [Use virtual desktop support to optimize Tableau Prep Installations](#) on the next page

### Connect to Data

- [Connect to cloud data sources and Hadoop Hive](#) on page 99

### Explore Your Data

- [New filter options to keep only the data you want](#) on page 99

### Clean and Shape Data

- **Use the ISO-8601 date standard in calculated fields** on page 100
- **Apply cleaning operations in the data grid** on page 100
- **Use multi-select to group values in the Profile pane** on page 101
- **Additional enhancements** on page 102

#### Join or Union Data

- **Use union recommendations to clean mismatched fields** on page 102
- **Identify mismatched fields for all join types** on page 104

## Install and Deploy Tableau Prep

### Deactivate Tableau Prep from the command line

Like Tableau Desktop, if you no longer need Tableau Prep on your computer you can now deactivate it from the command line using the `-return` option.

For more information see [Deactivate the product key](#). For more information about other installer properties that are available for Tableau Prep from the command line, see the Installer options and relevant sections in [Deploy Tableau Desktop](#).

### Use virtual desktop support to optimize Tableau Prep Installations

Just like Tableau Desktop you can now configure virtual desktop support to optimize your installations of Tableau Prep for non-persistent virtual desktops or for computers that are regularly reimaged. With virtual desktop support, Tableau Prep licenses are automatically deactivated after a predetermined period of time using a Tableau-hosted “Authorization to Run” (ATR) service, eliminating the need to manually deactivate the product key.

For more information about how to configure this option, see [Configure Virtual Desktop Support](#) in the Tableau Desktop and Tableau Prep deployment guide.

## Connect to Data

## Connect to cloud data sources and Hadoop Hive

We've added support for the following connectors so that you can connect to cloud data and data stored in Hadoop.

- Snowflake.
- Amazon EMR Hadoop Hive
- Cloudera Hadoop (Hive and Impala)
- Hortonworks Hadoop Hive
- MapR Hadoop Hive
- Apache Drill
- SparkSQL

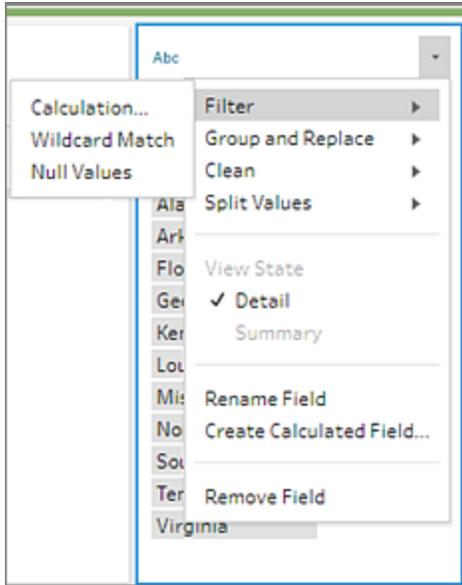
For more information about how to connect Tableau Prep to your data, see the topic for your connector under [Supported Connectors](#) in the Tableau Desktop help.

These data connectors are not backward compatible. Flows that include these connectors may open in a prior version of Tableau Prep, but will have errors or can't run unless the data connections are removed.

## Explore Your Data

### New filter options to keep only the data you want

No more writing complex calculations to keep or exclude Null values or to set up a wildcard match on text values. Instead select one of the new filter options on a field to see the impact of your changes right away without having to first write a calculation and then revert your change if it doesn't give you the results you want.



For more information, see [Examine Your Data](#) on page 245.

## Clean and Shape Data

### Use the ISO-8601 date standard in calculated fields

Creating calculated fields to support European calendars just got easier. Tableau Prep now supports the ISO-8601 international date standard for the following date parts:

- "iso-year"
- "iso-quarter"
- "iso-week"
- "iso-weekday"

Use these date parts in functions DATEPART, DATETRUNC, DATENAME, DATEDIFF, and DATEADD.

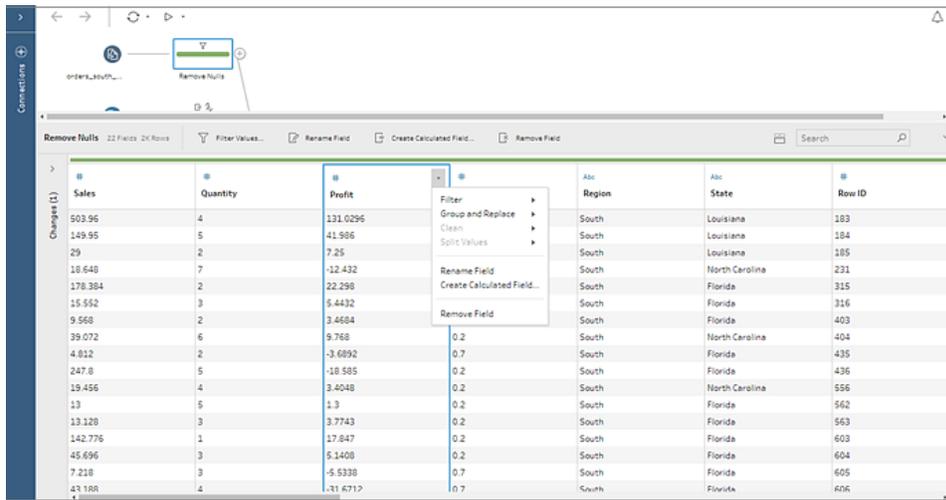
For example `Week Number = STR(DATEPART('iso-year', [Week Date])) + "-" + STR(DATEPART('iso-week', [Week Date]))`

For more information about how to work with date functions in calculated fields, see [Date Functions](#) in the Tableau Desktop help.

### Apply cleaning operations in the data grid

In prior versions, the data grid showed you a preview of your data, but had few cleaning options available. Now you can act on your data anywhere. If you want to work with the detailed

values in the data grid, collapse the Profile pane and perform the same cleaning operations that are available in the Profile pane in the data grid.

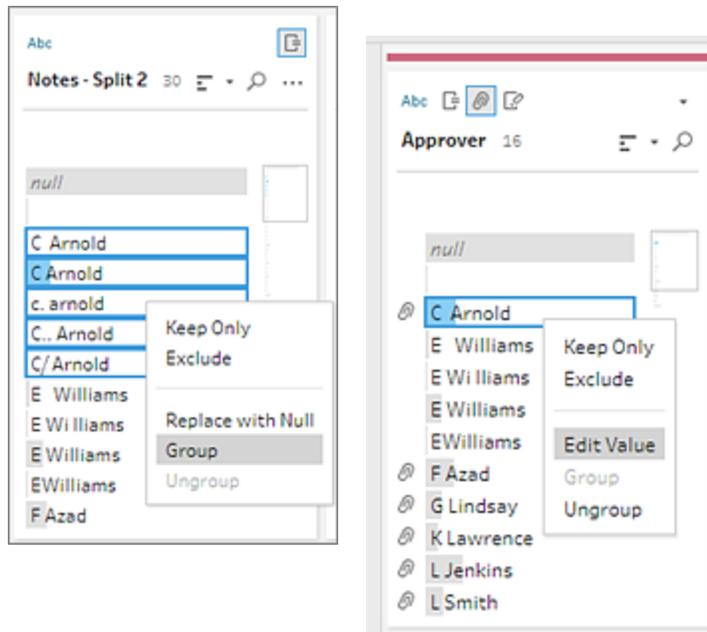


For more information, see [Clean and Shape Data](#) on page 277.

### Use multi-select to group values in the Profile pane

To quickly group a set of values for a field, you can now multi-select the values in the Profile card, then right-click to open the menu and select **Group**. The values are grouped under the field value that you select when you right-click to open the menu. A paperclip icon shows next to the grouped value.

Right-click the grouped values to open the menu again to ungroup or edit the values.



For more information about grouping values, see [Edit field values](#) on page 295

### Additional enhancements

We've also made the following enhancements to improve usability:

- New icons show on the menu when adding steps to your flow to provide visual cues and help you learn the visual language of Tableau Prep.



- New animations in the Profile pane help catch your eye to better see the impact of your changes.

## Join or Union Data

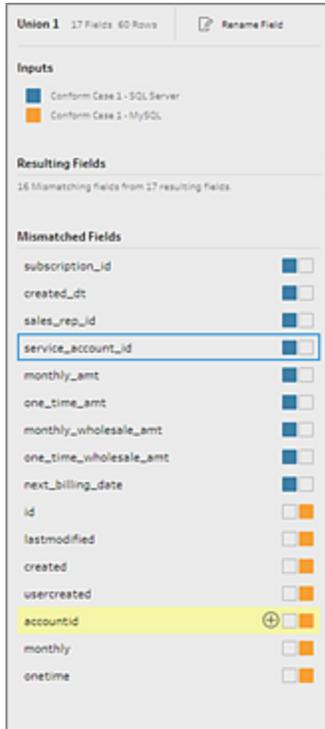
Use union recommendations to clean mismatched fields

Fixing mismatched fields after unioning two or more files just got easier. A new **Mismatched Fields** section in the **Union summary** pane shows a list of fields that don't match and the data

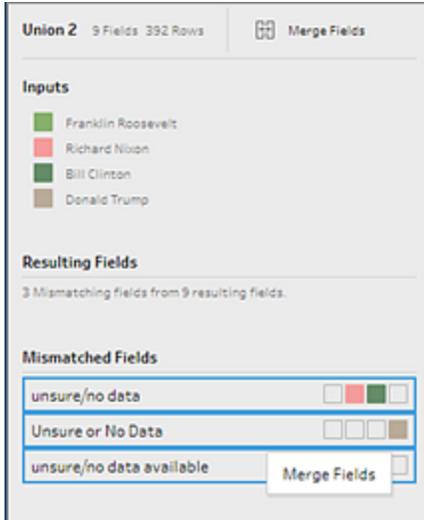
source where they originated. Merge your mismatched fields directly in this section using one of the following options:

- Select a field in the list. If Tableau Prep identifies a field with similar characteristics, based on similar data types and field names, it highlights the field in yellow, suggesting a match.

Click the plus (+) button that appears on hover on the suggested matched field to merge the two fields.



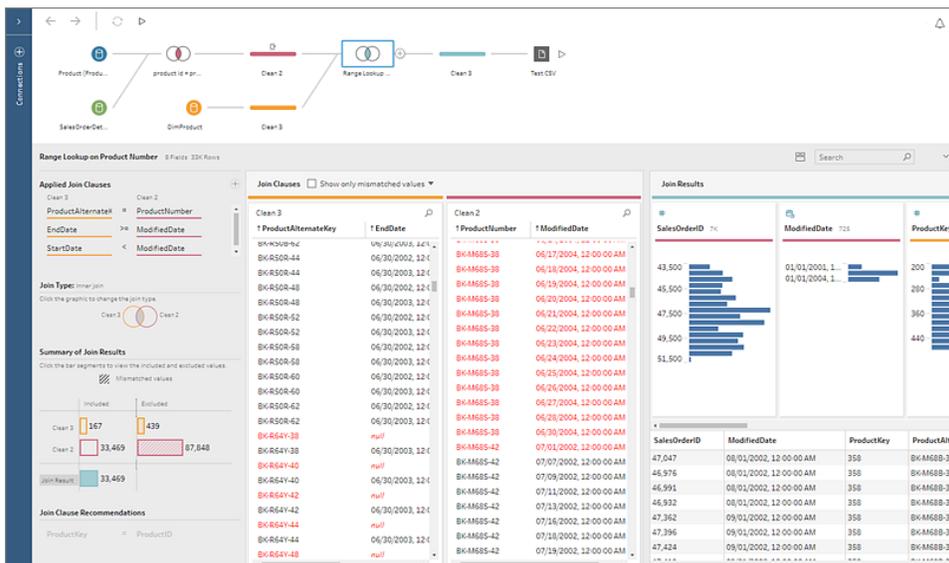
- Select two or more fields in the list, right-click on one of them and select **Merge Fields**.



For more information about unioning data and resolving mismatched fields, see [Union your data](#) on page 368.

### Identify mismatched fields for all join types

Easily identify fields that don't match no matter how you join tables. In prior versions the **Join Clauses** tables showed field values that were excluded only when one field equaled another. But now you can see this data using any operator when matching join clauses, such as "End Date >= Modified Date".



For more information, see [Join your data](#) on page 361.

## Added in version 2018.1.2

### Install and Deploy Tableau Prep

- **Activate and register Tableau Prep from the command line (Windows)** below

### Connect to Data

- **Connect to data stored in statistical files or on Presto** on the next page
- **Union sub-tables found by Data Interpreter in the Input step** on the next page
- **Better feedback when loading tables** on page 107

### Explore Your Data

- **Reorder fields in the Profile pane and the Data grid** on page 108

### Clean and Shape Data

- **Use drag-select to remove multiple steps in your flow** on page 108
- **Pivot multiple groups of fields in a single action** on page 109
- **Improved field naming when merging fields** on page 109
- **Additional enhancements** on page 110

## Install and Deploy Tableau Prep

### Activate and register Tableau Prep from the command line (Windows)

Like Tableau Desktop, you can now activate and register Tableau Prep from the command line by including a command line with the following properties:

- `ACTIVATE_KEY=<key>`. The installer runs `-activate` to apply the product key.
- `REGISTER="1"`. During the installation process, the installer will run the `-register` process and add the registration information.

For more information about these installer properties and how to activate and register Tableau Prep from the command line, see the Installer options and relevant sections in [Deploy Tableau Desktop](#).

## Connect to Data

### Connect to data stored in statistical files or on Presto

We've added two new connectors to help you connect to data from more locations.

- Statistical files. Connect to SAS (\*.sas7bdat), SPSS (\*.sav), and R (\*.rdata) data files.
- Presto. For more information about how to configure your connection to Presto, see [Presto](#) in the Tableau Desktop help.

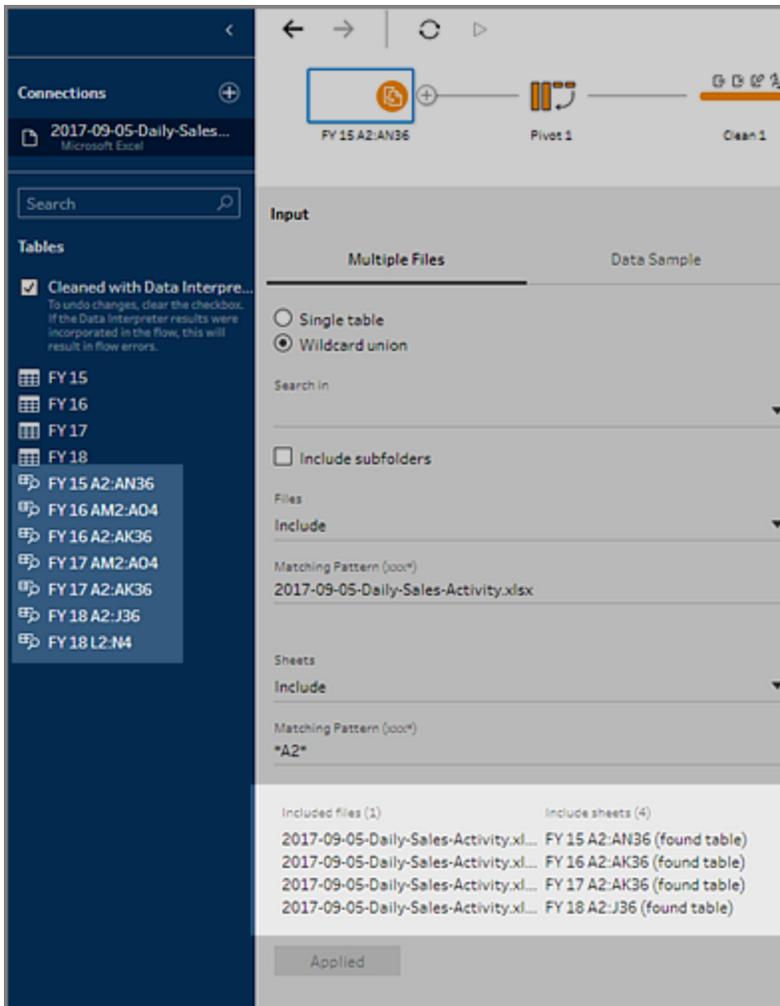
These data connectors are not backward compatible. Flows that include these connectors will open in a prior version of Tableau Prep, but will have errors or can't run unless the data connections are removed.

### Union sub-tables found by Data Interpreter in the Input step

Using Data Interpreter to clean your Microsoft Excel data and now you want to union the resulting sub-tables? You can now use wildcard union to union all of the found sub-tables in the Input step.

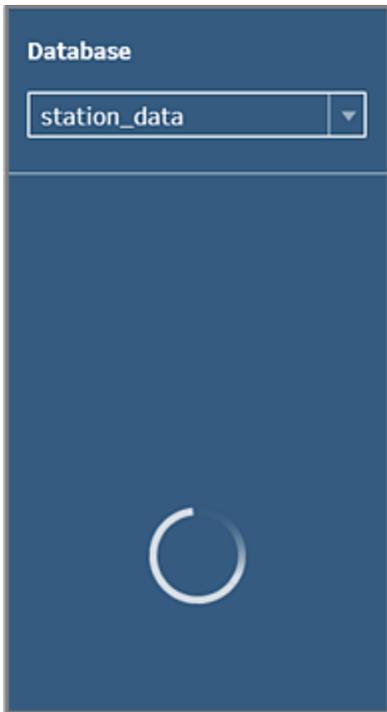
Simply drag one of your sub-tables to the **Flow** pane, and then use the wildcard search criteria to select the remaining sub-tables to union the data and include all the sub-table data in the Input step.

For more information see [Connect to Data on page 177](#).



### Better feedback when loading tables

When you connect to a database for the first time, it can sometimes seem like nothing happened. Now a new indicator tells you that the data is still loading.



## Explore Your Data

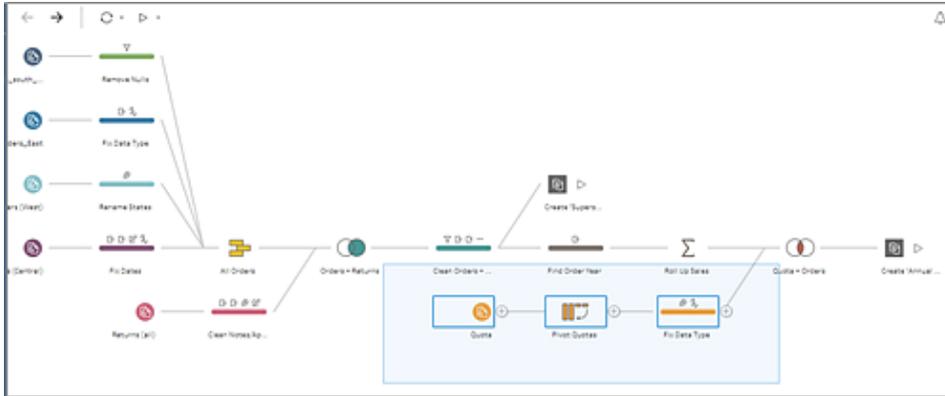
### Reorder fields in the Profile pane and the Data grid

You can now drag and drop to reorder your fields in both the **Profile** pane and the **Data** grid and the two panes will stay in sync. We also maintain the field order even when you rename a field. Fields are no longer reordered automatically.

## Clean and Shape Data

### Use drag-select to remove multiple steps in your flow

Removing whole sections of your flow just got easier. You can now click in the **Flow** pane and use your mouse to drag and select the section of the flow that you want to remove. Then right-click to remove all of the selected steps at once. For more information see [Clean and Shape Data on page 277](#).



### Pivot multiple groups of fields in a single action

The pivot option in Tableau Prep has been expanded to better support more complex spreadsheets or text files. You can now perform either a single pivot or select groups of fields to pivot.

For example to pivot a spreadsheet to see sales, tax, and totals by month and year you can pivot each group of fields to get the results you want. For more information, see [Clean and Shape Data](#) on page 277.

#### Original Spreadsheet

	A	T	U	V	W	X
2	DATE	DECEMBER 2014			JANUARY 2015	
3		Sales (Shelf Price)	Excise Tax Due	Total (Shelf Price)	Sales (Shelf Price)	Excise Tax Due
4	1	\$ 448,111	\$ 112,028	\$ 560,139	\$ 296,841	\$ 74,210
5	2	\$ 425,472	\$ 106,368	\$ 531,840	\$ 754,061	\$ 188,515
6	3	\$ 435,525	\$ 108,881	\$ 544,406	\$ 482,497	\$ 120,624
7	4	\$ 634,765	\$ 158,691	\$ 793,456	\$ 332,228	\$ 83,057
8	5	\$ 695,425	\$ 173,856	\$ 869,282	\$ 601,529	\$ 150,382
9	6	\$ 436,720	\$ 109,180	\$ 545,899	\$ 527,374	\$ 131,843
10	7	\$ 238,481	\$ 59,620	\$ 298,101	\$ 560,102	\$ 140,026
11	8	\$ 421,422	\$ 105,356	\$ 526,778	\$ 539,974	\$ 134,993
12	9	\$ 543,816	\$ 135,954	\$ 679,770	\$ 683,408	\$ 170,852
13	10	\$ 616,271	\$ 154,068	\$ 770,339	\$ 442,352	\$ 110,588
14	11	\$ 756,542	\$ 189,135	\$ 945,677	\$ 288,605	\$ 72,151
15	12	\$ 726,270	\$ 181,567	\$ 907,837	\$ 674,121	\$ 168,530
16	13	\$ 477,208	\$ 119,302	\$ 596,510	\$ 526,451	\$ 131,613
17	14	\$ 245,898	\$ 61,475	\$ 307,373	\$ 573,842	\$ 143,461
18	15	\$ 456,254	\$ 114,064	\$ 570,318	\$ 658,952	\$ 164,738

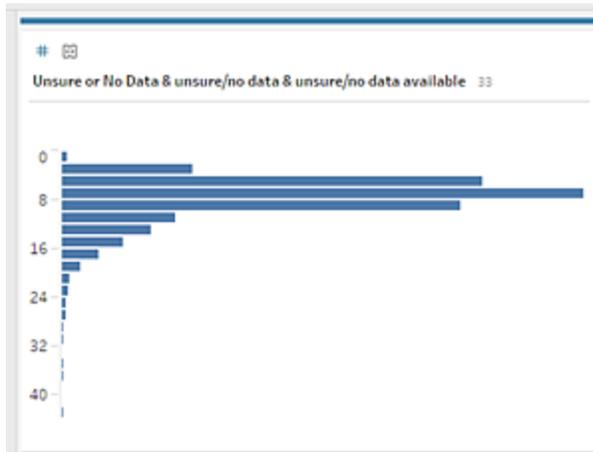
#### After pivoting on multiple groups of fields

The screenshot shows the Tableau Prep interface after pivoting. The 'Pivot' step is active, and the resulting data is displayed in a pivot table. The pivot table has columns for 'Month and Year', 'Sales', 'Excise Tax Due', and 'Total (Shelf Price)'. The rows are grouped by month and year, showing the aggregated values for each group. The interface also shows the 'Pivot Results' section with a bar chart and a summary table.

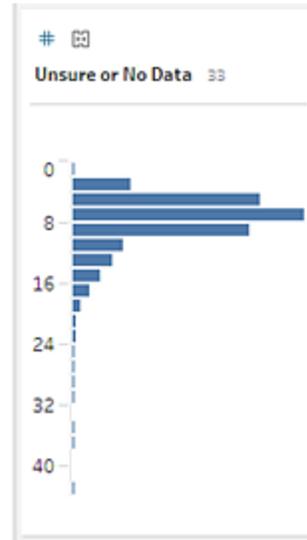
### Improved field naming when merging fields

When you merge fields, the field names are no longer concatenated. Instead the field name of the target field persists. For more information, see [Merge fields](#) on page 290.

## Concatenated field naming



## Simplified field naming



## Additional enhancements

We've also made the following enhancements to improve usability and performance:

- A new edit icon shows on hover on entries in the **Changes** pane to help you quickly see which items are editable.



- Renaming a step will no longer automatically run the flow so your authoring experience is seamless.
- The **Connections** pane automatically opens when you connect to a Microsoft Excel file with multiple sheets to help you quickly get to your data.

# Get Started with Tableau Prep Builder

**Note:** Starting in version 2020.4.1, as a Creator, you can also create and edit flows on the web. This tutorial was designed using Tableau Prep Builder, but can also be done on the web with some noted exceptions.

This tutorial introduces you to the common operations that are available in Tableau Prep. Using the sample data sets that come with Tableau Prep, you will walk through creating a flow for Sample Superstore. This tutorial uses the most current version of Tableau Prep Builder. If you are using a previous version, your results may differ.

Watch for tips along the way to gain insights into how Tableau Prep helps you clean and shape your data for analysis.

To install Tableau Prep Builder before continuing with this tutorial, see [Install Tableau Desktop or Tableau Prep Builder from the User Interface](#) in the Tableau Desktop and Tableau Prep Builder Deployment guide. Otherwise you can download the [free trial](#).

## Sample files

To complete the tasks in this tutorial, you need to install Tableau Prep Builder, or if web authoring is enabled on your server version 2020.4 or later, you can also try the steps on the web.

After installing Tableau Prep Builder on your machine, you can also find the sample files in the following location :

- (Windows) `C:\Program Files\Tableau\Tableau Prep Builder <version>\help\Samples\en_US\Superstore Files`
- (Mac) `/Applications/Tableau Prep Builder <version>.app/Contents/help/Samples/en_US/Superstore Files`

Alternatively, download the sample files from these links and create a Samples directory and a South sub-directory. You'll need to do this if completing this tutorial on the web.

**Download to Samples directory**

- [Orders\\_Central](#)
- [Orders\\_East](#)
- [Orders\\_West](#)
- [returns\\_reasons\\_new](#)

**Download to South Sub-directory**

- [Orders\\_South\\_2015](#)
- [Orders\\_South\\_2016](#)
- [Orders\\_South\\_2017](#)
- [Orders\\_South\\_2018](#)

## Here's the story...

You work at the headquarters for a large retail chain. Your boss wants to analyze product sales and profits over the last four years for the company. You suggest that he use Tableau Desktop to do that. Your boss thinks that's a great idea and wants you to get right on that.

As you start gathering all the data you'll need, you notice that the data has been collected and tracked differently for each region. You also notice a lot of creative data entry in the different files, and that one region even has a separate file for each year!

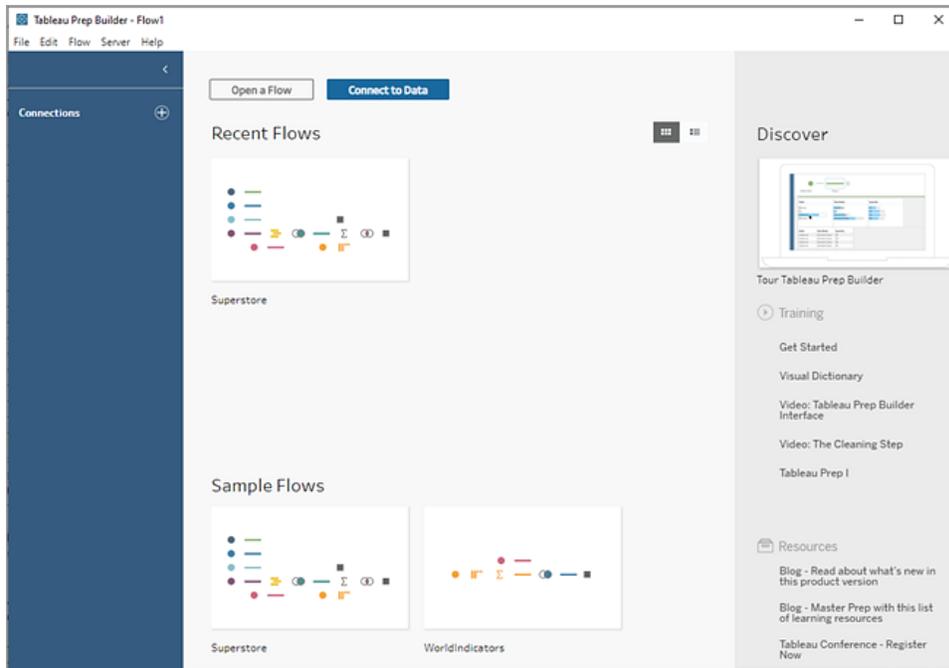
Before you can start analyzing the data in Tableau, you'll have to do some serious data cleaning first, and it's going to be a long night.

As you rummage for restaurant menus to order some dinner, you remember that Tableau has a product called Tableau Prep that might help you with your Herculean data cleaning tasks.

You download the product, or sign up for a [free trial](#) and decide to give it a try.

## 1. Connect to data

The first thing you see when you open Tableau Prep Builder is a Start page with a **Connections** pane, just like Tableau Desktop.



To get started, the first step is to connect to your data and create an Input step. From there you will start building a workflow or "flow", as it's called in Tableau Prep, and add more steps to take action on your data as you go.

**Tip:** The Input step is the ingestion point for your data and the starting point for your flow. You can have multiple Input steps and some might include multiple data files. For more information about connecting to data, see [Connect to Data on page 177](#).

Your sales data files for the different regions are stored in different formats, and your orders from the South are actually multiple files. You check out the **Connections** pane and see that you have a lot of choices to connect to data. Great!

Since your other regions have one file for all four years worth of data, you decide to tackle the files from the South first.

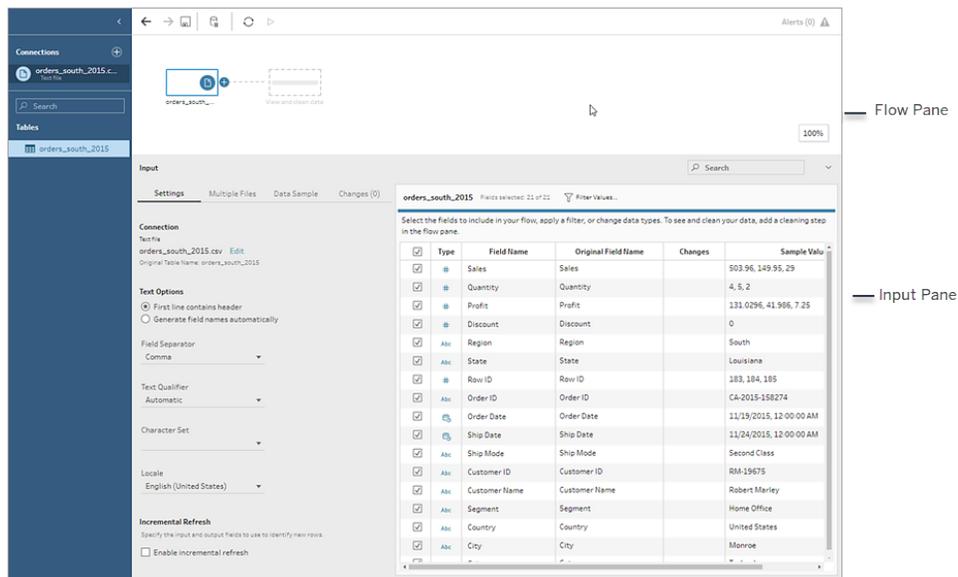
1. On the **Connections** pane, click the **Add connection**  button.

In web authoring, from the **Home** page, click **Create > Flow** or from the **Explore** page, click **New > Flow**. Then click **Connect to Data**.

2. The files are .csv files, so select **Text file** in the list of connections.
3. Navigate to the directory for your files. In the Orders South subdirectory, select the first file **orders\_south\_2015.csv** and click **Open** to add it to your flow. (For file location, see

Wrap up and resources on page 156.)

After you connect to your first file, the Tableau Prep Builder workspace opens and you see it is divided into two main sections. The **Flow** pane at the top and the **Input** pane at the bottom.



Much like Tableau Desktop, this **Flow** pane is your workspace, where you can interact with your data visually and build your flow. The **Input** pane contains configuration options about how the data is ingested. It also shows you the fields, data types, and examples of your values from your data set.

We'll look at how you can interact with this data in the next section.

**Tip:** For single tables, Tableau Prep automatically creates an Input step for you in the **Flow** pane when you add data to your flow. Otherwise you can use drag-and-drop to add tables to the **Flow** pane.

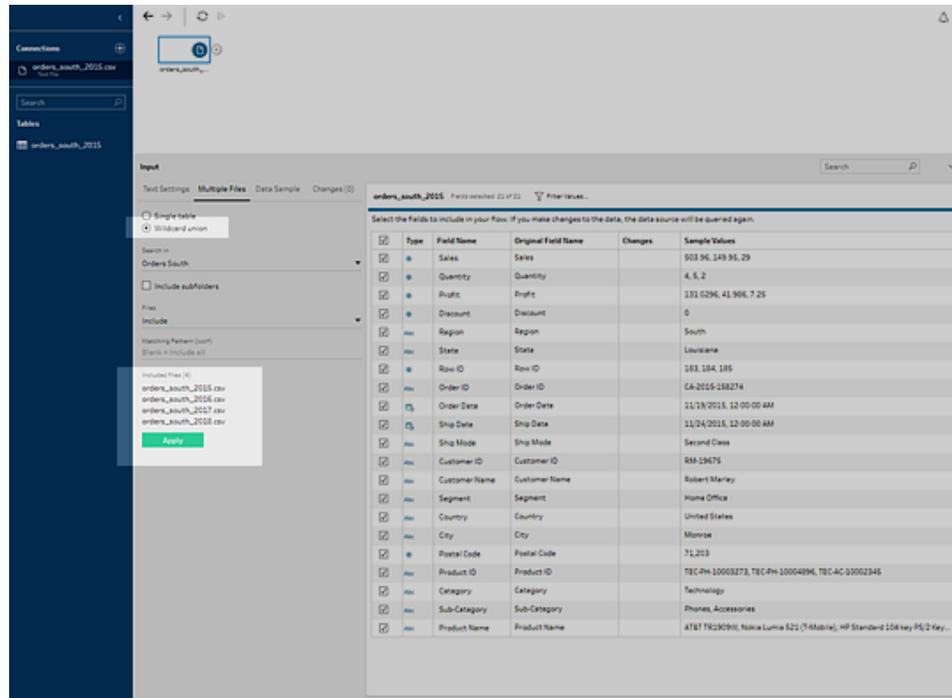
- You have three other files for your orders in the South, and how you combine them depends on where you're working.

#### In Tableau Prep Builder:

- You could add each file individually, but you want to combine all the files together into one Input step, so you click the **Multiple Files** tab in the **Input** pane.
- You see an option for **Wildcard union**. Select it.

You notice that the directory where you selected your file is already populated and the other files you need are listed in the **Included files** section in the Input pane.

**Tip:** Using a wildcard union is a great way to connect to and combine multiple files from a single data source with a similar name and structure. To use this option, the files must be in the same parent or child directory. If you don't see the files you need right away, change your search criteria. For more information, see [Union files and database tables in the Input step](#) on page 217.



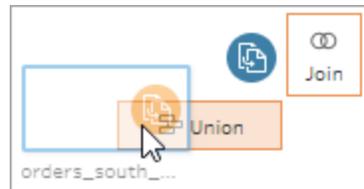
- c. Click **Apply** to add the data from these files to the **orders\_south\_2015** input step.
- d. The files for the other regions are all single table files, so you can select all of the files at once and add them to your flow.

**Note:** On the web, files can only be uploaded individually.

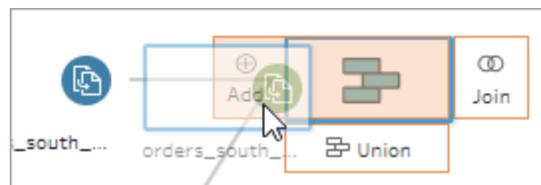
**In Tableau Server or Tableau Online:**

The wildcard option isn't currently available for Tableau Server or Tableau Online. Still, you want to include all of the files from the South and handle the data alike, so combining them makes sense.

- a. Repeat steps 2 and 3 to add the rest of the files from the Orders South sub-directory.
- b. Combine them with a union step. (For more details, see [Union files and database tables in the Input step](#) on page 217.)
  - i. Drag **Orders\_South\_2016** on top of **Orders\_South\_2015** and drop it on the **Union** option.



- ii. Drag **Orders\_South\_2017** on top of the new Union step and drop it on **Add**. Repeat this step with the final file.

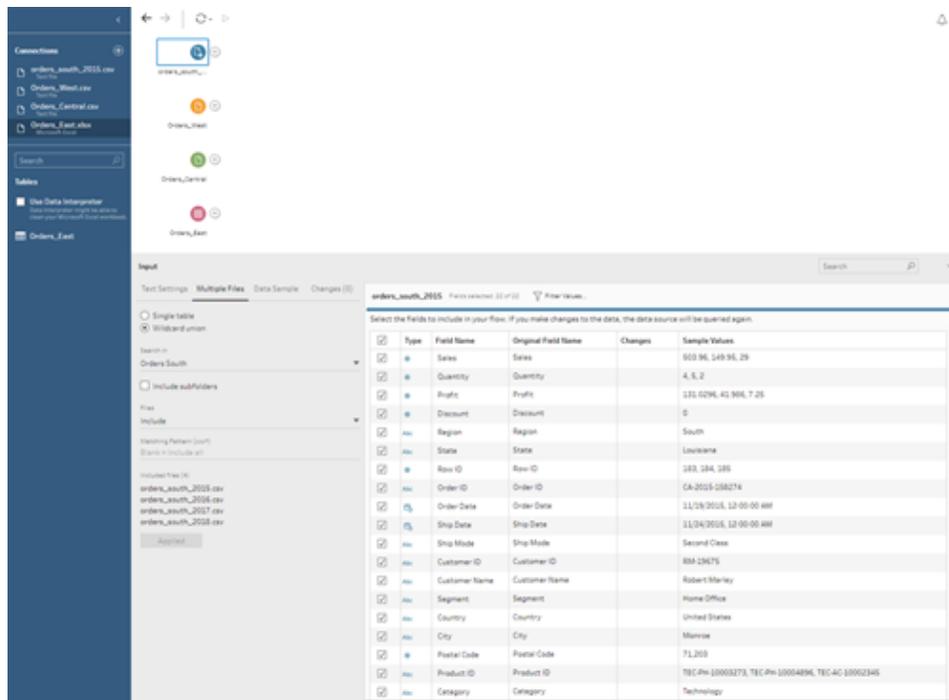


5. Add the remaining files.

#### In Tableau Prep Builder:

- Open File Explorer or Finder and navigate to the directory for the files. Ctrl-click or Cmd-click (MacOS) to select the following files and drag-and-drop them onto the **Flow** pane to add them to your flow. (For file location, see [Wrap up and resources](#) on page 156.)
  - Orders\_Central.csv
  - Orders\_East.xlsx
  - Orders\_West.csv

**Note:** These are different file types. If you don't see all of these files, make sure your file explorer or finder is set to view all file types.

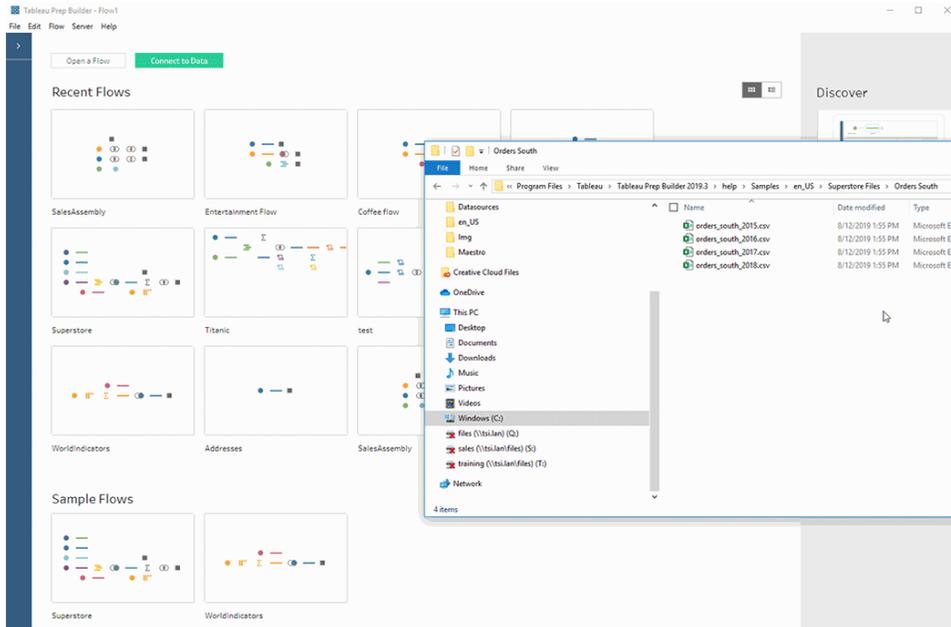


**In Tableau Server or Tableau Online:**

- Follow steps 2 and 3 to add Orders\_Central.csv and Orders\_West.csv.
- On the **Connections** pane, click the **Add connection**  button. Click **Microsoft Excel** and select **Orders\_East.xlsx**.

Check your work: Watch "Connect to data" in action.

*Click the image to replay it*



## 2. Explore your data

Now that you have the data files loaded into Tableau Prep, you're pretty sure that you want to combine all of the files together. But before you do that, it might be a good idea to take a look at them first and see if you can spot any issues.

When you select an Input step in the **Flow** pane, you can see the settings used to bring in the data, the fields that are included, and a preview of your values.

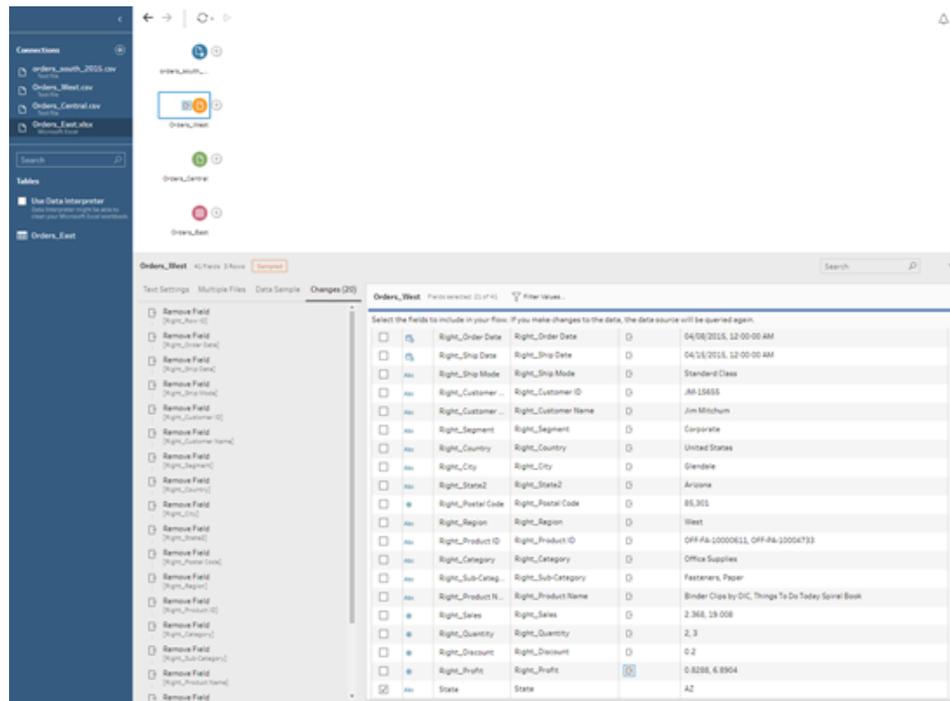
This is a good place to decide how much data you want to include in your flow and remove or filter fields that you don't want. You can also change any data types that were assigned incorrectly.

**Tip:** If you are working with large data sets, Tableau Prep automatically brings in a sample of the data to maximize performance. If you don't see the data you expect, you might need to adjust the sample. You can do this on the **Data Sample** tab. For more information about configuring your data options and sample size, see [Set your data sample size on page 213](#).

In the **Flow** pane, as you select each step and look over each data set, you notice a few things that you want to fix later and one thing that you can fix now in the **Input** step.

- Select the **Orders\_West** Input step.
  - The **State** field uses abbreviations for the state name. Other files spell this out, so you'll need to fix that later.
  - There are a lot of fields that start with **Right\_**. These fields appear to be duplicates of the other fields. You don't want to include these duplicate fields in your flow. This is something you can fix right here in the **Input** step:

**To fix this now**, clear the check box for all fields that start with **Right\_**. This tells Tableau Prep to ignore these fields and not to include them in the flow.



**Tip:** When you perform cleaning operations in a step, like removing fields, Tableau Prep tracks your changes in the **Changes** pane and adds an annotation (in the form of a little icon) in the Flow pane to help you keep track of the actions you take on your data. For Input steps, an annotation is also added to each field.

- In the **Flow** pane, click the **Orders\_Central** Input step to select it. In the **Input** pane, you notice the following issues:
  - The order dates and ship dates are separated out into fields for month, day, and year.

- Some of the fields have different data types than the same fields in other files.
- There is no field for **Region**.

You'll need to do some cleaning on these fields before you can combine this file with the others files. But you can't fix that here in the **Input** step, so you make a note to do this later

- Select the **Orders\_East** Input step.

The fields in this file look like they align pretty well with the other files. But the **Sales** values all seem to have the currency code included. You'll need to fix that later, too.

Now that you've identified a few troublemakers in your data sets, the next step is to examine your data a bit more closely and clean up any issues that you find so that you can combine and shape your data and generate an output file that you can use for analysis.

## 3. Clean your data

In Tableau Prep, examining and cleaning your data is an iterative process. After you decide on the data set that you want to work with, the next step is to examine and take action on that data by applying various cleaning, shaping, and combining operations to it. You apply these operations by adding steps to your flow. For more information about cleaning options, see [Clean and Shape Data on page 277](#)

Steps come in many flavors, depending on what you are trying to do. For example, add a cleaning step any time you want to apply cleaning operations to your fields like filter, merge, split, rename, and so on. Add an aggregation step to group and aggregate fields and change the level of detail of your data. For more information about the different step types and their uses, see [Build and Organize your Flow on page 226](#).

**Tip:** As you add steps to your flow, a flow line is automatically added to connect the steps to one another. You can move these flow lines around and remove or add them as needed.

When you run your flow, these connection points are required so Tableau Prep knows which steps are connected and in which order the steps apply in the flow. If a flow line is missing, the flow will be broken and you'll get an error.

## Clean Orders\_Central

To address the issues you noticed earlier and to see if there are any other issues, you start by adding a cleaning step to the **Orders\_Central** Input step.

1. In the **Flow** pane, select **Orders\_Central**, do one of the following:
  - Click the plus (+) icon and add a cleaning step. Depending on your version, this menu option is **Add Step**, **Add Clean Step**, or **Clean Step**.
  - Click on the suggested clean step (Tableau Prep Builder version 2020.3.3 and later and on the web)



When you add a cleaning step to your flow, the workspace changes and you see the details of your data.

The screenshot shows the Tableau Prep workspace with the following components labeled:

- A. Flow pane:** Shows the data flow from 'Orders\_Central' to a 'Clean' step.
- B. Toolbar:** Contains options like 'Filter Values', 'Create Calculated Field', and 'Recommendations'.
- C. Profile pane:** Displays a horizontal bar chart for 'Order ID' and a list of values for other fields like 'Ship Mode', 'Customer ID', 'Customer Name', and 'Segment'.
- D. Data grid:** A table showing the cleaned data with columns: Row ID, Order ID, Ship Mode, Customer ID, Customer Name, Segment, Country, City, State, Postal Code, Product ID, and Category.

Row ID	Order ID	Ship Mode	Customer ID	Customer Name	Segment	Country	City	State	Postal Code	Product ID	Category
15	US-2016-118983	Standard Class	HP-14815	Harold Pavilion	Home Office	United States	Fort Worth	Texas	76106	OFF-AP-10002311	Off
16	US-2016-118983	Standard Class	HP-14815	Harold Pavilion	Home Office	United States	Fort Worth	Texas	76106	OFF-BI-10000795	Off
17	CA-2015-105899	Standard Class	PK-19075	Pete Kriz	Consumer	United States	Madison	Wisconsin	53711	OFF-ST-100004186	Off
22	CA-2017-137330	Standard Class	KB-16585	Ken Black	Corporate	United States	Fremont	Nebraska	68025	OFF-AB-10000246	Off
23	CA-2017-137330	Standard Class	KB-16585	Ken Black	Corporate	United States	Fremont	Nebraska	68025	OFF-AP-10001492	Off
26	CA-2018-107727	Second Class	86A-17560	Matt Abelman	Home Office	United States	Houston	Texas	77095	OFF-PA-10000249	Off

A. Flow pane, B. Toolbar, C. Profile pane, D. Data grid

The workspace is now split into three parts: the **Flow** pane, the **Profile** pane with a toolbar, and the **Data** grid.

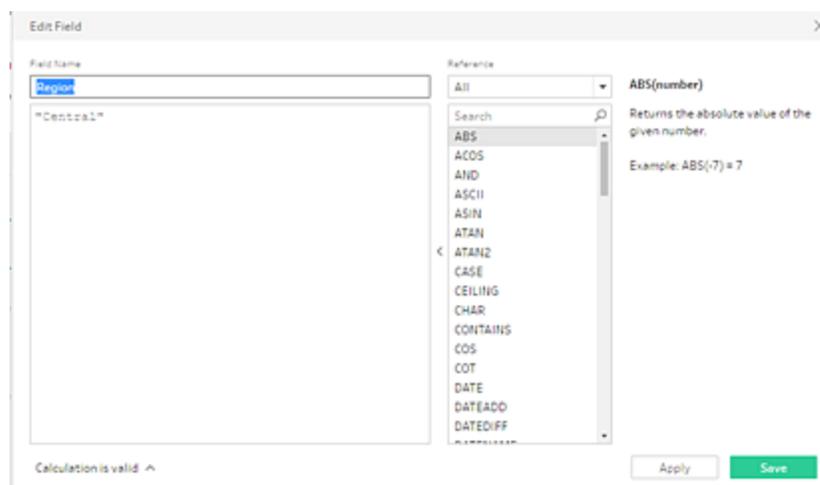
The **Profile** pane shows you the structure of your data, summarizing the field values into bins so that you can quickly see related values and spot outliers and null values. The **Data** grid shows you the row level detail for your fields.

**Tip:** Each field in the **Profile** pane is shown on a profile card. Use the **More options** ... menu (drop-down arrow in prior versions) on each card to see and select the different cleaning options that are available for that field type. You can also sort the field values, change the data type, assign a data role to the field or drag and drop the profile cards and the columns in the **Data** grid to rearrange them.

### Clean data with calculated fields

This data set is missing a field for **Region**. Since the other data sets have this field you'll need to add it so that you can combine your data later. You'll need to use a calculated field to do this.

2. In the toolbar, click **Create Calculated Field**.
3. In the Calculation editor, name the calculated field **Region**. Then enter **"Central"** (including the quotes) and click **Save**.



You love the flexibility of being able to use calculated fields to shape you data. You are pleased to see that Tableau Prep uses the same calculation editor language as Tableau Desktop.

**Tip:** When you make changes to your fields and values, Tableau Prep keeps track of them in the **Changes** pane on the left. An icon (annotation) representing the change is

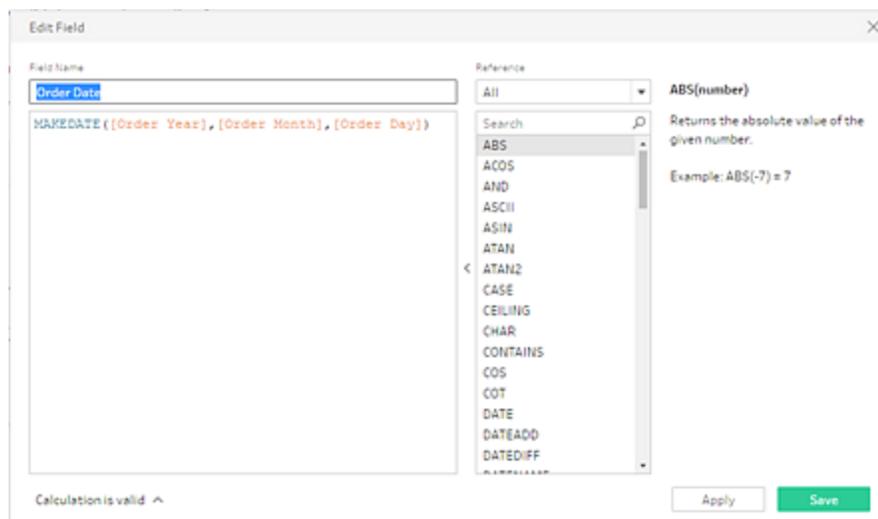
also added to the cleaning step in the flow and to the field in the **Profile** pane. We'll look at the **Changes** pane after making more changes.

Next you want to address the separate order date and ship date fields. You want to combine them into two single fields, one for **Order Date** and one for **Ship Date** so they align with the same fields in the other data sets. Making sure your tables have the same fields will enable you to combine the tables using a union later.

You can use a calculated field again to do this in one easy step.

4. In the toolbar, click **Create Calculated Field** to combine the **Order Year**, **Order Month**, and **Order Day** fields into one field with the format "MM/DD/YYYY".
5. In the Calculation editor, name the calculated field **Order Date**. Then enter the following calculation and click **Save**:

```
MAKEDATE([Order Year],[Order Month],[Order Day])
```



Now that you have a new field for your order date, you want to remove the existing fields, as you no longer need them.

You have a lot of fields in the **Profile** pane. You notice a **Search** box in the top right corner on the toolbar. You wonder if you can use that to quickly find the fields that you want to remove. You decide to give it a try.

6. In the **Profile** pane, in the search box, type **Order**.

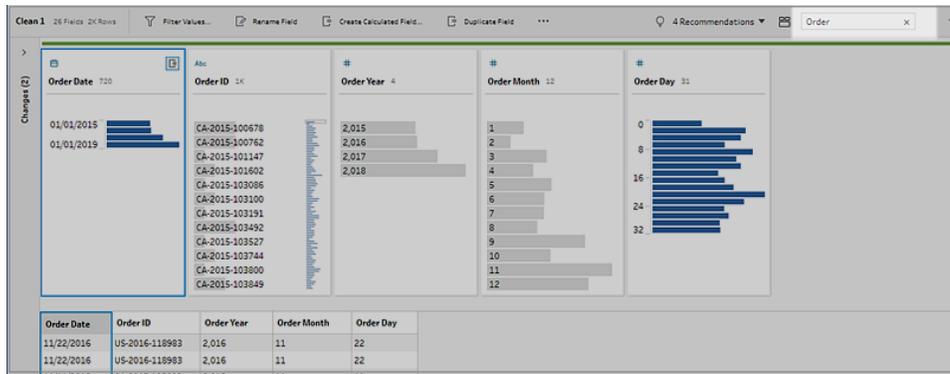


Tableau Prep quickly scrolls all the fields with **Order** in the name into view. Cool!

7. Ctrl-click or Cmd-click (MacOS) to select the fields for **Order Year**, **Order Month**, and **Order Day**. Then right-click on the selected fields and select **Remove (Remove Field in prior versions)** from the menu to remove them.



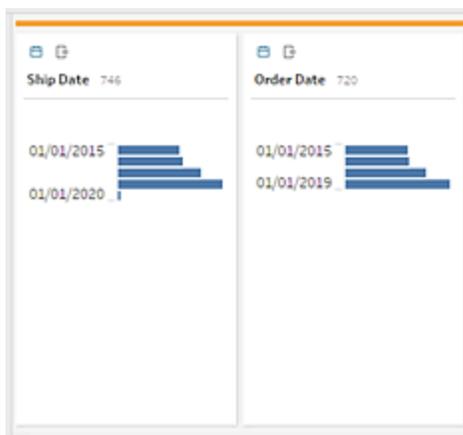
8. Now repeat steps 4 through 7 above to create a single field for **Ship Date**. Try it on your own or use the steps below to help you.
  - In the toolbar, click **Create Calculated Field** to combine the **Ship Year**, **Ship Month**, and **Ship Day** fields into one field with the format "MM/DD/YYYY".
  - Name the calculated field **Ship Date** and enter the calculation `MAKEDATE([Ship Year],[Ship Month],[Ship Day])`. Then click **Save**.
  - Remove the **Ship Year**, **Ship Month**, and **Ship Day** fields. Search for the fields,

select them, and select **Remove** (**Remove Field** in prior versions) from the menu to remove the fields.

**Tip:** Tableau Prep summarizes the data in the Profile pane into bins to help you quickly see the shape of your data, find outliers, spot relationships between fields, and so on.

In this scenario, the order and ship dates can now be summarized by year. Each bin represents a year from January of the starting year to January of the following year and is labeled accordingly. Because there are sales dates and ship dates that fall in the latter part of 2018 and 2019, we get a bin for that data that is labeled with the ending year 2019 and 2020 accordingly.

To change this view to the actual dates, click the **More options**  $\dots$  menu (drop-down arrow in prior versions) in the Profile card and select **Detail**.



### Interact directly with fields to clean your data

Your data is starting to look good. But, as you finish removing the extra fields for the order and ship dates, you notice that the **Discounts** field has a couple of issues.

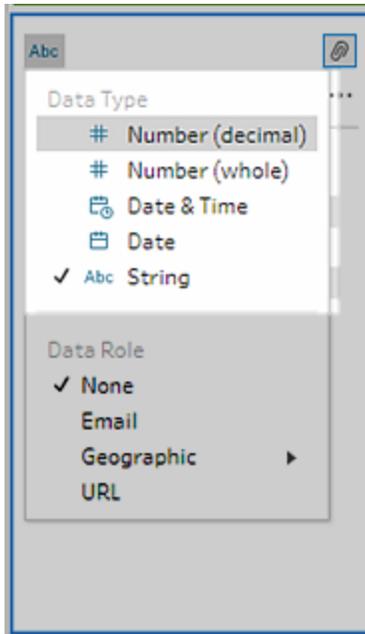
- It's assigned to a **String** data type instead of a **Number (decimal)** data type.
- There's a field value **None** instead of a numeric value for no discount.

This will cause a problem when you combine the files, so you better fix that too.

9. Clear your search and enter **disc** in the search box to find the field.
10. Select the **Discounts** field, double-click the field value **None**, and change it to the

numeric value **0**.

- To change the data type for the **Discount** field from **String** to **Number (decimal)**, click **Abc** and select **Number (decimal)** from the drop-down menu.



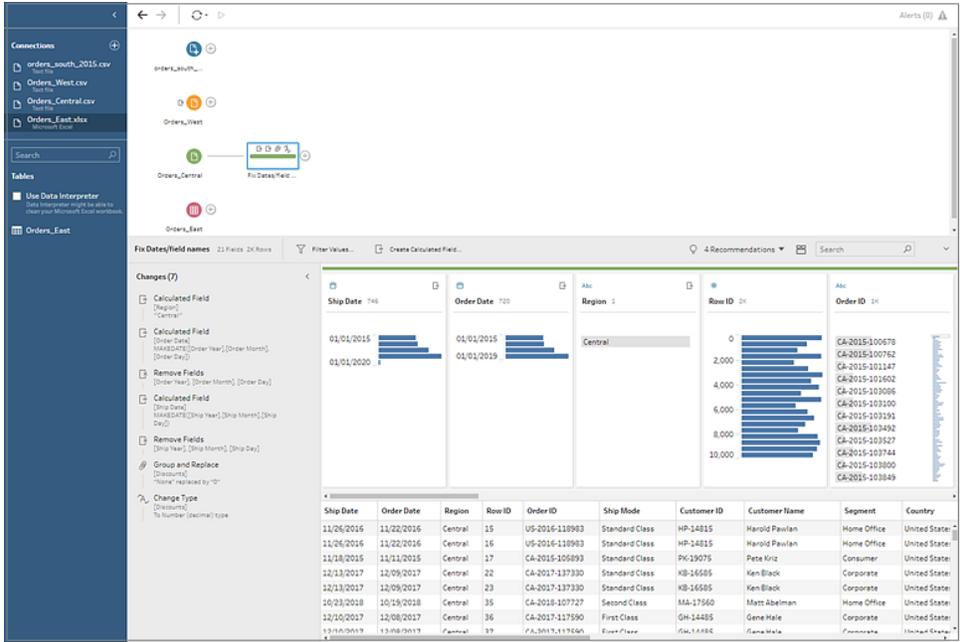
- Finally name your step to help keep track of what you did in this step. In the **Flow** pane, double-click the step name **Clean 1** and type in **Fix dates/field names**.

## Review your changes

You made a lot of changes to this data set and you start to worry that you won't remember everything you did. As you look over your work, you see a column on the left of the **Profile** pane called **Changes**.

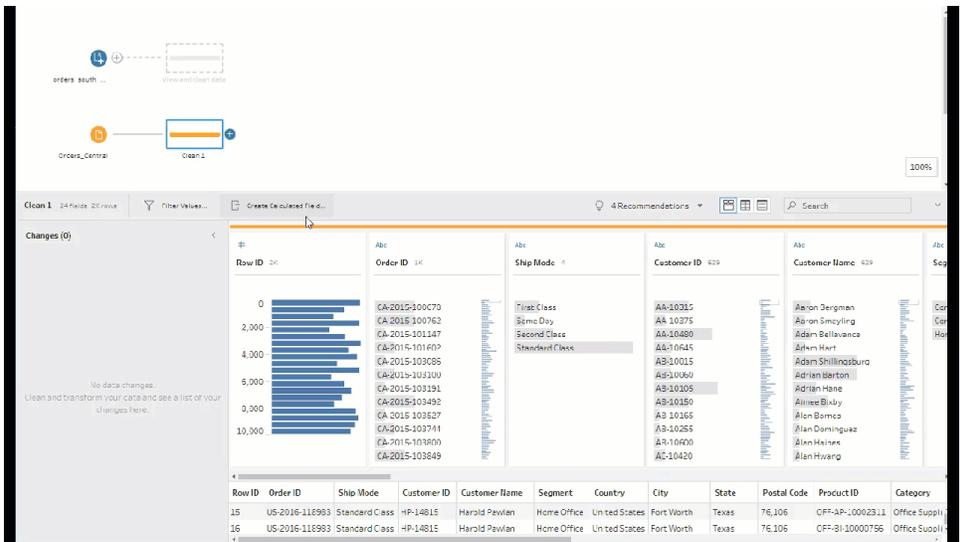
You click the arrow to open it and are delighted to see a list of every change you just made. As you scroll through the changes in the list, you notice that you can delete or edit your changes or even move them around to change the order that you did them in.

You love that you can easily find the changes you made in any step as you build your flow and experiment with the order of those changes to get the most out of your data.



Check your work: Watch "Clean Orders\_Central" in action.

*Click the image to replay it*



Now that you've cleaned one file, you take a look at the other files to see what other issues you need to fix.

You decide to look at the Excel file for **Orders\_East** next.

## Clean Orders\_East

As you look over the fields for the **Orders\_East** file, most of the fields look like they align with the other files, except for **Sales**. To take a closer look and see if there are any other issues to address, you add a cleaning step to the **Orders\_East** Input step.

1. In the **Flow** pane, select **Orders\_East** and do one of the following:
  - Click the plus  icon and add a clean step. Depending on your version, this menu option is **Add Step**, **Add Clean Step**, or **Clean Step**.
  - Click on the suggested clean step (Tableau Prep Builder version 2020.3.3 and later and on the web).

Looking at the **Sales** field you quickly see that the **USD** currency code has been included with the sales numbers, and Tableau Prep interpreted these field values as a string.

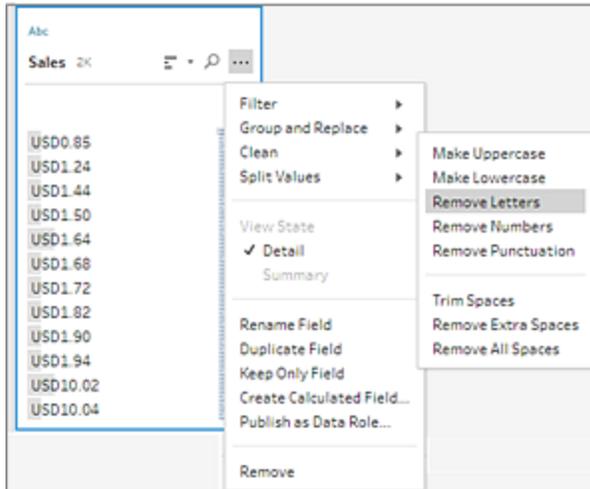
You'll need to remove the currency code from this field and change the data type if you want to get accurate sales data.

Fixing the data type is easy, you already know how to do that. But there are over 2000 unique rows of sales data and fixing every individual row to remove the currency code seems cumbersome.

But this is Tableau Prep, and you decide to check out the drop-down menu to see if there is an option to fix this.

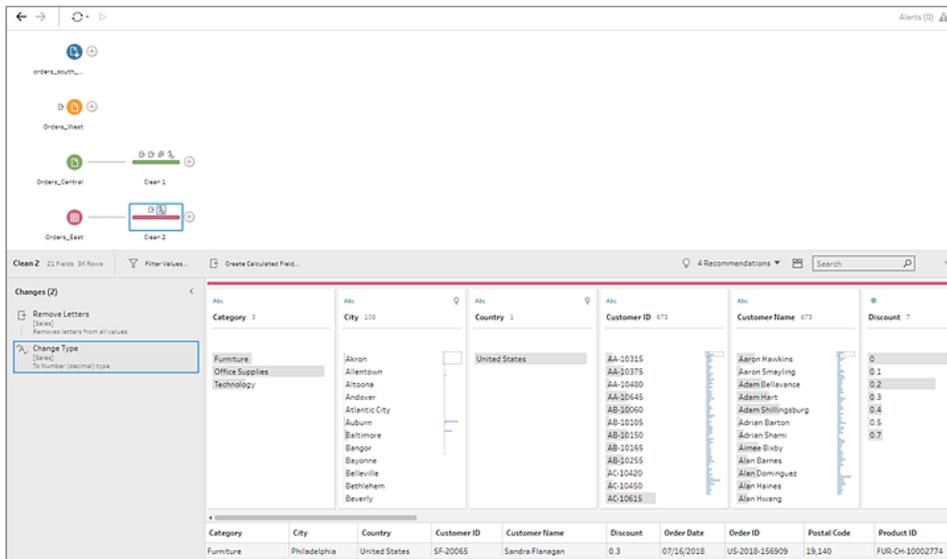
When you click the **More options**  (drop-down arrow in prior versions) for the **Sales** field, you see a menu option called **Clean** and an option under that to remove letters. You decide to give that a try and see what it does.

2. Select the **Sales** field. Click the **More options**  menu (drop-down arrow in prior versions) and select **Clean > Remove Letters**.



Wow! That cleaning option instantly removed the currency code from every field. Now you just need to change the data type from **String** to **Number (decimal)** and this file is looking good.

3. Click the data type for the **Sales** field and select **Number (decimal)** from the drop-down list to change the data type.



4. The rest of the file looks pretty good. Name your cleaning step to keep track of your work. For example, **Change data type**.

Next you look at your last file for **Orders\_West** to see if there are any issues there that you need to fix.

## Clean Orders\_West

As you look over the fields for the **Orders\_West** file, most of the fields look like they align with the other files, but you remember seeing that the **States** field used abbreviations for the values instead of spelling out the state name. To combine this file with the other files, you'll need to fix this. So you add a cleaning step to the **Orders\_West** Input step.

1. In the **Flow** pane, select **Orders\_West** and do one of the following:
  - Click the plus  icon and add a clean step.
  - Click on the suggested clean step (Tableau Prep Builder version 2020.3.3 and later and on the web).
2. Scroll or use Search to find the **State** field.

You see that all the state name values use the short abbreviation. There are only 11 unique values for this field. You could manually change each one, but maybe Tableau Prep has another way to do this?

You click the **More options**  menu (drop-down arrow in prior releases) for the field and see an option called **Group Values** (Group and Replace in previous versions). When you select it you see several options:

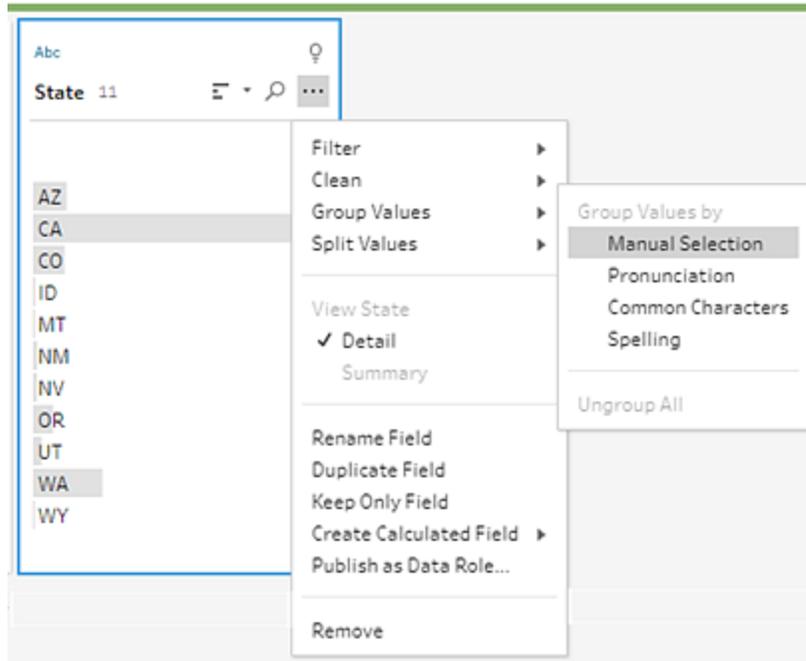
- Manual Selection
- Pronunciation
- Common Characters
- Spelling

The state names don't sound alike, they aren't spelled incorrectly, and they don't share the same characters, so you decide to try the **Manual Selection** option.

**Tip:** You can double-click a field name or field value to edit a single value. To edit multiple values you can select all the values and use the right-click menu option **Edit Values**. But when you want to map one or more values to specific values, use the **Group Values** option in the drop-down menu.

For more information about editing and grouping values, see [Edit field values on page 295](#).

3. Select the **State** field. Click the drop-down arrow and select **Group Values** (Group and Replace in previous versions) > **Manual Selection**.



A two column card opens. This is the **Group Values editor**. The column on the left shows the current field values and the column on the right shows the fields that are available to map to the fields on the left.

You want to map your state abbreviations to the spelled out version of the state name, but you don't have those values in the **Orders\_West** data set. You wonder if you can just edit the name directly and maybe add it there, so you give that a try.

4. In the **Group Values editor** in the left pane, double-click **AZ** to highlight the value and type **Arizona**. Then press **Enter** to add your change.

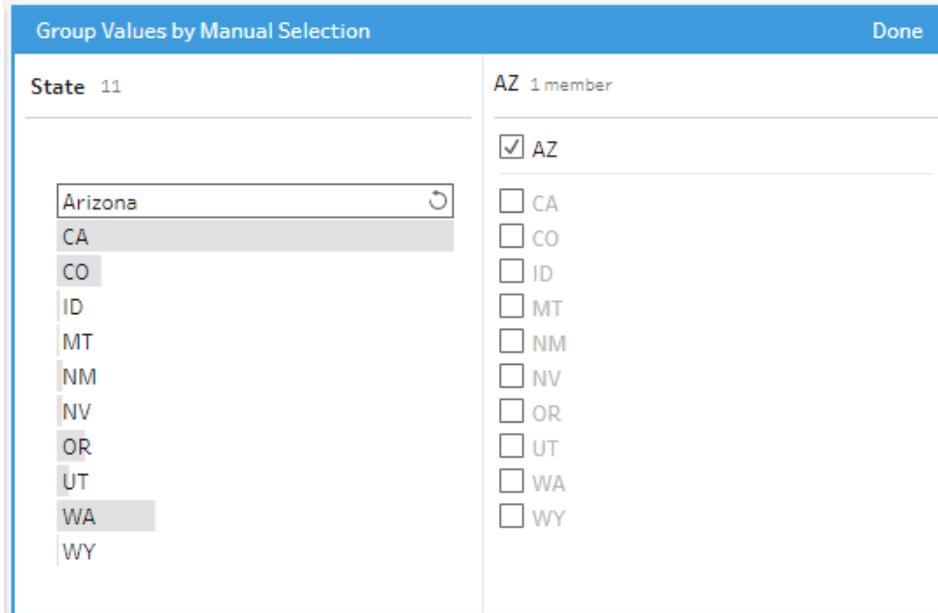


Tableau Prep created a mapped value for your new value **Arizona** and automatically mapped the old value, **AZ** to it. Having a mapped relationship set up for these values will save you time if you get more data from this region entered like this.

**Tip:** You can add field values that aren't in your data sample to set up mapping relationships to organize your data. If you refresh your data source and new data is added, you can add the new data to the mapping instead of manually fixing each value.

When you manually add a value that isn't in your data sample, the value is marked with a red dot to help you easily identify it.

- Repeat these steps to map each state to the spelled out version of its name.

Abbreviation	State Name
--------------	------------

AZ	Arizona
----	---------

CA	California
----	------------

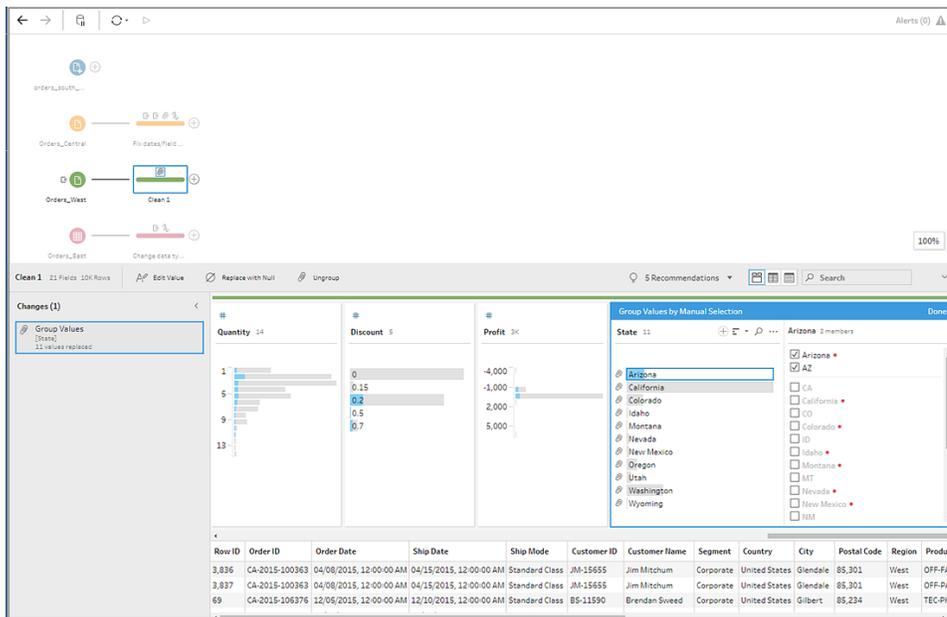
CO	Colorado
----	----------

ID	Idaho
----	-------

MT	Montana
----	---------

NM	New Mexico
NV	Nevada
OR	Oregon
UT	Utah
WA	Washington
WY	Wyoming

Then click **Done** to close the **Group Values** editor.



After all the states are mapped, you look at the **Changes** pane and see there is only one entry there instead of 11.

Tableau Prep grouped similar actions for a field together. You like that because it will make it easier to find changes you made to your data set later.

Fixing the **State** field values was the only change you needed to make here.

6. Name your cleaning step to keep track of your work. For example **Rename states**.

You've done a lot of clean up in your files, and you can't believe how quick and easy it was. You might make it home for dinner after all! To make sure that you don't lose all of your work so far, save your flow.

**Note:** If working on the web, your changes are automatically saved as you go, creating a draft flow. Click in the draft title to name your draft. For more information about authoring on the web, see [Tableau Prep on the Web on page 166](#).

Click **File > Save** or **File > Save As**. Save your file as a flow file (.tfl) and give it a name. For example, **My Superstore**.

**Tip:** When you save your flow files, you can either save them as a flow file (.tfl) or you can save them as a packaged file (.tflx) and package your local data files with them to share the flow and files with someone else. For more information about saving and sharing your flows, see [Save and Share Your Work on page 383](#).

## 4. Combine your data

Now that all the files are cleaned up, you are finally ready to combine them all.

Because all the files have similar fields after your clean up efforts, to pull all the rows together into a single table, you need to union the tables.

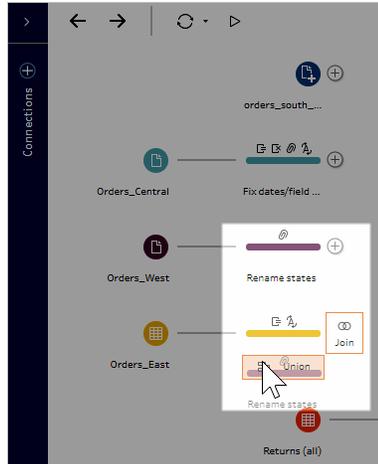
You remember that there was a step option called **Union**, but you wonder if you can simply drag and drop the steps to union them. You decide to try it and see.

### Union your data

1. Follow the steps for where you are working.

#### Tableau Prep Builder

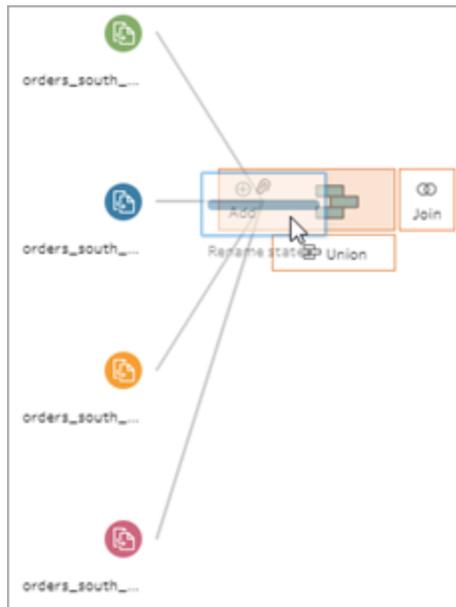
- In the **Flow** pane, drag the cleaning step **Rename states** on to the cleaning step **Changed data type** step and drop it on the **Union** option.



You see that Tableau Prep Builder added a new **Union** step to your flow. Great!  
Now you want to add the other files to this union too.

### Tableau Server or Tableau Online

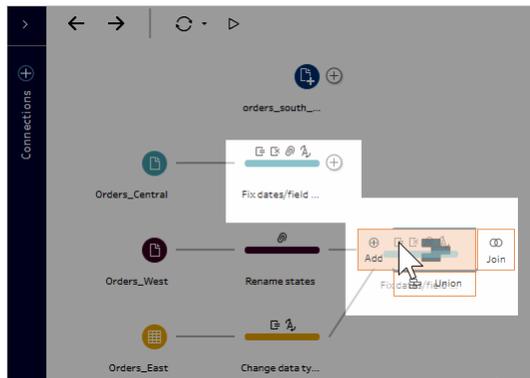
- In the **Flow** pane, drag the cleaning step **Rename states** on to the Union step you created earlier for your South files and drop it on the **Add** option.



You see that Tableau Prep added your new files to your previous union. Great!  
Now you want to add the other files to this union too.

2. Drag the next cleaning step in the flow on to the **Union** step, then drop it on **Add** to add it

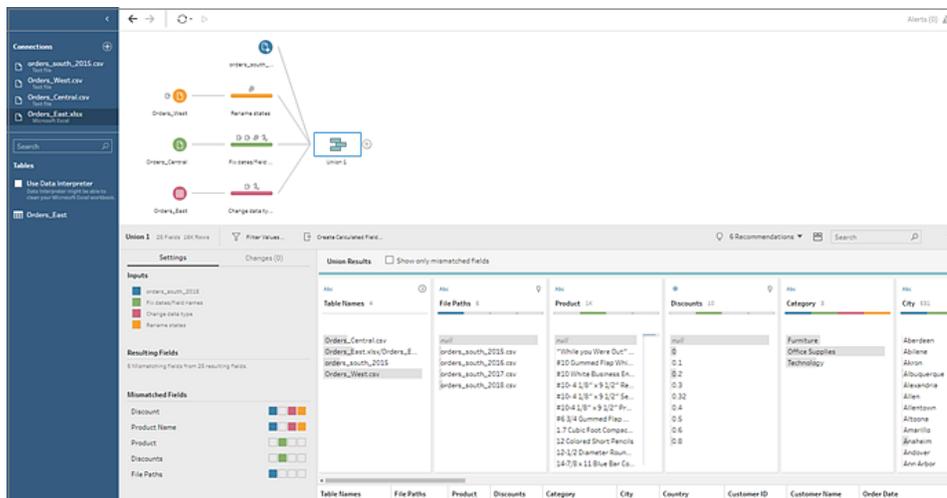
to the existing union.



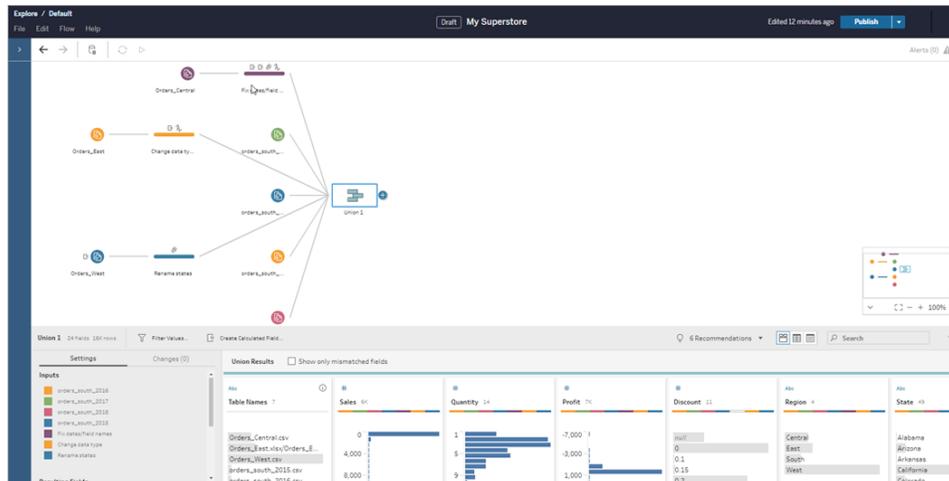
3. Drag the remaining step (**orders\_south\_2015** Input step if working in Tableau Prep Builder or your cleaning step if working on the web) to the new **Union** step. Drop it on **Add** to add it to the existing union.

Now all of your files are combined into a single table. In the **Flow** pane, select the new **Union** step to see your results.

**On Tableau Prep Builder:**



**On Tableau Server or Tableau Online:**



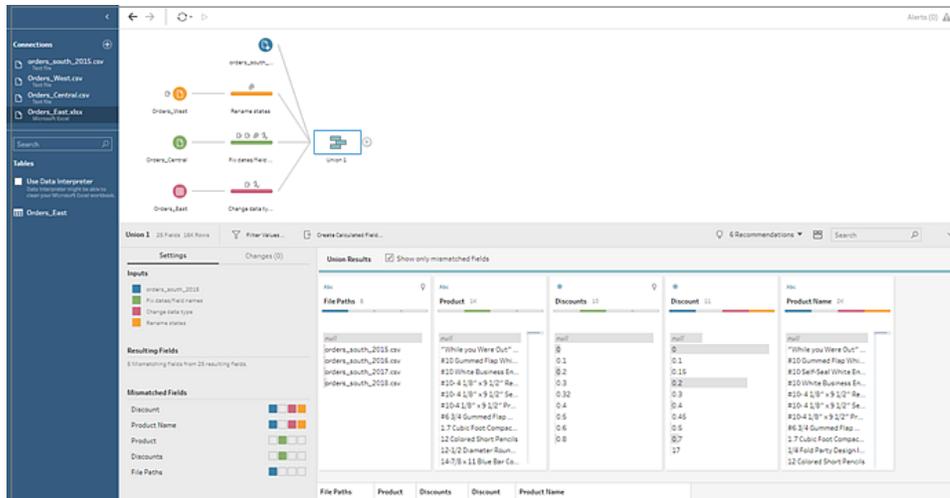
You notice that Tableau automatically matched up the fields that had the same names and types.

You also see that the **colors** assigned to the steps in the flow are used in the union profiles to indicate where the field came from and also appear in the **colored band** across the top of each field to show you if that field exists in that table.

You notice that a new field called **Table Names** was added that lists the tables where all the rows in the union come from.

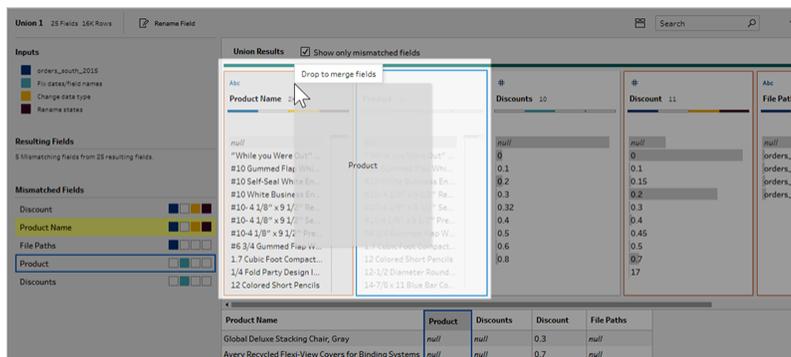
A list of mismatched fields also shows in the summary pane and you can see right away that the fields **Product** and **Discounts** only appear in the **Orders\_Central** file.

4. To take a closer look at these fields, in the **Union Results** pane, select the **Show only mismatched fields** check box.



Looking at the field data, you quickly see that the data is the same, but the field name is different. You could simply rename the field, but you wonder if you could just drag and drop these fields to merge them. You decide to try that and see.

5. Select the **Product** field and drag and drop it onto the **Product Name** field to merge the fields. After the fields are merged, they no longer appear in the pane.



6. Repeat this step to merge the **Discounts** field with the **Discount** field.

The only field that doesn't have a match now is the **File Paths** field. In Tableau Prep Builder, this field shows the file paths for the wildcard union that you did for your sales orders from the South. You decide to leave this field there as it has good information.

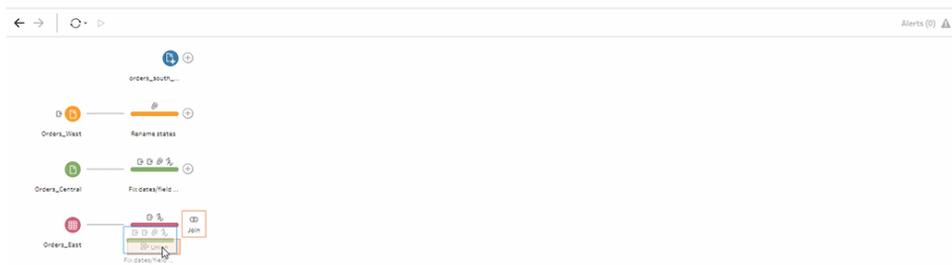
**Tip:** You have several options when fixing mismatched fields after a union. If Tableau Prep detects a possible match, it will highlight it in yellow. To merge the fields hover over the highlighted field and click the plus (+) button that appears.

For more ways to merge fields in a union, see [Fix fields that don't match](#) on page 371.

7. Clear the **Show only mismatched fields** check box to show all the fields included in the union.
8. Name your Union step to represent what this union includes work. For example, **All orders**.

## Check your work: Watch "Union your data" in action.

*Click the image to replay it*



You are a cleaning genius! As you are admiring your results, your boss calls. He forgot to mention that he also wants you to include any product returns in your analysis. He hopes that won't be too much trouble. With Tableau Prep in your toolkit, it's no problem at all!

## Clean the product returns data

You look over the Excel file that your boss sent you for product returns and it looks a little messy. You add the new file **return\_reasons\_new** to your flow to take a closer look.

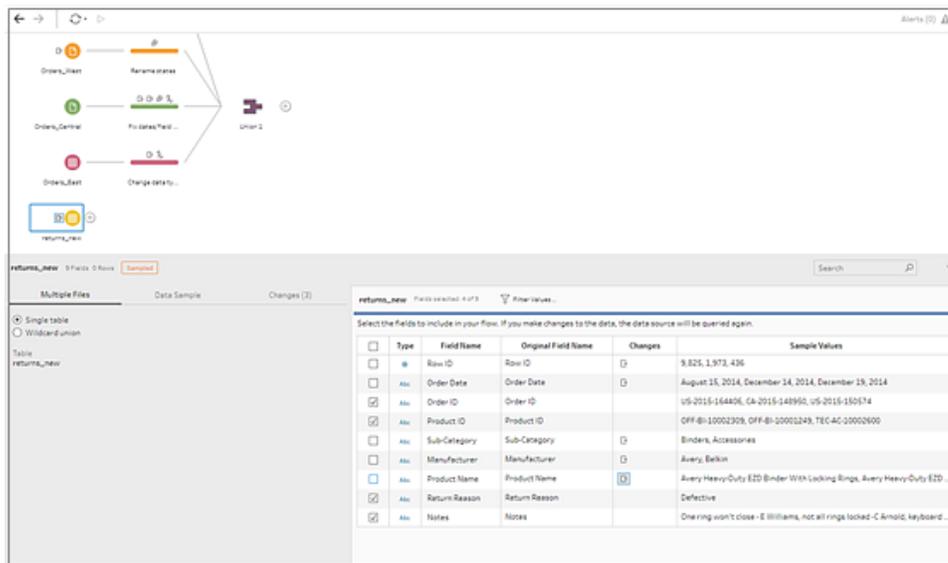
1. In the **Connections** pane, click **Add connection**. Select **Microsoft Excel** and navigate to the sample data files you've been using for this exercise. (See [Sample files on](#)

page 111 to download the file.)

2. Select **return reasons\_new.xlsx**, and then click **Open** to add the file to the flow pane.

There are only four fields that you want to include from this file in your flow: **Order ID**, **Product ID**, **Return Reason** and **Notes**.

3. In the **Input** pane for **returns\_new** clear the check box at the top of the left-most column to clear all the check boxes. Then select the check box for the **Order ID**, **Product ID**, **Return Reason** and **Notes** fields.



4. Rename the Input step to better reflect the data that is included in this input. In the **Flow** pane, double-click the Input step name **Returns\_new** and type in **Returns (all)**.

Looking at the sample field values, you notice that the **Notes** field seems to have a lot of different data combined together.

You have some cleaning to do in this file before you can do any further work with the data, so you add a cleaning step to check it out.

5. In the **Flow** pane, select the Input step **Returns (all)**, click the plus  $\oplus$  icon or on the suggested clean step to add a clean step.

In the **Profile** pane, re-size the **Notes** field so you can see the entries better. To do this, click and drag the outer right edge of the field to the right.

6. In the **Notes** field, use the visual scroll bar to the right of the field values to scan the

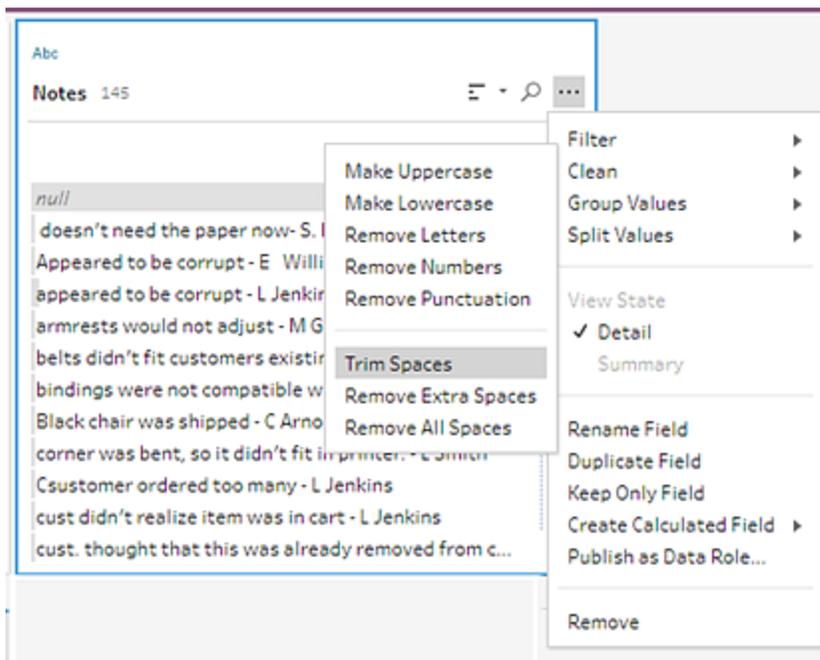
values.

You notice a few things that are problematic:

- Some of the entries have an extra space in the entry. This can result in the field being read as a null value.
- It looks like the name of the approver is included in the return notes entry. To better work with this data you'll want that information in a separate field.

To tackle the extra spaces, you remember that there was a cleaning option to remove trailing spaces, so you decide to try that to see if it can fix that problem.

7. Select the **Notes** field. Click the **More options** ... menu (drop-down arrow in prior releases) and select **Clean > Trim Spaces**.

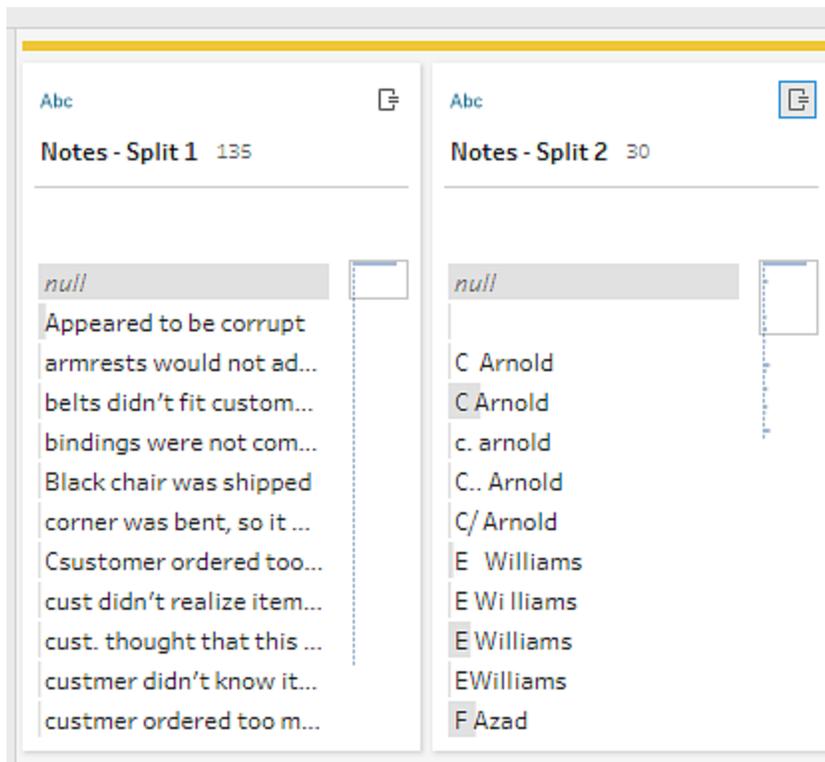


Yes! It did exactly what you wanted it to do. The extra spaces are gone.

Next you want to create a separate field for the approver name. You see a **Split Values** option in the menu, so you decide to try that.

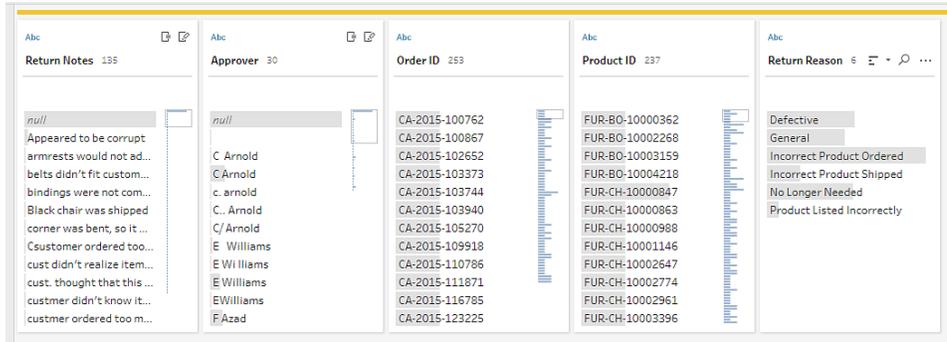
8. Select the **Notes** field. Click the **More options** ... menu (drop-down arrow in prior releases) and select **Split Values > Automatic Split**.

This option did exactly what you were hoping it would do. It automatically split the return notes and the approver name into separate fields.



Just like Tableau Desktop, Tableau Prep automatically assigned a name to those fields. So you'll need to rename the new fields to something meaningful.

9. Select the field **Notes-Split 1**. Double-click in the field name and type **Return Notes**.
10. Repeat this step for the second field and rename it to **Approver**.
11. Finally remove the original **Notes** field, as you no longer need it. Select the **Notes** field, click the **More options**  $\dots$  menu (drop-down arrow in prior versions), and select **Remove** (**Remove Field** in prior versions) from the menu.

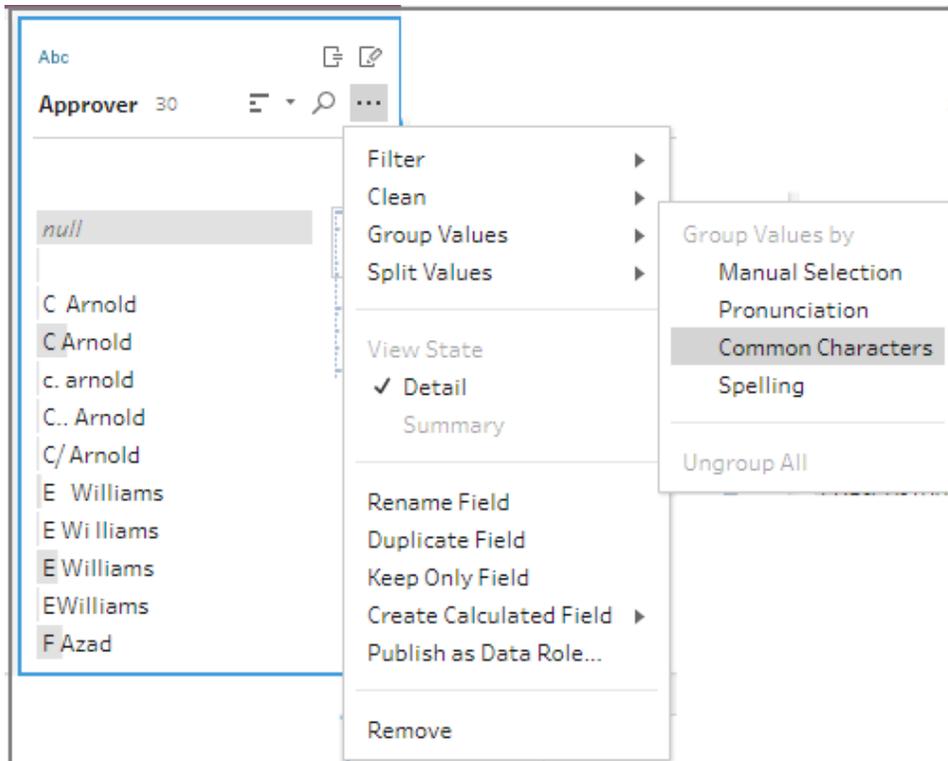


Looking at the new **Approver** field, you notice that the field values lists the same names but they are entered differently. You want to group them to eliminate multiple variations of the same value.

Maybe the **Group Values** (Group and Replace in prior versions) option can help with that?

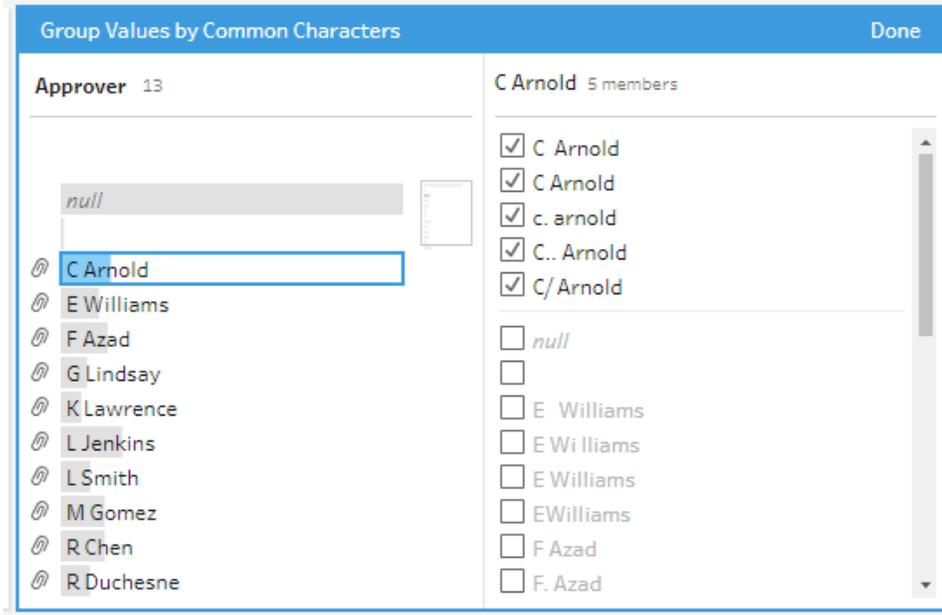
You remember there was an option for **Common Characters**. Since these values share the same letters, you decide to try that.

12. Select the **Approver** field. Click the **More options**  $\cdots$  menu (drop-down arrow in prior versions) and select **Group Values** (Group and Replace in prior versions) > **Common Characters**.



This option grouped all of the variations of each name together for you. That's exactly what you wanted to do.

After checking the other names to make sure they are grouped properly, you click **Done** to close the **Group Values editor**.



This file is looking pretty good.

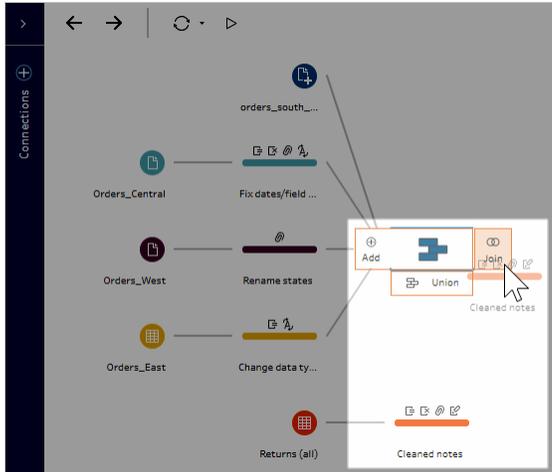
13. Name your cleaning step to keep track of your work. For example **Cleaned notes**.

Now that the product return data is all cleaned up, you want to add this data to the orders data from your unioned files. But many of these fields don't exist in the unioned files. To add these fields (columns of data) to your unioned data set, you need to use a join.

## Join your data

When you join data, the files must have at least one field in common. Your files share the **Order ID** and **Product ID** fields, so you can join on those fields to see all the rows that have those fields in common. You remember an option to create a join when you created your union using drag and drop, so you give that a try.

1. In the **Flow** pane, drag the **Cleaned notes** step on to the **All orders** Union step and drop it on **Join**.



When you join files, Tableau Prep shows you the results of your join in the **Join Profile**.

Working with joins can be tricky. You often want to have a clear view of the factors that are included in the join, such as the fields used to join the files, the number of rows included in the results and any fields that aren't included or are null values.

As you review the results of the join in Tableau Prep, you are delighted to see so much information and interactivity at your fingertips.

**Summary of Join Results**

Included	2,640
Excluded	13,662
Matched values	0
Unmatched values	275
Join Results	3,187

Table Names	Return Notes	Approver	File Paths	Order ID	Product ID	Gen
Orders_Central.csv	null	null	null	CA-2016-111948	OFF-AB-10002311	Gen
Orders_Central.csv	Customer meant to order something else	E Williams	null	CA-2018-129707	OFF-AB-10000246	Inco
Orders_Central.csv	null	null	null	CA-2018-189827	OFF-AB-10001892	No L
Orders_Central.csv	Customer found comparable products at local store	R Chen	null	CA-2017-109606	TEC-FH-10004939	No L
Orders_Central.csv	null	null	null	CA-2017-133802	OFF-BI-10003291	Def
Orders_Central.csv	Customer ordered too many	K Lawrence	null	US-2017-152051	OFF-ST-10001713	No L
Orders_Central.csv	customer got them cheaper at online discount store	M Gomez	null	CA-2017-145583	FUR-FU-10001706	No L
Orders_Central.csv	null	null	null	PA-2016-101168	BIB-ELI-10001706	Inco

**Tip:** The far left pane of the join profile is where you can explore and interact with your join. You can also edit values directly in the **Join Clauses** panes and perform cleaning operations in the **Join Results** pane.

Click in the **Join Type** diagram to try different join configurations and see the number of rows included or excluded in your join for each table in the **Summary of Join Results** section.

Select the fields that you want to join on in the Applied Join Clauses section or add suggested join clauses from the Join Clause Recommendations section.

For more information about working with joins, see [Aggregate, Join, or Union Data on page 360](#).

You see that you have over 13,000 rows excluded from your **All Orders** files. When you created your join, Tableau Prep automatically joined on the **Product ID** field, but you also wanted to join on the **Order ID** field.

As you scan the left pane of the join profile, you see that **Order ID** is in the list of recommended join clauses, so you quickly add it from there.

2. In the left pane of the **Join** profile, in the **Join Clause Recommendations** section, select **Order ID = Order ID** and click the plus  button to add the join clause.

Join 1 28 Fields 621 Rows ✓ Keep Only ✕ E

**Applied Join Clauses**

All orders = Cleaned notes

Product ID = Product ID

Order ID = Order ID

**Join Type:** Inner join

Click the graphic to change the join type.

All orders Cleaned notes

**Summary of Join Results**

Click the bar segments to view the included and excluded values.

Mismatched values

	Included	Excluded
All orders	621	15,681
Cleaned n...	272	3
Join Result	621	

**Join Clause Recommendations**

Product Name = Product ID

Order Date = Order ID

Because the **Join Type** is set to an inner join (the default setting for Tableau Prep), the join is only including values that exist in both files. But you want all of the data from your **Orders** files as well as the return data for those files. So you'll need to change the join type.

- In the **Join Type** section, click the side of the diagram to include all orders. In the example below, click the left side of the diagram to change the join type to a **Left** join and include all data from the **All orders** union step and any matching data from the **Cleaned notes** step.

**Join 1** 28 Fields 16K Rows

**Applied Join Clauses**

All orders = Cleaned notes

Product ID = Product ID

Order ID = Order ID

**Join Type:** Left join

Click the graphic to change the join type.

All orders Cleaned notes

**Summary of Join Results**

Click the bar segments to view the included and excluded values.

Mismatched values

	Included	Excluded
All orders	16,302	0
Cleaned n...	272	3
<b>Join Result</b>	<b>16,302</b>	

**Join Clause Recommendations**

Product Name = Product ID

Order Date = Order ID

Now you have all of the data from the sales order files and any return data that apply to those orders. You review the **Join Clauses** pane and see the distinct values that don't exist in the other file.

For example there are many order rows (shown in red) that have no corresponding return data. You love being able to explore this level of detail about your join.

You're anxious to start analyzing this data in Tableau Desktop, but you notice a few results from the join that you want to clean up before you do that. Good thing you know what to do!

**Tip:** Wonder if your data is clean enough? From Tableau Prep Builder, you can preview your data in Tableau Desktop from any step in your flow to check it out.

Just right-click on the step in the **Flow** pane and select **Preview in Tableau Desktop** from the menu.

You can experiment with your data and any changes that you make in Tableau Desktop

won't write back to your data source in Tableau Prep Builder. For more information see [View flow output in Tableau Desktop on page 386](#).

4. Before you start cleaning your join results, name your **Join** step **Orders+Returns** and save your flow.

## Clean your join results

**Note:** To clean up the fields in your join, you can perform cleaning operations directly in the Join step. For the purposes of this tutorial we will add a cleaning step so you can clearly see your cleaning operations. If you want to try performing these steps directly in the join step skip steps 1 and 3 below.

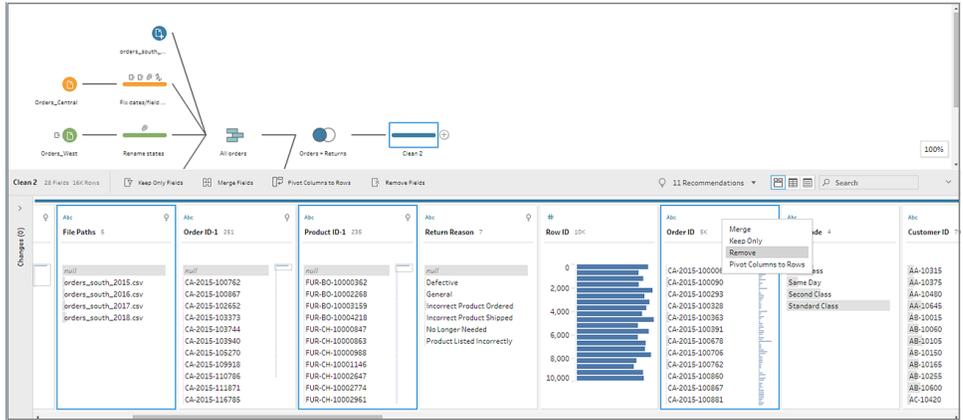
When you joined the two steps, the common fields Order ID and Product ID were added for both tables.

You want to keep the Product ID field from all of your orders and the Order ID field from the returns file and remove the duplicate fields that came from those files. You also don't need the **File Paths** and **Table Names** fields in your output file, so you want to remove those fields as well.

**Tip:** When you join tables using fields that exist in both files, Tableau Prep brings in both fields and renames the duplicate field from the second file by adding a "-1" or a "-2" to the field name. For example Order ID and Order ID-1.

1. In the **Flow** pane, select **Orders+Returns**, click the plus  icon, and add a clean step.
2. In the **Profile** pane, select and remove the following fields:
  - **Table Names**
  - **Order ID**
  - **File Paths** (Tableau Prep Builder only)
  - **Product ID-1**

# Tableau Prep Help



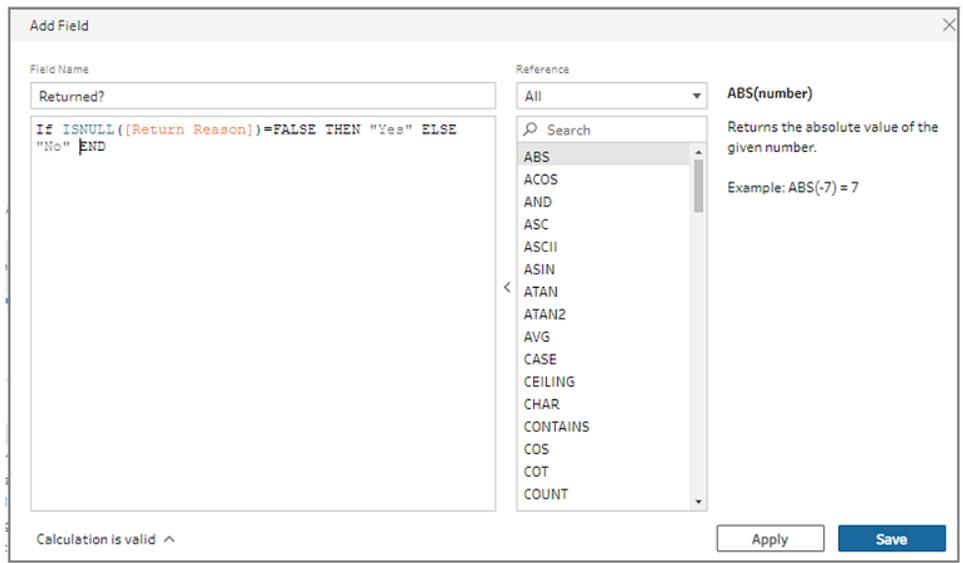
3. Rename the field **Order ID-1** to **Order ID**.

You have quite a few null values where the product was returned but there was no return note or appover indicated. To make this data easier to analyze, you want to add a field with a value of **Yes** and **No** to indicate whether the product was returned.

You don't have this field, but you can add it by creating a calculated field.

4. In the toolbar, click **Create Calculated Field**.
5. Name the field **Returned?** and then enter the following calculation and click **Save**.

```
If ISNULL([Return Reason])=FALSE THEN "Yes" ELSE "No" END
```

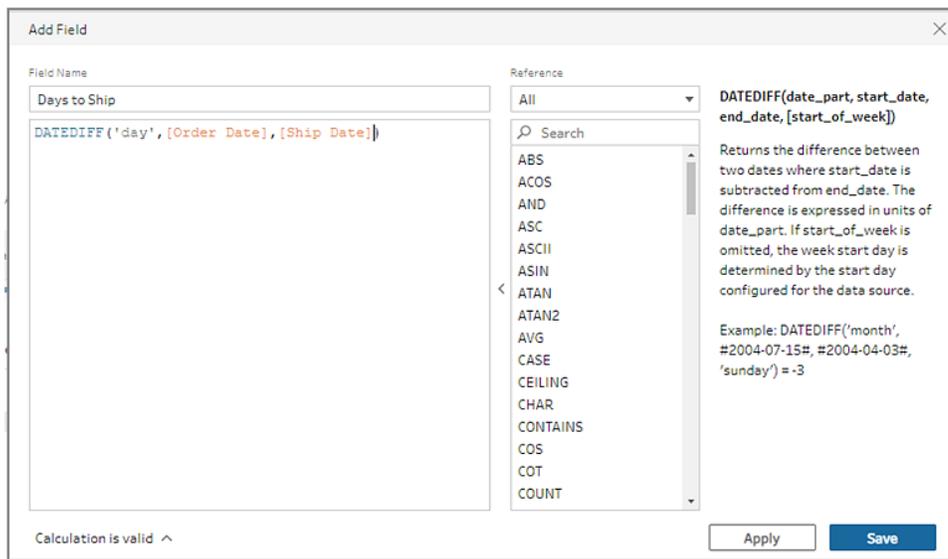


For your analysis you would also like to know the number of days it takes to ship an order, but you don't have that field either.

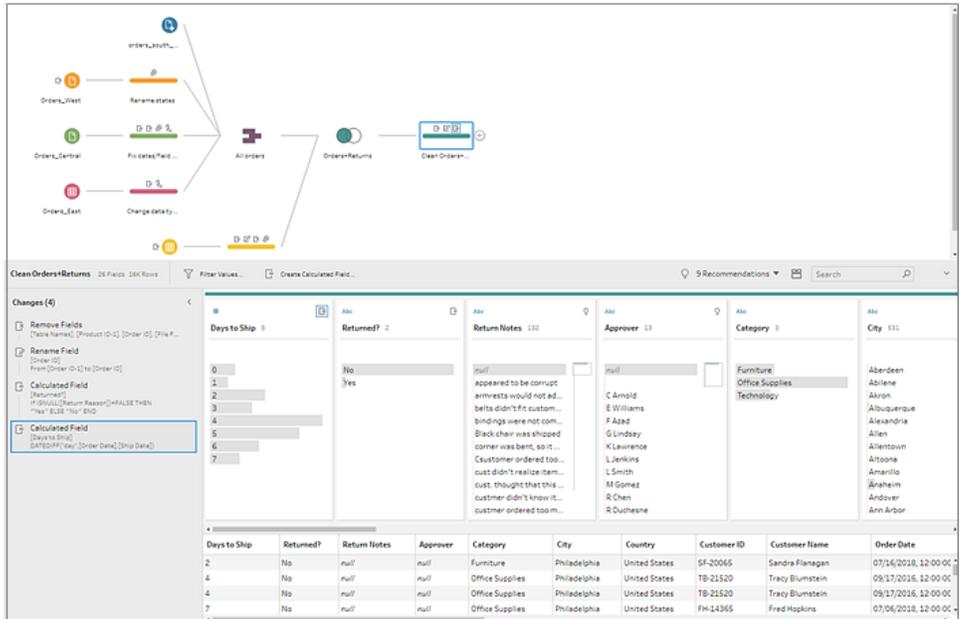
You have all the information that you need to create it though, so you add another calculated field to create it.

6. In the toolbar, click **Create Calculated Field**.
7. Name the field **Days to Ship** and then enter the following calculation and click **Save**.

```
DATEDIFF('day', [Order Date], [Ship Date])
```



8. Name your step **Clean Orders +Returns**.
9. Save your flow.



## 5. Run your flow and generate output

Your data is looking good and you're ready to generate your output file to start analyzing it in Tableau Desktop. All you need to do is run your flow and generate your extract file. To do this you need to add an **Output** step.

Depending on where you're working, you can output your flow to a file (Tableau Prep Builder only), to a published data source or to a database.

1. In the **Flow pane**, select **Clean Orders+Returns**, click the plus (+) icon and select **Output (Add Output in prior versions)**.

When you add an Output step, the **Output** pane opens and shows you a snapshot of your data. Here you can select the type of output that you want to generate, and specify the name and where you want to save the file.

The default location is in the **My Tableau Prep Builder** repository in your data sources folder.

The screenshot shows the Tableau Prep Builder interface. At the top, a data flow diagram consists of several steps: 'Orders\_General' (with a 'Focus' icon), 'Orders\_West' (with a 'Rename' icon), 'Orders\_East' (with a 'Change data type' icon), 'All orders', 'Orders + Returns', 'Clean Orders + ...', and 'Output'. Below the flow, the 'Output' pane is active, displaying a table with 17 columns and 20 rows of data. The columns include 'Days to Ship', 'Returned?', 'Return Notes', 'Approver', 'Order ID', 'Return Reason', 'Row ID', 'Ship Mode', 'Customer ID', 'Customer Name', 'Segment', 'Country', 'City', 'State', 'Postal Code', and 'Product ID'. The 'Save output to' section on the left shows a file path 'C:\\_DataSources' and the 'Output type' is set to 'Tableau Data Extract (.hyper)'. The 'Write Options' section shows 'Full refresh' and 'Create table' selected.

Days to Ship	Returned?	Return Notes	Approver	Order ID	Return Reason	Row ID	Ship Mode	Customer ID	Customer Name	Segment	Country	City	State	Postal Code	Product ID
4	No	null	null	null	null	15	Standard Class	HP-14815	Harold Pavlan	Home Office	United States	Fort Worth	Texas	76106	OFF-AD-1
4	No	null	null	null	null	16	Standard Class	HP-14815	Harold Pavlan	Home Office	United States	Fort Worth	Texas	76106	OFF-AD-1
7	No	null	null	null	null	17	Standard Class	PK19075	Paula Kozl	Consumer	United States	Madison	Wisconsin	53711	OFF-ST-1
4	No	null	null	null	null	22	Standard Class	KB-16585	Ken Black	Corporate	United States	Fremont	Nebraska	68025	OFF-AD-1
4	No	null	null	null	null	23	Standard Class	KB-16585	Ken Black	Corporate	United States	Fremont	Nebraska	68025	OFF-AD-1
4	No	null	null	null	null	35	Second Class	MA-17560	Matt Abelman	Home Office	United States	Houston	Texas	77095	OFF-PA-1
2	No	null	null	null	null	36	First Class	GH-14485	Gene Hale	Corporate	United States	Richardson	Texas	75080	TECH-1
2	No	null	null	null	null	37	First Class	GH-14485	Gene Hale	Corporate	United States	Richardson	Texas	75080	FUR-FU-1
4	No	null	null	null	null	38	Standard Class	SN-20710	Steve Nguyen	Home Office	United States	Houston	Texas	77041	OFF-EN-1
4	No	null	null	null	null	39	Standard Class	SN-20710	Steve Nguyen	Home Office	United States	Houston	Texas	77041	FUR-BO-1
4	No	null	null	null	null	40	Standard Class	SN-20710	Steve Nguyen	Home Office	United States	Houston	Texas	77041	FUR-CH-1
4	No	null	null	null	null	41	Standard Class	SN-20710	Steve Nguyen	Home Office	United States	Houston	Texas	77041	TECH-1
5	No	null	null	null	null	42	Standard Class	LC-16930	Linda Cazamas	Corporate	United States	Hoperville	Illinois	60540	TECH-1
2	No	null	null	null	null	45	First Class	ON-18715	Odella Nelson	Corporate	United States	Eagan	Minnesota	55122	TECH-1
2	No	null	null	null	null	46	First Class	ON-18715	Odella Nelson	Corporate	United States	Eagan	Minnesota	55122	OFF-BI-1
5	No	null	null	null	null	47	Second Class	PO-18865	Patrick O'Donnell	Consumer	United States	Westland	Michigan	48185	OFF-ST-1

- In the left pane in the **Save output to** drop-down, depending on where you are working, do one of the following:

### Tableau Prep Builder

- Select **File** (select **Save to file** in previous versions).
- Click the **Browse** button, then in the **Save Extract As** dialog, enter a name for the file, for example **Orders\_Returns\_Superstore**, and click **Accept**.
- In the **Output type** field, select an output type. Select **Tableau Data Extract (.hyper)** for Tableau Desktop or **Comma Separated Values (.csv)** if you want to share the extract with a third party.

### Tableau Server or Tableau Online

- Select **Published data source**.
- Select a project.
- Enter a name for the file, for example **Orders\_Returns\_Superstore**.

**Tip:** You have choices when generating output from your flow. You can generate an extract file (Tableau Prep Builder only), you can publish your data as a data source to Tableau Server or Tableau Online or you can write your data to a database. For more information about generating output files, see [Create data extract files and published data sources on page 387](#).

- In the **Write Options** section, view the options to write the new data to your files. You want to use the default (**Create table**) and replace the table with your flow output, so

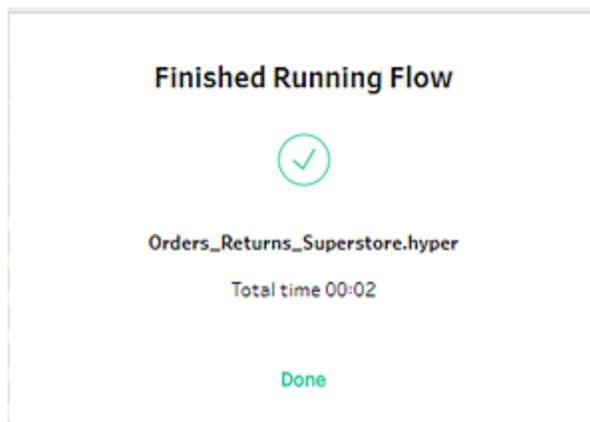
there is nothing to change here.

**Tip:** Starting in version 2020.2.1, you can choose how you want to write your flow data back to your table. You can choose from two options; **Create table** or **Append table**. By default, Tableau Prep uses the **Create table** option and overwrites your table data with the new data when you run your flow. If you choose **Append table**, Tableau Prep adds the flow data to the existing table so you can track both new and historical data on every flow run. For more information, see [Configure write options on page 405](#)

4. In the Output pane, click **Run Flow** or click the **Run Flow** ▸ button in the flow pane to generate your output.

**Note:** If you are working on the web, click **Publish** to publish your draft flow. Only published flows can be run.

5. When the flow is finished running, a status dialog shows whether the flow ran successfully and the time it took to run. Click **Done** to close the dialog.



If working on the web, navigate to the **Explore>All Flows** page, and find your flow. You can see the status of your flow run on the Flow Overview page.

The screenshot displays the Tableau Prep interface for a flow named 'My Superstore'. The top navigation bar includes 'Overview', 'Connections', 'Scheduled Tasks', 'Run History', and 'Lineage'. Below this is a table showing the execution status of the flow:

Run All	Output step	Output name	Status	Schedule	Errors
Run	Output	Orders>Returns_Superstore	Succeeded: Dec 1, 2020, 4:07 PM		+ Create new task

The flow diagram below the table shows a sequence of steps: 'Orders\_Central', 'Orders\_East', 'Orders\_West', 'Rename states', 'Change data type...', 'Orders\_South...', 'Orders\_South...', 'Orders\_South...', 'Orders\_South...', 'All Orders', 'Orders>Returns', 'Clean Orders...', and 'Output'.

To keep your data fresh, you can run the flow manually or use the command line. If you have the Data Management Add-on and have Tableau Prep Conductor enabled, you can also run your flow on a schedule in Tableau Server or Tableau Online.

Starting in Tableau Prep Builder version 2020.2.1 and on the web, you can also choose to refresh all your data every time the flow is run, or run your flow using incremental refresh and process only your new data each time.

For more information about keeping your data fresh, see the following topics:

- [Refresh flow output files from the command line](#) on page 409
- [Publish a Flow to Tableau Server or Tableau Online](#) on page 479
- [Refresh Flow Data Using Incremental Refresh](#) on page 400

## Wrap up and resources

You are a data prep rock star! You took dirty data and transformed it with ease! In no time, you cleaned and prepped your data from multiple data sets and turned it into a sleek, clean data set that you can now work with in Tableau Desktop to do your analysis.

Want more practice? Try replicating the rest of the sample flow for Superstore using the data files found here:

## Tableau Prep Help

- [Orders\\_South\\_2015](#)
- [Orders\\_South\\_2016](#)
- [Orders\\_South\\_2017](#)
- [Orders\\_South\\_2018](#)
- [Orders\\_Central](#)
- [Orders\\_East](#)
- [Orders\\_West](#)
- [returns\\_reasons\\_new](#)
- [Quota](#)

You can also find the files in the following location on your computer after installing Tableau Prep Builder:

- (Windows) `C:\Program Files\Tableau\Tableau Prep Builder <version>\help\Samples\en_US\Superstore Files`
- (Mac) `/Applications/Tableau Prep Builder <version>.app/Contents/help/Samples/en_US/Superstore Files`

Want more training? Check out the [training videos](#) for Tableau Prep Builder, check out these great [resources](#), or take an [in-person training](#) course.

Want more information about the topics we covered? Check out the other topics in the Tableau Prep online help.

## About Tableau Prep

Tableau Prep Builder is a tool in the Tableau product suite designed to make preparing your data easy and intuitive. Use Tableau Prep Builder to combine, shape, and clean your data for analysis in Tableau.

**Note:** Tableau Prep version 2019.1.2 had changed its name to Tableau Prep Builder and refers to the Desktop application. Starting in version 2020.4.1, you can now create and edit flows on the web. Tableau Prep on the web refers to creating or editing flows on Tableau Server or Tableau Online. For more information, see [Tableau Prep on the Web on page 166](#).

## Using Tableau Prep

Start by connecting to your data from a variety of files, servers, or Tableau extracts. Connect to and combine data from multiple data sources. Drag and drop or double-click to bring your tables into the flow pane, and then add flow steps where you can then use familiar operations such as filter, split, rename, pivot, join, union and more to clean and shape your data.

Each step in the process is represented visually in a flow chart that you create and control. Tableau Prep tracks each operation so that you can check your work and make changes at any point in the flow.

When you are finished with your flow, run it to apply the operations to the entire data set.

Tableau Prep works seamlessly with other Tableau products. At any point in your flow, you can create an extract of your data, publish your data source to Tableau Server or Tableau Online, publish your flow to Tableau Server or Tableau Online to continue editing on the web or refresh your data using a schedule. You can also open Tableau Desktop directly from within Tableau Prep Builder to preview your data.

For information about installing Tableau Prep Builder, see [Install Tableau Desktop or Tableau Prep Builder](#) in the Tableau Desktop and Tableau Prep Deployment Guide.

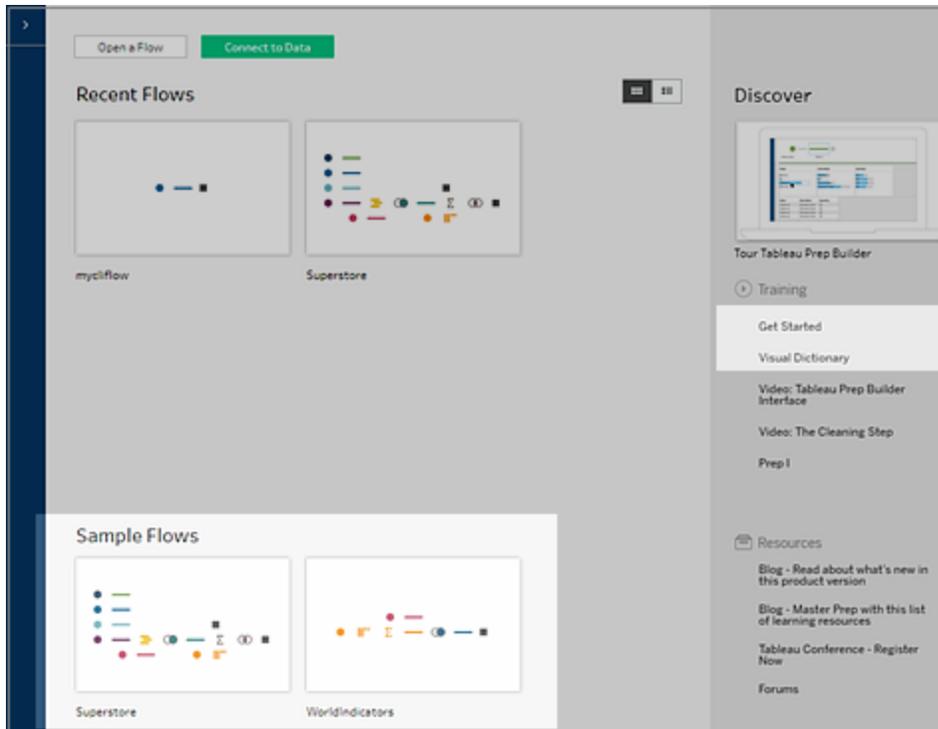
## See Tableau Prep Builder in action

Click the image to replay it.

The screenshot shows the Tableau Prep Builder interface. On the left, there are connections to three CSV files: 'orders\_south\_2015.csv', 'Orders\_East.xlsx', and 'Orders\_Central.csv'. The main workspace shows a flow where each of these files is processed through a 'Clean' step (Clean-1, Clean-2, Clean-3). The outputs of these steps are combined in a 'Union 1' step, which then feeds into an 'Output' step. Below the flow, the 'Output' pane shows a preview of the data with 23 fields. The data is organized into a table with the following columns: Table Names, File Paths, Sales, Quantity, Profit, Region, State, Row ID, Order ID, and Order Date. The data includes rows from various states like Texas, Wisconsin, Nebraska, Illinois, Minnesota, and Michigan.

Table Names	File Paths	Sales	Quantity	Profit	Region	State	Row ID	Order ID	Order Date	Sh
Orders_Central.csv	null	68.81	5	-123.858	Central	Texas	15	US-2016-118983	11/22/2016, 12:00:00 AM	
Orders_Central.csv	null	2.544	3	-3.816	Central	Texas	16	US-2016-118983	11/22/2016, 12:00:00 AM	
Orders_Central.csv	null	665.88	6	13.3176	Central	Wisconsin	17	CA-2015-105893	11/11/2015, 12:00:00 AM	
Orders_Central.csv	null	19.46	7	5.0596	Central	Nebraska	22	CA-2017-137330	12/09/2017, 12:00:00 AM	
Orders_Central.csv	null	60.34	7	15.6884	Central	Nebraska	23	CA-2017-137330	12/09/2017, 12:00:00 AM	
Orders_Central.csv	null	29.472	3	9.9468	Central	Texas	35	CA-2016-107727	10/19/2016, 12:00:00 AM	
Orders_Central.csv	null	1,097.544	7	123.4737	Central	Texas	36	CA-2017-117590	12/08/2017, 12:00:00 AM	
Orders_Central.csv	null	190.52	5	-147.963	Central	Texas	37	CA-2017-117590	12/08/2017, 12:00:00 AM	
Orders_Central.csv	null	113.328	9	35.415	Central	Texas	38	CA-2016-117415	12/27/2016, 12:00:00 AM	
Orders_Central.csv	null	532.3992	3	-46.9764	Central	Texas	39	CA-2016-117415	12/27/2016, 12:00:00 AM	
Orders_Central.csv	null	212.058	3	-15.147	Central	Texas	40	CA-2016-117415	12/27/2016, 12:00:00 AM	
Orders_Central.csv	null	371.168	4	41.7564	Central	Texas	41	CA-2016-117415	12/27/2016, 12:00:00 AM	
Orders_Central.csv	null	147.168	4	16.5564	Central	Illinois	42	CA-2018-120999	09/10/2018, 12:00:00 AM	
Orders_Central.csv	null	45.98	2	19.7714	Central	Minnesota	45	CA-2017-118255	03/11/2017, 12:00:00 AM	
Orders_Central.csv	null	17.46	2	8.2062	Central	Minnesota	46	CA-2017-118255	03/11/2017, 12:00:00 AM	
Orders_Central.csv	null	211.96	4	8.4784	Central	Michigan	47	CA-2015-146703	10/20/2015, 12:00:00 AM	

Ready to try it out? From the **Start** page, click on one of the sample flows to explore and experiment with the steps, try the [Get Started with Tableau Prep Builder](#) on page 111 hands-on tutorial to learn how to create a flow or try stepping through one of our [Day in the Life Scenarios](#) on page 531 using Tableau Prep Builder.



**Note:** You can find the sample data files used in the flows in these locations:

- (Windows) C:\Program Files\Tableau\Tableau Prep Builder <version>\help\Samples\en\_US
- (Mac) /Applications/Tableau Prep Builder <version>.app/Contents/help/Samples/en\_US

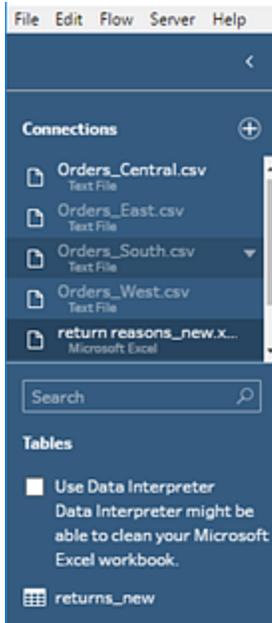
To learn more about how Tableau Prep Builder optimizes your data for performance, see [Tableau Prep under the hood](#). To learn more about Tableau Prep and the different features and functions it offers, review the topics in this guide.

## A tour of the Tableau Prep workspace

The Tableau Prep workspace consists of the **Connections pane** (A) where you connect to your data sources, and three coordinated areas that help you interact with and explore your data:

- **Flow pane** (B): A visual representation of your operation steps as you prepare your data. This is where you add steps to build your flow.

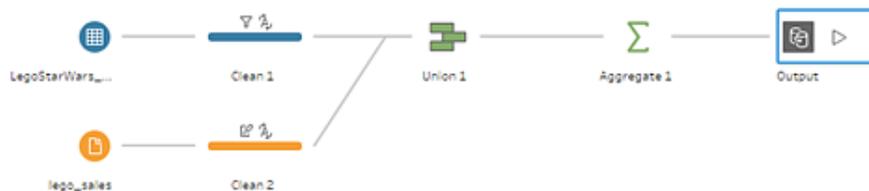




You can minimize the **Connections** pane if you need more room in your workspace.

## Flow pane

At the top of the workspace is the **Flow** pane. This is where you'll build your flow. As you connect to, clean, shape, and combine your data, steps appear in the **Flow** pane and align from left to right along the top. These steps tell you what kind of operation is being applied, in what order, and how your data is affected by it. For example, the Join step shows you which join type you've applied, the join clauses, recommended join clauses, and the fields of the tables that are included in the join.

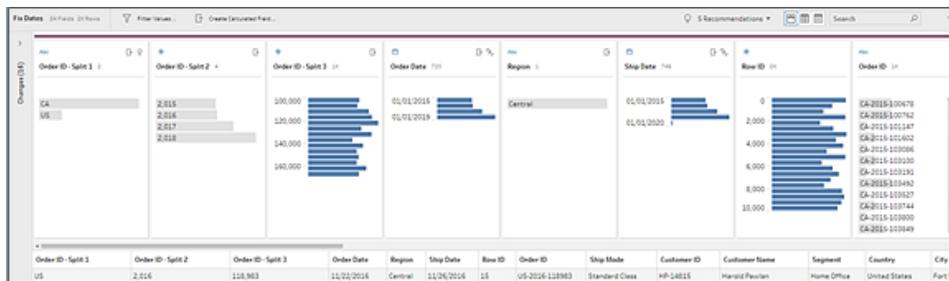


You start your flow by dragging tables into the **Flow** pane. Here you can add additional data sets, pivot your data, union or join data, create aggregations, and generate output files in the form of .tds files, Hyper extract (.hyper) files, or published data sources that you can use in Tableau. You can even write your output data to a database. For more information about generating output files, see [Save and Share Your Work](#) on page 383.

**Note:** If you make changes to the data while in Tableau Desktop, for example renaming fields, changing data types, and so on, these changes aren't written back to Tableau Prep Builder.

## Profile pane

In the center of the workspace is the **Profile** pane. The **Profile** pane shows you the structure of your data at any point in the flow. The structure of your data can be represented in different ways depending on the operation you want to perform on your data or the step that you select in the **Flow** pane.

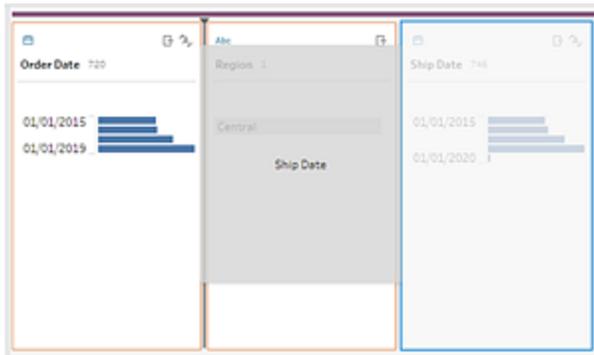


At the top of the **Profile** pane is a toolbar that shows you the cleaning operations that you can perform for each step in your flow. An options menu also appears on each card in the **Profile** pane where you can select the different operations that you can perform on the data.

For example:

- Search, sort, and split fields
- Filter, include, or exclude values
- Find and fix null values
- Rename fields
- Clean up data entry errors using group values or quick cleaning operations
- Use automatic data parse to change data types
- Rearrange the order of your field columns by dragging and dropping them where you

want them



Select one or more field values in a Profile card and right-click or Ctrl-click (MacOS) to see additional options to keep or exclude values, group selected values or replace values with Null.

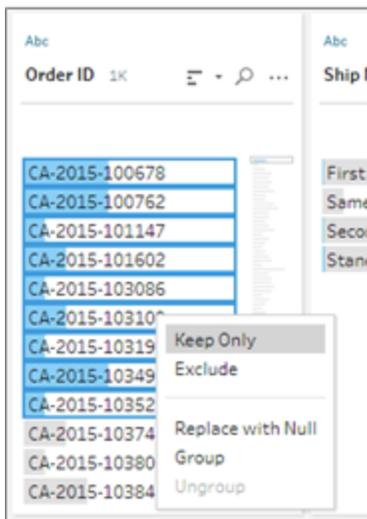
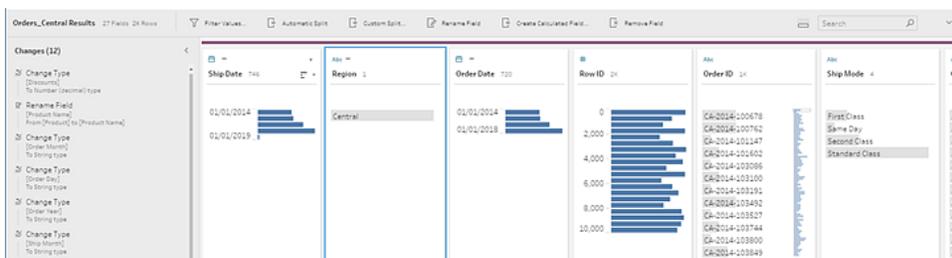


Tableau Prep keeps track of any changes you make, in the order you make them, so you can always go back and review or edit those changes if needed. Use drag and drop to re-order the operations in the list to experiment and apply changes in a different order.



## Tableau Prep Help

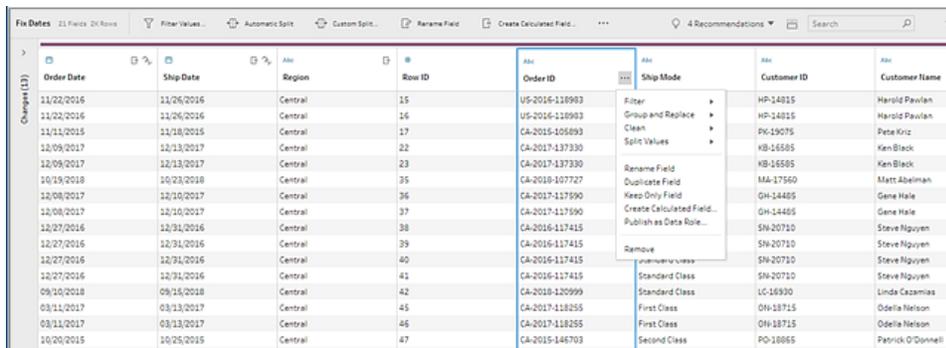
Click the arrow on the upper right of the pane to expand and collapse the **Changes** pane for more room to work with the data in the **Profile** pane.

For more information about applying cleaning operations to your data see [Clean and Shape Data on page 277](#).

## Data grid

At the bottom of the workspace is the **Data** grid, which shows you the row level detail in your data. The values displayed in the **Data** grid reflect the operations defined in the **Profile** pane. You can perform the same cleaning operations here as you can in the Profile pane if you prefer to work at a more detailed level.

Click the **Collapse Profiles**  icon on the toolbar to collapse (and expand) the **Profile** pane to see your options.



Order Date	Ship Date	Region	Row ID	Order ID	Ship Mode	Customer ID	Customer Name
11/22/2016	11/26/2016	Central	15	US-2016-118993	Filter	HP-14815	Harold Paulan
11/22/2016	11/26/2016	Central	16	US-2016-118993	Group and Replace	HP-14815	Harold Paulan
11/11/2015	11/18/2015	Central	17	CA-2015-105893	Clean	PV-19075	Pete Kriz
12/09/2017	12/13/2017	Central	22	CA-2017-137330	Split Values	KB-16585	Ken Black
12/09/2017	12/13/2017	Central	23	CA-2017-137330	Rename Field	KB-16585	Ken Black
10/19/2018	10/23/2018	Central	35	CA-2018-107727	Duplicate Field	MA-17560	Matt Abeleman
12/08/2017	12/10/2017	Central	36	CA-2017-117590	Keep Only Field	GH-14485	Gene Hale
12/08/2017	12/10/2017	Central	37	CA-2017-117590	Create Calculated Field...	GH-14485	Gene Hale
12/27/2016	12/31/2016	Central	38	CA-2016-117415	Publish as Data Role...	SN-20710	Steve Nguyen
12/27/2016	12/31/2016	Central	39	CA-2016-117415	Remove	SN-20710	Steve Nguyen
12/27/2016	12/31/2016	Central	40	CA-2016-117415	Remove Rows	SN-20710	Steve Nguyen
12/27/2016	12/31/2016	Central	41	CA-2016-117415	Standard Class	SN-20710	Steve Nguyen
09/10/2018	09/15/2018	Central	42	CA-2018-120999	Standard Class	LC-16930	Linda Cazamas
03/11/2017	03/13/2017	Central	45	CA-2017-118255	First Class	DN-18715	Odella Nelson
03/11/2017	03/13/2017	Central	46	CA-2017-118255	First Class	DN-18715	Odella Nelson
10/20/2015	10/25/2015	Central	47	CA-2015-146703	Second Class	PD-18865	Patrick O'Donnell

## How Tableau Prep stores your data

When you connect Tableau Prep to your data and create a flow, it stores the frequently used data in a .hyper file. For large data sets, this might be a sample of the data. Any stored data is saved under a secure temporary file directory in a file named Prep BuilderXXXXX, where XXXXX represents a universally unique identifier (UUID). After you save the flow, the file is deleted. For more information about how Tableau Prep samples your data, see [Set your data sample size on page 213](#).

Tableau Prep Builder also saves data in the Tableau flow (.tfl) file to support the following operations (which can capture entered field data values):

- Custom SQL used in Input steps
- Filtering (on data entry)
- Group Values (on data entry)
- Calculations

## Tableau Prep on the Web

Tableau Prep now supports web authoring for flows. Starting in version 2020.4.1, you can create flows to clean and prepare your data using either Tableau Prep Builder, Tableau Server, or Tableau Online. You can also manually run flows on the web and the Data Management Add-on is not required.

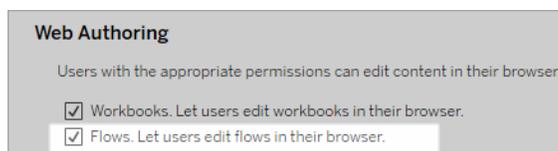
While most of the same Tableau Prep Builder functionality is also supported on the web, there are a few differences when creating and working with your flows.

**Important:** To create and edit flows on the web you must have a Creator license. However, the Data Management add-on is only required if you want to run your flows on a schedule using Tableau Prep Conductor.

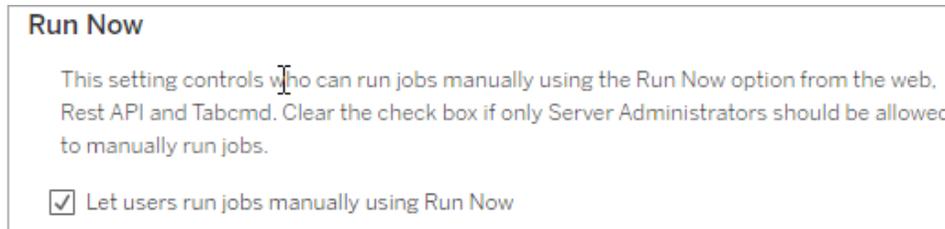
## Installation and Deployment

To enable users to create and edit flows on the web, configure the following settings on your server:

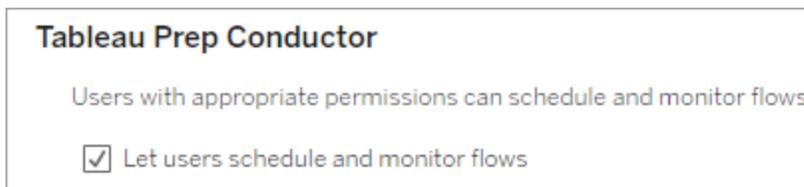
- **Web Authoring:** Controls whether users can create and edit flows on Tableau Server or Tableau Online. For more information, see [Create and Interact with Flows on the Web](#) in the Tableau Server help.



- **Run Now:** Controls whether users or only administrators can run flows manually using the **Run Now** option.



- **Tableau Prep Conductor:** If the Data Management Add-on is enabled, enable this option to let users schedule and track flows in Tableau Server and Tableau Online.



- **Autosave:** Enabled by default, this feature automatically saves a user's flow work every few seconds.

While not recommended, administrators can disable autosave on a site using the Tableau Server REST API method "Update Site" and `flowAutoSaveEnabled` setting. For more information, see [Tableau Server REST API Site Methods: Update Site](#). For more information about autosave on the web, see [Autosave and working with drafts on page 169](#).

For more information about configuring site settings, see [Site Settings Reference](#) in the Tableau Server help.

On Tableau Server, administrators can fine-tune the configuration of the Tableau Prep Flow Authoring processes. For more information, see [Tableau Prep Flow Authoring](#).

## Sample data and processing limits

To maintain performance while working with flows on the web, limits are applied to the amount of data you can include in a flow.

The following limits apply:

- When connecting to files, the maximum file size is 1GB.
- The data sampling option to include all data is not available. The default sample data limit is 1 million rows.

- The maximum number of rows that a user can select when using large data sets is configured by the administrator. As a user, you can select the number of rows up to that limit. For more information, see [tsm configuration set Options](#) in the Tableau Server help.
- In Tableau Online, the number of flow runs you can perform in a day is also limited by the site administrator. For more information, see [Tableau Online Site Capacity](#) in the Tableau Online help.

## Available features on the web

When you create and edit flows on the web you may notice a few differences in navigation and the availability of certain features. While most features are available across all platforms, some features are limited or not yet supported in Tableau Server or Tableau Online. The following table identifies features where differences might apply.

Feature	Tableau Prep Builder	Tableau Server	Tableau Online
<a href="#">Connect to Data</a> on page 177*	✓	✓	✓
<a href="#">Build and Organize your Flow</a> on page 226	✓	✓	✓
<a href="#">Set your data sample size</a> on page 213**	✓	✓	✓
<a href="#">Union files and database tables in the Input step</a> on page 217***	✓	✓	✓
<a href="#">Clean and Shape Data</a> on page 277	✓	✓	✓
<a href="#">Aggregate, Join, or Union Data</a> on page 360	✓	✓	✓
<a href="#">Use R and Python scripts in your flow</a> on page 342 ****	✓	✓	✗
<a href="#">Create reusable flow steps (version 2019.3.2 and later)</a> on page 316	✓	✗	✗

<b>Automatically save your flows on the web (version 2020.4 and later)</b> on page 384	Not Applicable		
<b>Automatic file recovery</b> on page 385		Not Applicable	Not Applicable
<b>View flow output in Tableau Desktop</b> on page 386			
<b>Create an extract to a file</b> on page 388			
<b>Create a published data source</b> on page 392			
<b>Save flow output data to external databases</b> on page 394			

\* Some connectors may not be supported on the web. Open the Connect pane on your server to see supported connectors.

\*\* In Tableau Server and Tableau Online, the data sample size is subject to limits set by your administrator.

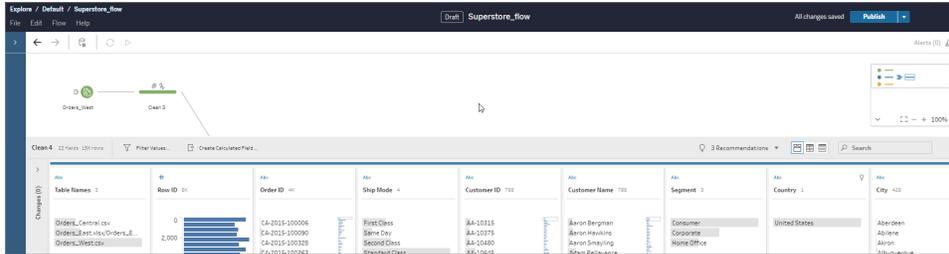
\*\*\* Input unions can't be edited or created in Tableau Server or Tableau Online. Only in Tableau Prep Builder.

\*\*\*\* Script steps can't be added when creating or editing a flow in Tableau Online. This is currently supported only in Tableau Prep builder and Tableau Server.

## Autosave and working with drafts

When you create or edit flows on the server, your work is automatically saved as a draft every few seconds so that in the event of a crash, or when closing a tab by accident, you don't lose your work.

Drafts are saved to the server and project you are signed into. You can't save or publish a draft to another server, but you can save the flow to another project on that server using the **File > Publish As** menu option.



Draft content can only be seen by you until you publish it. If you publish changes and need to revert them, you can use the **Revision History** dialog to view and revert to a previously published version. For more information about saving flows on the web, see [Automatically save your flows on the web \(version 2020.4 and later\)](#) on page 384.

## Publishing flows and embedding credentials

Whether you are publishing flows from Tableau Prep Builder to Tableau Server or Tableau Online or publishing a new or edited flow on the web, you have the option to embed credentials for database connections. Embedding your credentials enables flows that include database connections to run seamlessly on the server without requiring manual intervention.

**Note:** Embedding credentials only applies to running published flows on your server. You will still manually need to enter your credentials when editing a flow connected to a database in either Tableau Prep Builder or on the web.

When creating or editing flows on the web, you must first publish a flow before you can run it to generate your flow output for your data analysis. During publish, you can choose to embed your credentials for your database connections. By default credentials are not embedded.

You can also change your credential option from the top menu under **File > Connection Credentials**. For more information, see [Publish a flow in web authoring](#) on page 501.



<p>1</p>	<p><b>Input Step</b></p> <p>Start your flow by dragging data to the Flow pane to create an Input step. The icon shows you the type of data source.</p> <ul style="list-style-type: none"> <li> Data Source</li> <li> Data Source with Wildcard Union</li> <li> Excel</li> <li> Excel with Wildcard Union</li> <li> CSV</li> <li> CSV with Wildcard Union</li> <li> Tableau Extract</li> </ul>														
<p>2</p>	<p><b>Clean Step, Changes Pane, and Toolbar</b></p> <p>Easily keep track of the changes you make to your data. Find these icons on the Clean steps in the Flow pane, in the Changes pane, and on the toolbar.</p> <table border="0" style="width: 100%;"> <tr> <td> Calculated Field</td> <td> Hide Profile Pane</td> </tr> <tr> <td> Change Data Type</td> <td> Show Profile Pane</td> </tr> <tr> <td> Edit Value</td> <td> Merge Fields</td> </tr> <tr> <td> Exclude Values</td> <td> Remove Field</td> </tr> <tr> <td> Filter Values</td> <td> Rename Field</td> </tr> <tr> <td> Group Values</td> <td> Search</td> </tr> <tr> <td> Keep Only</td> <td> Split Fields</td> </tr> </table>	 Calculated Field	 Hide Profile Pane	 Change Data Type	 Show Profile Pane	 Edit Value	 Merge Fields	 Exclude Values	 Remove Field	 Filter Values	 Rename Field	 Group Values	 Search	 Keep Only	 Split Fields
 Calculated Field	 Hide Profile Pane														
 Change Data Type	 Show Profile Pane														
 Edit Value	 Merge Fields														
 Exclude Values	 Remove Field														
 Filter Values	 Rename Field														
 Group Values	 Search														
 Keep Only	 Split Fields														
<p>3</p>	<p><b>Union Step</b></p> <p>Combine up to ten sources of data with similar fields in a single Union step.</p> <ul style="list-style-type: none"> <li> Union Data</li> </ul>														

<p>4</p>	<p><b>Join Step</b></p> <p>Connect two steps to join your data on one or more common fields. Select one of these options to choose the join type.</p> <ul style="list-style-type: none"><li> Full Anti Join</li><li> Inner Join</li><li> Left Inner Join</li><li> Left Outer Join</li><li> Full Outer Join</li><li> Right Inner Join</li><li> Right Outer Join</li></ul>
<p>5</p>	<p><b>Output Step</b></p> <p>Add an Output step and run your flow to apply the changes to the complete data set and generate output files.</p> <ul style="list-style-type: none"><li> CSV</li><li> Published Data Source</li><li> Tableau Data Extract</li><li> Run Flow</li></ul>
<p>6</p>	<p><b>Pivot Step</b></p> <p>Add a Pivot step to change columns to rows.</p> <ul style="list-style-type: none"><li> Pivot Data</li></ul>

<p>7</p>	<p><b>Aggregate Step</b></p> <p>Add an Aggregate step to group and aggregate your data, which changes the level of detail of your data.</p> <p> Aggregate Data</p>
<p>8</p>	<p><b>Notification</b></p> <p>If there's a problem with your flow or something you need to know, check notifications. Errors include a <b>Go to Error</b> link to help you quickly find the problem.</p> <p> No Notifications</p> <p> Notification Alert</p> <p> Error in the Step</p>
<p>9</p>	<p><b>Profile Pane</b></p> <p>See the exact row count of your data and know when your data is sampled.</p> <p> Only shows when data is sampled</p> <p> Hover over row summary to see exact row count</p>



**Profile Card**

Identify the data type and see the options available to apply to your data when you select a field in the Profile pane.

 Calculated Field	 Rename Field
 Change Data Type	 Search
 Edit Value	 Split Fields
 Exclude Values	 Boolean Data Type
 Filter Values	 Date Data Type
 Group Values	 Date Time Data Type
 Keep Only	 Numeric Data Type
 Merge Fields	 Text Data Type
 Remove Field	



# Connect to Data

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web on page 166](#).

Tableau Prep supports connections to popular types of data as well as Tableau data extracts (.hyper) and published data sources.

If you have the [Data Management Add-on](#) with Tableau Catalog enabled, you can also search for and connect to databases, files, and tables stored on Tableau Server or Tableau Online. For more information about Tableau Catalog, see "About Tableau Catalog" in the [Tableau Server](#) or [Tableau Online](#) Help.

New data connectors are added with each new version of Tableau Prep. However, depending on which version you are using or whether you are creating and editing flows on the web, some connectors might not be available. To see the most current list of available connectors, open

Tableau Prep Builder or start a flow on the web and click the **Add connection**  button to see if a connector for your data is listed in the left pane under **Connect**.

**Note:** If you open a flow in a version where the connector isn't supported, the flow may open but might have errors or won't run unless the data connections are removed.

While most connectors work the same across all of our platforms, some have different requirements when using them with Tableau Prep and are described in this topic. For all other connectors, see [Supported Connectors](#) in the Tableau Desktop help.

## Start or open a flow

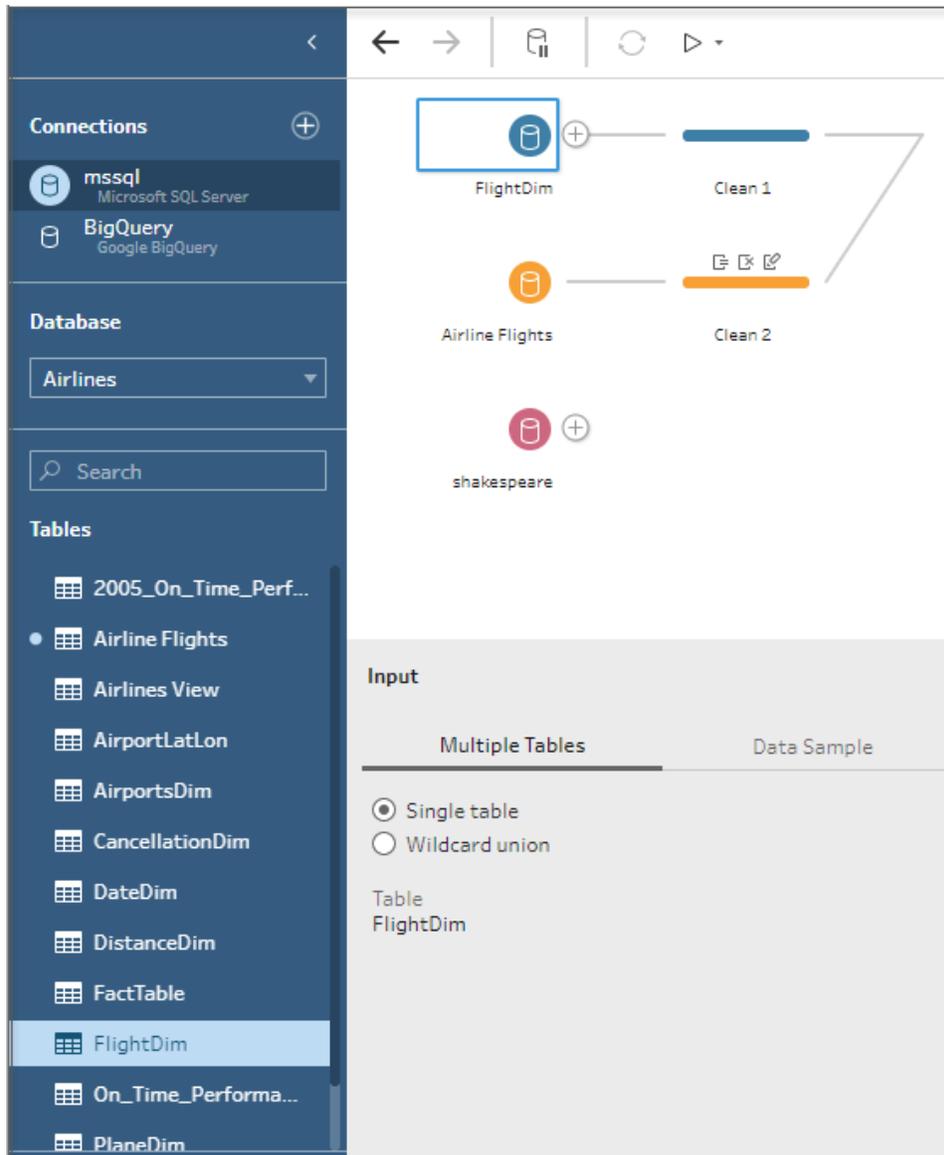
Start a new flow by connecting to your data, just like in Tableau Desktop. You can also open an existing flow and pick up where you left off.

**Note:** Some connectors might require you to download and install a driver before you can connect to your data. See the [Driver Download](#) page on the Tableau website to get driver download links and installation instructions.

In Tableau Prep Builder, you can see and access your most recent flows right on the Start page, so it's easy to find your work in progress. When working with flows on the web, all your flows are conveniently listed on the **Explore** page under the **All Flows** menu.

After you connect to your data, use the different options in the Input step to identify the data that you want to work with in your flow. Then add a cleaning step or other step type to examine, clean and shape your data.

When your flows include many different data source connectors, Tableau Prep helps you easily see which connectors and tables are associated with your Input steps. When you click on the Input step, the associated connector and data table is highlighted in the Connections pane. This option was added in Tableau Prep Builder version 2020.1.1 and is also supported when editing flows on the web.



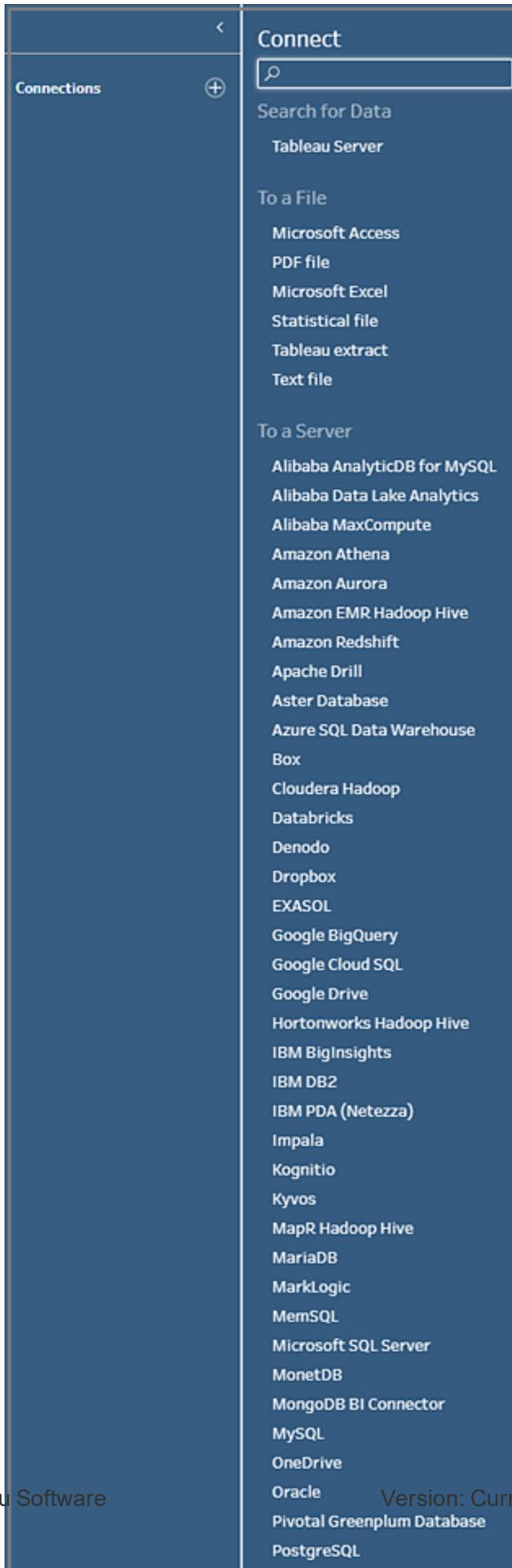
## Start a new flow

1. Open Tableau Prep Builder and click the **Add connection**  button.

In web authoring, from the **Home** page, click **Create > Flow** or from the **Explore** page, click **New > Flow**. Then click **Connect to Data**.

2. From the list of connectors, select the file type or server that hosts your data. If prompted, enter the information needed to sign in and access your data.

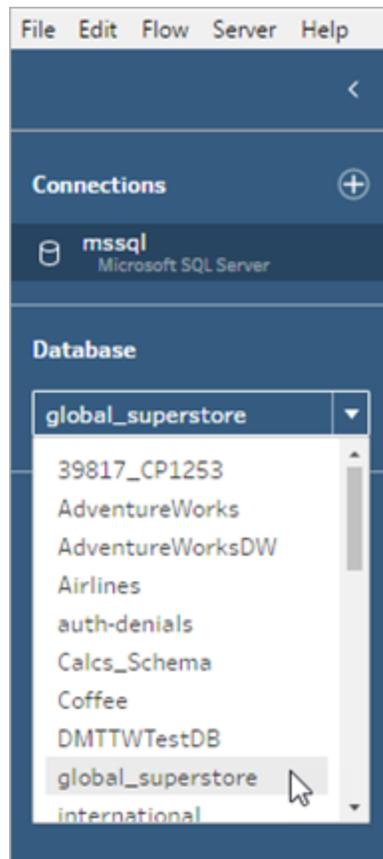
**Note:** In web authoring, the list of file connectors may differ.



3. From the **Connections** pane, do one of the following:
- If you connected to a file, double-click or drag a table to the **Flow** pane to start your flow. For single tables, Tableau Prep automatically creates an Input step for you in the **Flow** pane when you add data to your flow.

**Note:** In web authoring, for file connections, you can only download the files one at a time. Direct connections to a file network share isn't currently supported.

- If you connected to a database, select a database or schema, and then double-click or drag a table to the **Flow** pane to start your flow.



**Note:** In Tableau Prep Builder, you can union multiple files or database tables from a single data source in the input step using a wildcard search.

In web authoring you can't create or edit input unions but they are supported in flows published from Tableau Prep Builder. For more information, see [Union files and database tables in the Input step on page 217](#).

## Open an existing flow

### Tableau Prep Builder

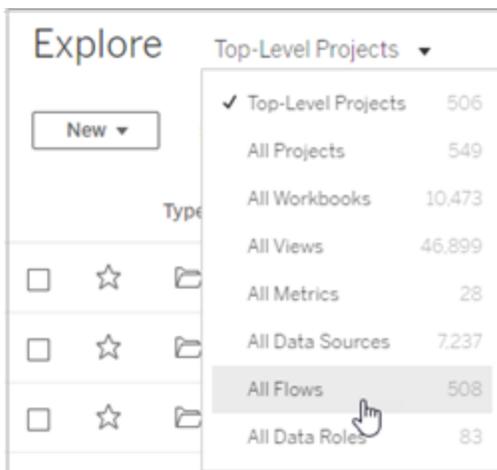
On the **Start** page do one of the following:

- Under **Recent Flows**, select a flow.
- Click **Open a Flow** to navigate to your flow file and open it.

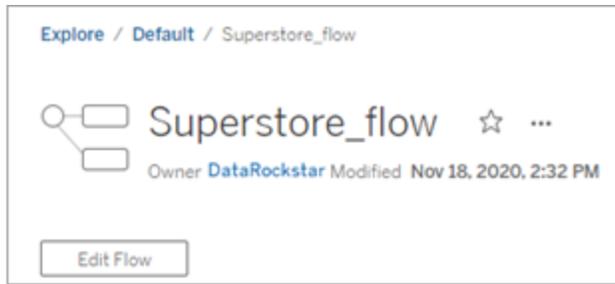
You can also click **File > New** or **File > Open** to open a new workspace. You can open multiple Tableau Prep Builder workspaces using these options if you want to work on multiple flows at the same time. In Tableau Prep Builder version 2019.3.1 and earlier, if you select **File > Open**, Tableau Prep Builder replaces your current open flow with the new flow you select.

### Tableau Prep on the web

1. To open and edit an existing flow, on the **Explore** page select **All Flows** from the top drop-down menu and select your flow from the list.



2. On the **Flow Overview** page, click **Edit** to edit your flow.



Your flow will open in a new tab. As soon as you start making changes, Tableau will automatically save your changes every few seconds and save your modified flow as a draft. Drafts are only visible to you and your administrator.

When you're finished, you can close your flow and continue making changes later or publish your flow to apply your changes, creating a new version of the flow.

Like other tools, flow publishing uses a first-in method. If another user modifies and republishes the flow before you, their changes are committed first. But you can track and revert to a previous version using the **Revision History** page. For more information, see [Work with Content Revisions](#) in the Tableau Desktop help.

## Connect to published data sources

If you publish data sources from Tableau Prep Builder (version 2019.3.1 and later) to Tableau Server or Tableau Online from Tableau Desktop or as output from your flow, you can connect to these published data sources and use them as an input data source for your flow. You can also connect to published data sources when creating or editing flows on the web.

**Note:** When you publish a flow that includes a published data source as an input, the publisher is assigned as the default flow owner. When the flow runs, it uses the flow owner for the **Run As** account. For more information about the Run As account, see [Run As Service Account](#). Only the Site or Server Administrator can change the flow owner in Tableau Server or Tableau Online.

When using this feature the following requirements apply:

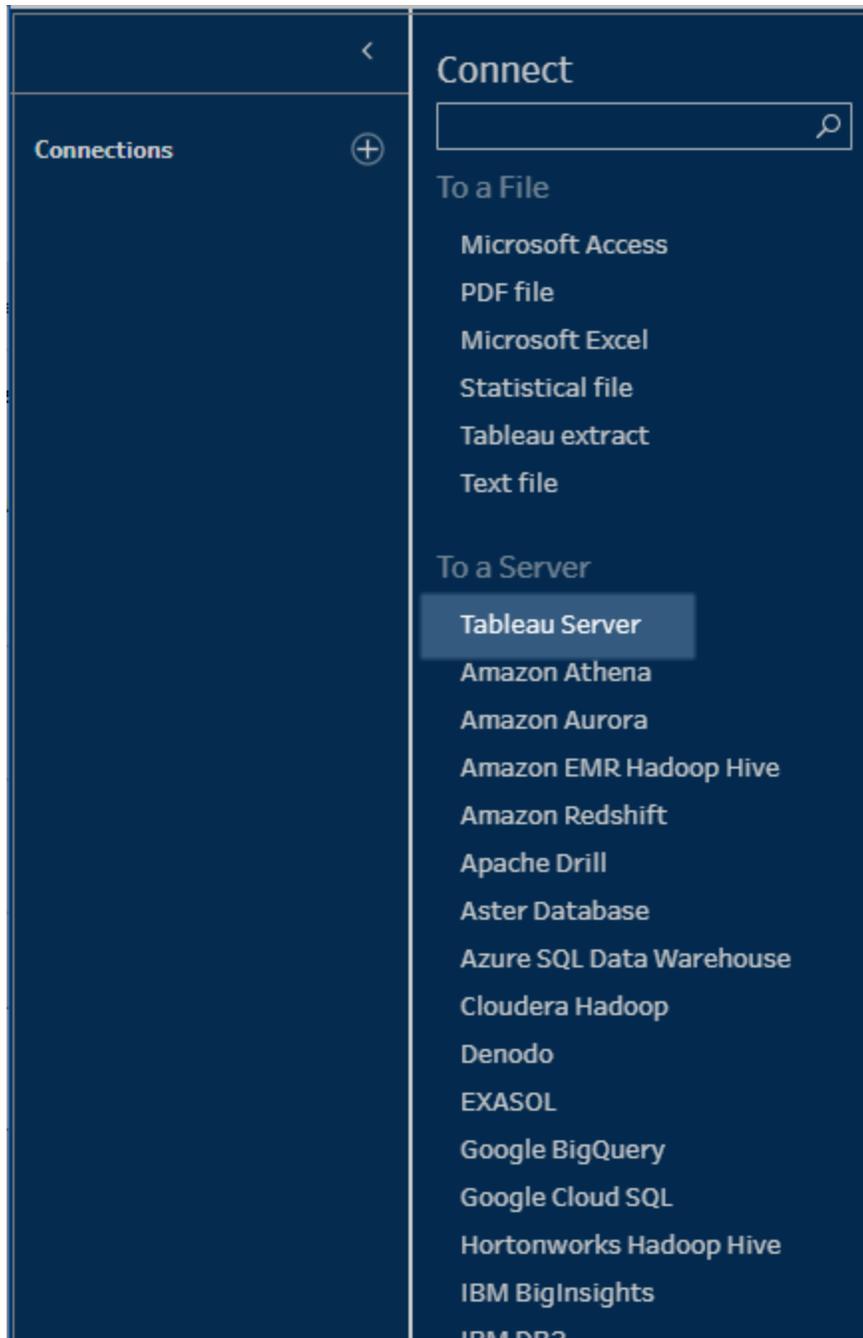
- Published data sources that include multi-dimensional (cube) data or includes user filters are not currently supported.
- Multi-server connections aren't supported. You must use the same server or site connection to do the following:

- Connect to the published data source.
- Publish flow output to Tableau Server or Tableau Online.
- Schedule the flow to run on Tableau Server or Tableau Online.
- Connecting to published data sources that are available on Tableau Server version 2019.3 and later are supported. All features may not be available if connecting to published data sources on earlier version of Tableau Server.
- You can connect to published data sources when creating or editing flow on the web starting with version 2020.4.1.
- You must be assigned a role of Explorer or higher in the Tableau Server site you are signed into to connect to published data sources. Only Creators can create or edit flows on the web. For more information about site roles, see [Set User's Site Roles](#) in the Tableau Server help.
- Credentials must be embedded to connect to the published data source. If credentials aren't embedded for the data source, update the data source to include the embedded credentials.

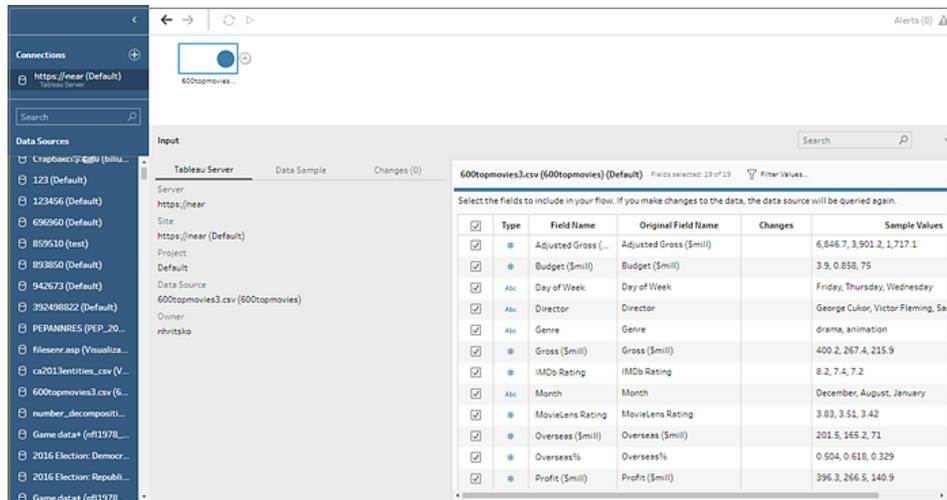
To connect to a published data source, follow the instructions for your Tableau Prep version:

### Tableau Prep Builder version 2020.2.1 and earlier

1. Open Tableau Prep Builder and click the **Add connection**  button.
2. From the list of connectors, select **Tableau Server**.



3. Sign in to connect to your server or site.
4. Select your data source or use the search option to find your data source and drag it to the flow pane to start your flow. The **Tableau Server** tab in the Input pane shows details about the published data source.



## Tableau Prep Builder version 2020.2.2 and later and on the web

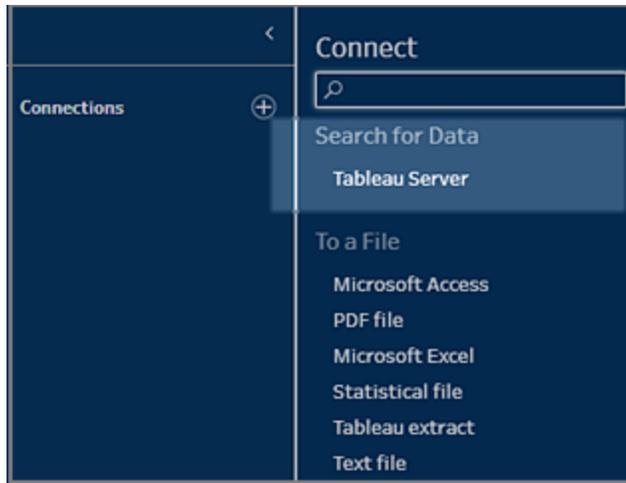
You can connect to published data sources and more that are stored on Tableau Server or Tableau Online directly from the Connect pane. If you have the [Data Management Add-on](#) with Tableau Catalog enabled you can also search for and connect to databases and tables and view or filter by meta data about the data sources, such as descriptions, data quality warnings, and certifications.

For more information about Tableau Catalog, see "About Tableau Catalog" in the [Tableau Server](#) or [Tableau Online](#) Help.

1. Open Tableau Prep Builder and click the **Add connection**  button.

In web authoring, from the **Home** page, click **Create > Flow** or from the **Explore** page, click **New > Flow**. Then click **Connect to Data**.

2. On the **Connect** pane, under **Search for Data**, select **Tableau Server**.



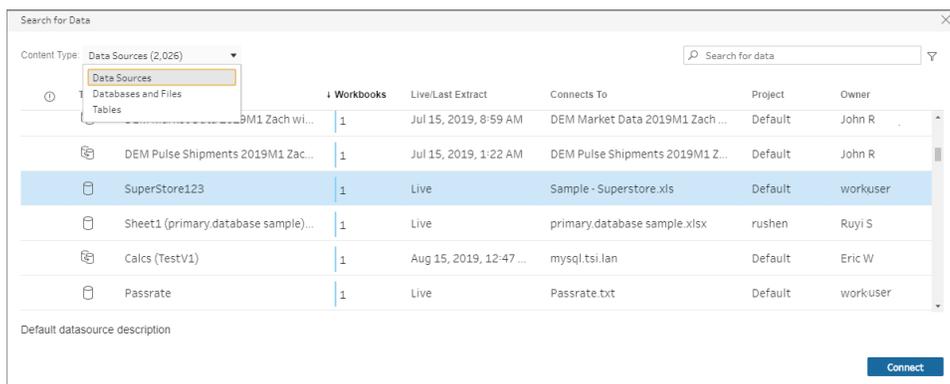
3. Sign in to connect to your server or site.

In web authoring, the **Search for data** dialog opens for the server you are signed into.

4. In the **Search for Data** dialog, search from a list of available published data sources. Use the filter option to filter by connection type and certified data sources.
5. Select the data source you want to use, then click **Connect**.

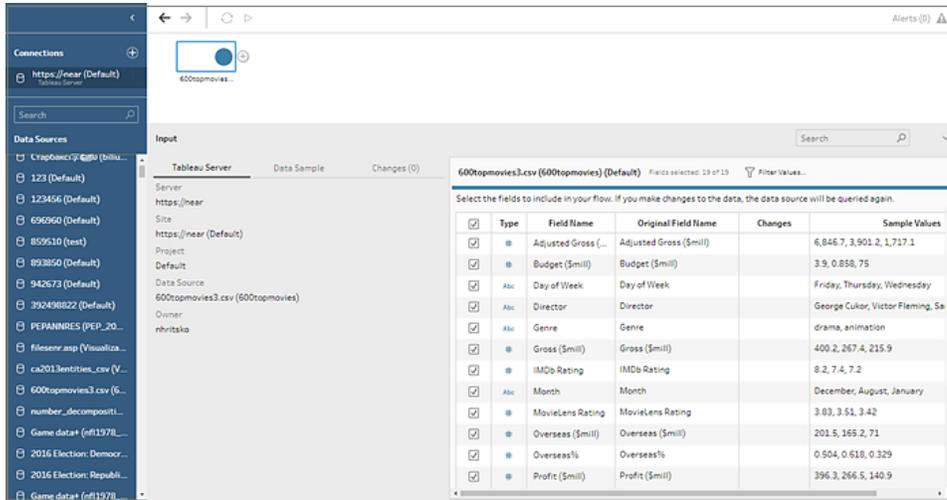
If you don't have permission to connect to a data source, the row and the **Connect** button is grayed out.

**Note:** The **Content Type** drop-down isn't shown if you don't have the Data Management Add-on with Tableau Catalog enabled. Only published data sources are shown in the list.

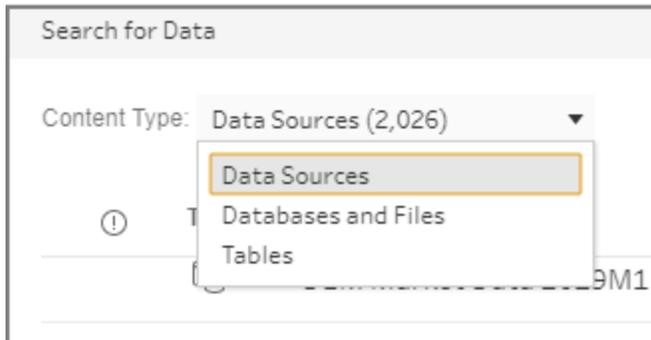


6. The data source is added to the Flow pane. In the **Connections** pane, you can select

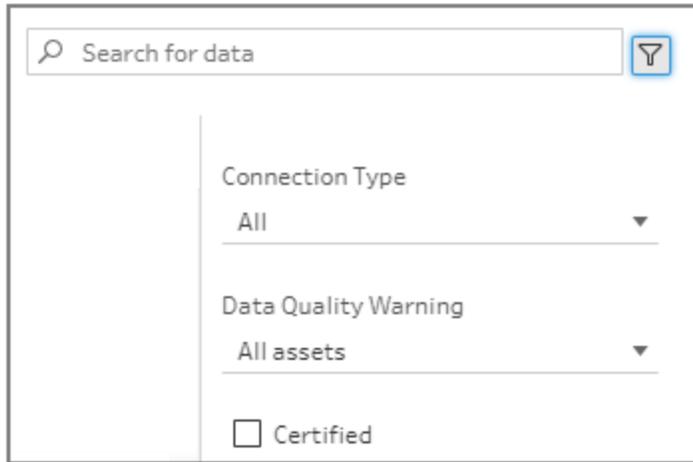
additional data sources or use the search option to find your data source and drag it to the flow pane to build your flow. The **Tableau Server** tab in the Input pane shows details about the published data source.



- (Optional) If you have the Data Management Add-on with Tableau Catalog enabled, use the **Content Type** drop-down to search for databases and tables.



You can use the filter option in the top right corner to filter your results by connection type, data quality warnings, and certifications.



## Connect to cloud data sources

You can connect to cloud data sources in Tableau Prep just like Tableau Desktop, but if you plan to publish flows that connect to cloud data sources and run them on a schedule in your server, you'll need to configure your credentials in Tableau Server or Tableau Online.

You set up your credentials in the **Settings** tab in the **My Account Settings** page and connect to your cloud connector input using these same credentials.

### Tableau Prep Builder

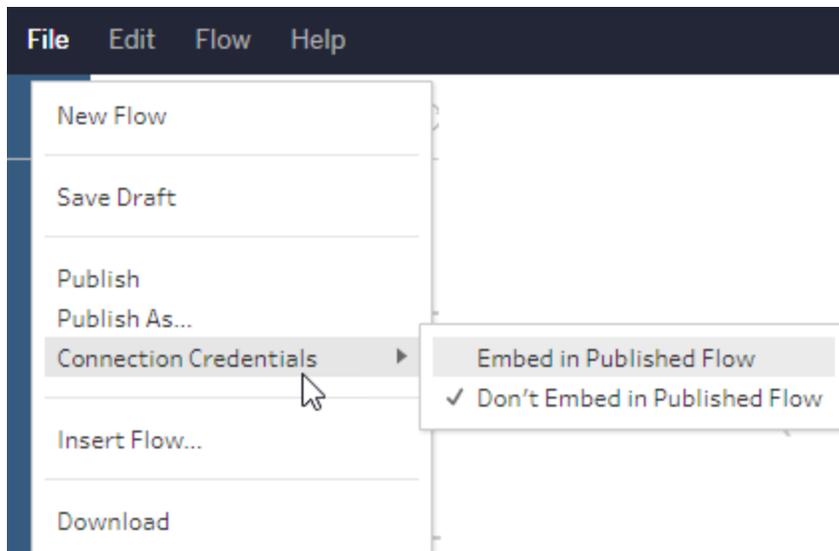
When publishing the flow, on the **Publish** dialog, click **Edit** to edit the connection, then in the **Authentication** drop-down, select **Embed** <your credentials>.

You can also add credentials right from the publish dialog (Tableau Prep Builder version 2020.1.1 when publishing your flow and then automatically embed them in your flow when you publish. For more information, see [Publish a flow from Tableau Prep Builder on page 486](#).

If you don't have saved credentials set up and select **Prompt user** in the **Authentication** drop-down, after you publish the flow you must edit the connection and enter your credentials in the **Connections** tab in Tableau Server or Tableau Online or the flow will fail when run.

### Tableau Prep on the web

In web authoring, you can embed credentials from the top menu under **File > Connection Credentials**. For more information, see [Publish a flow in web authoring on page 501](#).



In Tableau Prep Builder version 2019.4.1, the following cloud connectors were added and are also available when creating or editing flows on the web:

- Box
- DropBox
- Google Drive
- OneDrive

For more information about how to connect to your data using these connectors, see the [connector-specific](#) help topic in the Tableau Desktop help.

## Connect to Salesforce data

*Supported in Tableau Prep Builder version 2020.2.1 and later and when authoring flows on the web starting in version 2020.4.1.*

Tableau Prep Builder supports connecting to data using the Salesforce connector, just like Tableau Desktop, but with a few differences.

- Tableau Prep Builder supports any join type you want to do.
- Custom SOQL isn't currently supported.
- Using a standard connection to create your own custom connection isn't currently supported.
- You can't change the default data source name to be something unique or custom.
- If you plan to publish flows on Tableau Server and want to use saved credentials, the server administrator must configure Tableau Server with an OAuth client ID and secret

on the connector. For more information, see [Change Salesforce.com OAuth to Saved Credentials](#) in the Tableau Server help.

- To run incremental refresh on flow inputs that use the Salesforce connector, you must be using Tableau Prep Builder version 2021.1.2 or later. For more information about using incremental refresh, see [Refresh Flow Data Using Incremental Refresh on page 400](#).

Tableau Prep imports the data by creating an extract. Only extracts are currently supported for Salesforce. The initial extract may take some time depending on the amount of data that is included. You will see a timer in the Input step while the data loads.

For general information about using the Salesforce connector, see [Salesforce](#) in the Tableau Desktop and Web Authoring help.

## Connect to Google BigQuery

*Supported in Tableau Prep Builder version 2019.3.1 and later and when authoring flows on the web starting in version 2020.4.1*

Tableau Prep Builder supports connecting to data using Google BigQuery just like Tableau Desktop.

You must configure OAuth credentials to enable Tableau Prep to communicate with Google BigQuery. If you plan to publish flows to Tableau Server or Tableau Online, OAuth connections must also be configured for those applications.

**Note:** Tableau Prep doesn't currently support using Google BigQuery customization attributes.

- [Set up OAuth for Google](#) - Configuring OAuth connections for Tableau Server.
- [OAuth Connections](#) - Configure OAuth connections for Tableau Online.

## Configure SSL to connect to Google BigQuery (MacOS only)

If you are using Tableau Prep Builder on Mac and you are using a proxy to connect to Big Query, you may need to modify the SSL configuration to connect to Google BigQuery

**Note:** No extra steps are required for Windows users.

To configure SSL for OAuth connections to Google BigQuery, complete the following steps:

## Tableau Prep Help

1. Export the SSL certificate for your proxy to a file, for example proxy.cer. You can find your certificate in Applications > Utilities > Keychain Access > System > Certificates (under Category).
2. Locate the version of java that you are using to run Tableau Prep Builder. For example:  
`/Applications/Tableau Prep Builder  
2020.4.app/Plugins/jre/lib/security/cacerts`
3. Open the Terminal command prompt and run the following command for your Tableau Prep Builder version:

**Note:** The keytool command must be run from the directory that contains the version of java that you are using to run Tableau Prep Builder. You may have to change directories before running this command. For example `cd /Users/tableau_user/Desktop/SSL.cer -keystore Tableau Prep Builder 2020.1.1/Plugins/jre/bin`. Then run the keytool command.

```
keytool -import -trustcacerts -file /Users/tableau_
user/Desktop/SSL.cer -keystore Tableau Prep Builder
<version>/Plugins/jre/lib/security/cacerts -storepass
changeit
```

**Example:** `keytool -import -trustcacerts -file /Users/tableau_
user/Desktop/SSL.cer -keystore Tableau Prep Builder
2020.4.1/Plugins/jre/lib/security/cacerts -storepass changeit`

If you get a **FileNotFoundException** (Access denied) when running the keytool command, try running the command with elevated permissions. For example: `sudo keytool -import -trustcacerts -file /Users/tableau_user/Desktop/SSL.cer -keystore Tableau Prep Builder 2020.4.1/Plugins/jre/lib/security/cacerts -storepass changeit`.

## Set up and manage your Google BigQuery credentials

The credentials that you use to connect to Google BigQuery in your Input step must match the credentials that are set up in the **Settings** tab in the **My Account Settings** page for Google BigQuery in Tableau Server or Tableau Online.

If you select different credentials or no credentials in your authentication setting when publishing your flow, the flow will fail with an authentication error until you edit the connection for the flow in Tableau Server or Tableau Online.

To edit your credentials do the following:

1. In Tableau Server or Tableau Online, on the **Connections** tab, on the Google BigQuery connection, click **More actions** ... .
2. Select **Edit Connection**.
3. Select the saved credentials that are set up in the **Settings** tab in the **My Account Settings** page.

For more information about setting and managing your credentials, see the following topics:

[Manage Your Account Settings](#) in the Tableau Desktop and Web Authoring help.

[Publish a flow from Tableau Prep Builder on page 486](#) for information about setting authentication options when publishing a flow.

[View and resolve errors on page 517](#) for information about resolving connection errors in Tableau Server or Tableau Online.

## Connect to SAP HANA

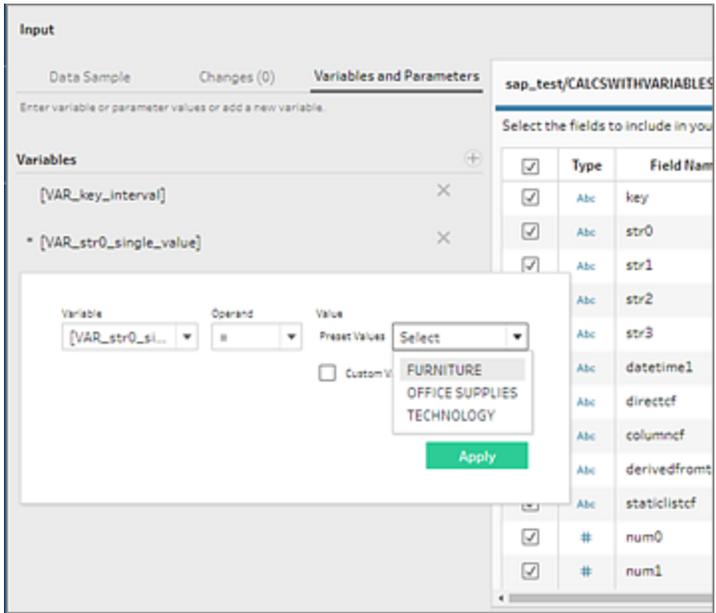
*Supported in Tableau Prep Builder version 2019.2.1 and later and when authoring flows on the web starting in version 2020.4.1.*

Tableau Prep Builder supports connecting to data using SAP HANA just like Tableau Desktop but with a few differences.

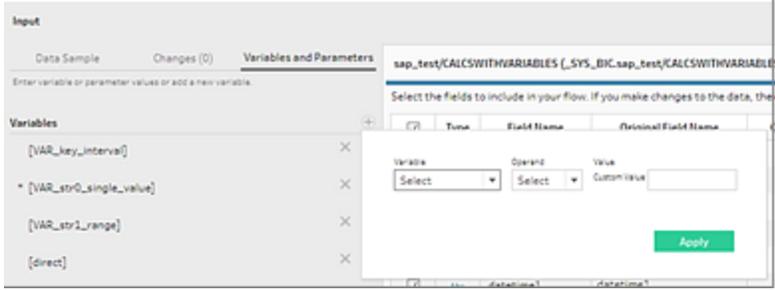
Connect to the database using the same procedure you would use in Tableau Desktop. For more information see [SAP HANA](#). After you connect and search for your table, drag the table to the canvas to begin building your flow.

Prompting for variables and parameters when opening a flow isn't supported in Tableau Prep. Instead, in the Input pane, click the **Variables and Parameters** tab and select the variables and operands you want to use, then select from a list of preset values or enter custom values to query your database and return the values you need.

**Note:** Starting in Tableau Prep Builder (version 2019.2.2) and on the web, you can use Initial SQL to query your connection and if you have multiple values for a variable, you can select the value you need from a drop-down list.



You can also add additional variables. Click the plus button (+) in the **Variables** section and select a variable and operand, then enter a custom value.



**Note:** This connector is only supported in Tableau server version 2019.2 and later. If you create a flow in Tableau Prep Builder that uses this connector and publish the flow to an earlier server version, you can publish the flow but you won't be able to run the flow using the scheduling features in Tableau Server. Instead, you can run the flow using the

command line interface to keep your data fresh. For more information about running flows from the command line see [Refresh flow output files from the command line on page 409](#). For more information about version compatibility, see [Version Compatibility with Tableau Prep on page 427](#).

## Connect to Spatial files and databases

*Supported in Tableau Prep Builder version 2020.4.1 and later.*

You can connect to spatial files and spatial data sources in Tableau Prep Builder or when creating or editing flows on the web.

Tableau Prep supports the following connection types:

- Spatial File formats
  - Tableau Prep Builder: Esri Shapefiles, Esri File Geodatabases, KML, TopoJSON, GeoJSON, extracts, MapInfo MID/MIF, TAB files, and zipped shapefiles.
  - Tableau Server and Tableau Online: Zipped shapefiles, KML, TopoJSON, GeoJSON, Esri File Geodatabases, and extracts.
- Spatial databases (Amazon Redshift, Microsoft SQL Server, Oracle, and PostgreSQL).

You can also combine spatial tables with non-spatial tables using a standard join and output spatial data to an extract (.hyper) file. Spatial functions, spatial joins through intersects, and visualizing spatial data on a map view in Tableau Prep is not currently supported.

## Supported cleaning operations

When working with shape file data, some cleaning operations are not supported. Only the following cleaning operations are available in Tableau Prep when working with shape file data.

- Filters: Only to remove Null or unknown values
- Rename Field
- Duplicate Field
- Keep Only Field
- Remove Field
- Create Calculated Field

## Before you connect

Before connecting to spatial files, make sure the following files are in the same directory:

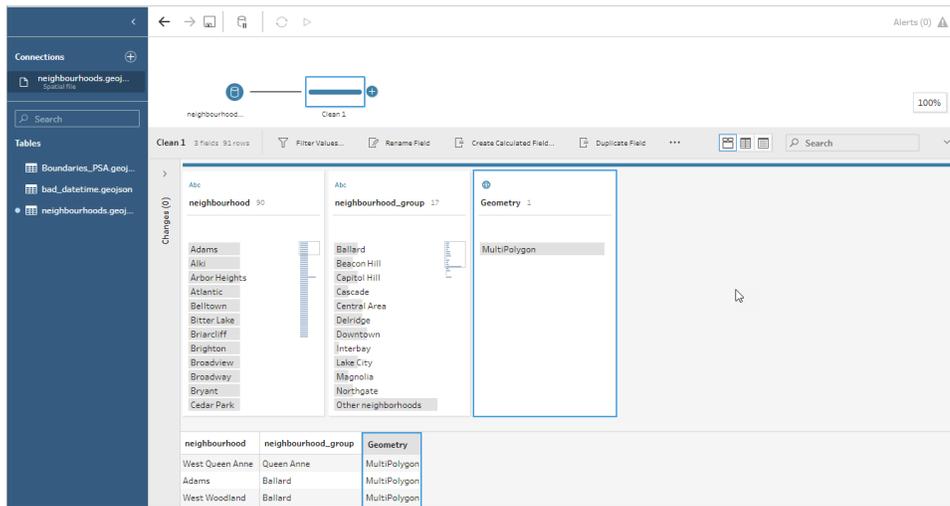
- **Esri shapefiles:** The folder must contain .shp, .shx, .dbf, and .prj files as well as .zip files of the Esri shapefile.
- **Esri File Geodatabases:** The folder must contain the File Geodatabase's .gdb or the .zip of the File Geodatabases's .gdb.
- **KML files:** The folder must contain the .kml file. (No other files are required.)
- **GeoJSON files:** The folder must contain the .geojson file. (No other files are required.)
- **TopoJSON files:** The folder must contain the .json or .topojson file. (No other files are required.)

## Connect to spatial files

1. Do one of the following:
  - Open Tableau Prep Builder and click the **Add connection**  button.
  - Open Tableau Server or Tableau Online. From the **Explore** menu, click **New > Flow**.
2. From the list of connectors, select **Spatial file**.

Spatial fields are assigned spatial data type and cannot be changed. If the fields come from a spatial file, the field is assigned a default field name of "Geometry". If the fields come from a spatial database, the database field names are shown. If Tableau can't

determine the type of data, the field shows as "Null".



## Connect using ODBC

*Supported in Tableau Prep Builder version 2019.2.2 and later. This connector type is not yet supported when authoring flows on the web.*

If you need to connect to data sources that aren't listed in the **Connections** pane, you can connect to any data source using the **Other Databases (ODBC)** connector that supports the SQL standard and implements the ODBC API. Connecting to data using the **Other Databases (ODBC)** connector works similarly to how you might use it in Tableau Desktop, however there are a few differences:

- You can only connect using the DSN (data source name ) option.
- To publish and run your flow in Tableau Server, the server must be configured using a matching DSN.

**Note:** Running flows from the command line that include the Other Databases (ODBC) connector isn't currently supported.

- There is a single connection experience for both Windows and MacOS. Prompting for connection attributes for ODBC drivers (Windows) isn't supported.
- Only 64-bit drivers are supported by Tableau Prep Builder.

## Before you connect

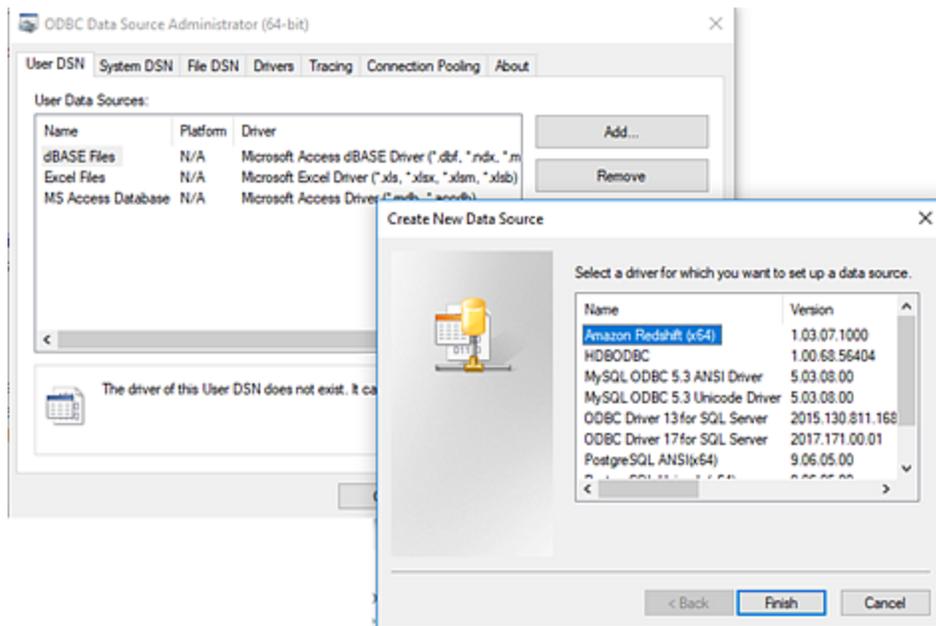
To connect to your data using the **Other Databases (ODBC)** connector, you must install the database driver and set up and configure your DSN (data source name). To publish and run flows to Tableau Server, the server must also be configured with a matching DSN.

**Important:** Tableau Prep Builder only supports 64-bit drivers. If you have a 32-bit driver already set up and configured, you may need to uninstall it and then install the 64-bit version if the driver doesn't allow both versions to be installed at the same time.

1. Create a DSN using either the **ODBC Data Source Administrator (64-bit)** (Windows) or the using an ODBC Manager utility (MacOS).

If you don't have the utility installed on your Mac, you can download one from ([www.odbcmanager.net](http://www.odbcmanager.net) for example) or you can manually edit the `odbc.ini` file.

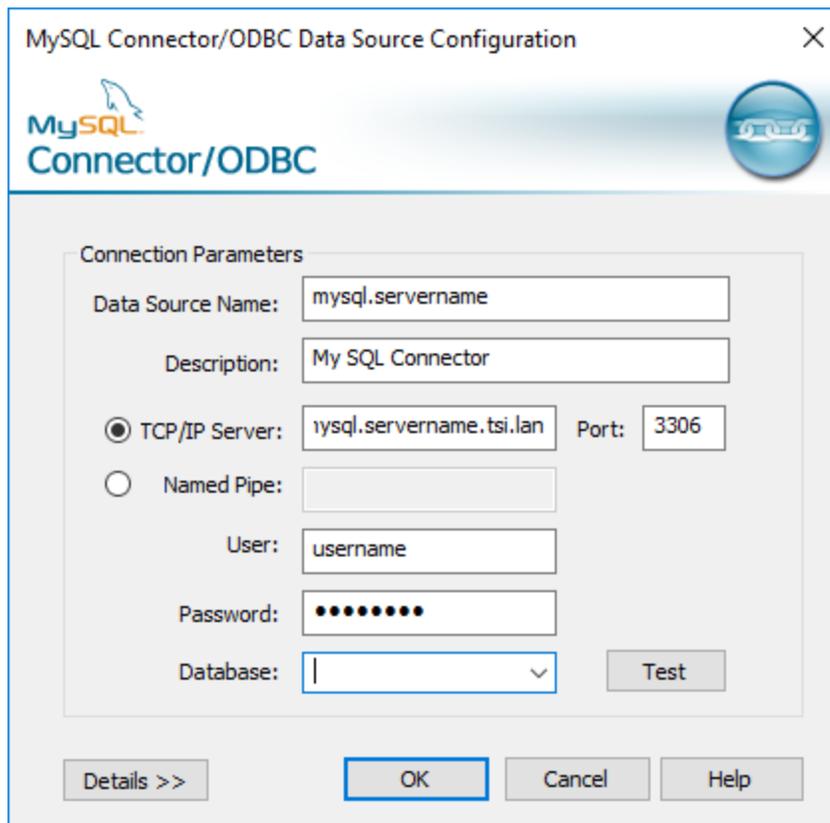
2. In the **ODBC Data Source Administrator (64-bit)** (Windows) or the ODBC Manager utility (MacOS), add a new data source then select the driver for the data source then click **Finish**.



3. In the **ODBC Driver Setup** dialog, enter the configuration information such as server name, port, user name and password. Click **Test** (if your dialog has that option) to verify that your connection is set up correctly, then save your configuration.

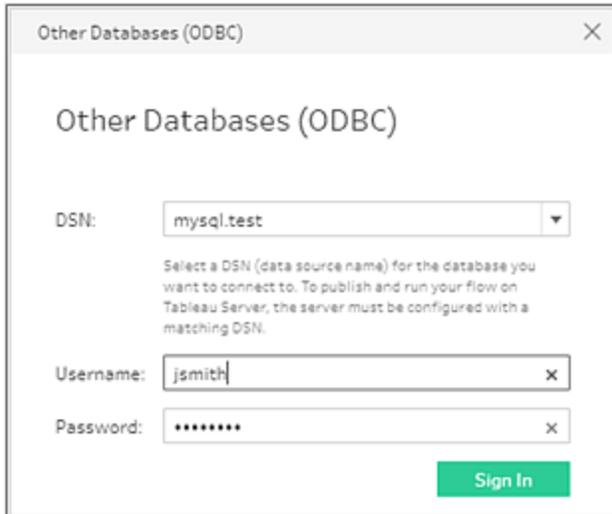
**Note:** Tableau Prep Builder doesn't support prompting for connection attributes so you must set this information when configuring the DNS.

This example shows the configuration dialog for a MySQL Connector.

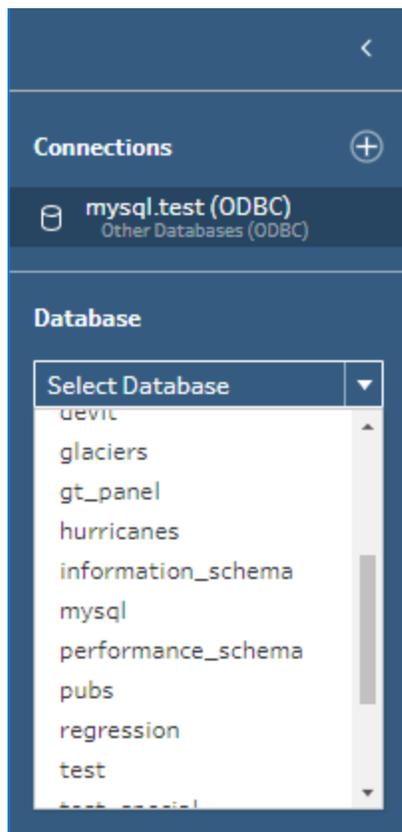


## Connect using Other Databases (ODBC)

1. Open Tableau Prep Builder and click the **Add connection**  button.
2. From the list of connectors, select **Other Databases (ODBC)**.
3. In the **Other Databases (ODBC)** dialog, select a DSN from the drop-down list and enter the user name and password. Then click **Sign In**.



4. From the **Connections** pane, select your database from the drop-down list.



# Use connector plugins to connect to ODBC- and JDBC-based data

*Supported in Tableau Prep Builder version 2020.4.1 and later.*

**Note:** Connector plugins that use Connection Dialog v2 are not yet supported, and connection attempts to the data source will fail. For more information about Connection Dialog v2, see [Build the Connection Dialog with Connection Dialog V2](#) in the Tableau Connector SDK.

When Tableau Prep doesn't provide a built-in connector for your data, you can connect to ODBC- and JDBC-based data using connector plugins created with the Tableau Connector SDK. Connector plugins are supported when connecting to data in Tableau Prep Builder and on the web in Tableau Server.

Some connectors require the installation of an additional driver. If prompted during the connection process, follow the prompts to download and install the required driver. Connector plugins currently cannot be used with Tableau Online.

## Connector plug in directories

To use connector plugins, download the connector .taco file, and add it to the following directories:

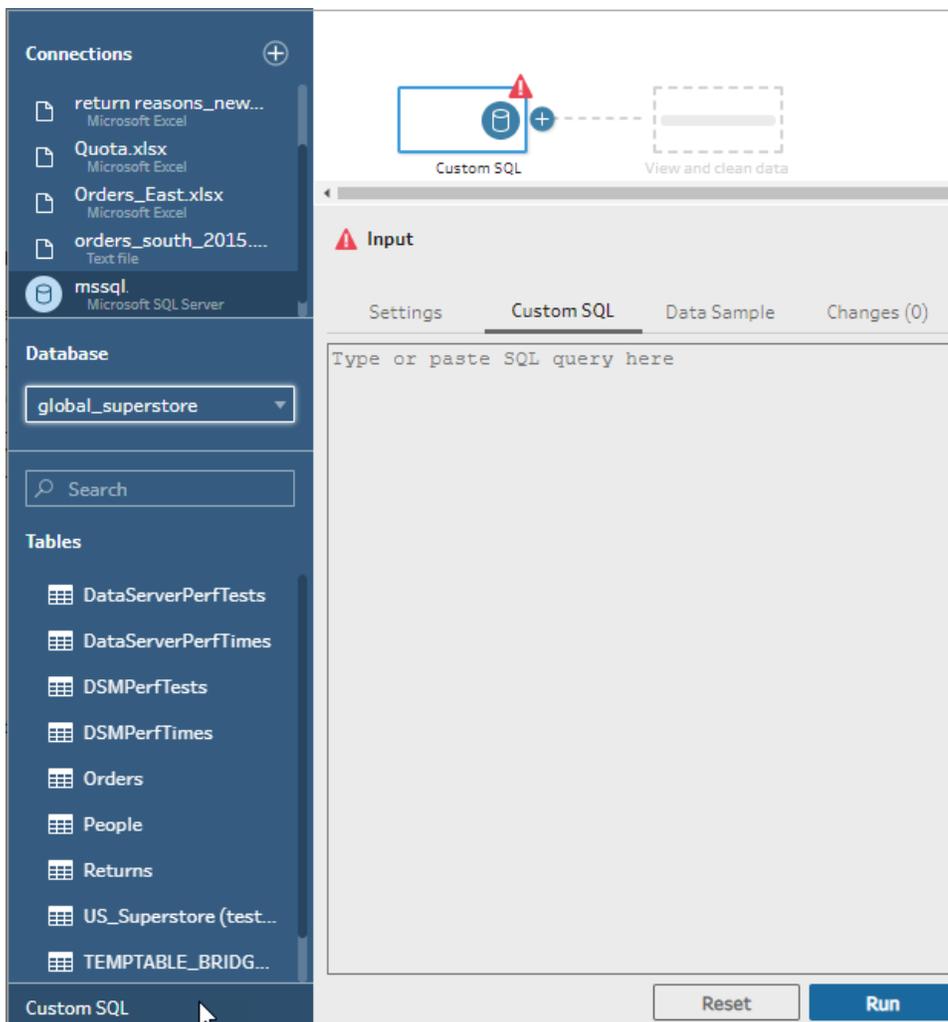
- Tableau Prep Builder:
  - **Windows:** C:\Users\  - **MacOS:** /Users/<user>/Documents/My Tableau Prep Repository/Connectors
- **Tableau Server (Flow web authoring):** <Tableau\_Server\_Installation\_Directory>/data/tabsvc/flowqueryservice/Connectors
- **Tableau Server (Tableau Prep Conductor):** <Tableau\_Server\_Installation\_Directory>/data/tabsvc/flowprocessor/Connectors

For general information about using connector plugins, see [Connector Plugins Built with the Tableau Connector SDK](#) in the Tableau Desktop help.

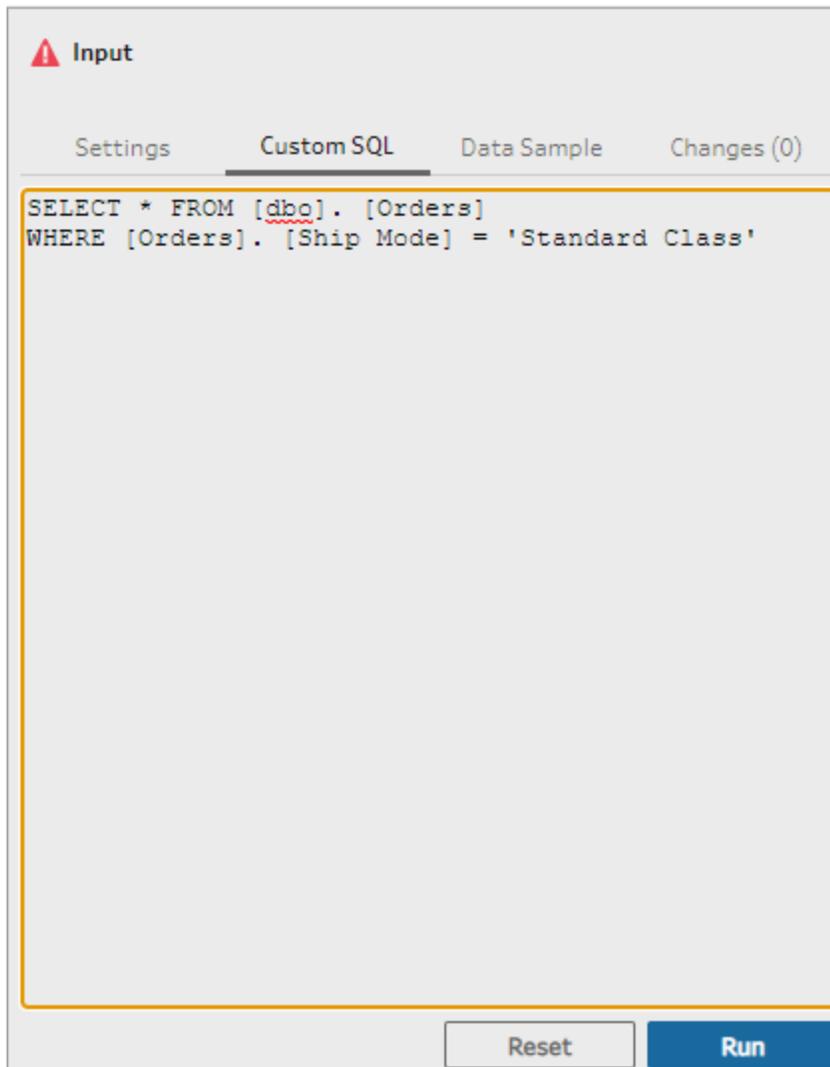
# Use Custom SQL to connect to data

If you know exactly the information you need from a database and understand how to write SQL queries, you can use custom SQL queries to connect to data just like you can in Tableau Desktop. You can use custom SQL to union your data across tables, recast fields to perform cross-database joins, restructure or reduce the size of your data for analysis, and so on.

1. Connect to your data source, and in the Connections pane, in the Database field, select a database.
2. Click the **Custom SQL** link to open the Custom SQL tab.



3. Type or paste the query into the text box and then click Run to run your query.



4. Add a clean step in the flow pane to see that only relevant fields from the custom SQL query are added to your flow.

## Use Initial SQL to query your connections

*Supported in Tableau Prep Builder version 2019.2.2 and later and when authoring flows on the web starting in version 2020.4.1*

You can specify an Initial SQL command that will run when a connection is made to a database that supports it. For example when connecting to Amazon Redshift, you can enter a SQL statement to apply a filter when connecting to the database just like adding filters in the Input step. The SQL command will apply before data is sampled and loaded into Tableau Prep.

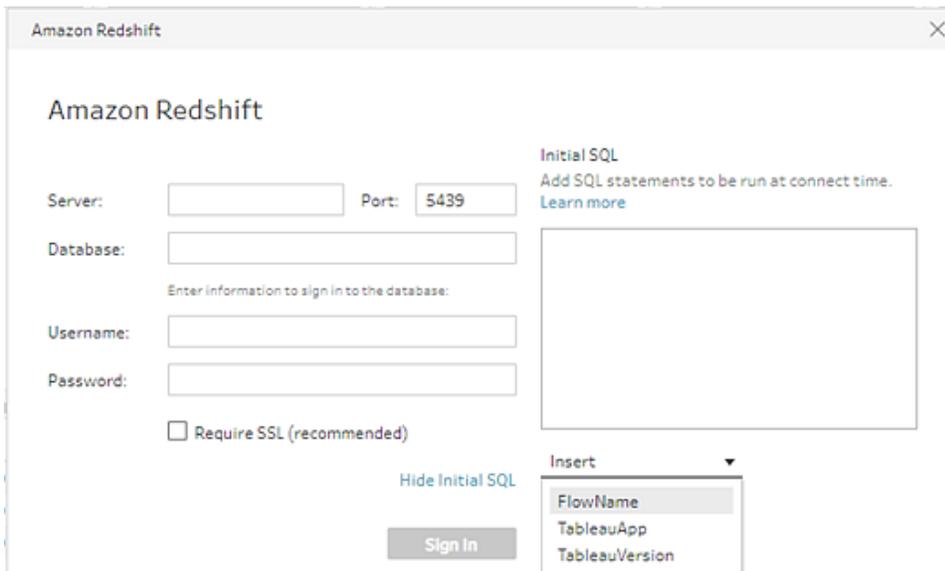
Starting in Tableau Prep Builder (version 2020.1.3) and on the web, you can also include parameters to pass application name, version and flow name data to include tracking data when you query your data source.

## Run Initial SQL

To refresh your data and run the Initial SQL command do one of the following:

- Change the Initial SQL command and refresh the Input step by re-establishing the connection.
- Run the flow. The Initial SQL command is run before processing all of the data.
- Run the flow on Tableau Server or Tableau Online. The Initial SQL is run every time that the flow is run as part of the data loading experience

**Note:** The [Data Management Add-on](#) is required to run your flow on a schedule on Tableau Server or Tableau Online. For more information about the Data Management Add-on, see [Use the Data Management Add-on](#).



1. In the Connections pane, select a connector in the list that supports Initial SQL.
2. Click the **Show Initial SQL** link to expand the dialog and enter your SQL statements.

## Include parameters in your Initial SQL statement

*Supported in Tableau Prep Builder version 2020.1.3 and later and when authoring flows on the web starting in version 2020.4.1.*

You can pass the following parameters to your data source to add additional detail about your Tableau Prep application, version and flow name. The **TableauServerUser** and **TableauServerUserFull** parameters are not currently supported.

Parameter	Description	Returned value
TableauApp	The application being used to access your data source.	Prep Builder Prep Conductor
TableauVersion	The application version number.	Tableau Prep Builder: Returns the exact version. For example 2020.4.1  Tableau Prep Conductor: Returns the major server version where Tableau Prep Conductor is enabled. For example 2020.4
FlowName	The name of the .tfl file in Tableau Prep Builder	Example: Entertainment Data_Cleaned

## Use Data Interpreter to clean your files

When working with Microsoft Excel files, you can use Data Interpreter to detect sub-tables in your data as well as remove extraneous information to help prepare your data for analysis. When you turn on Data Interpreter, it detects these sub-tables and lists them as new tables in the **Tables** section of the **Connections** pane. You can then drag them into the **Flow** pane.

If you turn Data Interpreter off, these tables are removed from the **Connections** pane. If these tables are already used in the flow, this will result in flow errors from the missing data.

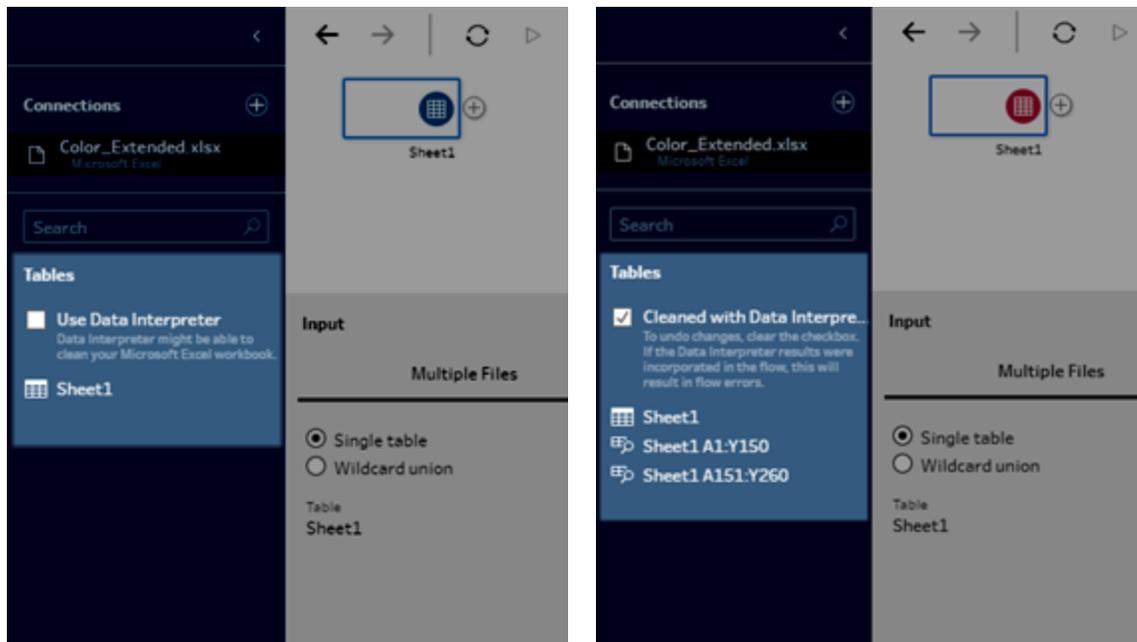
**Note:** Currently, Data Interpreter only detects sub-tables in your Excel spreadsheets and doesn't support specifying the starting row for text files and spreadsheets. Also,

tables that Data Interpreter detected are not included in the Wildcard Union search results.

The example below shows the results of using Data Interpreter on an Excel spreadsheet in the **Connections** pane. Data Interpreter detected two additional sub-tables.

### Before Data Interpreter

### After Data Interpreter



To use Data Interpreter, complete the following steps:

1. Select **Connect to Data** then select **Microsoft Excel**.
2. Select your file and click **Open**.
3. Select the **Use Data Interpreter** check box.
4. Drag the new table to the **Flow** pane to include it in your flow. To remove the old table, right-click the Input step for the old table and select **Remove**.

# Configure your Data Set

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web on page 166](#).

To determine how much of your data set to include in the flow, you can configure your data set. When you connect to your data or drag tables into the **Flow** pane, an Input step is automatically added to the flow. This is always the first step in your flow. You can right-click the Input step to rename or remove it. If you're connected to an Excel or text file, you can also refresh the data from the Input step. For more information about how to refresh data from the input step, see [Add More Data in the Input Step on page 214](#).

In the Input step, you can see the details about your data set. Here you can search for fields, see sample values, and perform actions to reduce the size of your data set, such as selecting the fields to include, selecting the data sample to work with, or applying filters to selected fields or rows. You can also configure the field properties by changing the field name or configuring the text settings for text files.

You can also change the data type in the Input step for data connections that support it. These include Microsoft Excel, text and PDF files, and data from Box, Dropbox, Google Drive, and OneDrive. For other data sources you can change the data type in a cleaning step. For more information, see [Review the data types assigned to your data on page 245](#).

**Note:** Field values that include square brackets are automatically converted to parentheses.

Orders (West) 41 fields | Filter Values...

Clear the check box to remove fields. You can also filter your data or change data types. [Add a clean step](#) to view and clean data.

Fields selected: 21 of 41

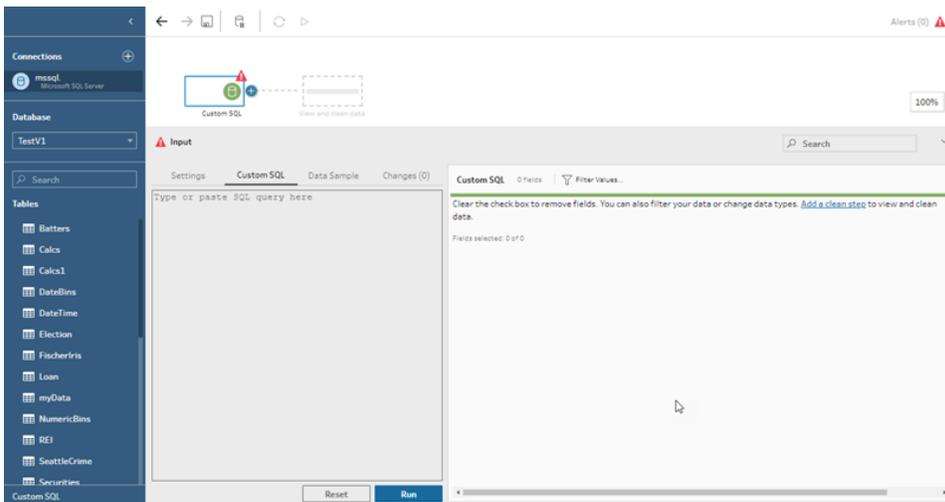
<input type="checkbox"/>	Type	Field Name	Original Field Name	Changes	Preview
<input checked="" type="checkbox"/>	#	Row ID	Row ID		3,836, 3,837
<input checked="" type="checkbox"/>	Abc	Order ID	Order ID		CA-2015-100363
<input checked="" type="checkbox"/>	📅	Order Date	Order Date		04/08/2015, 12:00:00 AM
<input checked="" type="checkbox"/>	📅	Ship Date	Ship Date		04/15/2015, 12:00:00 AM
<input checked="" type="checkbox"/>	#	Ship Mode	Ship Mode		Standard Class
<input checked="" type="checkbox"/>	#	Customer ID	Customer ID		JM-15655
<input checked="" type="checkbox"/>	📅	Customer Name	Customer Name		Jim Mitchum
<input checked="" type="checkbox"/>	Abc	Segment	Segment		Corporate
<input checked="" type="checkbox"/>	Abc	Country	Country		United States
<input checked="" type="checkbox"/>	Abc	City	City		Glendale
<input checked="" type="checkbox"/>	#	Postal Code	Postal Code		85,301

Dropdown menu for Ship Date:

- # Number (decimal)
- # Number (whole)
- 📅 Date & Time - default
- 📅 Date
- Abc String

## Connect to a custom SQL query

If your database supports using custom SQL, you will see **Custom SQL** displayed near the bottom of the **Connections** pane. Double-click **Custom SQL** to open the **Custom SQL** tab where you can enter queries to preselect data and use source-specific operations. After the query retrieves the data set, you can select the fields to include, apply filters, or change the data type before adding the data to your flow.

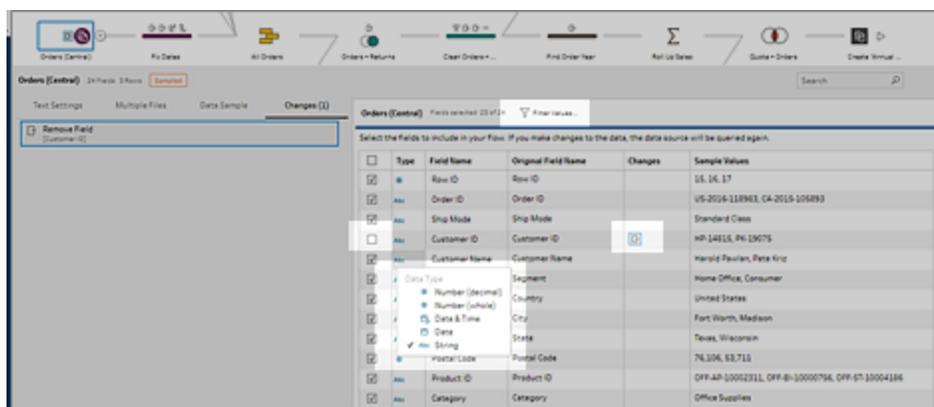


For more information about using custom SQL, see [Use Custom SQL to connect to data on page 203](#).

## Apply cleaning operations in an input step

Only some cleaning operations are available in an Input step. You can make any of the following changes in the Input field list. Your changes are tracked in the **Changes** pane and annotations are added to the left of the Input step in the **Flow** pane and in the Input field list.

- **Filter:** Click **Filter Values** in the toolbar then enter your filter criteria in the calculation editor.
- **Rename Field:** In the **Field Name** field, double-click or Ctrl-click (MacOS) on the field name and enter a new field name.
- **Change Data Type:** Click on the data type for the field and select a new data type from the menu.
- **Remove Field:** Clear the check box next to the fields that you don't want to include in your flow.



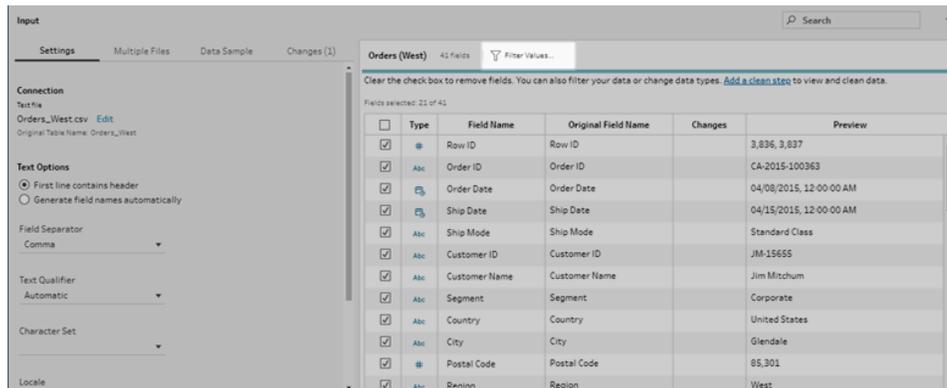
## Select the fields to include in the flow

The **Input** pane shows you a list of fields in your data set. You can use the **Search** field to find fields in the list, and then use the check boxes to select the fields to include or exclude. To include or exclude all fields from the flow, toggle the check box at the top left of the grid.

## Apply filters to fields in the Input step

To filter a field, do the following:

1. In the toolbar click **Filter Values**.



2. Enter your filter criteria in the calculation editor.

The calculation filter type is the only filter option available in the Input step. Other filter options are available in other step types. For more information, see [Filter Your Data on page 255](#)

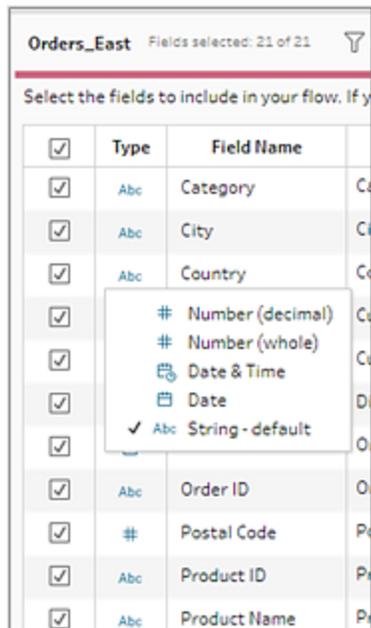
## Change field names

To change the name of a field, in the **Field Name** column, select the name, and then type the new name in the field. An annotation is added in the field grid and in the flow pane to the left of the Input step. Your changes are also tracked in the **Changes** pane.

## Change data types

To change the data type for a field, do the following:

1. Click the data type for the field.
2. Select the new data type from the menu.



You can also change the data type for fields in other step types in the flow or assign data roles to help validate your field values. For more information about changing your data type or using data roles, see [Review the data types assigned to your data on page 245](#) and [Use Data Roles to Validate your Data on page 262](#).

## Configure field properties

When you work with text files, you see a **Settings** tab where you can edit your connection and configure text properties, such as the field separator for text files. You can also edit the file connection in the Connections pane or configure incremental refresh settings. For more information about setting up incremental refresh for your flow, see [Refresh Flow Data Using Incremental Refresh on page 400](#).

When you work with text or Excel files, you can correct data types that have been inferred incorrectly before you even start your flow. Data types can always be changed in subsequent steps in the **Profile** pane after you start your flow.

## Configure text settings in text files

To change the settings used to parse text files, select from the following options:

- **First line contains header** (default): Select this option to use the first row as the field labels.

- **Generate field names automatically:** Select this option if you want Tableau Prep Builder to auto-generate the field headers. The field naming convention follows the same model as Tableau Desktop. For example **F1**, **F2**, and so on.
- **Field Separator:** Select a character from the list to use to separate the columns. Select **Other** to enter a custom character.
- **Text Qualifier:** Select the character that encloses the values in the file.
- **Character Set:** Select the character set that describes the text file encoding.
- **Locale:** Select the locale to use to parse the file. This setting indicates which decimal and thousand separator to use.

## Set your data sample size

To maintain peak performance, Tableau Prep limits the data included in the flow to a representative sample of your data set by default. The data sample is determined by calculating the optimal number of rows based on the total number of fields in the data set and the data types for those fields. Tableau Prep then retrieves the top number of rows for the calculated amount as quickly as possible.

The resulting data sample may include all the rows you need, or it may not, depending on how the sample was calculated and returned. If you don't see the data that you expect, you can change the data sample settings to run the query again.

When creating or editing flows on the web, limits are applied to the amount of data you can include in a flow and the options available to change your data sample are slightly different than when working in Tableau Prep Builder. For more information, see [Sample data and processing limits](#) on page 167.

**Note:** If your data is sampled, a **Sampled**  badge shows in the **Profile** pane and persists for every step you add. Any changes you make apply to the sample you are working with in the flow. All changes apply to your entire data set when you run the flow.

To change your data sample settings, select an Input step, then on the **Data Sample** tab select from the following options:

- **Default sample amount** (default): Tableau Prep calculates the total number of rows to return.
- **Use all data:** (Tableau Prep Builder only) Retrieve all rows in your data set regardless of size. This can impact performance or cause Tableau Prep Builder to time out.

**Note:** To maintain performance, even if you select this setting, a data sample limit of 1 million rows is applied to Aggregate and Union step types and a data sample limit of 3 million rows is applied to Join and Pivot step types.

- **Fixed number of rows:** Select the number of rows to return from the data set. The recommended number of rows is 1 million or less. Setting the number of rows to more than 1 million can impact performance.
  - **In Web authoring:** The maximum number of rows that a user can select when using large data sets is configured by the administrator. As a user, you can select the number of rows up to that limit.
- **Quick select** (default): The database returns the number of rows requested as quickly as possible. This might be the first N number of rows or the rows that the database had cached in memory from a previous query.
- **Random sample:** The database returns the number of rows requested but looks at every row in the data set and returns a representative sample from all of the rows. This option may impact performance when the data is first retrieved.

## Add More Data in the Input Step

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web on page 166](#).

After you connect to your data sources and begin to build your flow you may want to refresh your data connections as new data comes in. You can also join or union data sets in the input step to make working with larger data sources more efficient.

## Refresh data in the Input step

If data changes in your input files or tables after you begin working with your flow, you can refresh the Input step to bring in the new data.

### File input step types

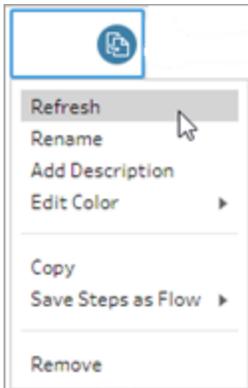
**Note:** This option is not yet supported on the web.

To refresh file inputs steps, do one of the following:

- In the flow pane on the top menu, click the **Refresh** button to refresh all Input steps. To refresh a single Input step, click the drop-down arrow next to the refresh button and select the Input step from the list.



- In the flow pane, right-click the Input step you want to refresh and select **Refresh** from the menu.



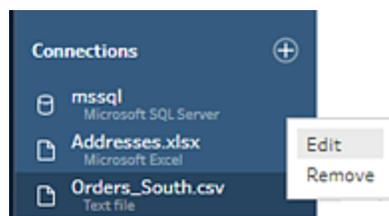
### Files, Database or Tableau extract input step types

To refresh database or tableau extract input steps, do one of the following:

- Try editing the connection.

**Note:** To maintain performance, Tableau Prep samples large data sets. If your data is sampled, you may or may not see your new data in the profile pane. You can change the settings for how your data is sampled in the **Data Sample** tab in the Input step, but it may impact performance. For more information about setting your data sample size, see [Set your data sample size on page 213](#).

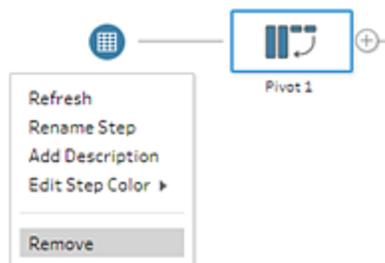
1. In the **Connections** pane, right-click or Ctrl-click (MacOS) on the data source and select **Edit**.



2. Re-establish your connection by signing into the database or re-selecting the file or Tableau extract.

- Remove and re-add the Input step to the flow.

1. In the flow pane, right-click the Input step you want to refresh and select **Remove** from the menu.



This will temporarily put your flow in an error state.



2. Connect to the updated file again.

3. Drag the table to the flow pane on top of the second step in the flow where you want to add the Input step. Drop it on the **Add** option to reconnect it to the flow.



## Union files and database tables in the Input step

**Note:** Input unions can't be edited or created in Tableau Server or Tableau Online. Only in Tableau Prep Builder.

When working with multiple files or database tables from a single data source, you can search for files or tables using a wildcard search and then union the data to include all of the file or table data in the Input step. To union files, the files must be in the same parent or child directory.

New files that are added to the same folder that match the pattern are automatically included in the union the next time you open the flow or run it from the command line. Packaged flow files (.tflx) won't automatically pick up new files because the files are already packaged with the flow. To include new files for packaged flows, open the flow file (.tfl) to pick up the new files, then repackage the flow to include the new file data.

To union database tables, the tables must be in the same database and the database connection must support using a wildcard search to union. The following databases support this type of union:

- Amazon Redshift
- Microsoft SQL Server
- MySQL
- Oracle
- PostgreSQL

If you add or remove files or tables after you create the union you can refresh the Input step to update your flow with the new or changed data.

**Note:** Currently, this feature applies only to Excel and .csv (text) files and data tables stored in the specific databases listed above. This option is not available for Tableau data extracts.

Wildcard union for files is available in Tableau Prep Builder version 2018.1.2 and later. Wildcard union for database tables is available in Tableau Prep Builder version 2018.3.1 and later. Editing a flow connection with this type of union in a prior version can result in errors.

If you need to union data from different data sources, you can do that using a Union step. For more information about creating Union steps, see [Union your data on page 368](#).

## Union files

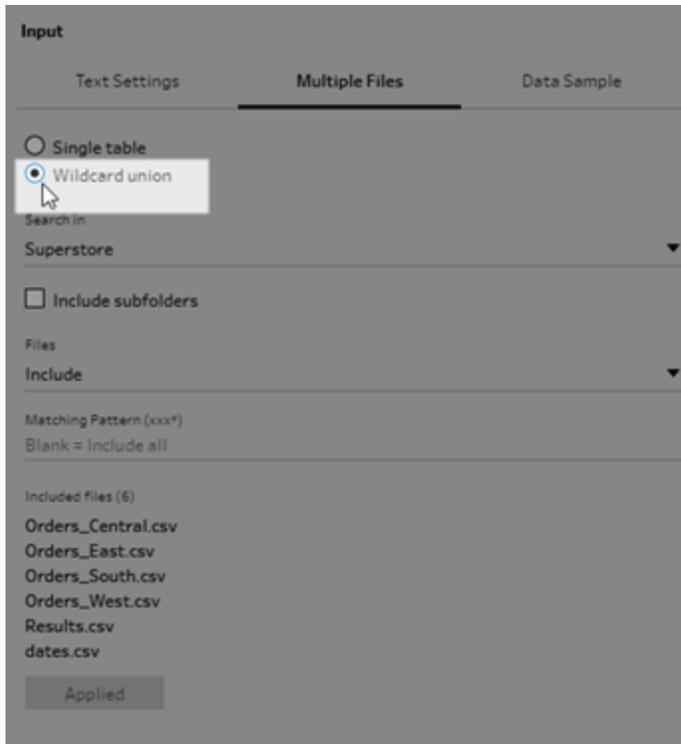
By default, Tableau Prep Builder unions all .csv files in the same directory as the .csv file you connected to or all the sheets in the Excel file you connected to. If you use Data Interpreter to clean Excel files and are using Tableau Prep Builder version 2018.1.2 or later, you can use the wildcard search to union and add any sub-tables that Data Interpreter found.

If you want to change the default union, use the following criteria to find the files or sheets you want to include in the union:

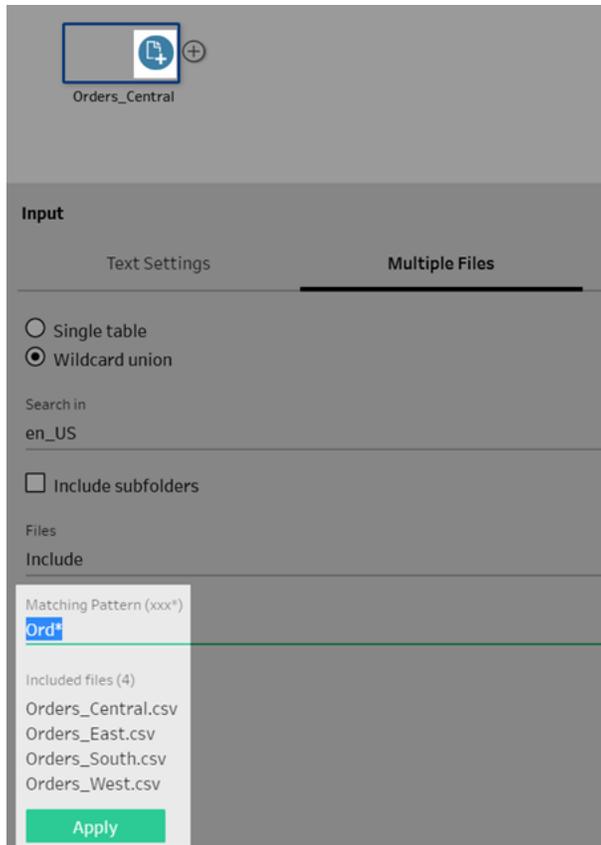
- **Search in:** Select the directory to use to search for files. Select the **Include subfolders** check box to include files in the sub-directory of the parent folder.
- **Files:** Select whether to include or exclude the files that match the wildcard search criteria.
- **Matching Pattern (xxx\*):** Enter a wildcard search pattern to find files that have those characters in the file name. For example, if you enter ord\* all files that include the file name are returned. Leave this field blank to include all of the files in the specified directory.

To union files in the input step, do the following:

1. Click the **Add connection**  button and under **Connect**, click **Text File** for .csv files or **Microsoft Excel** for Excel files, and then select a file to open.
2. In the **Input** pane, select the **Multiple Files** tab, and then select **Wildcard union**.

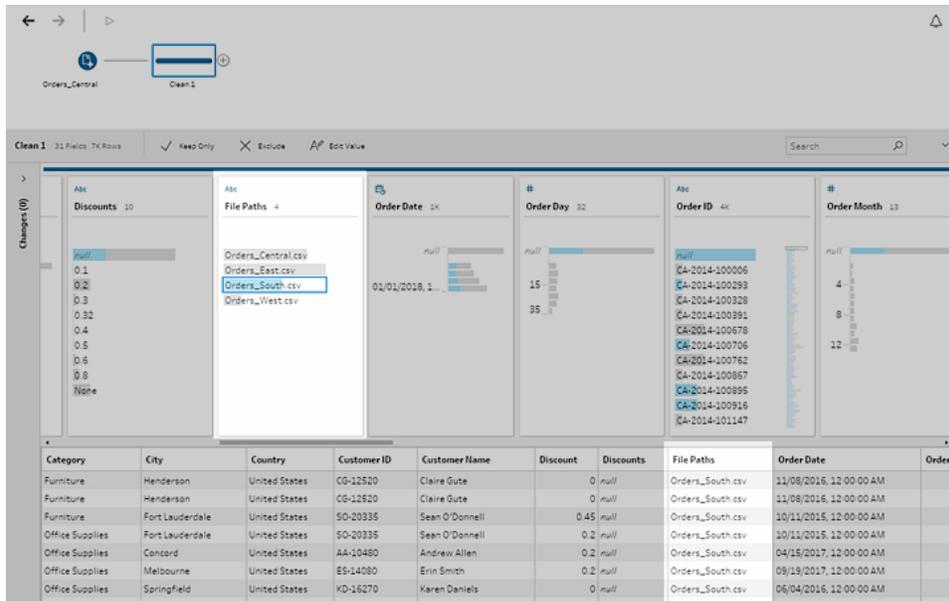


The example below shows a wildcard union using a matching pattern. The plus sign on the file icon on the Orders\_Central Input step in the **Flow** pane indicates that this step includes a wildcard union. The files in the union are listed under **Included files**.



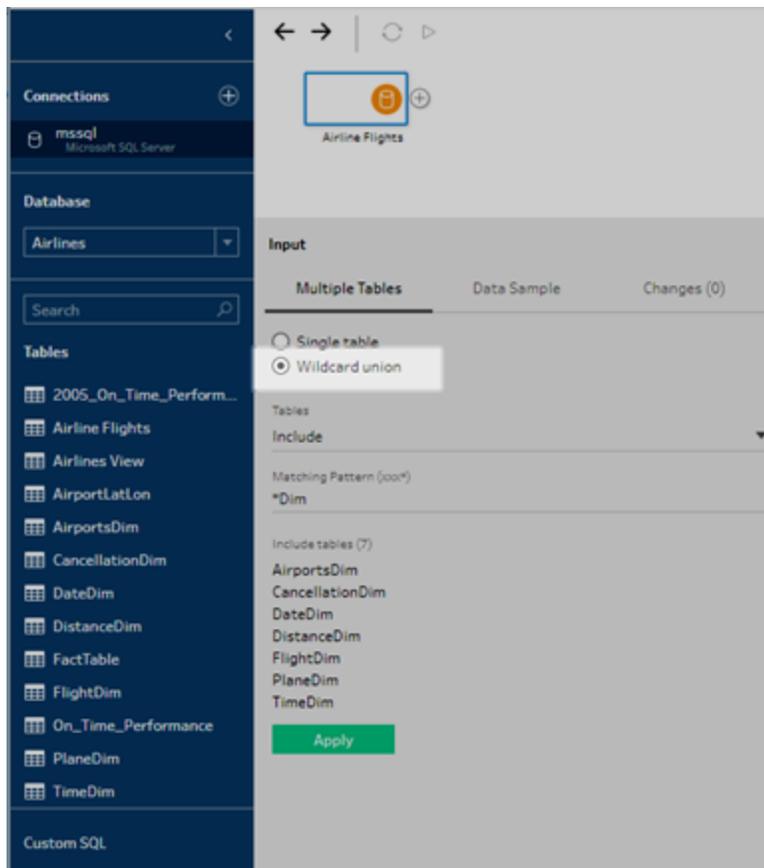
3. Use the search, file and matching pattern options to find the files that you want to union.
4. Click **Apply** to union the files.

When you add a new step to the flow, you can see all the files added to the data set in the **File Paths** field in the Profile pane. This field is added automatically.



## Union database tables (version 2018.3.1 and later)

1. Click the **Add connection**  button and under **Connect**, connect to a database that supports wildcard union.
2. Drag a table to the flow pane.
3. In the **Input** pane, select the **Multiple Tables** tab, and then select **Wildcard union**.

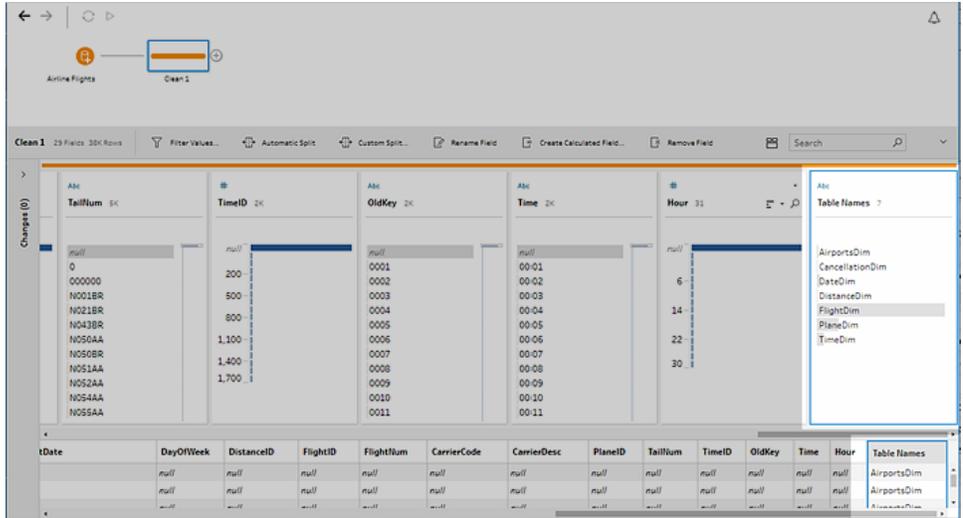


4. Use search, **Tables** and **Matching Pattern** options to find the tables that you want to union.

Only tables that display in the **Connections** pane in the **Tables** section can be included in the union. Wildcard search doesn't search across schemas or across the database connection to find tables.

5. Click **Apply** to union the table data.

When you add a new step to the flow, you can see all the tables added to the data set in the **Table Names** field in the Profile pane. This field is added automatically.



### Merge fields after a union

After you create a union in the input step, you might want to merge fields. You can do this in any subsequent step, except for the Input or Output steps. For more information, see [Additional merge field options](#) on page 374.

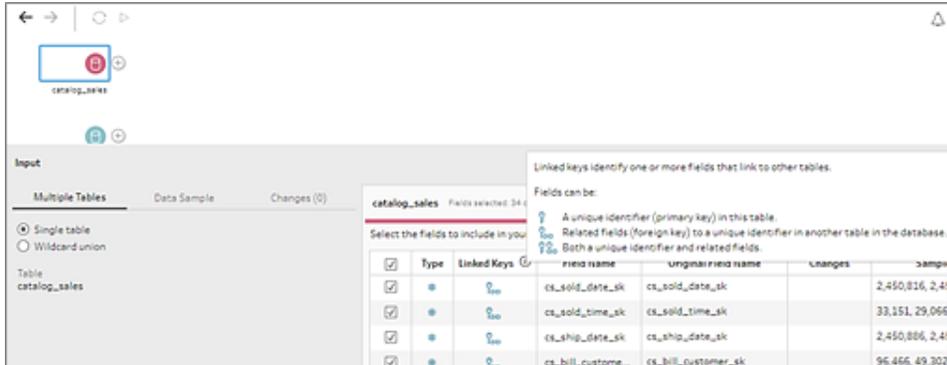
### Join data in the Input step

In Tableau Prep Builder (version 2019.3.1 and later), and on the web, when you connect to databases that include tables with relationship data, Tableau Prep can detect and show which fields in a table are identified as the unique identifier and which fields are identified as a related field as well as show the related table names for these fields.

A new column called **Linked Keys** shows in the Input pane and shows the following relationships if they exist:

-  Unique identifier. This field uniquely identifies each row in the table. There can be multiple unique identifiers in a table. The values in the fields must be unique and cannot be blank or null.
-  Related field. This field relates the table to another table in the database. There can be multiple related fields in a table.

-  Both Unique Identifier and related field. The field is a unique identifier in this table and also relates the table to another table in the database.

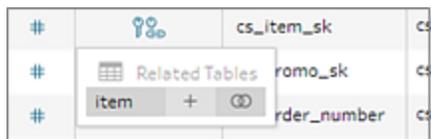


You can leverage these relationships to quickly find and add the related tables to your flow or create joins from the Input step. This feature is available for any supported database connector where table relationships are defined.

1. Connect to a database (such as Microsoft SQL Server) that contains relationship data for fields, such as unique identifiers or related fields (foreign key).
2. In the Input pane, click on a field that is marked as a  related field or as  both a unique identifier and related field.

A dialog opens that shows a list of related tables.

3. Hover on the table that you want to add or join and click the plus button to add the table to your flow, or click the join button to create a join with the selected table.



If you create a join, Tableau Prep uses the defined field relationship to join the tables and shows you a preview of the join clauses that it will use to create the join.

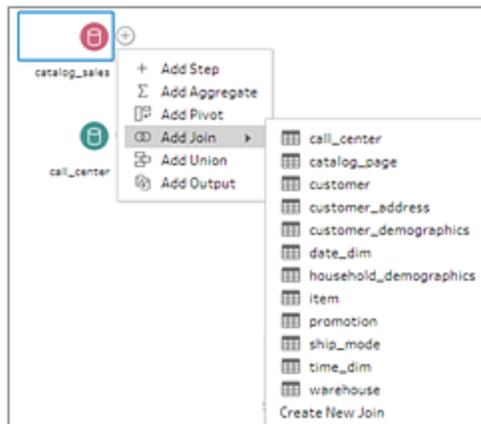
## Tableau Prep Help



4. Alternatively, you can join related tables from the menu in the Flow pane. Click the plus

⊕ icon, then select **Add Join** to see a list of related tables. Tableau Prep creates the join based on the fields that make up the relationship between the two tables.

**Note:** If your table doesn't have table relationships defined, this option is not available.



For more information about working with joins, see [Join your data](#) on page 361.

# Build and Organize your Flow

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web on page 166](#).

After you connect to the data that you want to include in your flow, you can begin cleaning and shaping your data by adding new steps to the flow or inserting steps in between existing steps.

To organize your flow, you can change the default step colors, add descriptions to provide context for your steps or cleaning actions, or reorganize your flow layout to make complex flows easier to follow.

## Add or insert steps

As you build out your flow, you can add different step types to perform the actions that you need. For example add a **Clean Step** to do things like split fields, apply filters, or perform a variety of other operations to clean dirty data. Use a **Join** or **Union** step type to combine data tables or add a **Script** step type to incorporate R or Python scripts into your flow.

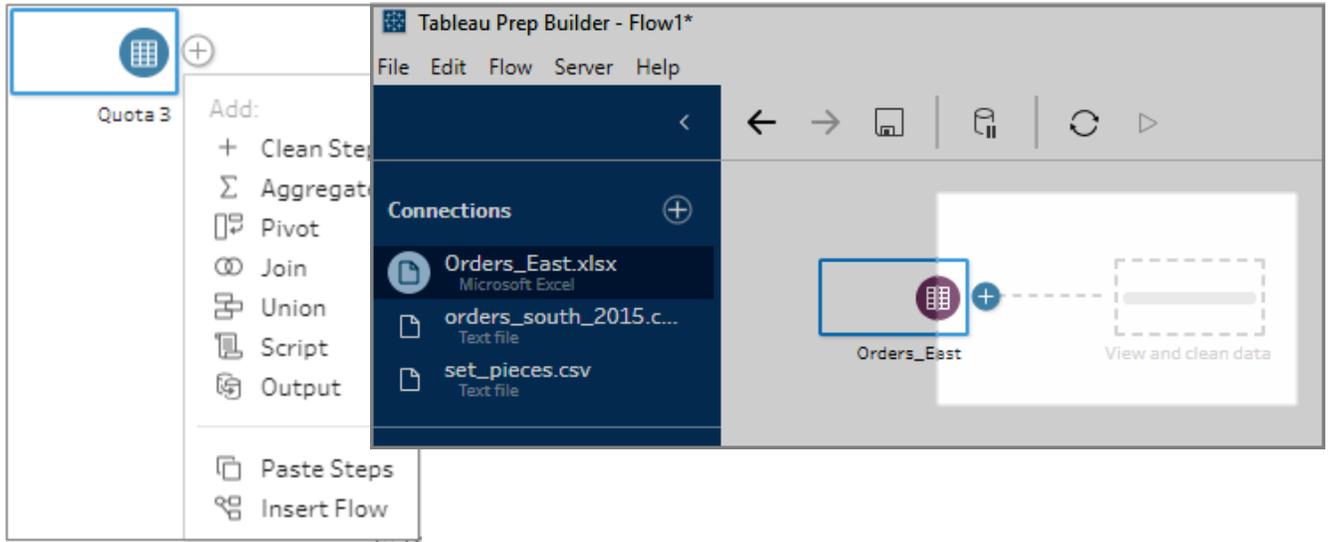
As your flow begins to take shape, you may need to go back to earlier steps in your flow and insert different step types to perform various actions like adding an additional cleaning step or aggregating your data to use the same level of detail as a later step.

**Note:** The menu options that you see will vary depending on your Tableau Prep Builder version and whether you are adding a step to build out the next step in the flow versus inserting a step between existing steps. If you are using Tableau Prep Builder version 2019.3.1 or earlier, refer to that section to see your menu options.

You can't add input steps using these menu's. Instead you'll need to drag tables from the **Connections** pane to the Flow pane. For more information, see [Connect to Data on page 177](#).

## Add steps

After you connect to your data and drag a table onto the canvas, click the plus  button to select a step type from the menu, or click on the suggested clean step (Tableau Prep Builder version 2020.3.3 and later and on the web) to automatically add a cleaning step to your flow.



Select a step type:

- **Clean Step:** Add a cleaning step to perform a variety of cleaning actions. For more information about the different cleaning actions that are available, see [Clean and Shape Data on page 277](#).

**Note:** In Tableau Prep Builder version 2019.4.2, the **Add Branch** option was replaced with the **Clean Step** option. To split your flow into different branches,

click the plus  button between two existing steps and select a step type from the **Add** menu.

- **Aggregate:** Create an **Aggregation** step to select fields and change their level of detail. For more information, see [Aggregate and group values on page 360](#).
- **Pivot:** Create a **Pivot** step to perform a variety of pivot options such as converting

column data to rows, or row data to columns. You can also set up a wildcard pivot to automatically add new data to your pivot. For more information, see [Pivot Your Data on page 333](#).

- **Join:** Create a **Join** step to combine data tables. When you create a join from the menu option, you must manually add the other input to the join and add your join clauses. As an alternative, you can drag and drop a step (shown below) to join files automatically. For more information about creating a join, see [Join your data on page 361](#).



If you connect to databases that include tables with relationship data, you can also create a join from the menu in the Flow pane. For more information about joining tables using this method, see [Join data in the Input step on page 223](#).

- **Union:** Create a Union step. Add tables to the union by dragging them to the step and dropping them on the **Add** option that displays. As an alternative, you can drag and drop a step onto another step to union files. For more information about creating a union, see [Union your data on page 368](#).
- **Script** (Tableau Prep Builder version 2019.3.1 and later and on the web): Create a Script step to include R and Python scripts in your flow. Script steps are not currently supported in Tableau Online. For more information, see [Use R and Python scripts in your flow on page 342](#).
- **Output:** Create an Output step to save the output to an extract file (.hyper), a .csv file, publish the output as a data source to a server, or write your flow output to a database. Saving Output steps to a file is not currently supported on the web. For more information about output types, see [Save and Share Your Work on page 383](#).
- **Paste Steps:** Add copied steps from the same flow. For more information about copying and pasting steps in the same flow, see [Clean and Shape Data on page 277](#).
- **Insert Flow** (Tableau Prep Builder version 2019.3.2 and later and on the web): Add flow steps that were saved from another flow into your current flow. You can add them to the end of a step or insert them between existing steps. For more information about using

saved flow steps in your flow, see [Create reusable flow steps \(version 2019.3.2 and later\)](#) on page 316

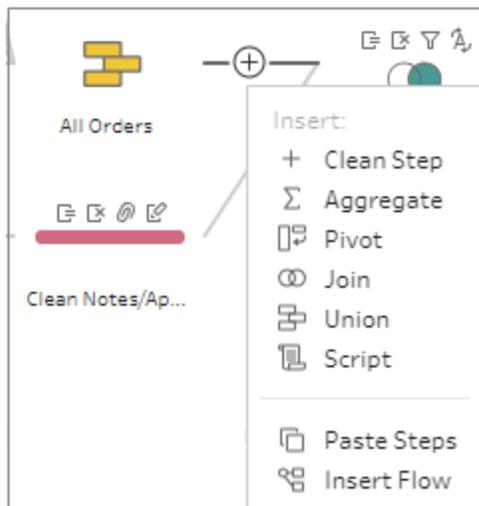
**Note:** This option was added to this menu in Tableau Prep Builder version 2019.4.2. In prior versions, you could add flow steps using right-click or Ctrl-click (MacOS) in the white space of the flow pane.

## Insert steps

Insert a step between existing steps. Input and Output step types aren't available from this menu. The options vary depending on your product version. If you are using an earlier version of Tableau Prep Builder, refer to the **Version 2019.3.1 and earlier** section below.

1. Hover in the middle of the flow line where you want to insert a step until the plus  icon appears. Then click the icon and select a step type.

**Note:** Your options may look different depending on your product version. For example **Insert Flow** was added to this menu in Tableau Prep Builder version 2019.4.2.



2. Select a step type:

- **Clean Step:** Insert a cleaning step between existing steps to perform a variety of cleaning actions. For more information about the various cleaning actions you can use, see [Clean and Shape Data on page 277](#).
- **Aggregate:** Insert an **Aggregation** step between existing steps to select fields and change their level of detail. For more information, see [Aggregate and group values on page 360](#).
- **Pivot:** Insert a **Pivot** step between existing steps to perform a variety of pivot options such as converting column data to rows, or row data to columns. You can also set up a wildcard pivot to automatically add new data to your pivot. For more information, see [Pivot Your Data on page 333](#).
- **Join:** Insert a **Join** step between existing steps . When you create a join from the menu option, you must manually add the other input to the join and add your join clauses. As an alternative, you can drag and drop a step (shown below) to join files automatically.



For more information about creating a join, see [Join your data on page 361](#).

If you connect to databases that include tables with relationship data you can also create a join from the menu in the Flow pane. For more information about joining tables using this method, see [Join data in the Input step on page 223](#).

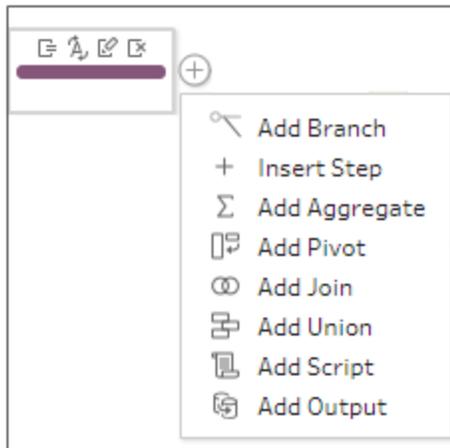
- **Union:** Insert a Union step. Add tables to the union by dragging them to the step and dropping them on the **Add** option that displays. As an alternative, you can drag and drop a step onto another step to union files. For more information about creating a union, see [Union your data on page 368](#).
- **Script** (Tableau Prep Builder version 2019.3.1 and later and on the web): Insert a Script step to include R and Python scripts in your flow. Script steps are not currently supported in Tableau Online. For more information, see [Use R and Python scripts in your flow on page 342](#).

- **Paste Steps:** Insert copied steps from the same flow between existing steps. For more information about copying and pasting steps in the same flow, see [Clean and Shape Data on page 277](#).
- **Insert Flow** (Tableau Prep Builder version 2019.3.2 and later and on the web): Insert flow steps that were saved from another flow into your current flow. You can add them to the end of a step or insert them between existing steps. For more information about using saved flow steps in your flow, see [Create reusable flow steps \(version 2019.3.2 and later\) on page 316](#).

**Note:** This option was added to this menu in Tableau Prep Builder version 2019.4.2. In prior versions, you could insert flow steps using right-click or Ctrl-click (MacOS) in the white space of the flow pane.

## Version 2019.3.1 and earlier

1. Hover over a step until the plus  $\oplus$  icon appears then click the icon and select a step type. **Insert Step** inserts a cleaning step between steps. All other options will create a branch from the flow.



2. Select from the following options:

- **Add Branch:** Split your flow into different branches.
- **Insert Step:** Insert a cleaning step between existing steps to perform a variety of cleaning actions. For more information about the various cleaning actions you can use, see [Clean and Shape Data on page 277](#).
- **Add Aggregate:** Create an **Aggregation** step where you can select the fields that you want to aggregate or group. For more information, see [Aggregate and group values on page 360](#).
- **Add Pivot:** Create a **Pivot** step where you can perform a variety of pivot options to convert column data to rows, or row data to columns. For more information, see [Pivot Your Data on page 333](#).
- **Add Join:** Create a **Join** step where you can manually add the other input to the join and add the join clauses. As an alternative, you can drag and drop a step to join files. The following example shows dragging the Orders\_Central Input step and dropping it on **Join**:



For more information about creating a join, see [Join your data on page 361](#).

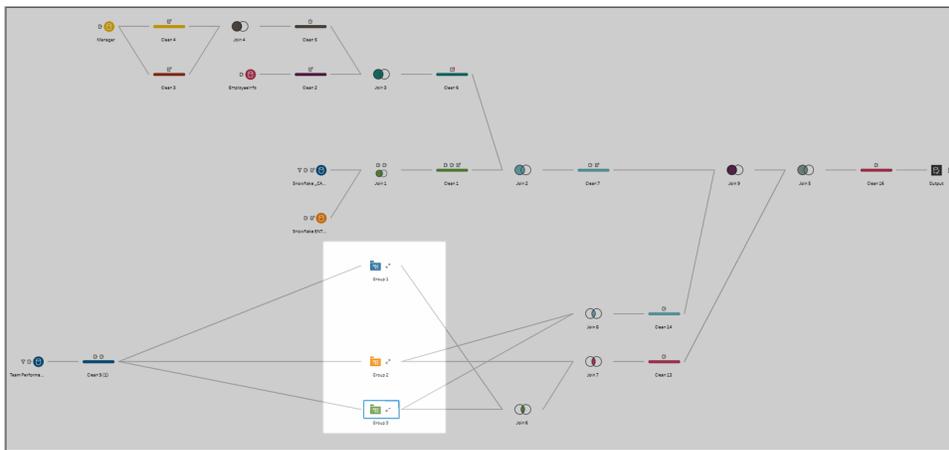
In Tableau Prep Builder version 2019.1.3 and later, if you connect to databases that include tables with relationship data you can also create a join from the menu in the Flow pane. For more information about joining tables using this method, see [Join data in the Input step on page 223](#).

- **Add Union:** Create a Union step. Add tables to the union by dragging them to the step and dropping them on the **Add** option that displays. As an alternative, you can drag and drop a step onto another step to union files. For more information about creating a union, see [Union your data on page 368](#).
- **Add Script**(version 2019.3.1 and later): Create a Script step to include R and Python scripts in your flow. For more information, see [Use R and Python scripts in your flow on page 342](#).

- **Add Output:** Select this option to save the output to an extract file (.tde or .hyper), a .csv file, or publish the output as a data source to a server.

## Group steps (version 2020.3.3 and later)

In Tableau Prep Builder version 2020.3.3 and later and on the web, you can use the Group option to compartmentalize sections of large complex flows into folders to make it easier to follow, troubleshoot, or share your flow with others. You can change the color of the group, add a description, copy and paste the grouped steps to other areas of your flow, or in Tableau Prep Builder, even save the grouped steps to a file on your server to reuse them in other flows.

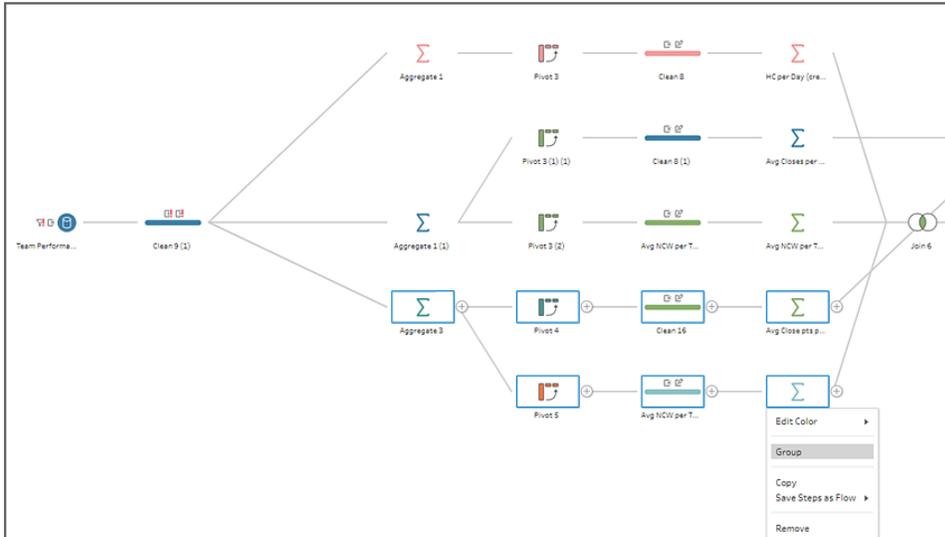


When creating groups, the following criteria applies:

- Steps must be directly connected with a flow line.
- Steps can only be included in one group at a time.
- Groups can't be nested.
- You can add or remove steps from a group at any time, as long as you maintain the flow line connections between steps in the group. This also applies to removing steps from a flow that are already included in a group. In that scenario, the group is automatically ungrouped.

### Create a group

Select a set of connected steps in your flow (you can also drag to select multiple steps in one click), then right-click or Cntrl-click (MacOS) on the selected steps and select **Group** from the menu.

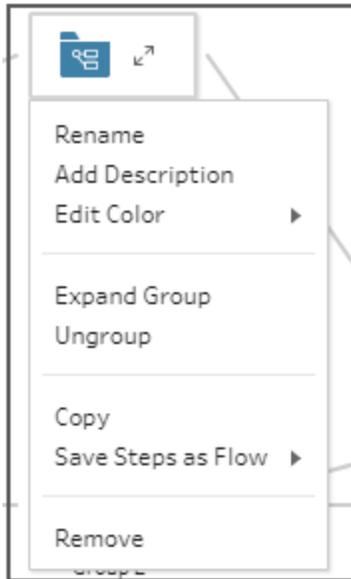


After you create the group, you can do any of the following:

- Click the double arrows to expand  or collapse  the group at any time.
- Add more steps to the group by dragging a connected step and dropping it onto the collapsed folder.
- Remove steps from the group. In the expanded state, right-click or Cntrl-click (Mac OS) a step and select **Remove from Group**.

**Note:** This option isn't available if you try to remove a step that breaks the continuity of the group.

- In the collapsed state, right-click or Cntrl-click (MacOS) to open the menu and select from the following options:



- **Rename:** Change the group name.
  - **Add Description:** Enter a description for the group
  - **Edit Color:** Change the color of the group folder. This won't change the color of the individual steps in the group.
  - **Expand Group:** Show all the steps in the group. You can also click the double arrows  to expand the group.
  - **Ungroup:** Remove all the steps from the group and delete the group.
  - **Copy:** Copies the group and all of the steps in the group to your clipboard to paste elsewhere in your flow. For more information about using copy and paste, see [Copy and paste steps on page 310](#).
  - **Save Steps as Flow** (Tableau Prep Builder only): Save your grouped steps locally to a file on your computer or publish it to Tableau Server or Tableau Online to share with others or use it in other flows. For more information about saving steps for reuse, see [Create reusable flow steps \(version 2019.3.2 and later\) on page 316](#).
  - **Remove:** Removes the group and all the steps in the group from the flow.
- (version 2021.1.2 and later) In the expanded state, right-click or Cntrl-click (MacOS) in the expanded group area to open the menu to collapse the group or ungroup the steps.

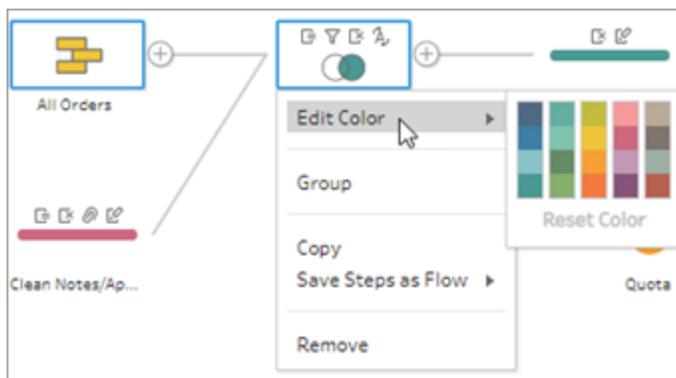


## Change the flow color scheme

Tableau Prep assigns each step in your flow a color by default. This color scheme is applied throughout the flow to help you keep track of your data throughout the flow as you apply cleaning steps, join, union or aggregate the data so you know which files are impacted by your operations.

To select a different color scheme for your steps do the following:

1. Select one or more steps.
2. Right-click or Ctrl-click (MacOS) on a selected step and select **Edit Color**.



3. Click on a color in the color palette to apply it.

To reset the step color back to the default color, do one the following:

- Click **Undo** from the top menu.
- Cntrl+Z or Command-Shift-Z (MacOS).
- Select the steps you changed, right-click on a selected step and select **Edit Color**, then select **Reset Color** from the bottom of the color palette.

# Add descriptions to flow steps and cleaning actions

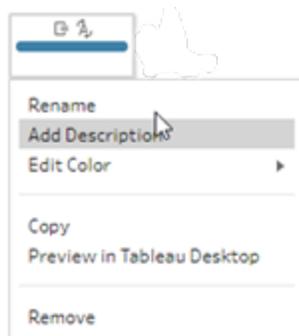
As you build your flow and perform various cleaning operations, you might want to add a description to help others who might later look at or work with your flow to better understand your steps. You can add a description to any individual step in your flow directly on the Flow pane, any step group, or to any cleaning action in the **Changes** pane to provide additional context for your changes. The description can be up to 200 characters long.

For more information about viewing changes in the Changes pane, see [View your changes on page 288](#).

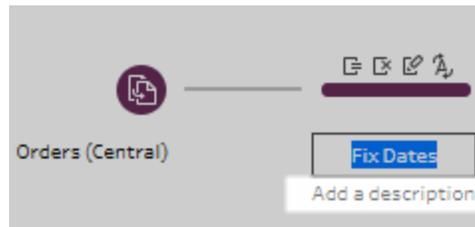
## Add a description to flow steps

When you add a description, a message  icon is added underneath the step. Click the icon to show or hide the description text in the Flow pane.

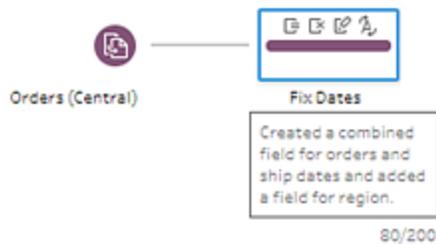
1. In the Flow pane, select a step.
2. Do one of the following:
  - Right-click or Ctrl-click (MacOS) on the step and select **Add Description** from the menu.



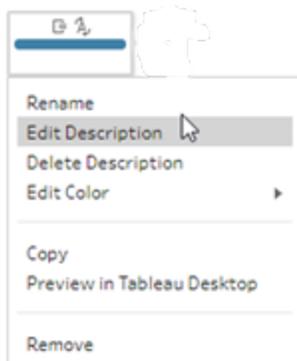
- Double-click in the name field for the step, then click on **Add a description**.



3. Type your description in the text box.



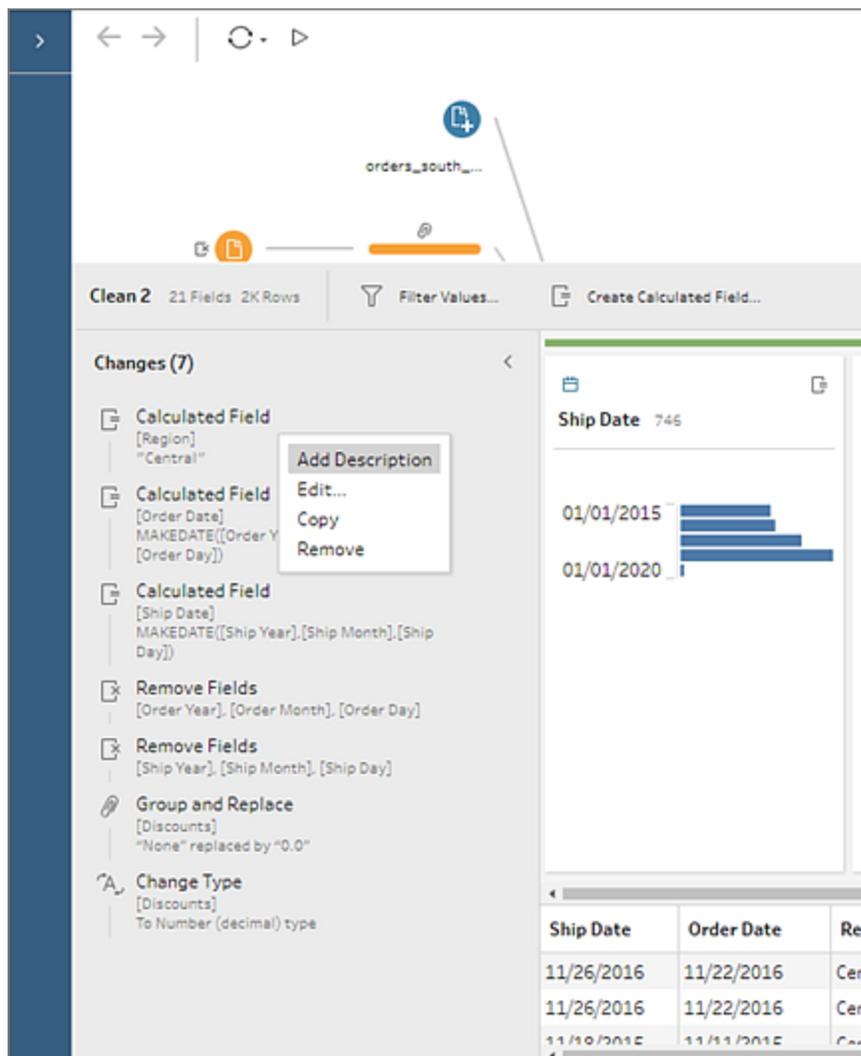
4. Click outside the text box or press Enter to apply your changes. By default, the description displays underneath the step. To hide the description click the message icon.
5. To edit or delete the description, right-click or Ctrl-click (MacOS) on the step or description. Then from the menu, select **Edit Description** or **Delete Description**.



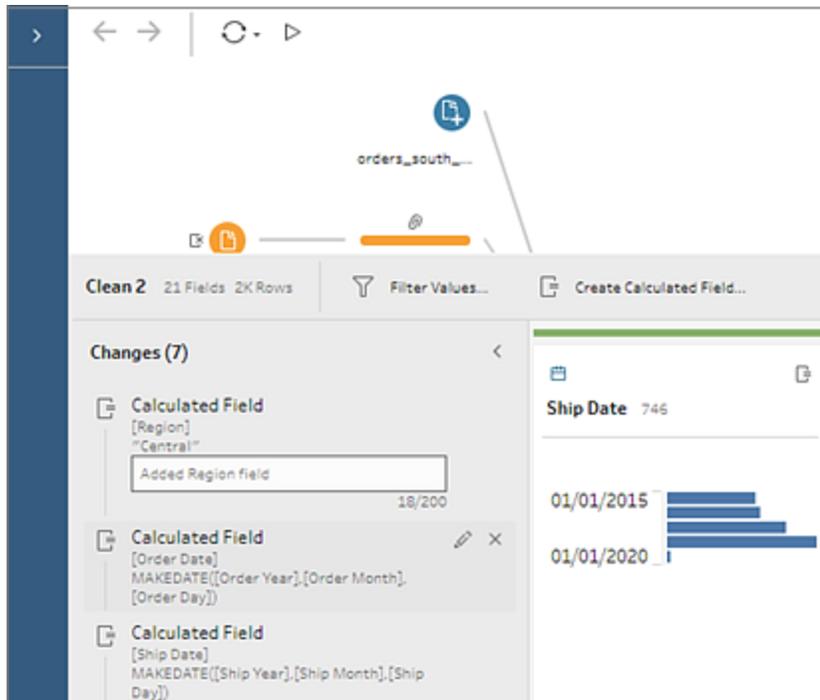
## Add a description to a change entry

You can add a description to an entry in the Changes pane starting Tableau Prep Builder version 2019.1.1 and on the web.

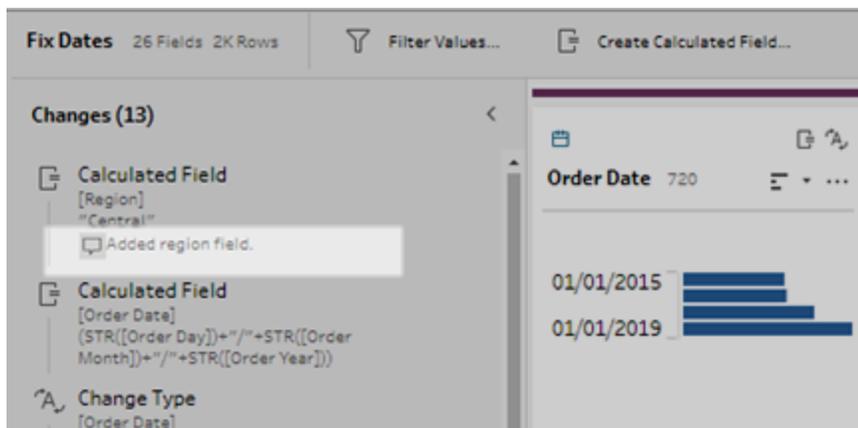
1. Select a step in the flow pane.
2. Open the **Changes** pane or **Changes** tab.
3. Right-click or Ctrl-click (MacOS) on an entry in the **Changes** pane and select **Add Description**.



4. Enter a description for the change action.



The description appears below the generated text for the change with a comment  icon.



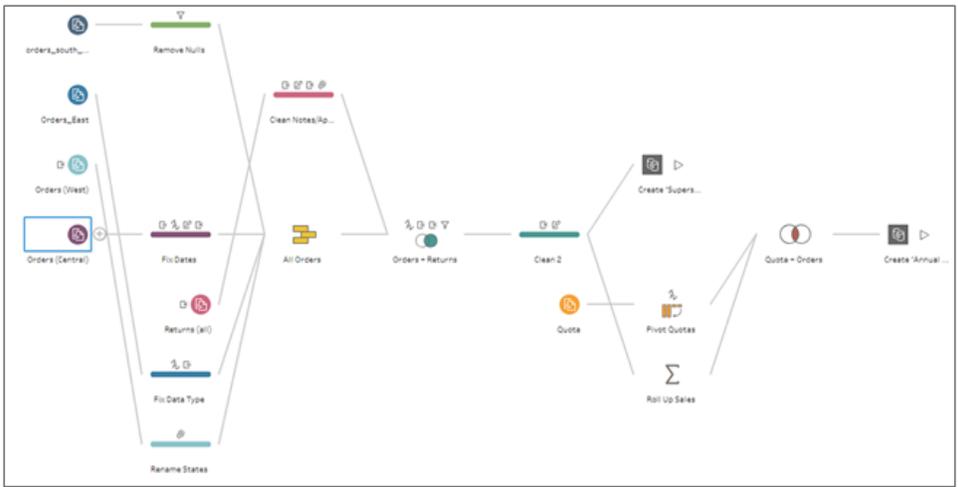
- To edit or delete the description, right-click or Ctrl-click (MacOS) on the change item, and select **Edit Description** or **Delete Description**.

# Reorganize the layout of your flow

As you build a flow, Tableau Prep Builder uses a default layout. Each flow is laid out and processed from left to right, with Input steps beginning on the far left of the canvas and Output steps ending on the right side of the canvas. However if you build large, complex flows, they can quickly become hard to follow.

Starting in Tableau Prep Builder version 2019.2.2 and on the web, you can clean up the layout of your flow by selecting and moving steps so the flow layout is organized in a way that makes sense to you. For example, you can fix crossed flow lines, move your flow steps to clean up extra white space, or rearrange your flow steps to show a clear sequence of events.

For example, the following flow is confusing and hard to follow:



To clean up this flow you can select and drag steps up, down, left or right and drop them to a new location in the canvas. Flow steps can't be moved to a position that disrupts the left-to-right process flow. For example, you can't drag a union step that is positioned before a join step, to a position that is after that join step in the flow.

When dragging flow steps to an allowed location, an orange box displays. If the location isn't allowed, no orange box displays and the steps return to their original location when you try to drop them.

To move steps in your flow, do the following:

1. In the Flow pane, select the steps that you want to move. You can click on a specific step, drag to select multiple steps, or Ctrl-click or Cmd-click (MacOS) to select steps that aren't

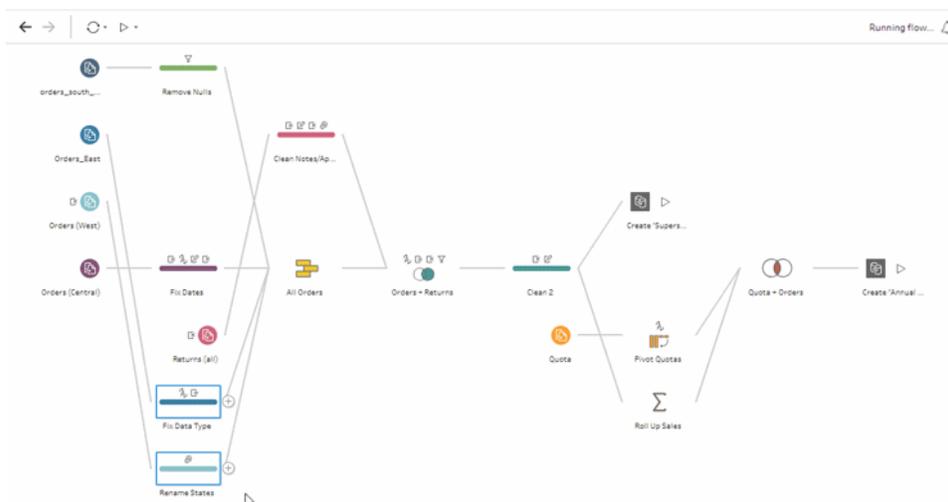
next to each other.

2. Drag and drop the steps to the new location.

**Note:** If you don't like the reorganization moves that you make you can click **Undo** in the top menu to reverse them. However, if you perform cleaning actions in between moving steps, you may undo those actions as well. The **Undo** option reverses your actions in the order that you performed them.

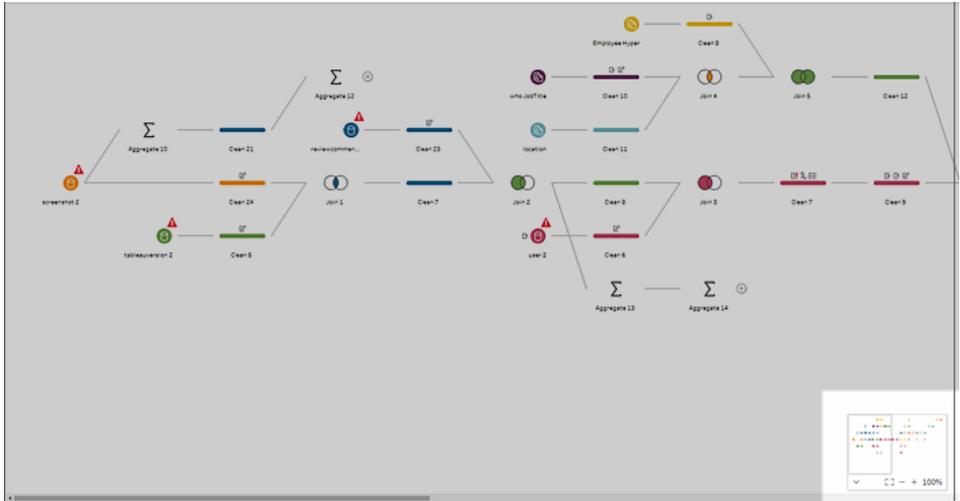
### Watch "Reorganize flow steps" in action

The following example shows rearranging a flow using drag and drop.



## Use the flow navigator tool

When working with large flows, scrolling back and forth to search for a particular area of the flow that you need to go back to can be difficult. The flow navigator tool makes this easier. The flow navigator is a miniature version of your flow that appears in the lower right corner of the canvas.



Click in any area of the graphic to jump to that area of your flow or use the following toolbar



options to navigate:

Toolbar option	Description
	Collapse the flow navigator graphic. In the collapsed state, you may only see the percentage indicator. Simply hover on this to expand the toolbar and click the up arrow  to expand the graphic again.
	Expand the flow navigator graphic.
	Change the size of your flow to fit on your screen.
	Zoom in and out of your flow. You can click on the percentage indicator to restore the view to 100 percent.

## Remove steps from the flow

At any point in the flow, you can remove steps or the flow lines between steps.

**Note:** You can't remove flow lines coming into or out of a collapsed step group. You must either expand the group or ungroup the steps first.

- To remove a step or flow line, select the step or line you want to remove, right-click the element, and then select **Remove**.
- To remove multiple steps or flow lines, do one of the following:
  - Use your mouse to drag and select a whole section of the flow. Then right-click or Ctrl-click (Mac OS) on one of the selected steps and select **Remove**.
  - Press Ctrl+A or Cmd+A (MacOS) to select all elements in the flow, or press Ctrl+click or Cmd+Click (MacOS) to select specific elements, and then press the **Delete** key.

# Examine Your Data

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web on page 166](#).

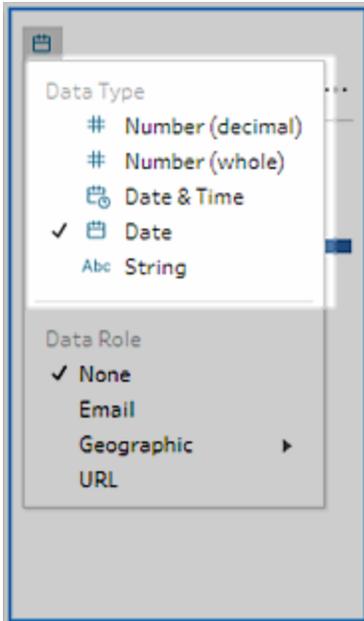
Use the options in this topic to get a good understanding about the composition of your data to better understand changes you need to make and the effect of the operations you include in the flow.

## Review the data types assigned to your data

Like Tableau Desktop, Tableau Prep interprets the data in your fields when you drag a connection to the **Flow** pane and automatically assigns a data type to it. Because different databases can handle data in different ways, Tableau Prep's interpretation might not always be correct.

To change a data type, click the data type icon and select the correct data type from the context menu. You can change string or integer data types to **Date** or **Date & Time**, and Tableau Prep will trigger Auto DateParse to change these data types. Like Tableau Desktop, if the change is not successful you will see Null values in the fields instead and you can create a calculation to make the change.

For more information about using DateParse, see [Convert a Field to a Date Field](#) in the Tableau Desktop and Web Authoring Help.



You can change the data type in your Input step after connecting to data from the following data sources:

- Microsoft Excel
- Text files
- PDF files
- Box
- Dropbox
- Google Drive
- OneDrive

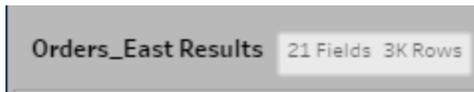
For all other data sources, add a cleaning step or other step type to make this change. To see a list of cleaning options available in the different step types, see [About cleaning operations on page 277](#).

## See size details about your data

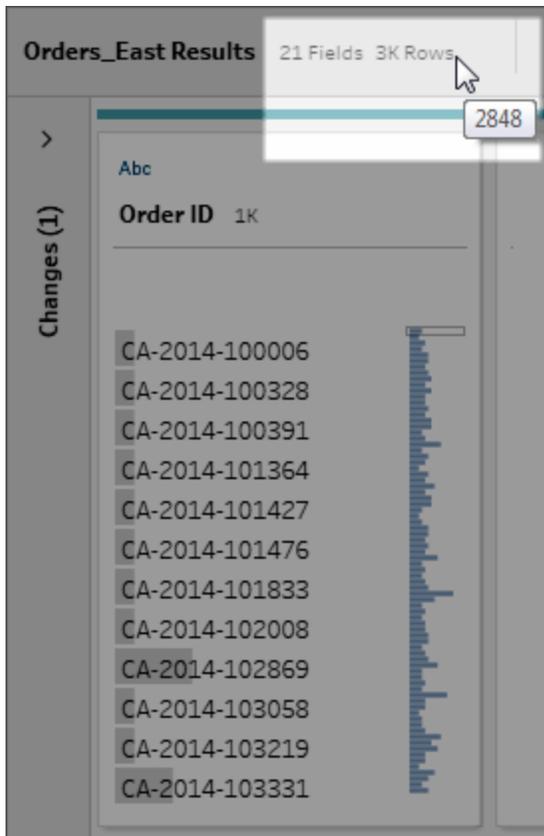
After you connect to your data, add a table to the flow, and then add a step. You can use the **Profile** pane to see the current state and structure of your data and spot nulls and outliers.

- **Number of fields and rows:** In the upper-left corner of the **Profile** pane you can find information that summarizes the number of fields and rows in the data at a particular point in the flow. Tableau Prep rounds to the nearest thousand. In the example below,

there are 21 fields and 3000 rows in the data set.



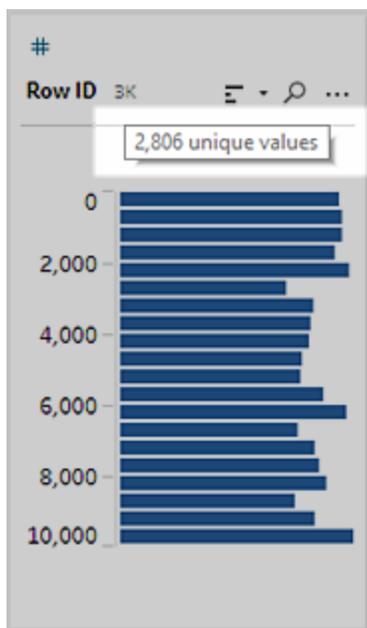
When you hover over the number of fields and rows, you can see the exact number of rows (in this example, 2848).



- **Data set size:** Work with a subset of your data by specifying the number of rows to include in the **Data Sample** tab in the **Input**pane.
- **Sampled:** To enable you to interact directly with your data, Tableau Prep works with a subset of your raw data. The number of rows is determined by the data types and number of fields that are being rendered. String fields take more storage space than integers, so if you have 10 fields of strings in your data set, you might get fewer rows than if you had 10 fields of integers.

A **Sampled** Sampled badge displays next to the size details in the **Profile** pane to indicate that this is a subset of your data set. You can modify the amount of data that you include in your flow. When creating or editing flows on the web, additional data limits apply. For more information, see [Set your data sample size on page 213](#).

- **Number of unique values:** The number next to each field header represents the distinct values that are contained within that field. Tableau Prep rounds to the nearest thousand. In the example below, there are 3,000 distinct values that are represented in the Description field, but if you hover over the number, you can see the exact number of unique values.



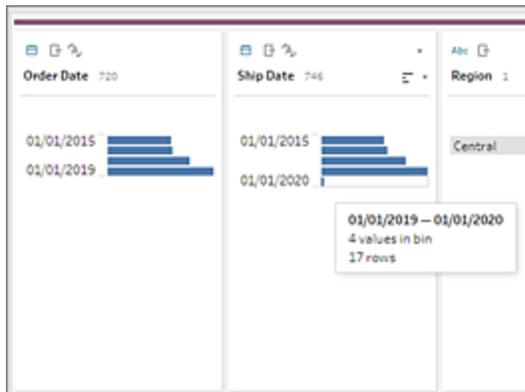
## See the distribution of values or unique values

By default, Tableau Prep groups numerical, date, and date & time values in a field into buckets. These buckets are also known as bins. The bins ensure that you can see the distribution of values as a whole and quickly identify outliers and null values. The bin size is calculated based on the minimum and maximum values in the field, and null values are always shown at the top of the distribution.

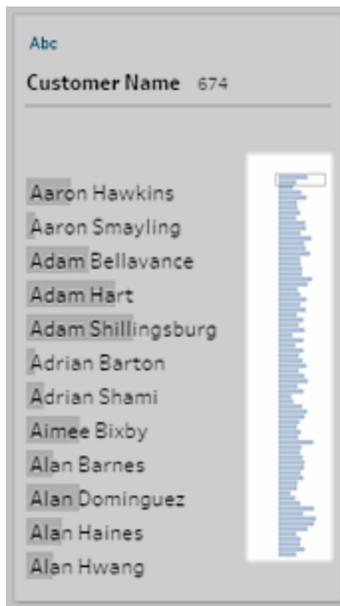
For example, order and ship dates are summarized or "binned" by year. Each bin represents a year from January of the beginning year to January of the following year and labeled

## Tableau Prep Help

accordingly. Because there are sales dates and ship dates that fall in the latter part of 2018 and 2019, a bin is created for the following year for those values.



If a discrete (or categorical) data field contains many rows or has a distribution that is large enough that it can't be displayed in the field without scrolling, you can see a summarized distribution to the right of the field. You can click and scroll through the distribution to target specific values.

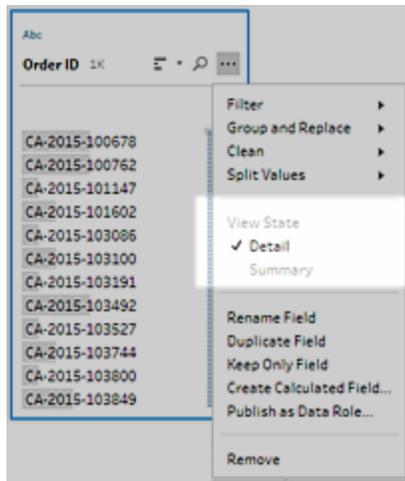


When your data contains numeric or date fields, you can toggle to display the detailed (discrete) version of the values or a summarized (continuous) version of the values. The summarized view shows you the range of values in a field and the frequency with which certain values appear.

This toggle can help you isolate unique values (like the number of “3” records in a field) or the distribution of values (like the sum of all “3” records in a field)

To toggle your view:

1. In the Profile pane, Results pane or data grid, click the **More options** ... menu for a numeric or date field.



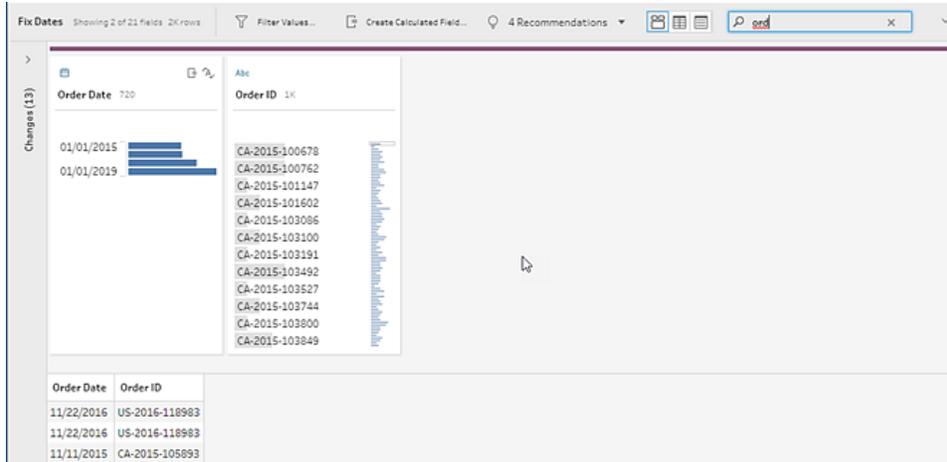
2. In the context menu, select **Detail** to see the detailed version of the values, or **Summary** to see the distributed version of the values.

## Search for fields and values

In the Profile pane or Results pane, you can search for fields or values of particular interest to you and use the search results to filter your data.

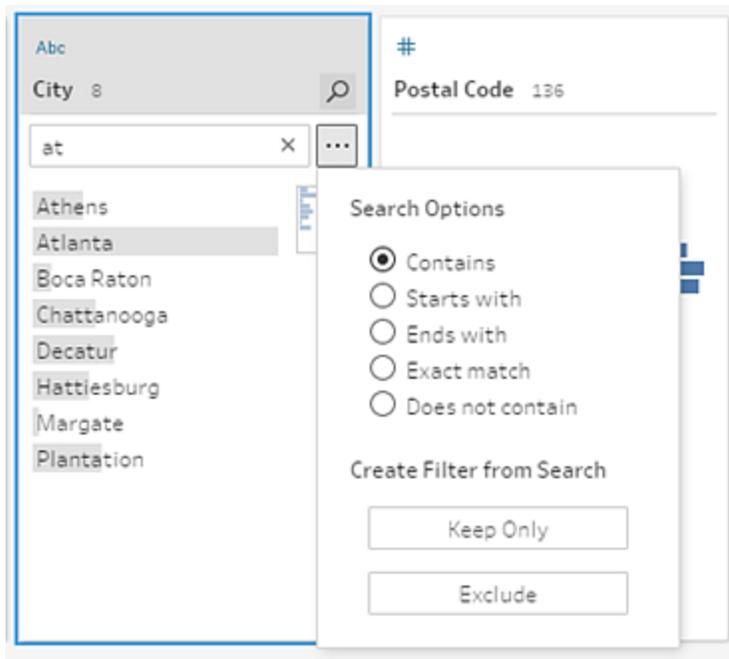
Starting in version 2021.1.1, when you search for fields, a new indicator will show telling you the number of fields found so you can better understand your search results. If no fields are found, additional messaging will show.

To search for fields, enter a full or partial search term in the search box on the toolbar.

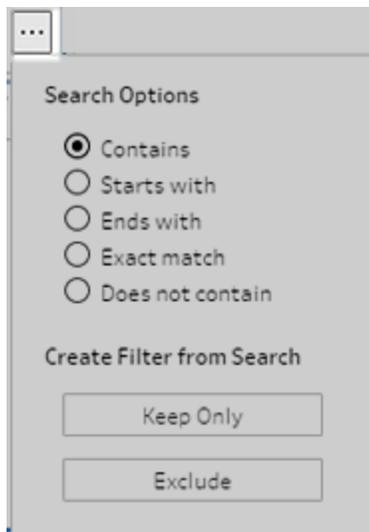


To search for a value in a field:

1. Click the Search icon  for a field, and enter a value.



2. To use advanced search options, click the **Search options...** button.

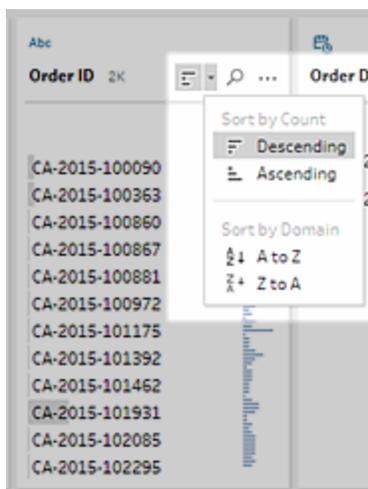


- To use the search results to filter the data, select **Keep Only** or **Exclude**.

In the **Flow** pane, a filter icon appears above affected steps.

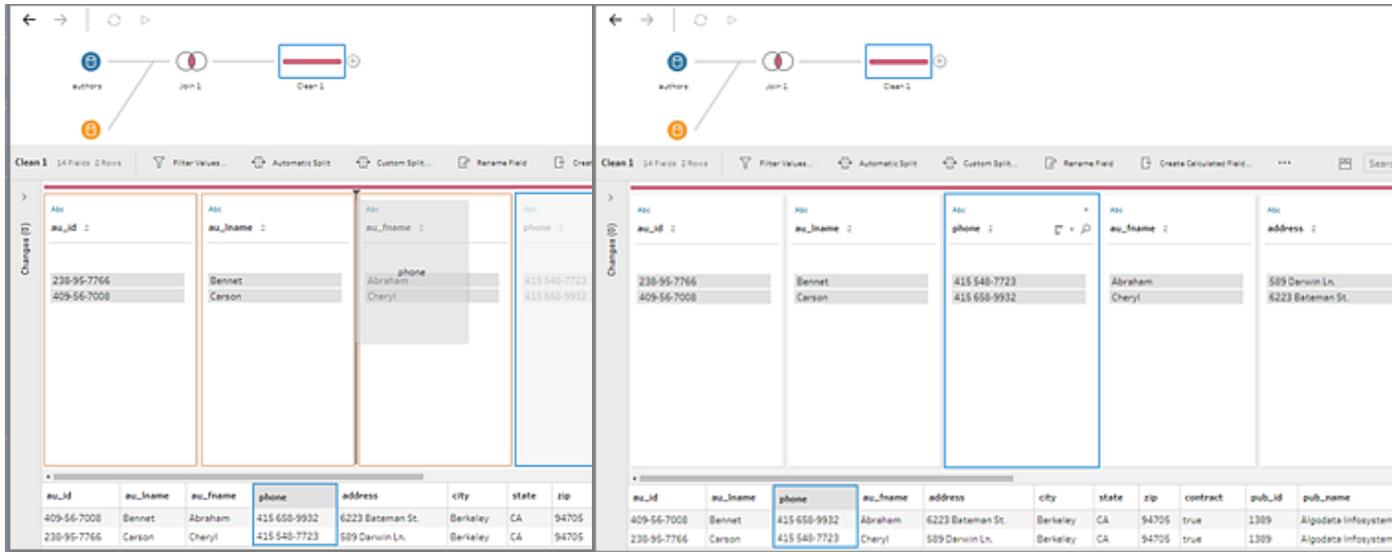
## Sort values and fields

Sort options on a profile card let you sort the bins (the count of values represented by the distribution bars) in ascending or descending order or the individual field values in alphabetical order.



If you want to rearrange the order of your fields, in the **Profile** pane, **Results** pane or **Data** grid simply select a profile card or field in the data grid and drag it until you see the black target

line appear. Then drop it into place. The Profile pane and data grid are synced so the field will appear in the same order in both places.



## Highlight fields and values in a flow

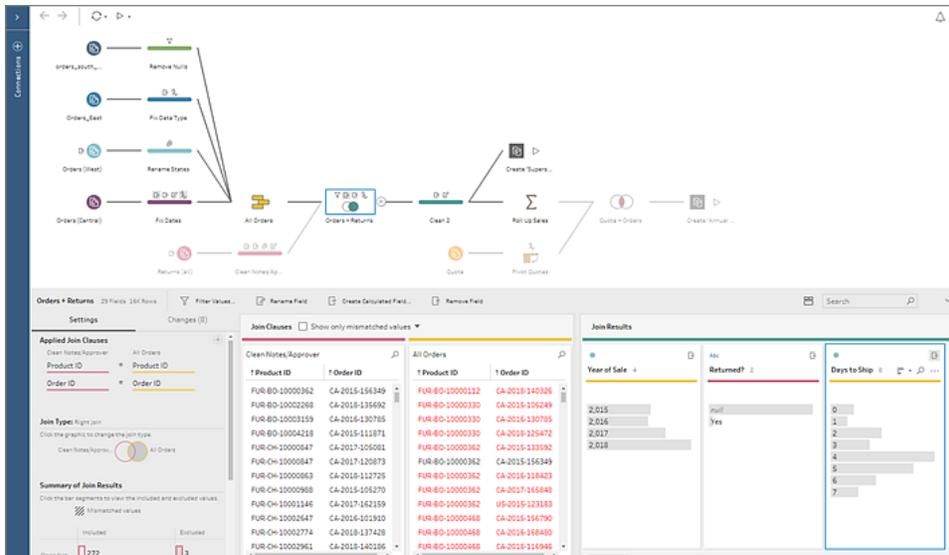
Tableau Prep makes it easy to find fields and values in your flow data. Trace where a field originated and where it is used throughout the flow in the flow pane, or click individual values in a profile card or in the data grid to highlight related or identical values.

### Trace fields in a flow

In Tableau Prep, you can highlight everywhere a field is used in a flow, even where it originated to help you track down missing values or troubleshoot a flow when you aren't seeing the results you expect.

Click on a field in the **Profile** pane in a cleaning step or in the **Results** pane in any other step type and the flow pane will highlight the path where that field is used.

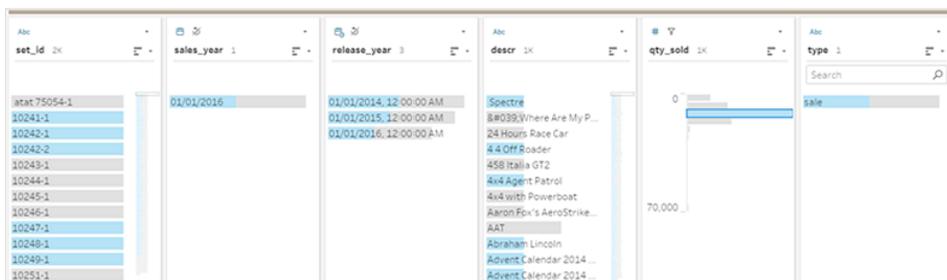
**Note:** This option is not available for Input or Output step types.



## See related values

You can use highlighting to find related values across fields. When you click a value in the **Profile** card in the Profile pane or Results pane, all the related values in the other fields are highlighted in blue. The blue color shows the relationship distribution between the value you selected and the values in the other fields.

For example, to highlight related values, in the **Profile** pane, click a value in a field. The related values in other fields turn blue and the proportion of the bar highlighted in blue represents the degree of association.



## Highlight identical values

When you select a value in the data grid, all identical values are highlighted too. These highlights help you identify patterns or irregularities in your data.

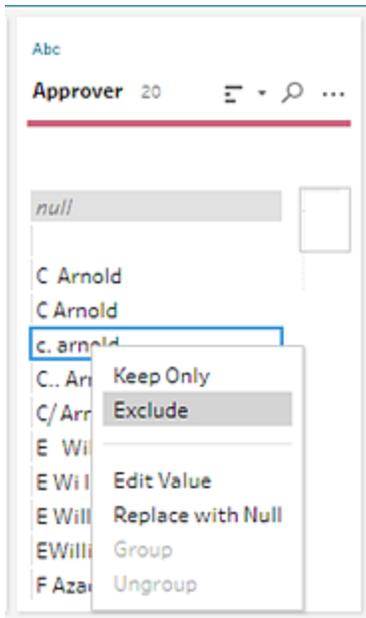
Type	Customer	Purchases	Date
Cash	Wei	5	08/18/2016
Cash	Jim	7	07/15/2016
Credit	Arnold	5	06/29/2016
Credit	Lee	1	08/07/2016
Cash	Maria	2	08/30/2016
Cash	Wendy	1	07/21/2016
Credit	Max	2	07/02/2016
Credit	Juan	1	05/10/2016
Cash	Isaac	4	06/28/2016
Credit	Philip	1	08/09/2016
Credit	Lane	5	05/04/2016

## Filter Your Data

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web](#) on page 166.

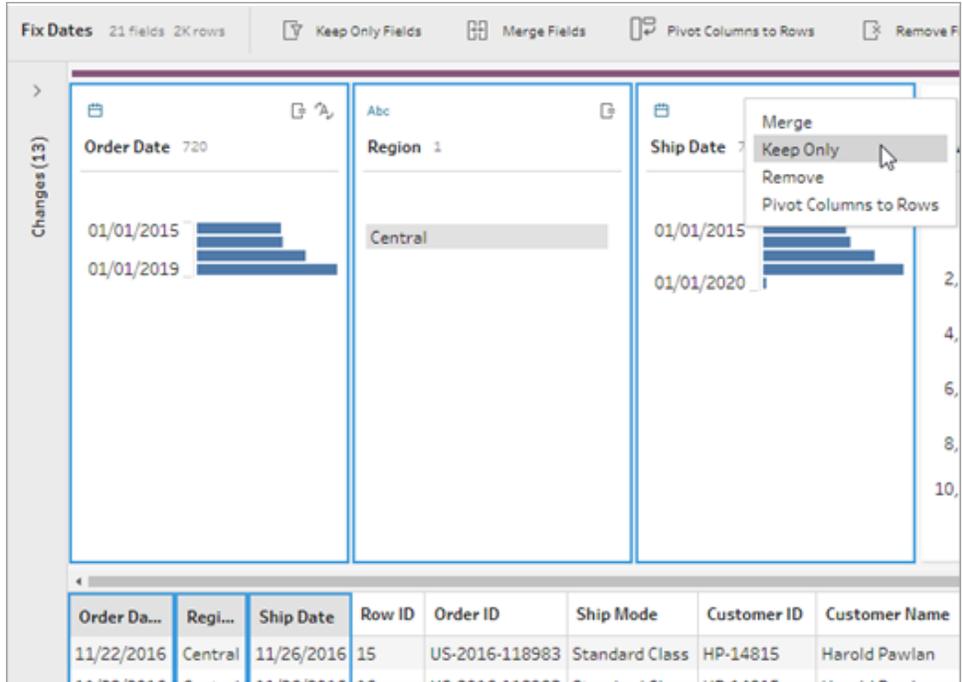
Tableau Prep provides various options that you can use to filter your data. For example, use **Keep Only** or **Exclude** to do one-click filtering on a specific value for a field in a profile card, data grid or results card, or select from a variety of filter options for more complex filtering needs. You can also keep or remove entire fields.

Filter data at any step in the flow. If you want to simply change a specific value, you can select **Edit Value** to edit the value in-line or replace the value with Null. For more information about editing field values, see [Edit field values](#) on page 295.



## Keep or remove fields

As you work with your data in your flow you might want to remove unwanted fields. In the Profile pane or the data grid in any cleaning or action step, select one or more fields and right-click or Ctrl-click (MacOS) and select **Remove** to remove the selected fields, or select **Keep Only** (Tableau Prep Builder version 2019.2.2 and later and on the web) to keep only the selected fields and remove all unselected fields.

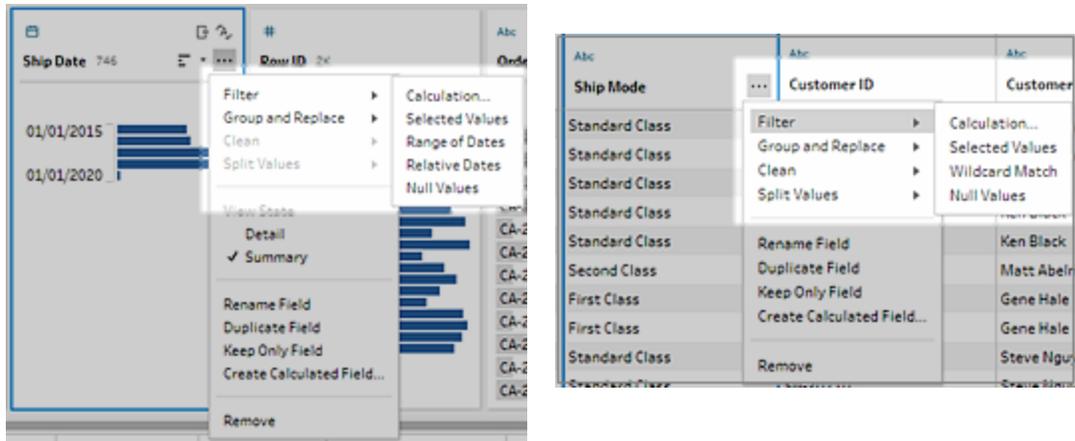


## Filters available for each data type

Data type	Available filters
String	Calculation, Wildcard Match, Null Values, Selected Values
Number	Calculation, Range of Values, Null Values, Selected Values
Date and Date & Time	Calculation, Range of Dates, Relative Date, Null Values, Selected Values

## Where are my filter options?

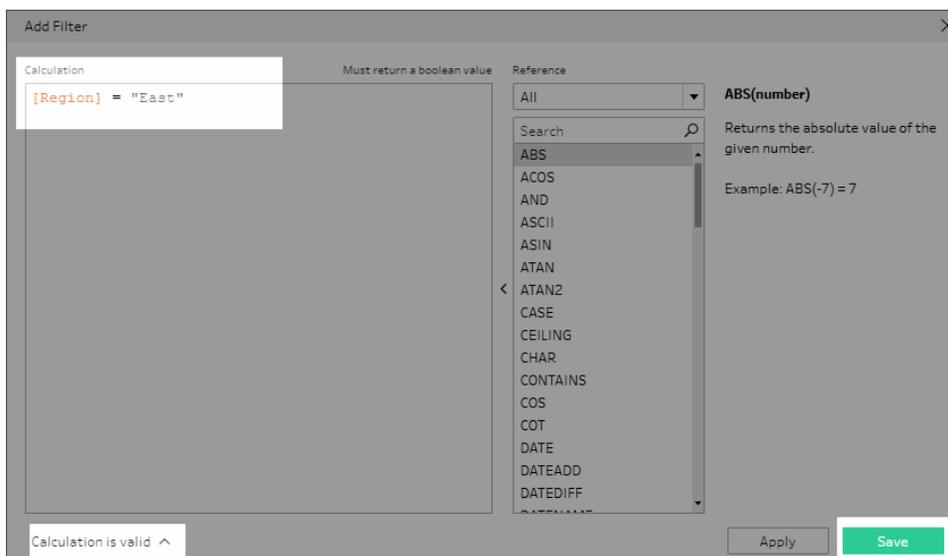
To see the different filter options available for your fields, on the profile card, in the data grid or in the results pane, click the **More options** ... menu. To see the menu on the data grid, you must click the **Hide profile pane**  button first, and then click **More options** ... .



## Calculation filter

When you select **Calculation**, the **Add Filter** dialog box opens. Enter the calculation, verify that it's valid, and click **Save**.

**Note:** In the Input step this is the only type of filter that is available. All other filter types are available in the profile cards, data grid or results pane.

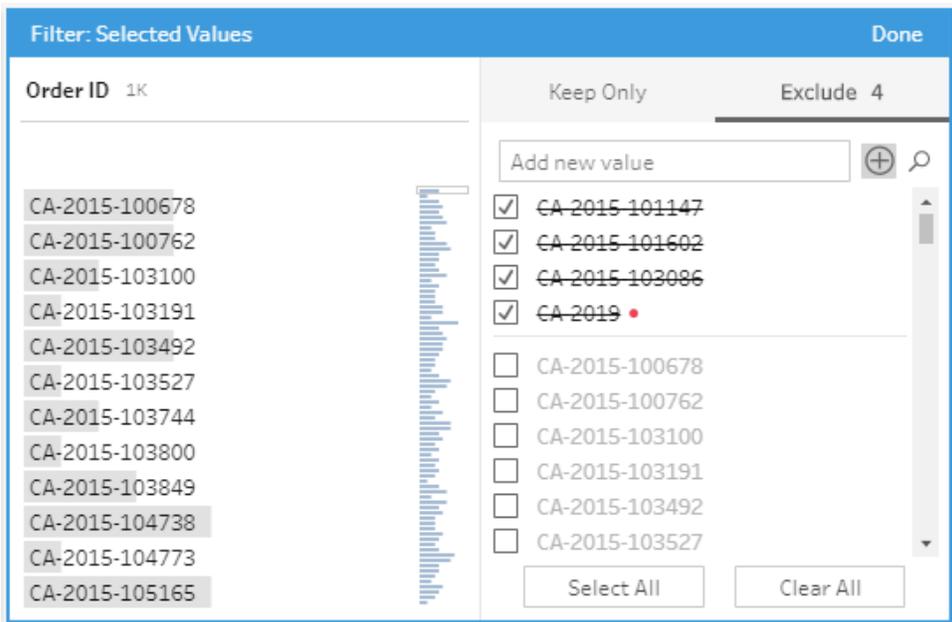


## Selected Values filter

In Tableau Prep Builder version 2019.2.3 and later and on the web, you can use the **Selected Values** filter to pick and choose the values that you want to keep or exclude for a field, even values that aren't in your sample. In the right pane, click the **Keep Only** or **Exclude** tab to

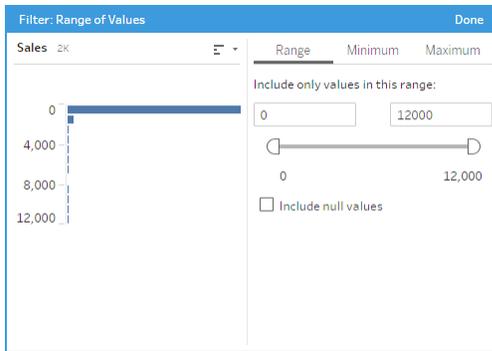
select your action, then enter search terms to search for values or click **Add a value**  to add values that are in your data set but aren't included in your sample. Click **Done** to apply your filter.

**Note:** This filter options isn't available for **Aggregation** or **Pivot** step types.



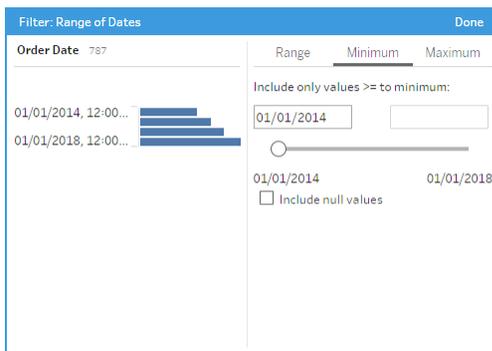
## Range of Values filter

Filter out values that fall within a specific range. When you select **Range of Values**, you can specify a range or set minimum or maximum values.



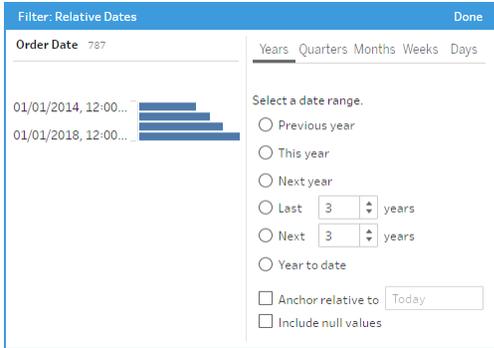
## Range of Dates filter

Filter out values that fall within a specific date range. When you select **Range of Dates**, you can specify a range of dates or set a minimum or maximum date.



## Relative Date filter

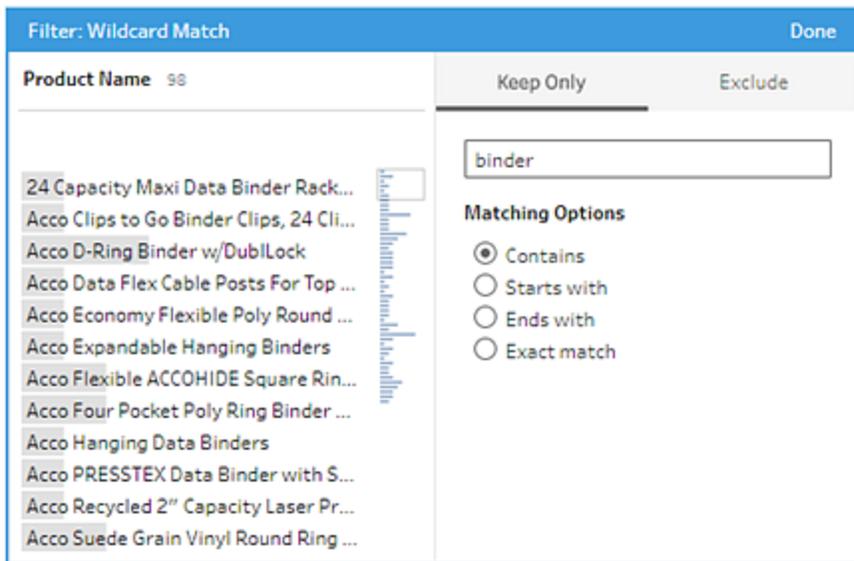
Use the **Relative Dates** filter to specify the exact range of years, quarters, months, weeks, or days that you want to see in your data. You can also configure an anchor relative to a specific date, and include null values.



## Wildcard Match filter

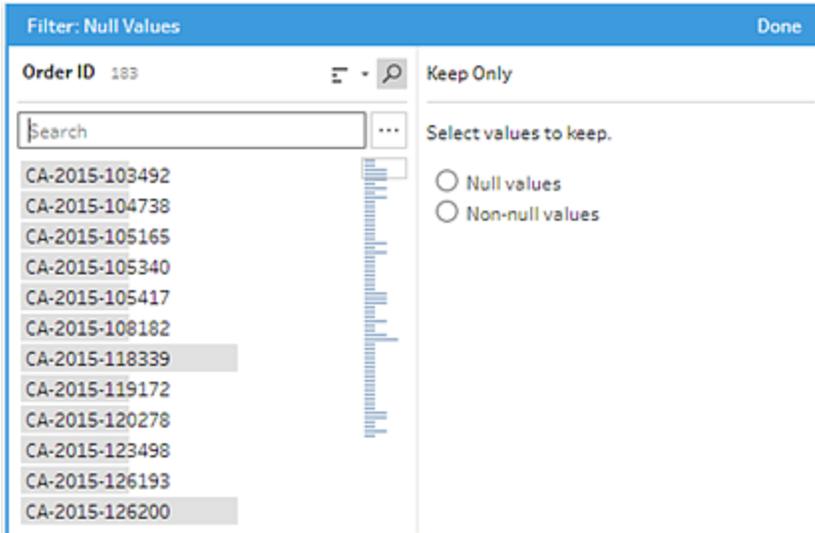
When you select **Wildcard Match**, you can filter the field values to keep or exclude values that match a pattern. In the filter editor, select the **Keep Only** or **Exclude** tab, enter a value to match and then set the **Matching Options** criteria to return the values you are looking for.

The filtered results display in the left pane of the filter editor so that you can review and experiment with your results. Once you have the results you want, click **Done** to apply your change.



## Null Values filter

When you select **Null Values** you can filter the values in the selected field to show only null values or exclude all null values.



## Use Data Roles to Validate your Data

**Note:** Data source owners and Tableau administrators can add synonyms for specific data field names and values for Ask Data. For information about using data roles for Ask Data, see [Add Synonyms for Ask Data](#) in the Tableau Desktop help.

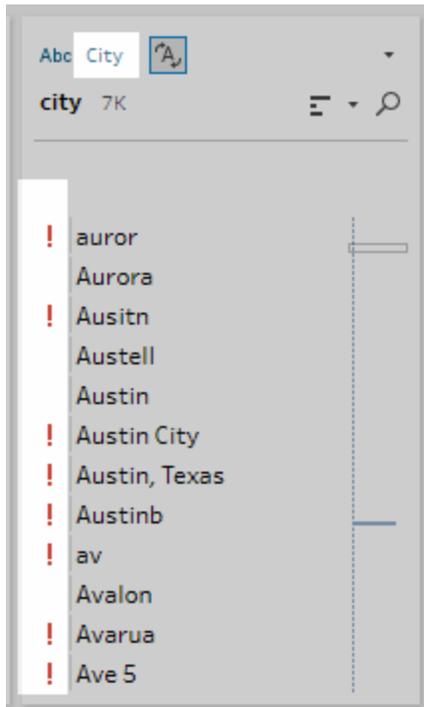
Use data roles to quickly identify whether the values in a field are valid or not. Tableau Prep delivers a standard set of data roles that you can select from or you can create your own using the unique field values in your data set.

When you assign a data role, Tableau Prep compares the standard values defined for the data role with the values in your field. Any values that don't match are marked with a red exclamation mark. You can filter your field to view only the valid or invalid values and take the appropriate actions to fix them. Once you've assigned a data role to your fields, you can use the **Group Values** option to group and match invalid values to valid ones based on spelling and pronunciation.

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web](#) on page 166.

## Assign standard data roles to your data

Assign data roles provided by Tableau Prep to your field the same way you assign a data type. The data role identifies what your data values represent so Tableau Prep can automatically validate values and highlight ones that aren't valid for that role.



For example if you have field values for geographical data, you can assign a data role of **City** and Tableau Prep compares the values in the field to a set of known domain values to identify values that don't match.

**Note:** Each field is analyzed independently so a City value of "Portland" in State "Washington" in Country "USA" might not be a valid city and state combination, but it won't be identified that way because it is a valid city name.

Tableau Prep Builder provides the following data roles:

- Email
- URL
- Geographic roles (Based on current geographic data and is the same data used by Tableau Desktop)

- Airport
- Area code (U.S.)
- CBSA/MSA
- City
- Congressional District (U.S.)
- Country/Region
- County
- NUTS Europe
- State/Province
- Zip code/Postal code

**Tip:** In Tableau Prep Builder version 2019.1.4 and later and on the web, if you assign a geographic role to a field, you can also use that data role to match and group values with the standard value defined by your data role. For more information about grouping values using data roles, see [Clean and Shape Data on page 277](#).

To assign a data role to a field, do the following:

1. In the Profile pane, Results pane or data grid, click the data type for the field.
2. Select the data role for the field.

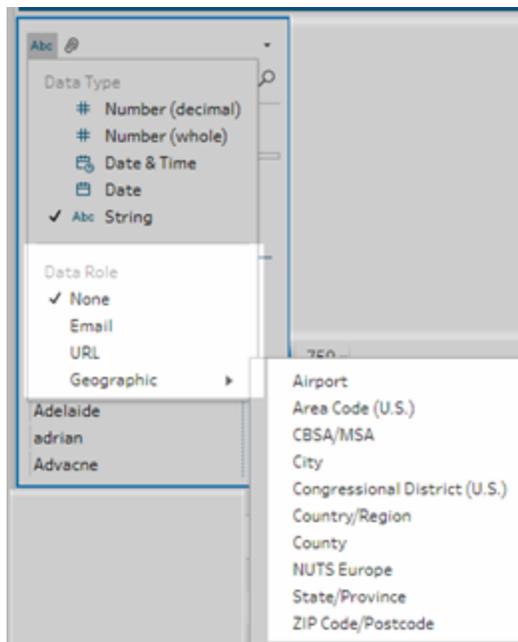
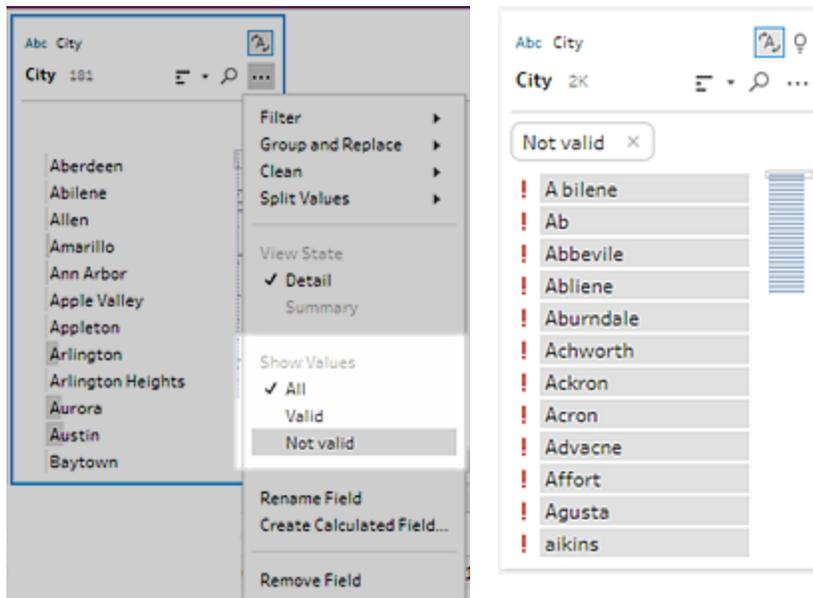


Tableau Prep compares the field's data values to known domain values or patterns (for email or URL) for the data role you select and marks any values that don't match with a red exclamation point.

3. Click the drop-down arrow for the field and from the **Show Values** section select an option to show all values or only values that are valid or not valid for the data role.



4. Use the cleaning options on the **More options** ... menu for the field to correct any values that aren't valid. For more information about how to clean your field values see [About cleaning operations on page 277](#).

## Create custom data roles

Starting in Tableau Prep Builder version 2019.3.1 and on the web, you can create your own custom data roles using the field values in your data sets to create a standard set of values that you or others can then use to validate fields when cleaning data. Select the field that you want to use, apply any cleaning operations to it if needed, then, publish it to Tableau Server or Tableau Online to use it in your flow or share your data roles with others.

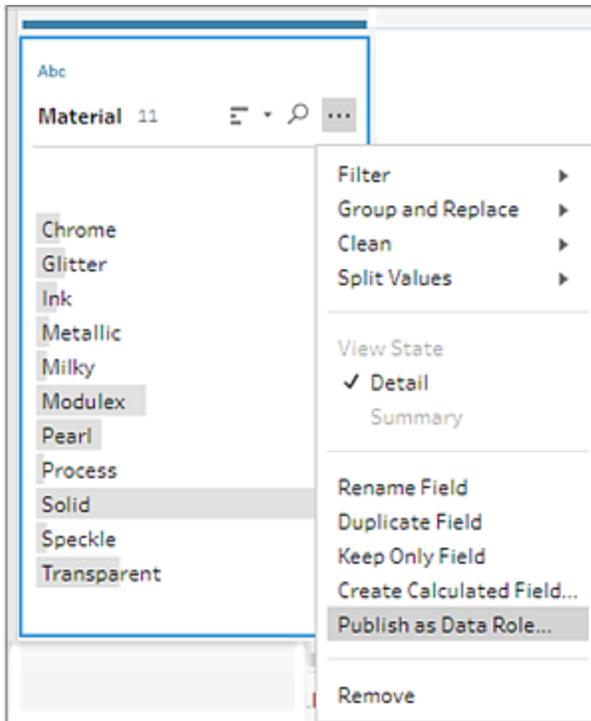
If creating custom data roles when editing flows on the web, you can publish the custom data role directly to the server you are signed into.

## Requirements

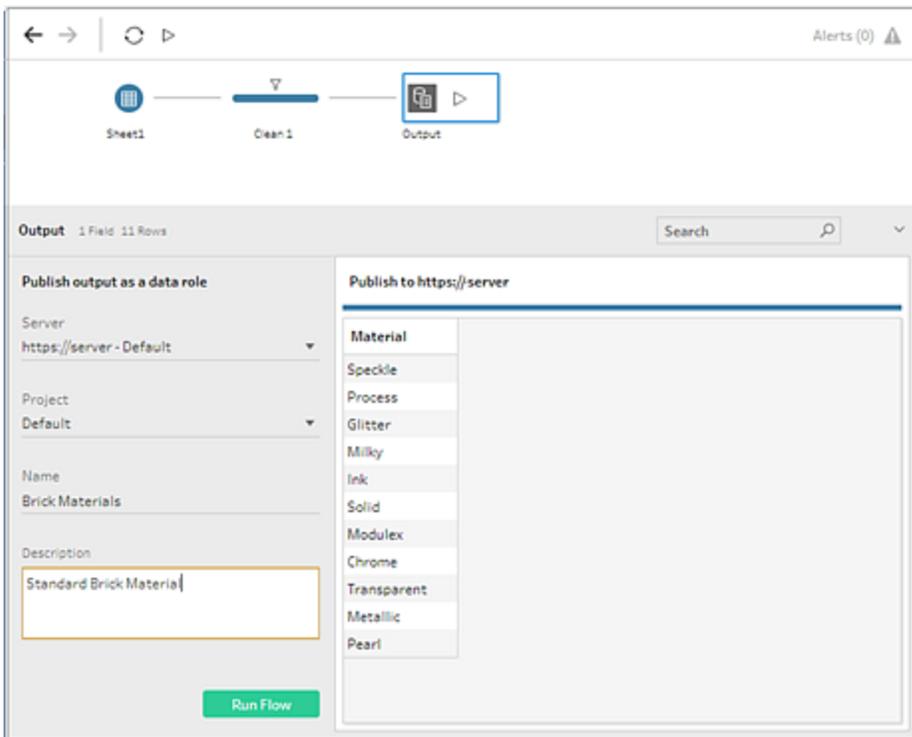
- You can create custom data roles from single fields in your data set. Creating custom data roles from a combination of fields isn't supported.
- You can create custom data roles only for fields assigned to a data type of **String** and **Number (whole)**.
- When you create a custom data role, Tableau Prep creates an output step in your flow that is specific to publishing the data role.
- Publishing custom data roles to multiple sites in the same flow isn't supported. If you publish the flow, you must publish the custom data role to the same site or server where the flow is published.
- Custom data roles are specific to the site, server and project where you publish them. All users with permissions to the location can use the custom data role, but must be signed into the site or server to select it or apply it. Custom data roles are assigned the default permission for the **All Users** group for new projects instead of **None**.
- Custom data roles aren't version specific. When applying a custom data role, the most current version is applied.
- Once published to Tableau Server or Tableau Online user with access to the site, server and project can view all data roles in that location.
  - Users with appropriate permissions can move, delete or edit permissions for the data roles.
  - The permissions you can set and actions you can take on a custom data role are similar to what you can do with a flow. For more information, see [Manage a Flow on page 508](#). For more information on setting permissions, see [Permission capabilities](#) in the Tableau Server help.
- To edit a data role, you must make your changes in Tableau Prep Builder or in the flow on the web, then republish the data role using the same name to overwrite it. This process is similar to editing a published data source.

## Create a custom data role

1. In the **Profile** pane, data grid, or Results pane select the field you want to use to create a custom data role.
2. Click **More options**  for the field, and select **Publish as Data Role**.



3. Select the server and project where you want to publish the data role.



4. Click **Run Flow** to create the data role. After the publishing process completes successfully, you can view your data role in Tableau Server or Tableau Online. Processing the data role can take some time based on the load on your Tableau Server or Tableau Online site. If your data role isn't available right away, wait a few minutes, then try selecting it again.

Explore / Default / Brick Materials

 **Brick Materials** ☆ ...

Owner [datarockstar](#) · Modified Aug 9, 2019, 3:39 PM

---

**Definition**

About

Role Type	Data Type
Dictionary	String

Description

Standard Brick Material

Values (11)

Name
Chrome
Glitter
Ink
Metallic
Milky
Modulex
Pearl
Process
Solid
Speckle
Transparent

## Apply a custom data role

1. In the Profile pane, Results pane or data grid, click the data type for the field where you want to apply the custom data role.
2. Select **Custom** then select the data role that you want to apply to the field.

**Important:** In Tableau Prep Builder, make sure you are signed into the site or server where the data role was published or you won't see this option.

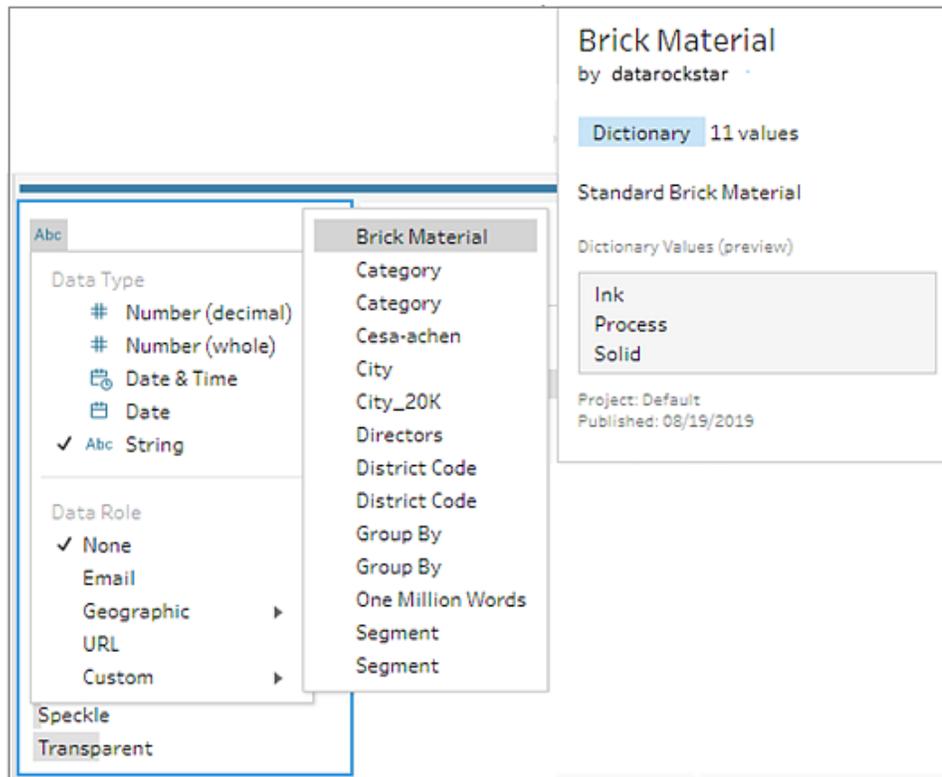
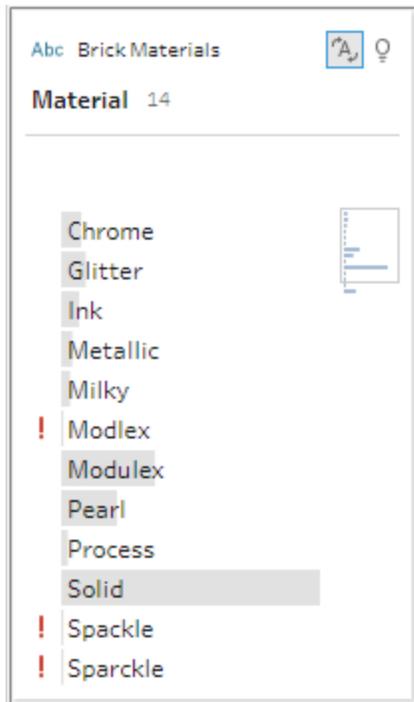
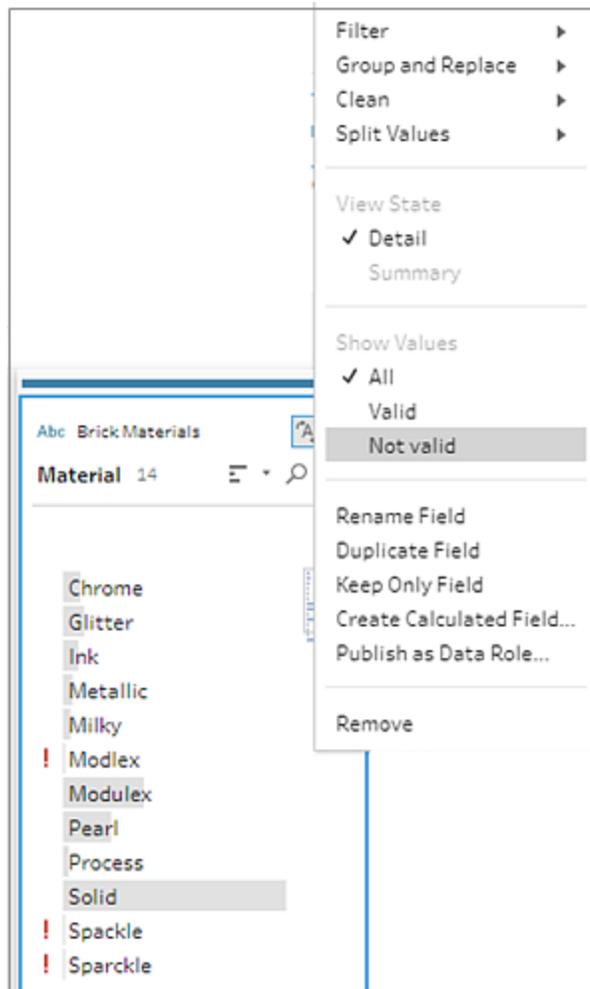


Tableau Prep compares the field's data values to known domain values for the data role you select and marks any values that don't match with a red exclamation point.



3. Click the drop-down arrow for the field and from the **Show Values** section select an option to show all values or only values that are valid or not valid for the data role.

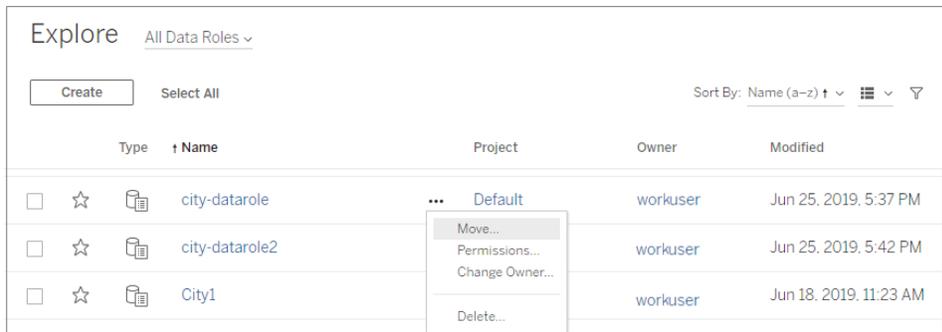


4. Use the cleaning options on the **More options** ⋮ menu for the field to correct any values that aren't valid. For more information about how to clean your field values see [About cleaning operations on page 277](#).

## View and manage custom data roles

You can view and manage your published custom data roles on Tableau Server and Tableau Online. You can view all custom data roles published to your site or server. Click **More actions**

⋮ for a selected data role to move it to a different project, change permissions or delete it.



## Group similar values by data role

**Note:** In Tableau Prep Builder version 2019.1.4 and 2019.2.1 this option was labeled **Data Role Matches**.

If you assign a geographic data role to a field you can use the values in the data role to group and match values in your data field based on spelling and pronunciation to standardize them. You can use either **Spelling** or **Spelling + Pronunciation** to group and match invalid values to valid ones.

These options use the standard value defined by the data role. If the standard value isn't in your data set sample, Tableau Prep adds it automatically and marks the value as not in the original data set. For more information about assigning data roles to fields, see [Assign standard data roles to your data on page 263](#).

To use data roles to group values, complete the following steps.

1. In the Profile pane, Results pane or data grid, click the data type for the field.
2. Select one of the following data roles for the field:
  - Airport
  - City
  - Country/Region
  - County
  - State/Province

Starting in Tableau Prep Builder version 2019.3.2 and on the web, you can also select from your custom data roles.

**Standard data roles (ver-**      **Custom data roles (version 2019.3.2 and later)**

### sion 2019.1.4 and later)

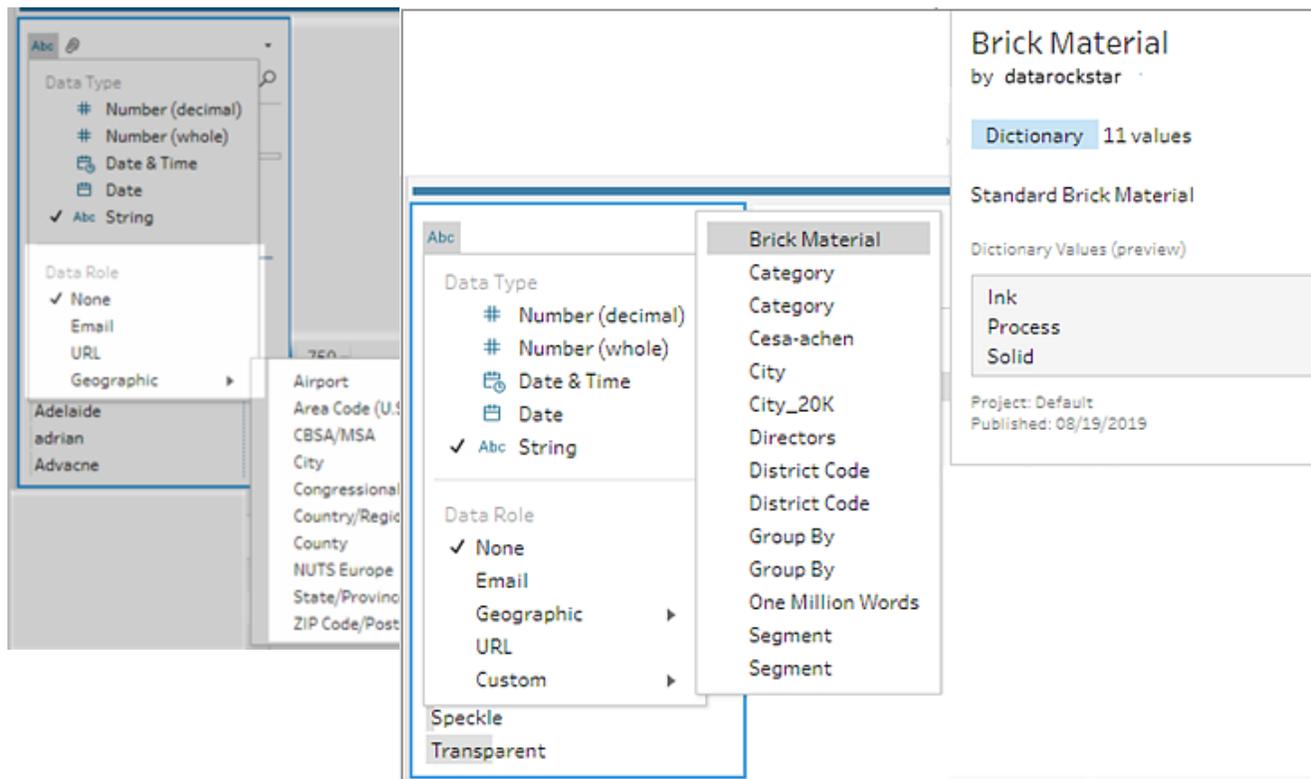
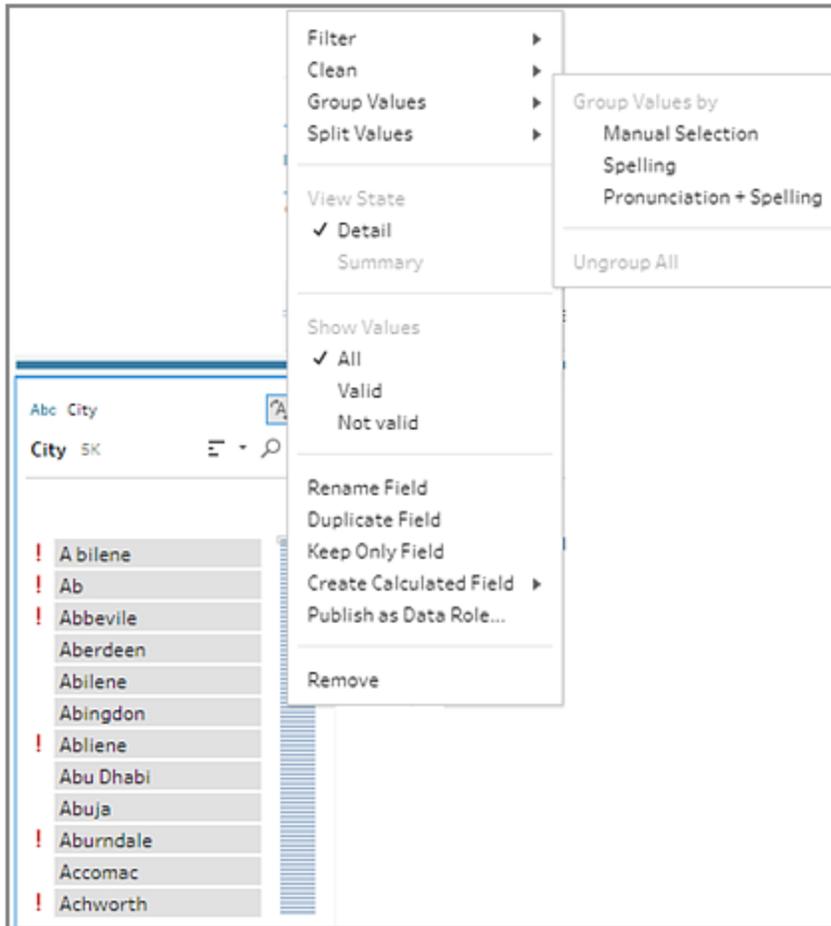


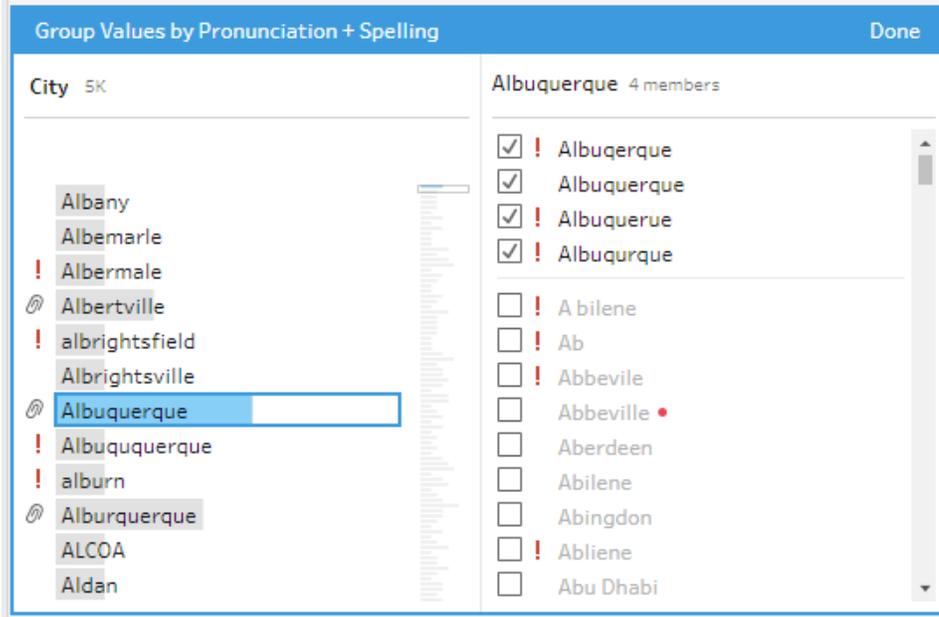
Tableau Prep compares the field's data values to known domain values for the data role you select and marks any values that don't match with a red exclamation point.

3. Click **More options** , select **Group Values (Group and Replace** in previous versions), then select one of the following options:
  - **Spelling:** Matches invalid values to the closest valid values that differ by adding, removing, or substituting characters.
  - **Pronunciation + Spelling:** Matches invalid values to the most similar valid value based on spelling and pronunciation.



You can also click on the **Recommendations**  icon on the field to apply the recommendation to group and replace the invalid values with valid ones. This option uses the **Pronunciation + Spelling** Group Values option.

Tableau Prep compares the values by spelling or spelling and pronunciation and then groups similar values under the standardized value for the data role. If the standardized value isn't in your data set, the value is added and marked with a red dot.



# Clean and Shape Data

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web on page 166](#).

Tableau Prep provides various cleaning operations that you can use out of the box to clean and shape your data. Cleaning up dirty data makes it easier to combine and analyze your data or makes it easier for others to understand your data when sharing your data sets.

You can also clean your data using a pivot step or a script step to apply R or Python scripts to your flow. Script steps are not supported in Tableau Online. For more information, see [Pivot Your Data on page 333](#) or [Use R and Python scripts in your flow on page 342](#).

## About cleaning operations

You clean data by applying cleaning operations such as filtering, adding, renaming, splitting, grouping, or removing fields. You can perform cleaning operations in most step types in your flow. You can also perform cleaning operations in the data grid in a cleaning step.

You can apply limited cleaning operations in the Input step and can't apply cleaning operations in the output step. For more information about applying cleaning operations in the Input step, see [Apply cleaning operations in an input step on page 210](#).

## Available cleaning operations

The following table shows which cleaning operations are available in each step type:

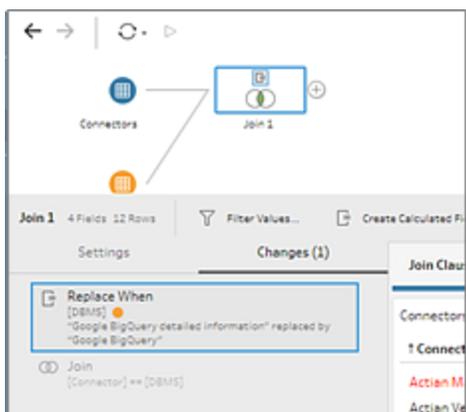
	Input	Clean	Aggregate	Pivot	Join	Union	Output
Filter	X	X	X	X	X	X	
Group Values		X		X		X	
Clean		X		X	X	X	

Convert Dates		X	X	X	X	X	
Split Values		X		X	X	X	
Rename Field	X	X	X	X	X	X	
Duplicate Field		X		X	X	X	
Keep Only Field	X	X	X	X	X	X	
Remove Field	X	X	X	X	X	X	
Create Calculated Field		X		X	X	X	
Edit Value		X		X	X	X	
Change Data Type	X	X	X	X	X	X	

As you make changes to your data, annotations are added to the corresponding step in the **Flow** pane and an entry is added in the **Changes** pane to track your actions. If you make changes in the Input step, the annotation shows to the left of the step in the **Flow** pane and is also shown in the **Input profile** in the field list.

The order that you apply your changes matters. Changes made in Aggregate, Pivot, Join and Union step types are performed either before or after those reshaping actions, depending on where the field is when you make the change. Where the change was made is shown in the **Changes** pane for the step.

The following example shows a field change from a single table in a Join step. The change is performed prior to the join action to give the corrected results.



## Order of operations

The following table shows where the cleaning action is performed in Aggregate, Pivot, Join and Union step types depending on where the field is in the step.

Action	Step Type:	Aggregate	Aggregate	Pivot	Pivot	Join	Join	Union	Union
	<i>Field Location:</i>	<i>Grouped fields</i>	<i>Aggregated fields</i>	<i>Not in pivot</i>	<i>Created from pivot</i>	<i>Included in one table*</i>	<i>Included in both tables*</i>	<i>Mismatched fields</i>	<i>Combined fields</i>
<b>Filter</b>		Before Aggregation	After Aggregation	Before Pivot	After Pivot	Before Join	After Join	Before Union	After Union
<b>Group Values</b>		NA	NA	Before Pivot	After Pivot	Before Join	After Join	Before Union	After Union
<b>Clean</b>		NA	NA	Before Pivot	After Pivot	Before Join	After Join	Before Union	After Union
<b>Convert Dates</b>		Before Aggregation	After Aggregation	Before Pivot	After Pivot	Before Join	After Join	Before Union	After Union
<b>Split Values</b>		NA	NA	Before Pivot	After Pivot	Before Join	After Join	Before Union	After Union

<b>Renam- e Field</b>		Before Aggreg- ation	After Aggreg- ation	Bef- ore Pivo- t	After Pivot	Befor- e Join	After Join	Before Union	After Union
<b>Duplic- ate Field</b>		NA	NA	Bef- ore Pivo- t	After Pivot	Befor- e Join	After Join	Before Union	After Union
<b>Keep Only Field</b>		After Aggreg- ation	After Aggreg- ation	Bef- ore Pivo- t	After Pivot	Befor- e Join	After Join	Before Union	After Union
<b>Remov- e Field</b>		Remove- s from Aggreg- ation	Remove- s from Aggreg- ation	Bef- ore Pivo- t	After Pivot	Befor- e Join	After Join	Before Union	After Union
<b>Create Cal- culated Field</b>		NA	NA	Bef- ore Pivo- t	After Pivot	After Join	After Join	Before Union	After Union
<b>Edit Value</b>		NA	NA	Bef- ore Pivo- t	After Pivot	Befor- e Join	After Join	Before Union	After Union
<b>Chang- e Data Type</b>		Before Aggreg- ation	After Aggreg- ation	Bef- ore Pivo- t	After Pivot	Befor- e Join	Befor- e Join	Before Union	After Union

**Note:** For joins, if the field is a calculated field that was created using a field from one table, the change is applied before the join. If the field is created with fields from both tables, the change is applied after the join.

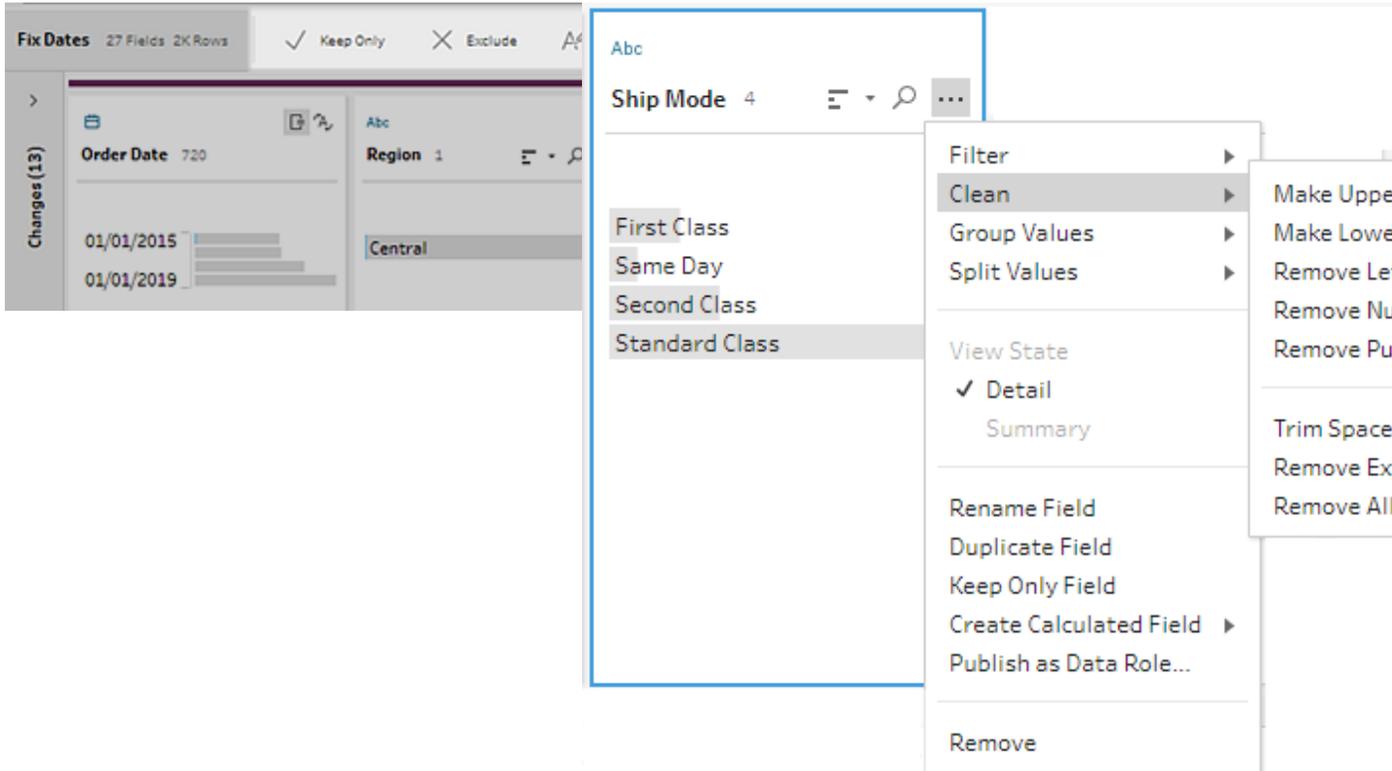
# Apply cleaning operations

To apply cleaning operations to fields, use the toolbar options or click **More options** ... on the field profile card, data grid or Results pane to open the menu.

In Aggregate, Pivot, Join and Union step types, the **More options** ... menu is available on the profile cards in the Results pane and corresponding data grid. If you perform the same cleaning operations or actions over and over throughout your flow, you can copy and paste your steps, actions or even fields. For more information see [Copy steps, actions and fields on page 309](#).

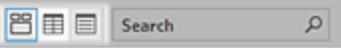
Profile pane toolbar

Drop-down menu



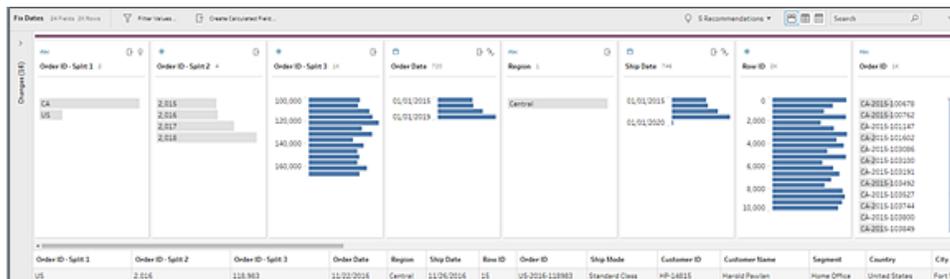
## Select your view

You can perform cleaning operations outside of the profile or results pane in the data grid or in

the list view. Use the view toolbar  (Tableau Prep Builder version

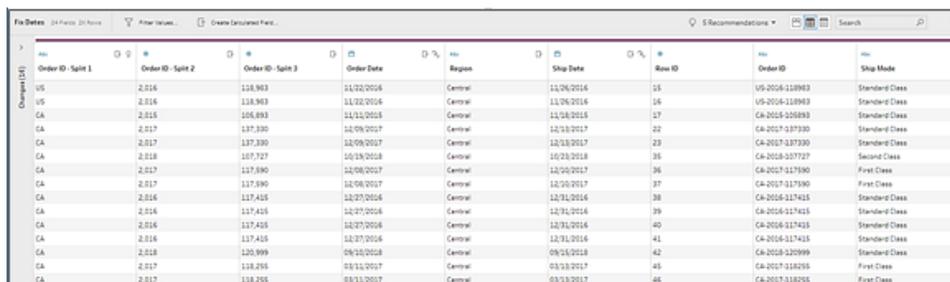
2019.3.2 and later and on the web) to change your view, then click **More options**  on a field to open the cleaning menu.

- **Show profile pane** : This is the default view. Select this button to go back to the Profile pane or Results pane view.



- **Show data grid** : Collapse the profile or results pane to expand and show only the data grid. This view provide a more detailed view of your data and can be useful when you need to work with specific field values. After you select this option, this view state persists across all steps in your flow but you can change it at any time.

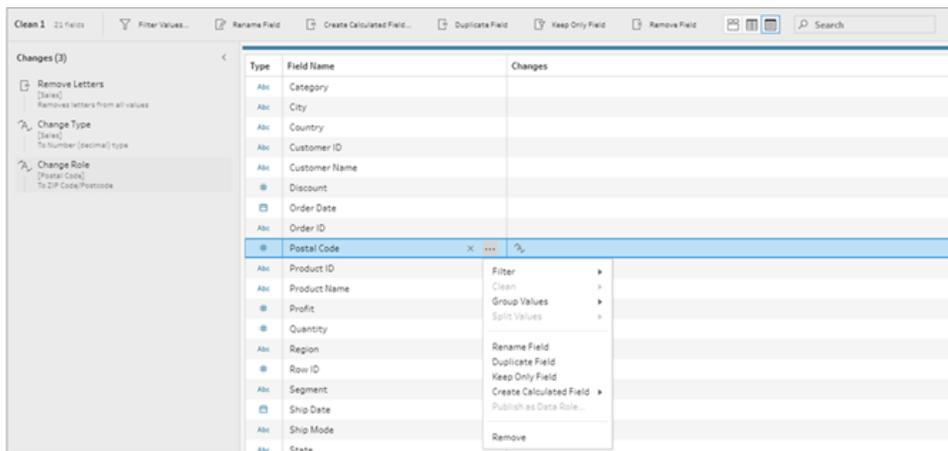
**Note:** Not all cleaning operations are available in the data grid. For example if you want to edit a value in-line, you must do this in the Profile pane.



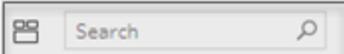
Order ID - Split 1	Order ID - Split 2	Order ID - Split 3	Order Date	Region	Ship Date	Row ID	Order ID	Ship Mode
US	2,516	118,963	11/01/2016	Central	11/06/2016	15	US-2016-118963	Standard Class
US	2,516	118,963	11/02/2016	Central	11/06/2016	16	US-2016-118963	Standard Class
CA	2,516	106,693	11/11/2015	Central	11/18/2015	17	CA-2015-106693	Standard Class
CA	2,517	137,330	12/09/2017	Central	12/18/2017	22	CA-2017-137330	Standard Class
CA	2,517	137,330	12/09/2017	Central	12/18/2017	23	CA-2017-137330	Standard Class
CA	2,518	107,727	10/19/2018	Central	10/23/2018	35	CA-2018-107727	Second Class
CA	2,517	117,890	12/08/2017	Central	12/10/2017	36	CA-2017-117890	First Class
CA	2,517	117,890	12/09/2017	Central	12/10/2017	37	CA-2017-117890	First Class
CA	2,516	117,415	12/27/2016	Central	12/31/2016	38	CA-2016-117415	Standard Class
CA	2,516	117,415	12/27/2016	Central	12/31/2016	39	CA-2016-117415	Standard Class
CA	2,516	117,415	12/27/2016	Central	12/31/2016	40	CA-2016-117415	Standard Class
CA	2,516	117,415	12/17/2016	Central	12/31/2016	41	CA-2016-117415	Standard Class
CA	2,518	120,999	09/10/2018	Central	09/13/2018	42	CA-2018-120999	Standard Class
CA	2,517	118,255	03/13/2017	Central	03/13/2017	45	CA-2017-118255	First Class
CA	2,517	118,255	08/11/2017	Central	08/13/2017	46	CA-2017-118255	First Class

- **Show list view**  (Tableau Prep Builder version 2019.3.2 and later and on the web): Convert the profile pane or results pane into a list. After you select this option, this view state persists across all steps in your flow but you can change it at any time.

You can select multiple rows and click the **X** to remove them or use the **More options** **...** menu to apply operations to selected fields. If you assign a data role to the field, or select **Filter**, **Group Values**, **Clean**, or **Split Values**, you will be returned to the Profile or Results view to complete those actions. All other options can be performed in the list view.



## Tableau Prep Builder version 2019.3.1 and earlier

Use the view toolbar  to hide the Profile pane and just show the

data grid. Then click **More options** **...** on a field in the data grid to open the cleaning menu. This view provide a more detailed view of your data and can be useful when you need to work with specific field values. After you select this option, this view state persists across all steps in your flow but you can change it at any time.

**Note:** Not all cleaning operations are available in the data grid. For example if you want to edit a value in-line, you must do this in the Profile pane.

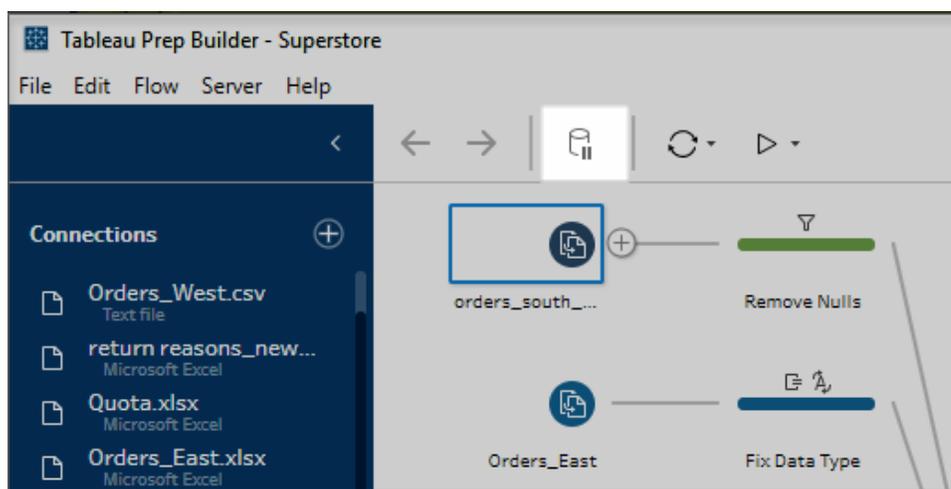
Order ID - Split 1	Order ID - Split 2	Order ID - Split 3	Order Date	Region	Ship Date	Row ID	Order ID	Ship Mode
US	2.516	118.963	11/02/2016	Central	11/06/2016	15	US-2016-118963	Standard Class
US	2.516	118.963	11/02/2016	Central	11/06/2016	16	US-2016-118963	Standard Class
CA	2.515	106.693	11/11/2015	Central	11/18/2015	17	CA-2015-106693	Standard Class
CA	2.517	137.330	12/09/2017	Central	12/13/2017	22	CA-2017-137330	Standard Class
CA	2.517	137.330	12/09/2017	Central	12/13/2017	23	CA-2017-137330	Standard Class
CA	2.518	137.727	10/19/2018	Central	10/23/2018	35	CA-2018-137727	Second Class
CA	2.517	137.990	12/08/2017	Central	12/10/2017	36	CA-2017-137990	First Class
CA	2.517	137.990	12/08/2017	Central	12/10/2017	37	CA-2017-137990	First Class
CA	2.516	117.415	12/27/2016	Central	12/31/2016	38	CA-2016-117415	Standard Class
CA	2.516	117.415	12/27/2016	Central	12/31/2016	39	CA-2016-117415	Standard Class
CA	2.516	117.415	12/27/2016	Central	12/31/2016	40	CA-2016-117415	Standard Class
CA	2.516	117.415	12/27/2016	Central	12/31/2016	41	CA-2016-117415	Standard Class
CA	2.518	120.999	09/10/2018	Central	09/13/2018	42	CA-2018-120999	Standard Class
CA	2.517	118.255	03/11/2017	Central	03/13/2017	45	CA-2017-118255	First Class
CA	2.517	118.255	03/11/2017	Central	03/13/2017	46	CA-2017-118255	First Class

## Pause data updates to boost performance

As you perform cleaning operations on your data, Tableau Prep applies your changes as you go to show you the results immediately. But if you know exactly what changes you want to make and don't need the immediate feedback as you make each change or just want a boost in performance, you can pause the data updates to save valuable processing time. When you pause data updates, you can make all your changes at once, then resume updates to see your results. You can resume data updates and enable all available operations at any time.

**Note:** When you pause data updates, any operations that require you to see your values will be disabled. For example if you want to apply a filter to selected values, you need to see the values you want to exclude.

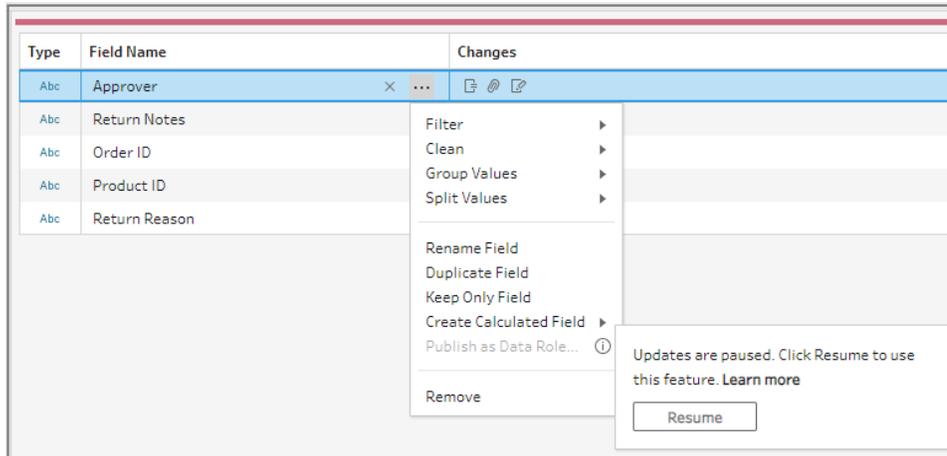
1. In the top menu, click **Pause data updates** to pause updates.



2. Tableau Prep converts the Profile pane into the List view. In List view, use the **More options**  $\dots$  menu to apply operations to selected fields. If the operation requires you to

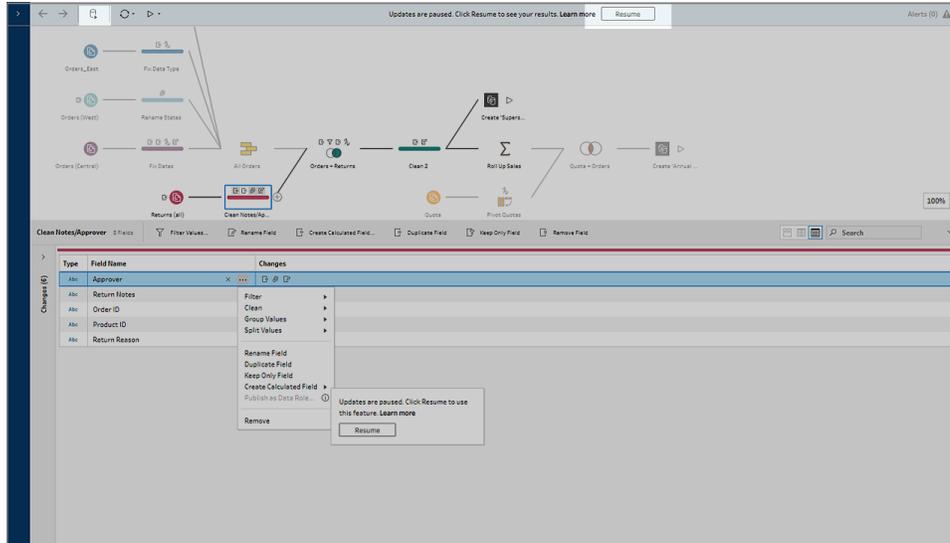
see your values, it will be disabled. To enable the operation, you will need to resume data updates.

For more information about using List view mode, see [Select your view on page 282](#).



- To see the results of your changes or enable a disabled feature, resume data updates. Click the **Resume data updates** button, click the **Resume** button in the menu dialog or in the message banner at the top of the Flow pane.

**Note:** Tableau Prep Builder provides an option to resume updates directly from the menu. If editing flows on the web, you'll need to resume updates from the top menu.



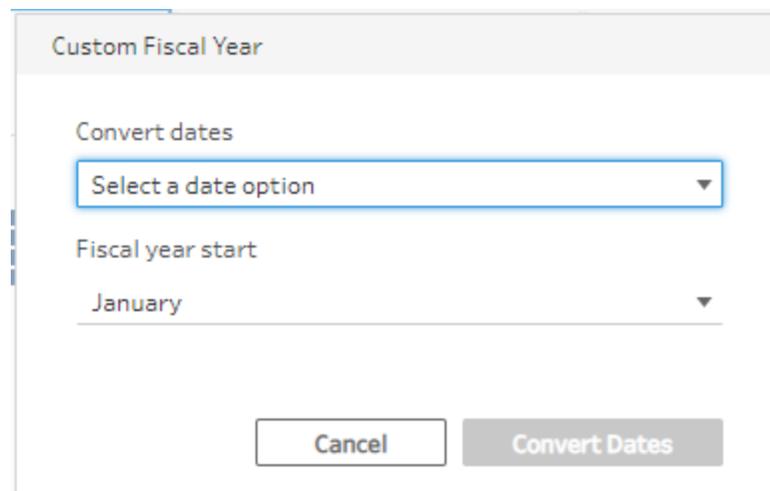
## Apply cleaning operations

To apply cleaning operations to a field, do the following:

**Note:** You can perform cleaning operations in a list view beginning in Tableau Prep Builder version 2019.3.2 and on the web.

1. In the **Profile** pane, data grid, Results pane or list view, select the field you want to make changes to.
2. From either the toolbar or **More options**  $\dots$  menu for the field, select from the following options:
  - **Filter** or **Filter Values**: Select from one of the filter options, right-click or Ctrl-click (MacOS) a field value to keep or exclude values. You can also use the **Selected Values** filter to pick and choose the values to filter, included values not in your flow sample. For more information about filter options, see [Filter Your Data on page 255](#).
  - **Group Values (Group and Replace** in prior versions): Manually select values or use automatic grouping. You can also multi-select values in the Profile card and right-click or Ctrl-click (MacOS) to group or ungroup values or edit the group value. For more information about using **Group Values**, see [Automatically map values to a standard value using fuzzy match](#) on page 304.

- **Clean:** Select from a list of quick cleaning operations to apply to all values in the field.
- **Convert Dates** (Tableau Prep Builder version 2020.1.4 and later and on the web): For fields assigned to a Date or Date & Time data type, select from a list of DATEPART quick cleaning operations to convert your date field values to an integer value representing year, quarter, month, week, day, or a date and time value.
  - **Custom Fiscal Year** (Tableau Prep Builder version 2020.3.3 and later and on the web): If your fiscal year doesn't start in January, set a custom fiscal month to convert the date using that month instead of the default month of January. This setting is on a per field basis, so if you want to apply a custom fiscal year to other fields, repeat this same step. To open the dialog, from the **More options** ⋮ menu, select **Convert Dates > Custom Fiscal Year**.



- **Split Values:** Split values automatically based on a common separator or use custom split to specify how you want to split field values.

Automatic split and custom split work the same as they do in Tableau Desktop. For more information, see [Split a Field into Multiple Fields](#) in the Tableau Desktop and Web Authoring Help.
- **Rename Field:** Edit the field name.
- **Duplicate Field** (Tableau Prep Builder version 2019.2.3 and later and on the

- web): Create a copy of your field and values.
- **Keep Only Field**(Tableau Prep Builder version 2019.2.2 and later and on the web): Keep only the selected field and exclude all other fields in the step.
  - **Create Calculated Field**: Write a custom calculation in the Calculation editor or use the Visual Calculation editor (Tableau Prep Builder version 2020.1.1 and later and on the web) to create level of detail, rank or row number calculations. For more information, see [Create level of detail and rank calculations on page 319](#).
  - **Remove (Remove Field in previous versions)**: Remove the field from the flow.

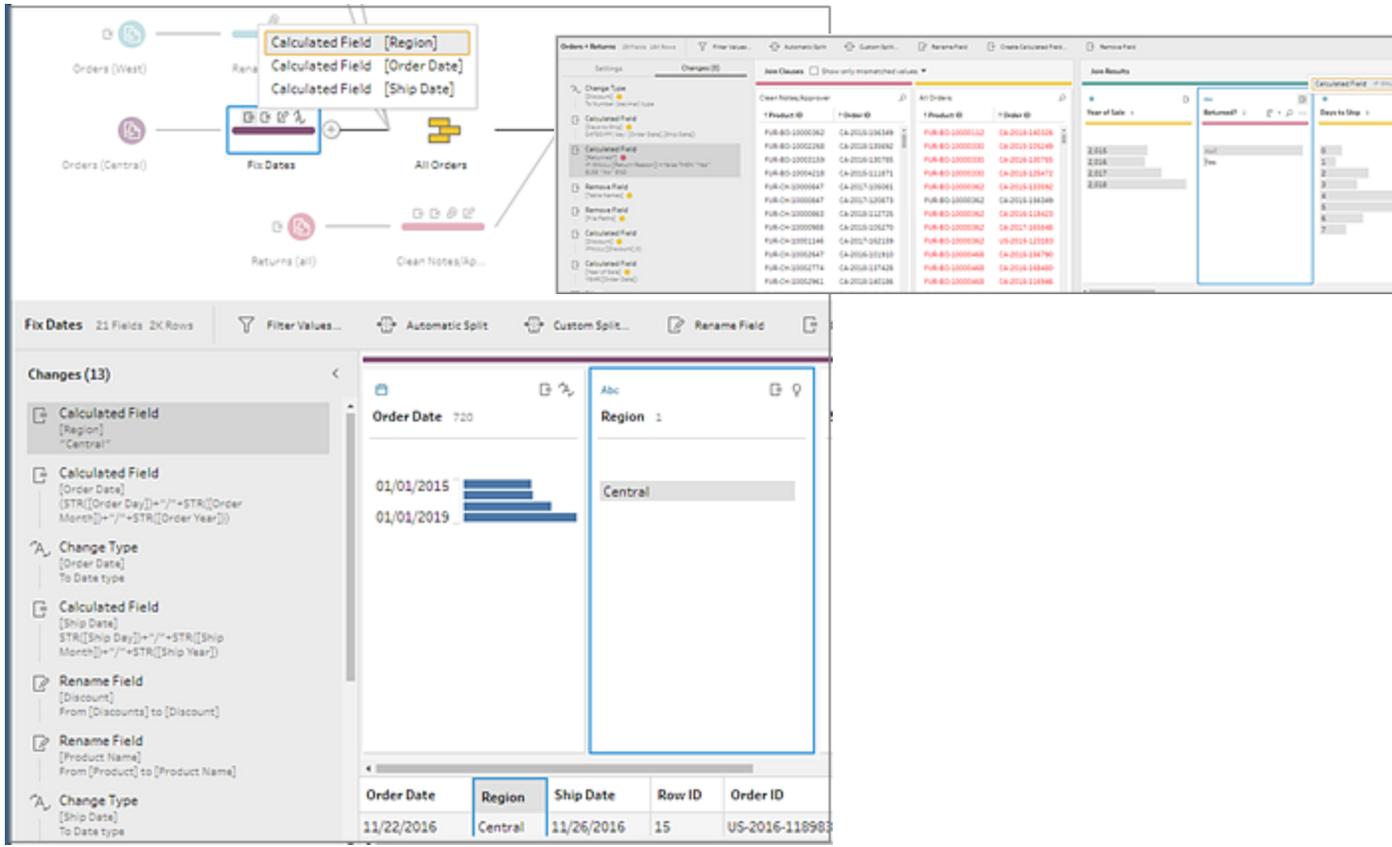
**Note:** You can also use the **Publish as Data Role** option to create custom data roles that you can then apply to your fields to validate the field values when cleaning data. For more information about this option, see [Create custom data roles on page 265](#).

3. To edit a value, right-click or Ctrl-click (MacOS) one or more values and select **Edit Value** then enter a new value. You can also select **Replace with Null** to replace the values with a Null value or double-click in a single field to edit it directly. For more information about editing field values see [Edit field values on page 295](#).
4. Review the results of these operations in the **Profile** pane, Summary panes or data grid.

## View your changes

The different types of cleaning operations are represented by icons over the steps in your flow. If more than four types of operations are applied to a step, an ellipsis displays over the step. Hover over these icons to view annotations showing applied operations and the order in which they are performed.

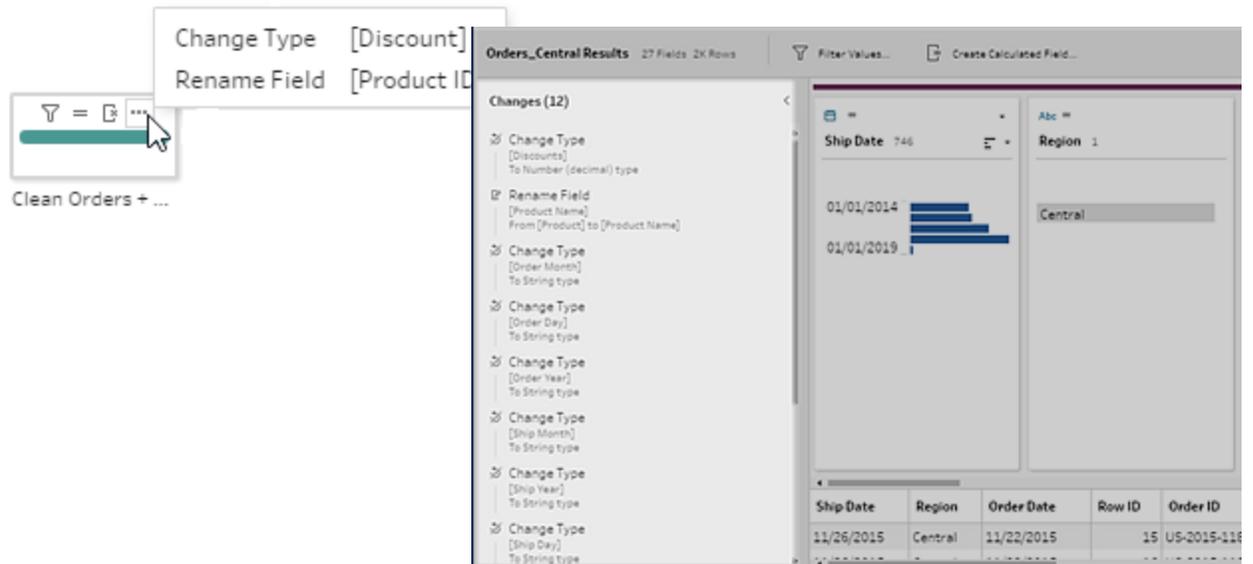
Starting in Tableau Prep Builder version 2019.1.3 and later and on the web, you can click on an annotation on the change icon on a step in the Flow pane or on a profile card in the Profile or Results pane and the change and field it impacts will be highlighted in the **Changes** pane and the **Profile** or **Results** pane.



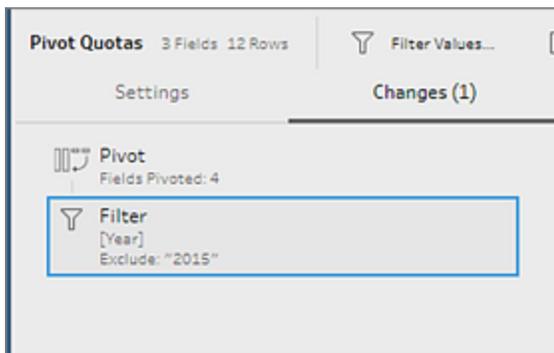
You can also select a step and then expand the **Changes** pane to view the details for each change, edit or remove your changes, drag changes up or down to change the order in which they're applied and add a description to provide context to other users. For more information about adding descriptions to your changes, see [Add descriptions to flow steps and cleaning actions](#) on page 237.

**Cleaning annotation**

**Changes pane**



When viewing changes in an Aggregation, Pivot, Join, or Union step, the order that the change is applied shows either before or after the reshaping action. The order of these changes is applied by the system and cannot be changed. You can edit and remove the change.



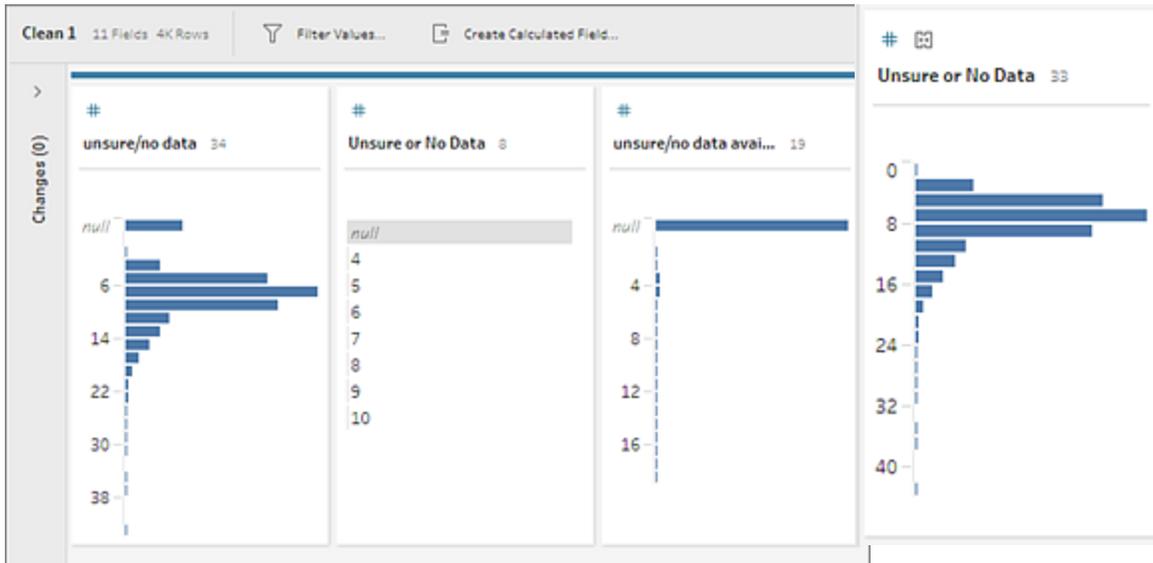
## Merge fields

If you have fields that contain the same values but are named differently, you can easily merge them into a single field to combine them by dragging one field on top of the other. When you merge the fields, the target field becomes the primary field and the field name of the target field persists. The field that you merge to the target field is removed.

**Example:**

Wildcard union results in 3 fields with the same values

Merge 3 fields into 1



When you merge fields, Tableau Prep keeps all of the fields from the target field and replaces any nulls in that field with values from the source fields that you merge with the target field. The source fields are removed.

**Example**

Name	Contact_Phone	Business_Phone	Cell_Phone	Home_Phone
Bob	123-4567	123-4567	null	null
Sally	null	null	456-7890	789-0123
Fred	null	null	null	567-8901
Emma	null	234-5678	345-6789	null

If you merge the **Business\_Phone**, **Cell\_Phone** and **Home\_Phone** fields with the **Contact\_phone** field, the other fields are removed and results in the following:

Name	Contact_Phone
Bob	123-4567

Sally	456-7890
Fred	567-8901
Emma	234-5678

To merge fields, do one of the following:

- Drag and drop one field onto another. A **Drop to merge fields** indicator displays.
- Select multiple fields and right-click within the selection to open the context menu, and then click **Merge Fields**.
- Select multiple fields, and then click **Merge Fields** on the toolbar.

For information about how to fix mismatched fields as a result of a union, see [Fix fields that don't match on page 371](#).

## Apply cleaning operations using recommendations

Sometimes it can be hard to identify which cleaning operation you need to use to fix problems in your data. Tableau Prep can analyze your data and recommend cleaning operations that you can apply automatically to quickly fix problems in your data fields or help to identify problems so you can fix them. This feature is available in all step types except Input, Output and Join step types.

**Note:** In Tableau Prep Builder, if you don't want to use this feature, you can turn it off. From the top menu, go to **Help > Settings and Performance**. Then click on **Enable Recommendations** to clear the check mark next to the setting.

Recommendation types include:

- Data roles
- Filter
- Group values (also applies to fields with data roles starting in Tableau Prep Builder version 2019.2.3 and on the web)
- Pivot columns to rows (Tableau Prep Builder version 2019.4.2 and later and on the web)

## Tableau Prep Help

- Replace values with Null values
- Remove fields
- Split (Tableau Prep Builder version 2019.1.1 and later and on the web)

**Note:** This option works specifically with data in fixed-width type text files. To use the split recommendation with this file type, after you connect to the data source, in the Input step, in the **Text Settings** tab, select a **Field Separator** character that is not used in the data so the data loads as a single field.

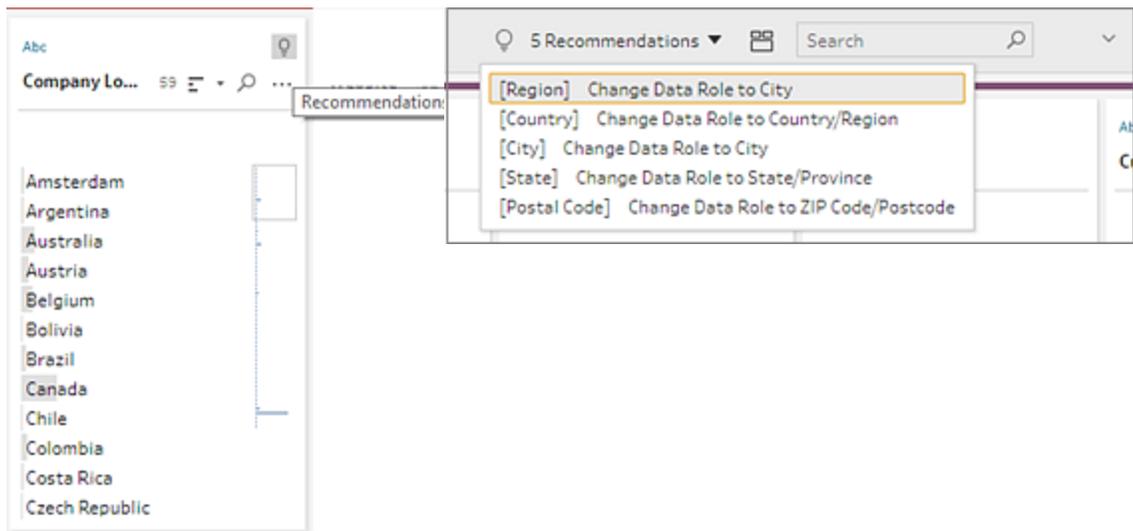
- Trim spaces

## Apply recommendations

1. Do one of the following:

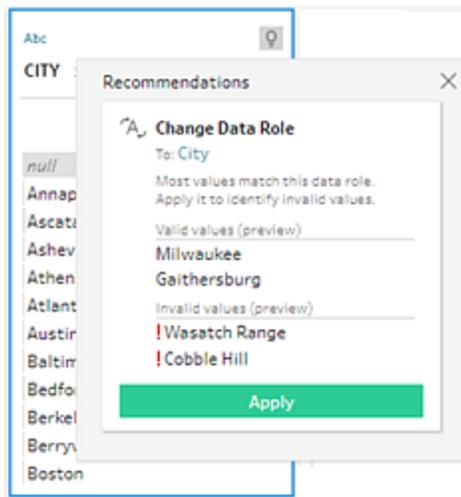
- Click the light bulb  icon in the top right corner of the profile card.
- From the toolbar, click the **Recommendations** drop-down arrow to view all recommendations for your data set and select a recommendation from the list.

This option only appears when recommended changes are identified by Tableau Prep.



2. To apply the recommendation, hover on the Recommendations card and then click

## Apply.

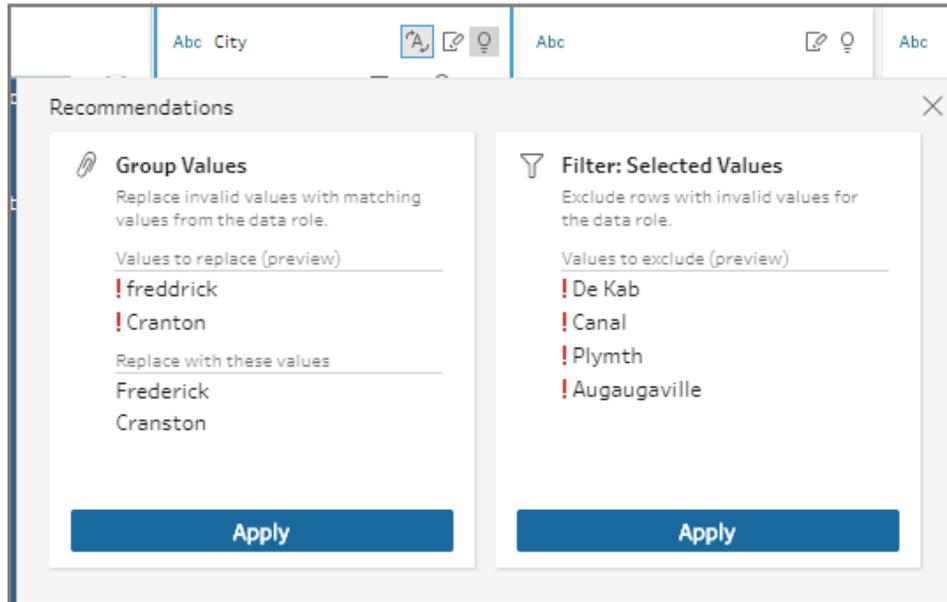


The change is automatically applied and an entry is added to the **Changes** pane. To remove the change, click **Undo** in the top menu or hover over the change in the **Changes** pane and click the **X** to remove it.

If you apply a recommendation to pivot fields, a Pivot step is automatically created where you can then perform any additional pivot actions like renaming the pivoted fields or pivoting on additional fields.

3. If Tableau Prep identifies further recommendations as a result of the change, the light bulb icon remains on the Profile card until no further recommendations are found.

Repeat the steps above to apply any additional changes or ignore the suggested change and use the other cleaning tools to address the data problems.



## Edit field values

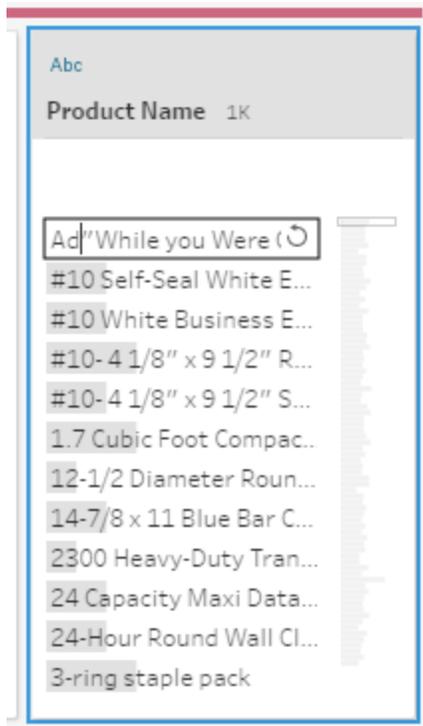
Multiple variations of the same value can prevent you from accurately summarizing your data. You can quickly and easily correct these variations using the following options.

**Note:** Any edits that you make to the values must be compatible with the field data type.

### Edit a single value

1. In the **Profile** card, click the value you want to edit, and enter the new value. A group icon  shows next to the value.

Alternatively, right-click a value and click **Edit Value**. The change is recorded in the **Changes** pane on the left side of the screen.



2. View the results in the **Profile** pane, and data grid.

## Edit multiple values

You have several options to edit multiple values at once. For example, use quick cleaning operations to remove punctuation for all values in a field, manually group values using multi-select, automatically group values together using fuzzy-match algorithms that find similar values or select multiple values and replace them with Null.

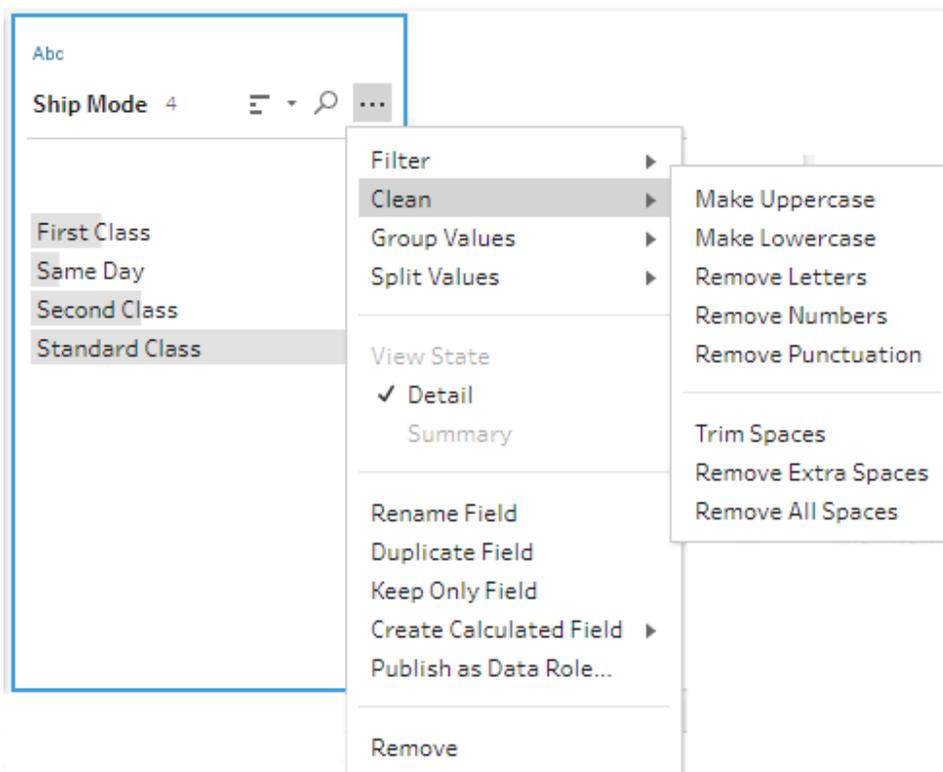
**Note:** When you map multiple values to a single value, the original field shows a group icon  next to the value, showing you which values are grouped together.

## Edit multiple values using quick cleaning operations

This option applies only to text fields.

1. In the **Profile** pane, Results pane or data grid, select the field you want to edit.
2. Click **More options**  , select **Clean**, and then select one of the following options:

- **Make Uppercase:** Change all values to uppercase text.
- **Make Lowercase:** Change all values to lowercase text.
- **Remove Letters:** Remove all letters and leave only other characters.
- **Remove Numbers:** Remove all numbers and leave letters and other characters.
- **Remove Punctuation:** Remove all punctuation.
- **Trim Spaces:** Remove leading and trailing spaces.
- **Remove Extra Spaces:** Remove leading and trailing whitespace and replace extra whitespace in-between characters with a single space.
- **Remove All Spaces:** Remove all whitespace, including leading and trailing whitespace and any whitespace in between characters.



You can stack operations to apply multiple cleaning operations to the fields. For example first select **Clean > Remove Numbers** and then select **Clean > Remove Punctuation** to remove all numbers and punctuation from the field values.

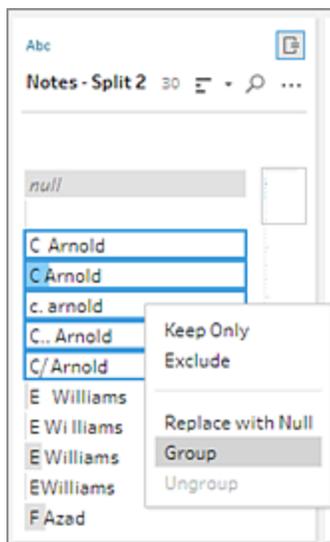
3. To undo your changes, click the **Undo** arrow at the top of the **Flow** pane, or remove the

change from the change list.

## Group and edit multiple values inline

Use this option to manually select multiple values and group them under a standard value in the profile card. To use other methods to group values, see [Manually map multiple values to a standard value](#) on the facing page and [Automatically map values to a standard value using fuzzy match](#) on page 304.

1. In the **Profile** card, select the field you want to edit.
2. Press Ctrl or Shift+click or Command or Shift+click (MacOS), and select the values that you want to group.
3. Right-click, and select **Group** from the context menu. The value in the selection that you right-click becomes the default name for the new group but you can edit this in-line.

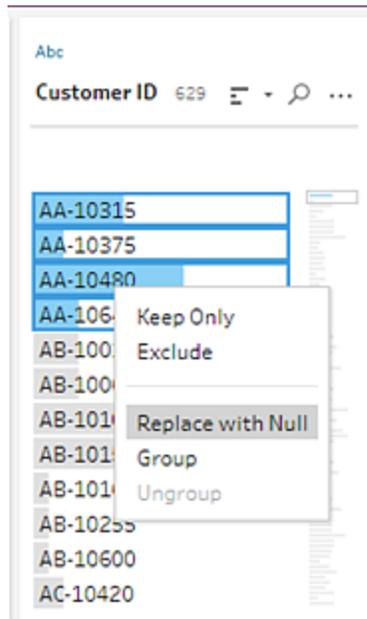


4. To edit the group name, select the grouped field and edit the value or right-click or Ctrl+click (Mac) on the grouped field and select **Edit Value** from the context menu.
5. To ungroup the grouped field values, right-click on the grouped field and select **Ungroup** from the context menu.

## Replace one or more values with Null

If you have data rows that you want to include in your analysis but you want to exclude certain field values you can change them to a Null value.

1. In the **Profile** card, press Ctrl or Shift+click or Command or Shift+click (on Mac), and select the values that you want to change
2. Right-click or Ctrl+click (Mac), and select **Replace with Null** from the menu. The values are changed to Null and the group icon  shows next to the value.



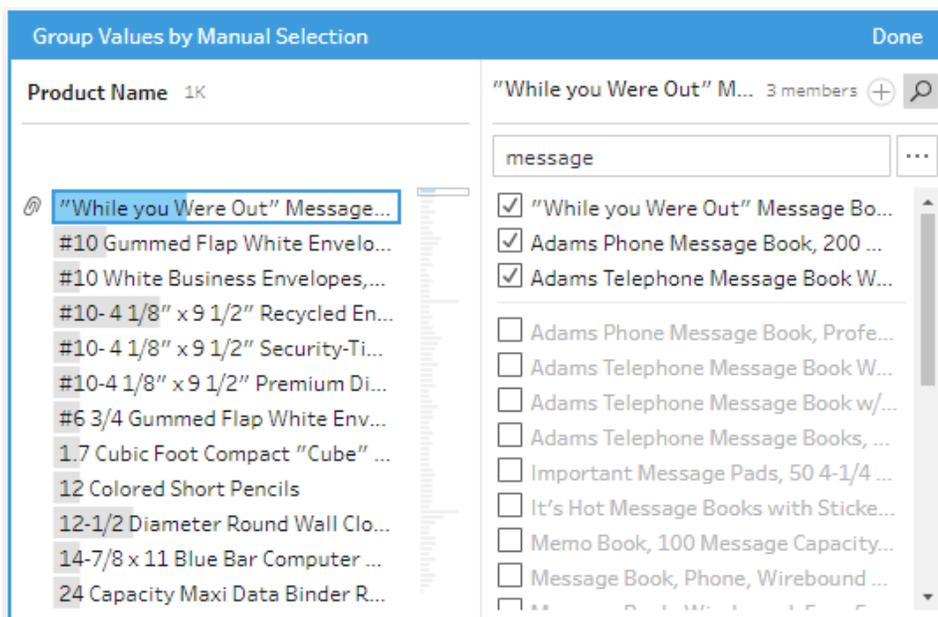
## Manually map multiple values to a standard value

Use **Group Values** (**Group and Replace** in previous versions) to map the value of a field from one value to another or manually select multiple values to group them. You can even add new values to set up mapping relationships to organize your data.

For example, let's say you have three values in a field: My Company, My Company Incorporated, and My Company Inc. All these values represent the same company, My Company. You can use **Group Values** to map the values My Company Incorporated and My Company Inc to My Company, so that all three values appear as My Company in the field.

## Map multiple values to a single selected field

1. In the **Profile** pane or Results pane, select the field you want to edit.
2. Click **More options**  $\dots$  and select **Group Values (Group and Replace** in previous versions) > **Manual Selection** from the menu.
3. In the left pane of the **Group Values** editor, select the field value that you want to use as the grouping value. This value now shows at the top of the right pane.
4. In the lower section of the right pane in the **Group Values** editor, select the values you want to add to the group.



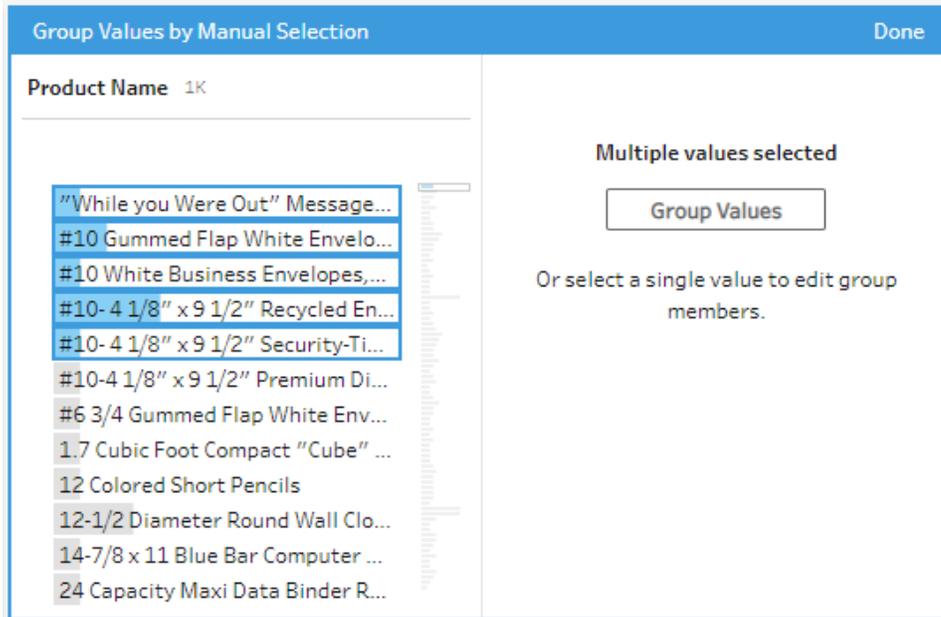
To remove values from the group, in the upper section of the right pane in the **Group Values** editor, clear the check box next to the values.

## Create a group by selecting multiple values

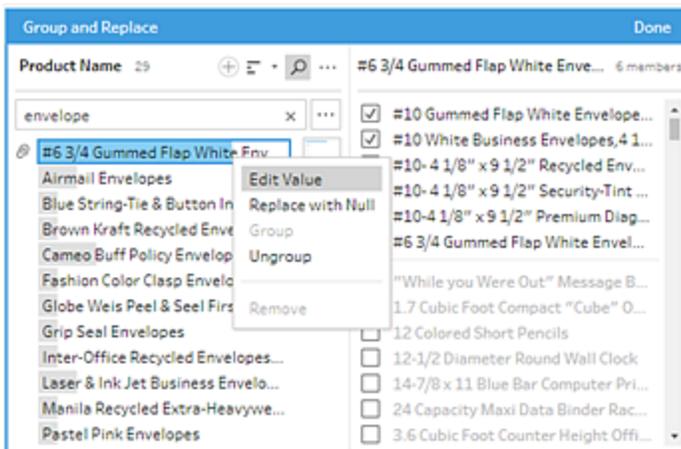
1. In the **Profile** pane or Results pane, select the field you want to edit.
2. Click **More options**  $\dots$  and select **Group Values (Group and Replace** in previous versions) > **Manual Selection** from the menu.
3. In the left pane of the **Group Values** editor, select multiple values that you want to

group.

4. In the right pane of the **Group Values** editor, click **Group Values**.



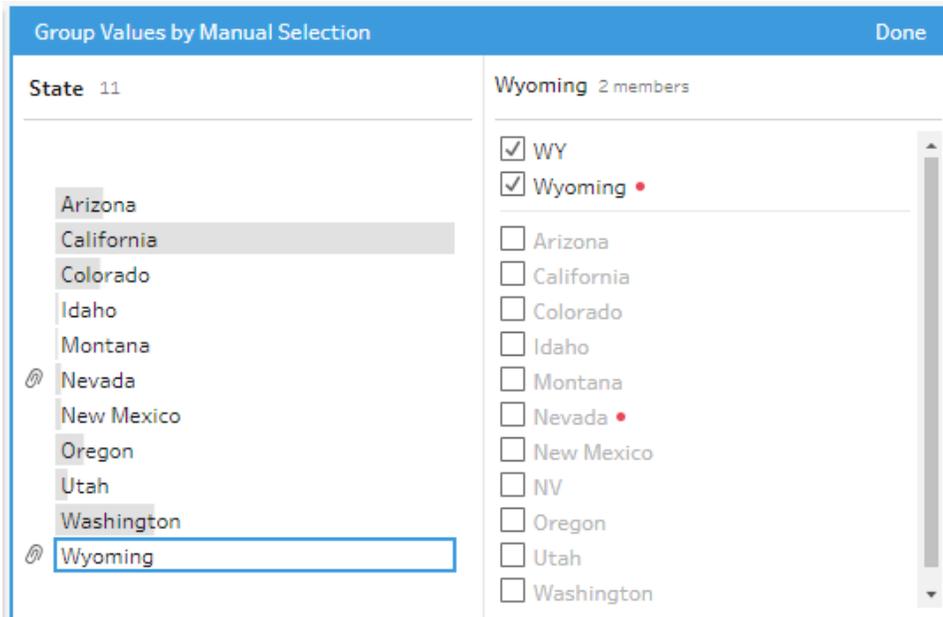
A new group is created using the last selected value as the group name. To edit the group name, select the grouped field and edit the value or right-click or Ctrl+click (MacOS) on the grouped field and select **Edit Value** from the menu.



## Add and identify values that aren't in the data set

If you want to map values in your data set to a new value that doesn't exist, you can add it using **Group Values (Group and Replace** in previous versions). To easily identify any values that are not in the data set, these values are marked with a red dot next to the value name in the **Group Values** editor.

For example in the image below, Wyoming and Nevada aren't in the data set.



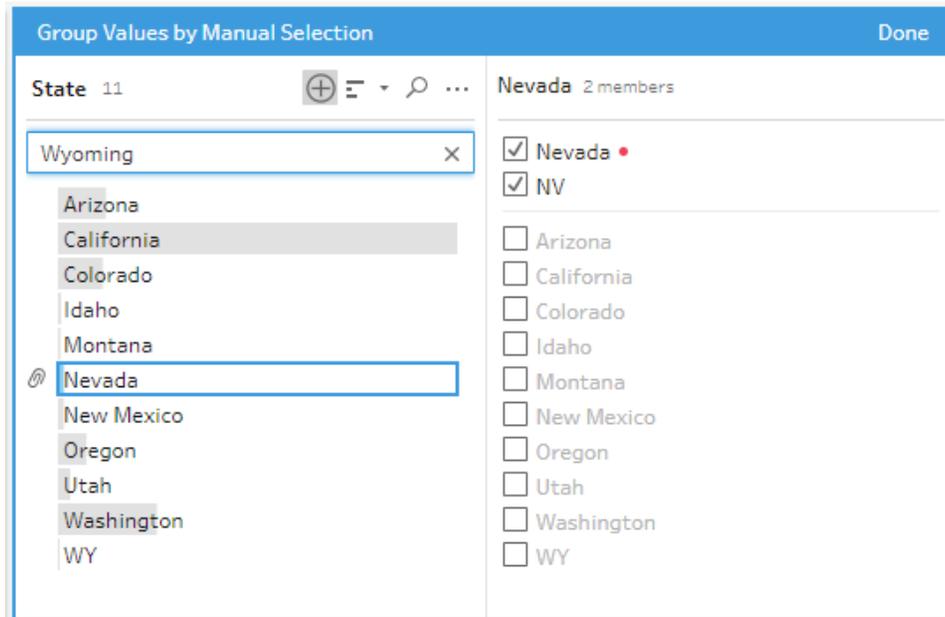
Some reasons why a value might not be in the data set include the following:

- You just added the new value manually.
- The value is no longer in the data.
- The value is in the data, but isn't in the sampled data set.

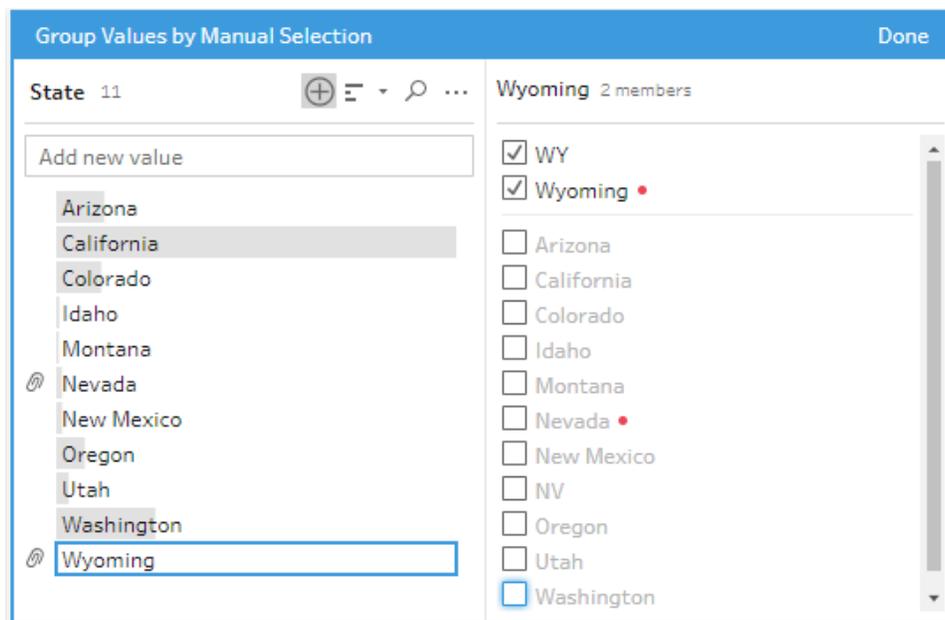
To add a new value:

1. In the **Profile** pane or Results pane, select the field you want to edit.
2. Click **More options**  $\dots$  and select **Group Values (Group and Replace** in previous versions) > **Manual Selection** from the context menu.
3. In the left pane of the **Group Values** editor, click the plus  $\oplus$  to add a new value.

4. Type a new value in the field and press Enter to add it.



5. In the right pane, select the values that you want to map to the new value.



6. (Optional) To add additional new values to your mapped value, click the plus  button in the right pane in the **Group Values** editor.

## Automatically map values to a standard value using fuzzy match

To search for and automatically group similar values, use one of the fuzzy match algorithms. Field values are grouped under the value that appears most frequently. Review the grouped values and add or remove values in the group as needed.

If you use data roles to validate your field values, you can use the **Group Values (Group and Replace** in previous versions) option to match invalid values with valid ones. For more information, see [Group similar values by data role](#) on page 273

Choose one of the following options to group values:

- **Pronunciation:** Find and group values that sound alike. This option uses the Metaphone 3 algorithm that indexes words by their pronunciation and is most suitable for English words. This type of algorithm is used by many popular spell checkers. This option isn't available for data roles.
- **Common Characters:** Find and group values that have letters or numbers in common. This option uses the ngram fingerprint algorithm that indexes words by their unique characters after removing punctuation, duplicates, and whitespace. This algorithm works for any supported language. This option isn't available for data roles.

For example, this algorithm would match names that are represented as "John Smith" and "Smith, John" because they both generate the key "hijmnost". Since this algorithm doesn't consider pronunciation, the value "Tom Jhinois" would have the same key "hijmnost" and would also be included in the group.

- **Spelling:** Find and group text values that are spelled alike. This option uses the Levenshtein distance algorithm to compute an edit distance between two text values using a fixed default threshold. It then groups them together when the edit distance is less than the threshold value. This algorithm works for any supported language.

Starting in Tableau Prep Builder version 2019.2.3 and on the web, this option is available to use after a data role is applied. In that case, it matches the invalid values to the closest valid value using the edit distance. If the standard value isn't in your data set

sample, Tableau Prep adds it automatically and marks the value as not in the original data set.

- **Pronunciation +Spelling:** (Tableau Prep Builder version 2019.1.4 and later and on the web) If you assign a data role to your fields, you can use that data role to match and group values with the standard value defined by your data role. This option then matches invalid values to the most similar valid value based on spelling and pronunciation. If the standard value isn't in your data set sample, Tableau Prep adds it automatically and marks the value as not in the original data set. This option is most suitable for English words.

For more information see [Clean and Shape Data on page 277](#).

**Note:** In Tableau Prep Builder version 2019.1.4 and 2019.2.1 this option was labeled **Data Role Matches**.

## Group similar values using fuzzy match

1. In the **Profile** pane or Results pane, select the field you want to edit.
2. Click **More options** ... and select **Group Values** then select one of these options:
  - **Pronunciation**
  - **Common Characters**
  - **Spelling**

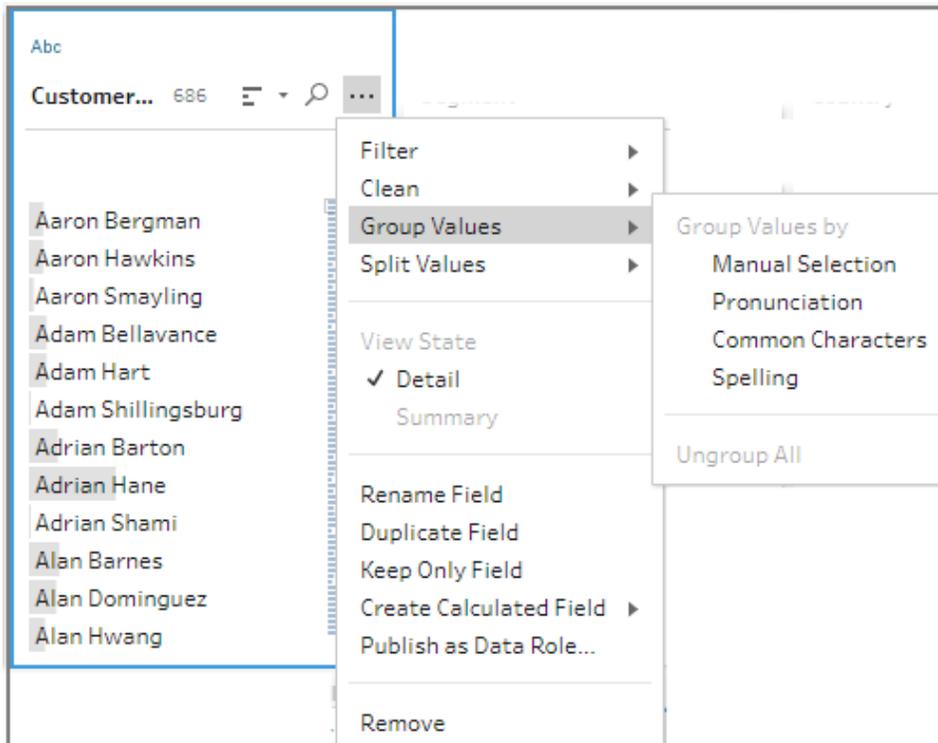
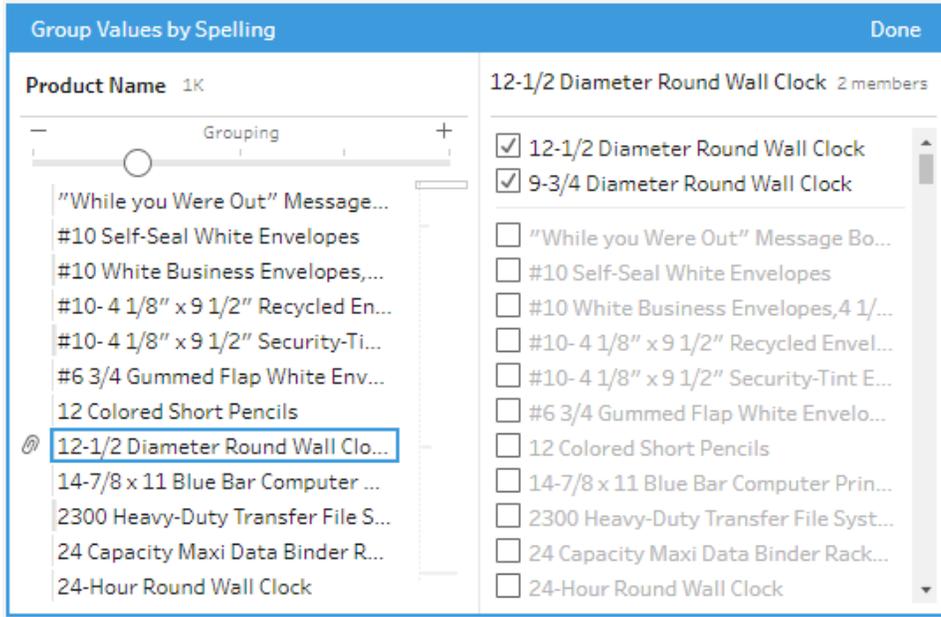


Tableau Prep Builder finds and groups values that match and replaces them with the value that occurs most frequently in the group.

3. Review the groupings and manually add or remove values or edit them as needed. Then click **Done**.



## Adjust your results when grouping field values

If you group similar values by **Spelling** or **Pronunciation**, you can change your results by using the slider on the field to adjust how strict the grouping parameters are.

Depending on how you set the slider, you can have more control over the number of values included in a group and the number of groups that get created. By default, Tableau Prep detects the optimal grouping setting and shows the slider in that position.

When you change the threshold, Tableau Prep analyzes a sample of the values to determine the new grouping. The groups generated from the setting are saved and recorded in the **Changes** pane, but the threshold setting isn't saved. The next time the **Group Values** editor is opened, either from editing your existing change or making a new change, the threshold slider is shown in the default position, enabling you to make any adjustments based on your current data set.

1. In the **Profile** pane or **Results** pane, select the field you want to edit.
2. Click **More options** ⋮ and select **Group Values (Group and Replace** in previous versions) then select one of these options:
  - **Pronunciation**
  - **Spelling**

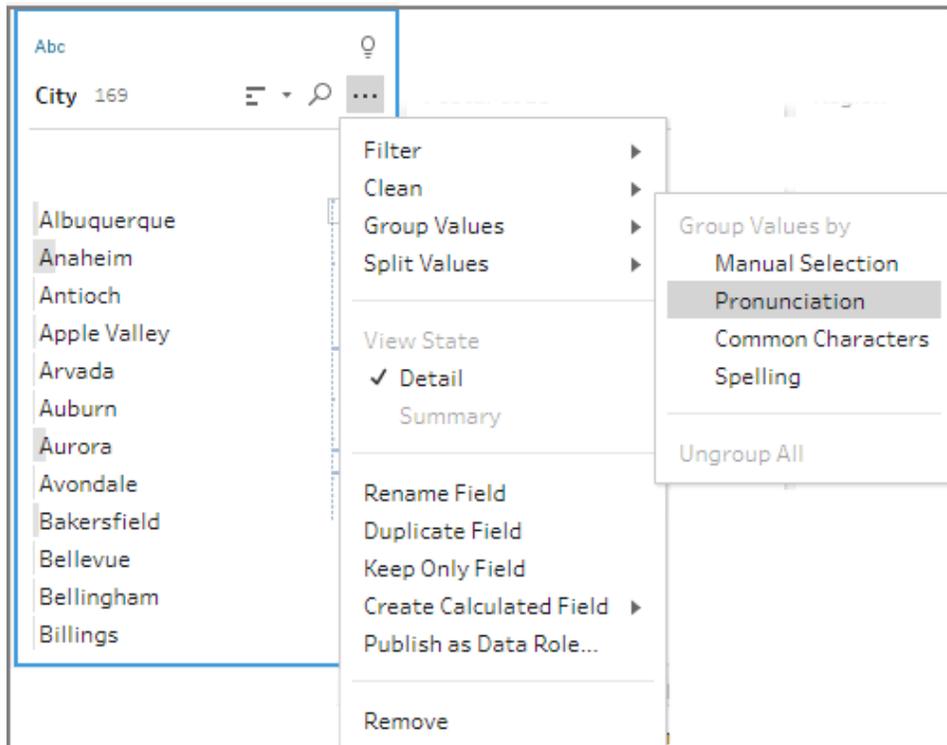
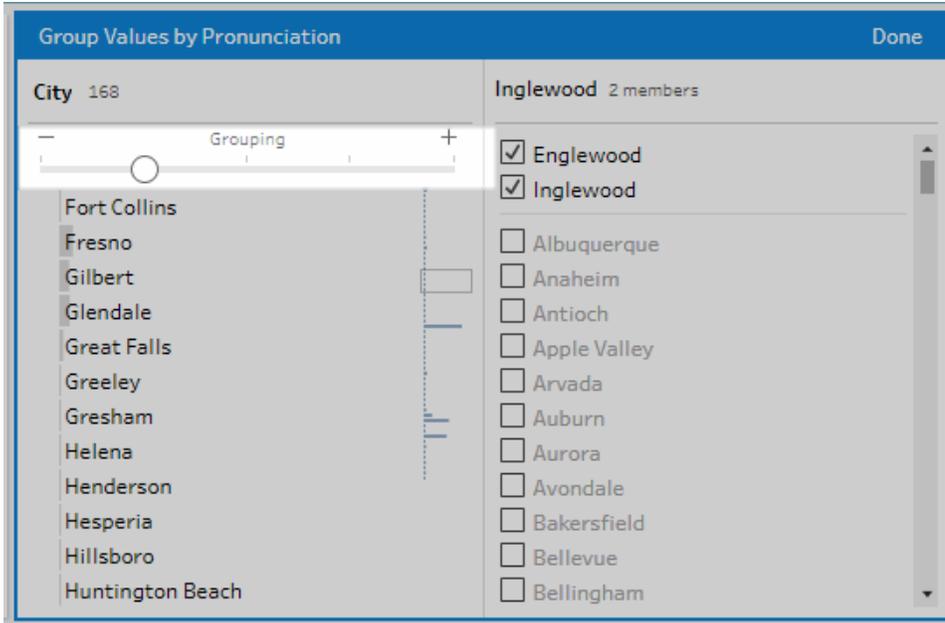


Tableau Prep finds and groups values that match and replaces them with the value that occurs most frequently in the group.

3. In the left pane of the **Group Values** editor, drag the slider to one of the 5 threshold levels to change your results.



To set a stricter threshold, move the slider to the left. This results in fewer matches and creates less groups. To set a looser threshold, move the slider to the right. This results in more matches and creates more groups.

4. Click **Done** to save your changes.

## Copy steps, actions and fields

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web](#) on page 166.

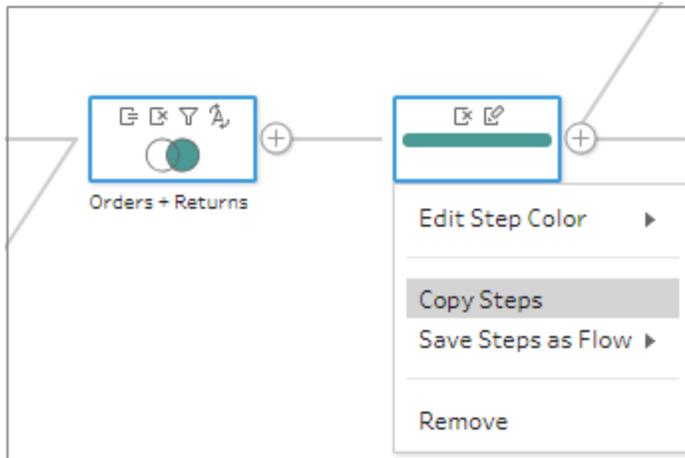
When cleaning your data you often perform the same cleaning operations or actions over and over throughout your flow. To help make cleaning and shaping your data more efficient, you can copy and paste operations or actions throughout your flow, or even copy selected steps or groups and save them so you can perform cleaning operations or actions once, then reuse it where you need it. You can even duplicate fields to experiment with different cleaning operations.

For more information about creating groups in your flow, see [Group steps \(version 2020.3.3 and later\)](#) on page 233.

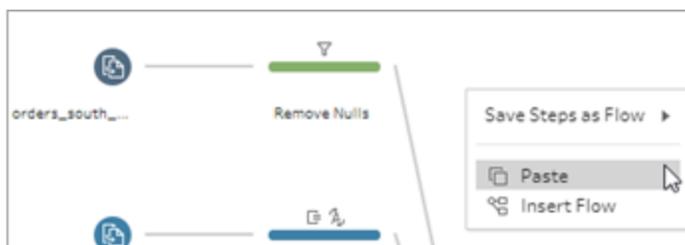
## Copy and paste steps

Copy one or more steps to use them in another area of the same flow. This option is not available for Input steps that include a wildcard union.

1. In the Flow pane, select one or more steps or group in the flow.
2. Right-click or Ctrl-click (MacOS) on the selected step, then select **Copy**.

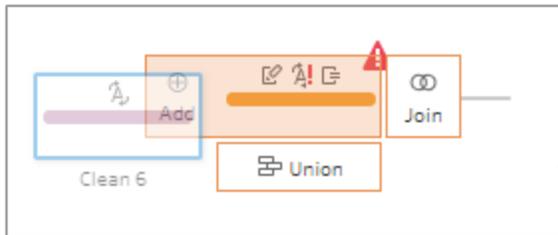


3. To paste the copied steps do one of the following:
  - Hover over a step or flow line until the plus  $\oplus$  icon appears, then click the icon and select **Paste** from the menu.
  - Right-click or Ctrl-click (MacOS) in any whitespace in the canvas and click **Paste**.



4. If you pasted the steps in the flow whitespace, drag and drop the steps to where you want to place them in the flow. If adding steps to the end of a flow step, the steps are automatically added to the end of the step. If inserting steps between existing flow steps, move the steps where you want them in the flow and fix any errors.

You can remove flow lines or move steps around if needed. For example to connect a step to the copied steps, remove the existing flow line if there is one, then drag the existing step to the new step and drop on **Add**.



For more information about organizing your flow, see [Reorganize the layout of your flow](#) on page 241.

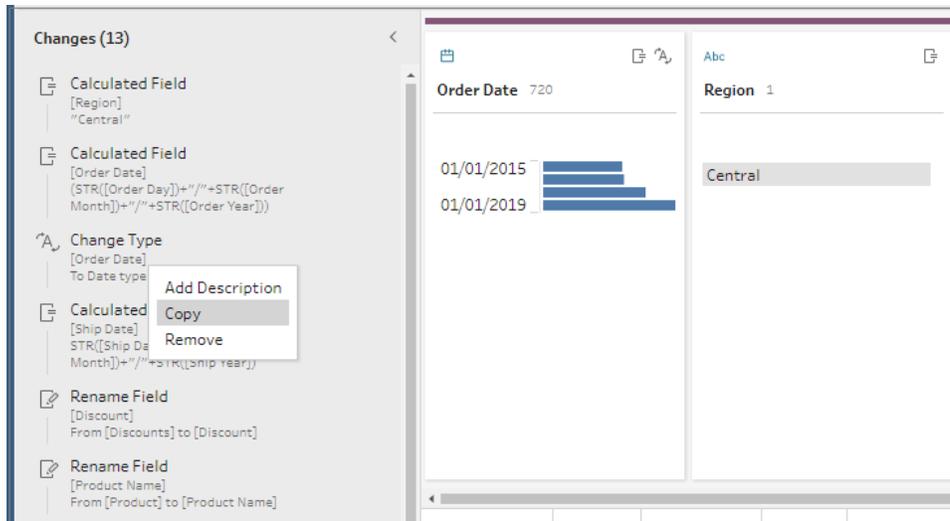
## Copy and paste cleaning operations

You can copy and paste cleaning operations in the same flow to reuse your actions using one of the following options:

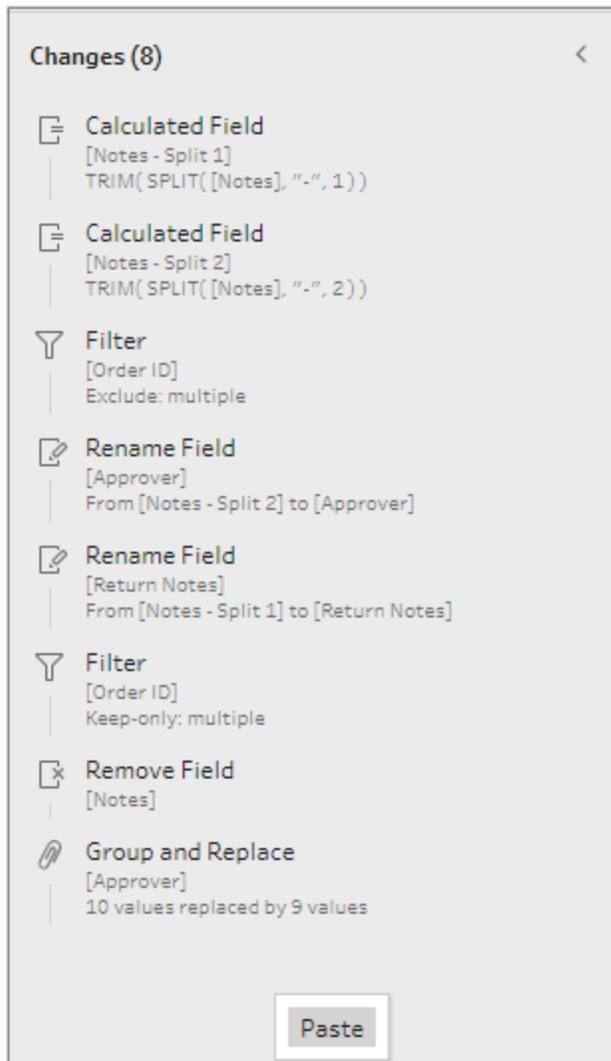
- Copy an operation from the **Changes** pane in one step and paste it in the **Changes** pane for the same step or another step to apply that same operation in that step.
- Drag and drop an operation from the **Changes** pane and drop it to other fields in the Profile pane for that step to apply that operation to multiple fields. This option is not available for operations that impact multiple fields, such as calculated fields.

To copy and paste a change in a step to the same step or another step, do the following:

1. In the **Changes** pane select the change you want to copy.
2. Right-click or Ctrl-click (MacOS) on the change item, then select **Copy** from the menu.



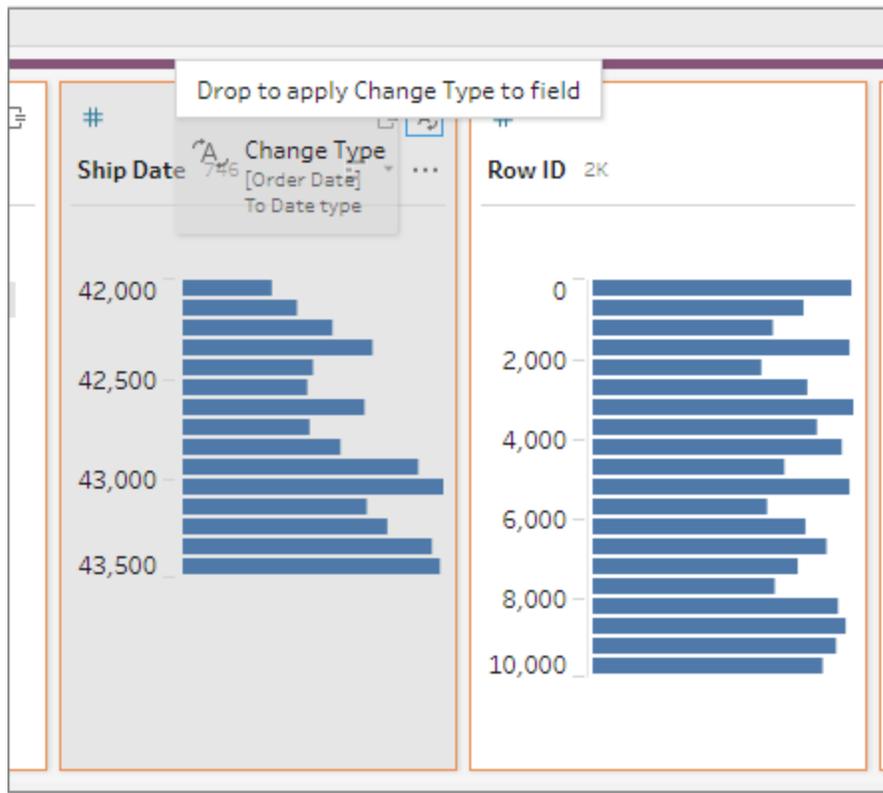
3. In the **Changes** pane where you want to paste the change right-click or Ctrl-click (MacOS) and select **Paste**. Select the change and click on **Edit** to make any adjustments as needed.



To drag and drop a change to other fields in the step do the following:

1. In the **Changes** pane select the change you want to copy.
2. Drag the change over the field where you want to apply it and drop it. Repeat this action

as needed.

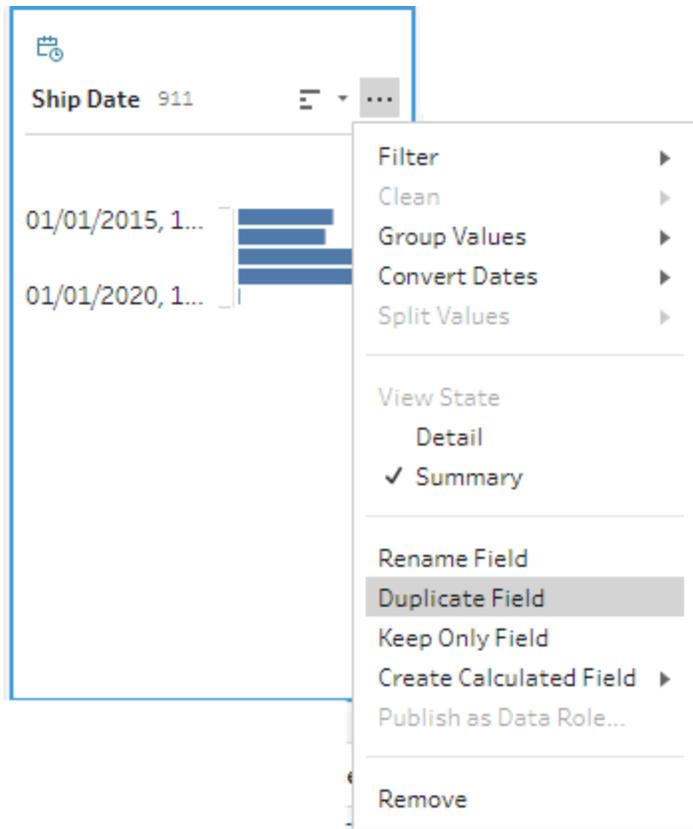


## Copy fields

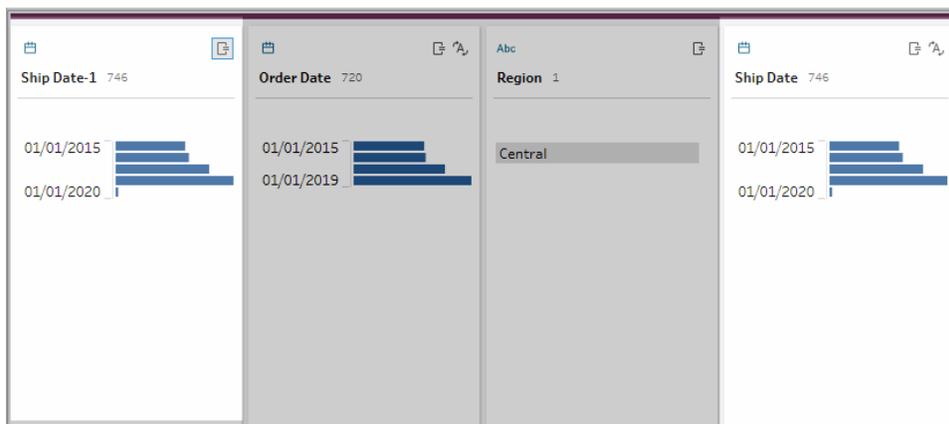
Starting in Tableau Prep Builder version 2019.2.3 and later and on the web, if you wanted to experiment with your cleaning operations on a field but don't want to change the original data, you can copy your fields .

## Tableau Prep Help

1. In the profile pane, data grid, results pane, or list view, select the field you want to copy.
2. From the **More options** menu, select **Duplicate Field**.



A new field is created with the same name and a modifier. For example, "Ship Date -1".



## Create reusable flow steps (version 2019.3.2 and later)

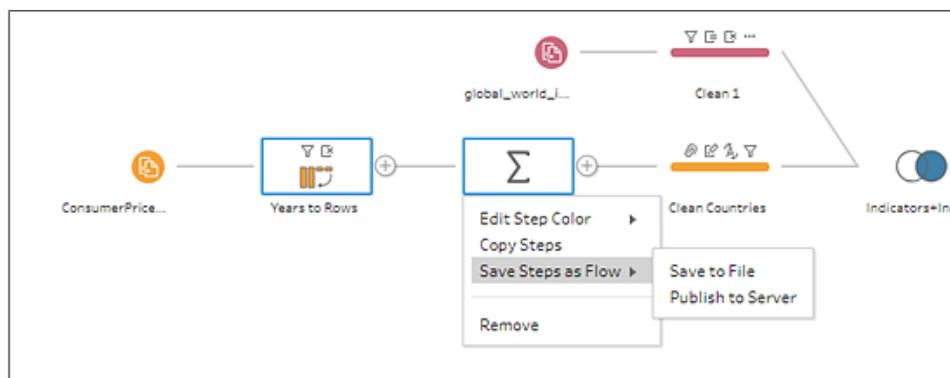
**Note:** Reusable flow steps can't be created on the web, but you can use them in your web flows. Reusable steps that include file-based input steps are not yet supported on the web.

If you commonly perform the same actions over and over again with your data and you want to apply these same steps in other flows, in Tableau Prep Builder version 2019.3.2 and later, you can select one or more flow steps or groups and their associated actions or the entire flow and save it locally to a file on your computer. You can also or publish it to Tableau Server or Tableau Online to share with others.

When the flow steps are published to your server, a **Saved Steps** tag is automatically added so you can easily search and find them when adding them to your flows.

### Create reusable steps

1. Select one or more steps.
2. Right-click or Ctrl-click (MacOS) on a selected step and select **Save Steps as Flow**.



3. Select **Save to File** to save the flow locally or **Publish to Server** to publish the flow to Tableau Server or Tableau Online.
4. If you publish the flow to Tableau Server or Tableau Online, sign into your server if

needed, then complete the fields in the **Publish Flow** dialog then click **Publish**.

**Publish Flow to Tableau Server**

Project  
Default

Name  
Pivot + Aggregation

Description  
Pivot year columns to rows and then aggregate months to years.

Tags  
Saved Steps [Add](#)

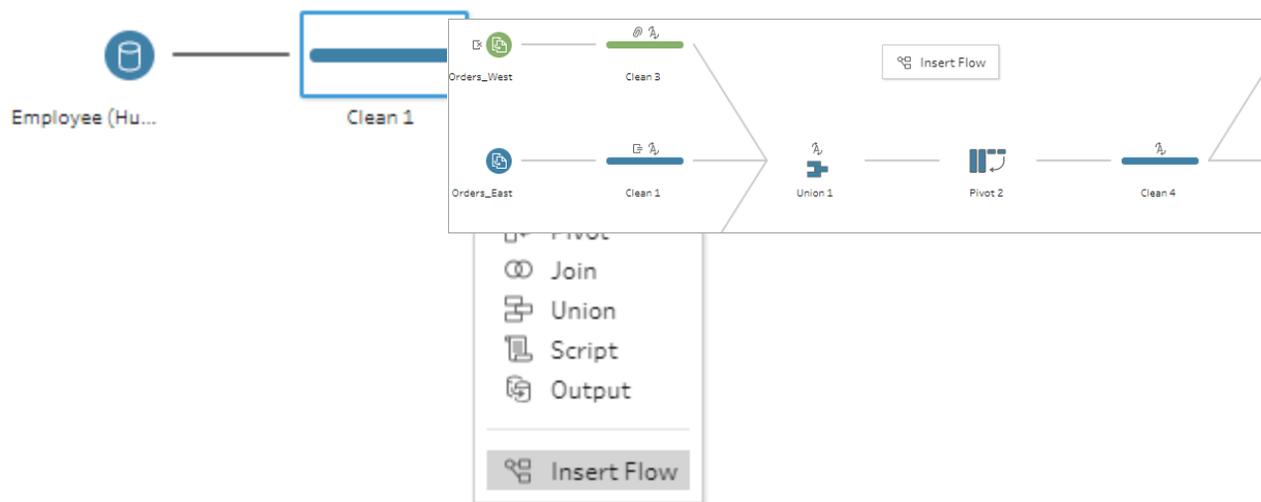
Cancel Publish

## Insert reusable steps in a flow

1. Open a flow.
2. In the flow pane, do one of the following:
  - Hover over a step or flow line until the plus  $\oplus$  icon appears, then click the icon and select **Insert Flow**.
  - In the white area of the canvas, right-click or Ctrl-click (MacOS) and click **Insert Flow** or click **Edit > Insert Flow** from the top menu.

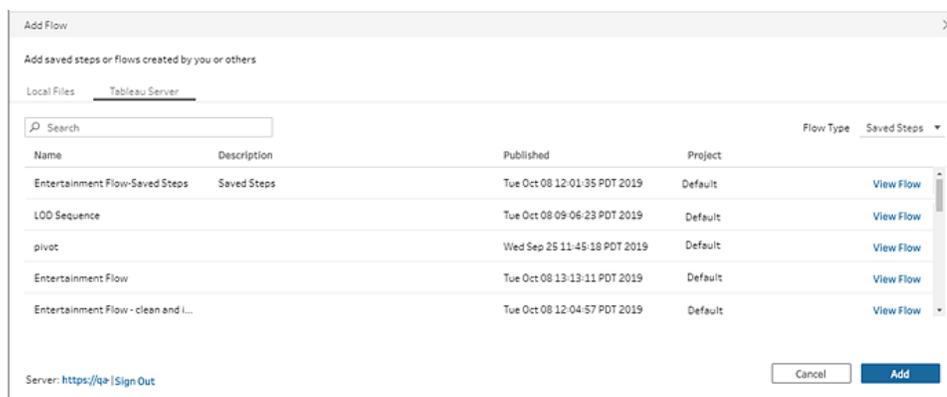
**Flow Step menu**

**Canvas menu**

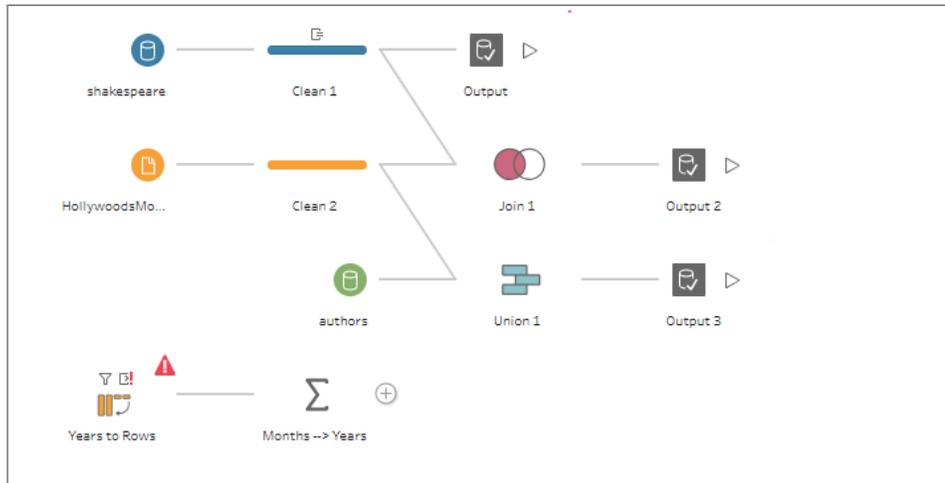


3. In the **Add Flow** dialog, select from flows saved to either your local file or your server, then click **Add**. The list of flows is automatically filtered to show flows tagged with **Saved Steps**. To insert other flows, change the **Flow Type** to **All Flows**.

In Tableau Prep Builder version 2019.4.2 and later and on the web, you can click **View Flow** to open and view the published flow in the server you are signed into.



4. The flow is added to the flow pane. If adding a flow to the end of a flow step, the flow steps are automatically added to the end of the step. If inserting flow steps between existing flow steps, move the steps where you want them in the flow and fix any errors.



## Create level of detail and rank calculations

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web on page 166](#).

You can use calculated fields to create new data using data that already exists in your data source. Tableau Prep supports many of the same calculation types as Tableau Desktop. For general information about creating calculations, see [Get Started with Calculations in Tableau](#).

Starting in version 2020.1.3 Tableau Prep Builder and on the web, you can use FIXED Level of Detail (LOD) and RANK and ROW\_NUMBER analytic functions to perform more complex calculations.

For example, add a FIXED LOD calculation to change the granularity of fields in your table, use the new ROW\_NUMBER () analytic function to quickly find duplicate rows, or use one of the new RANK () functions to find the top N or bottom N values for a selection of rows with similar data. If you want a more guided experience when building these types of expressions, you can use the new visual calculation editor.

**Note:** Some functions supported in Tableau Desktop may not yet be supported in Tableau Prep. To view the available functions for Tableau Prep, review the function list in the Calculation editor.

## Calculate level of detail

When you need to calculate data at multiple levels of granularity in the same table, you can write a level of Detail (LOD) expression to do this. For example, if you wanted to find the total sales for each region, you could write a calculation like `{FIXED [Region] : SUM ([Sales])}`.

Tableau Prep supports the FIXED level of detail expression and uses the syntax `{FIXED [Field1],[Field2] : Aggregation([Field])}`.

LOD expressions have two parts to the equation that are separated by a colon.

- **FIXED [Field]** (required): This is the field or fields that you want to calculate the values for. For example if you wanted to find the total sales for customer and region, you would enter `FIXED [Customer ID], [Region] :`. If you don't select any fields, this is the equivalent to performing the aggregation defined on the right side of the colon and repeating that value for every row.
- **Aggregation ([Field])** (required): Select what you want to calculate and what level of aggregation you want. For example if you want to find the total sales, then enter `SUM ([Sales])`.

When using this feature in Tableau Prep, the following requirements apply:

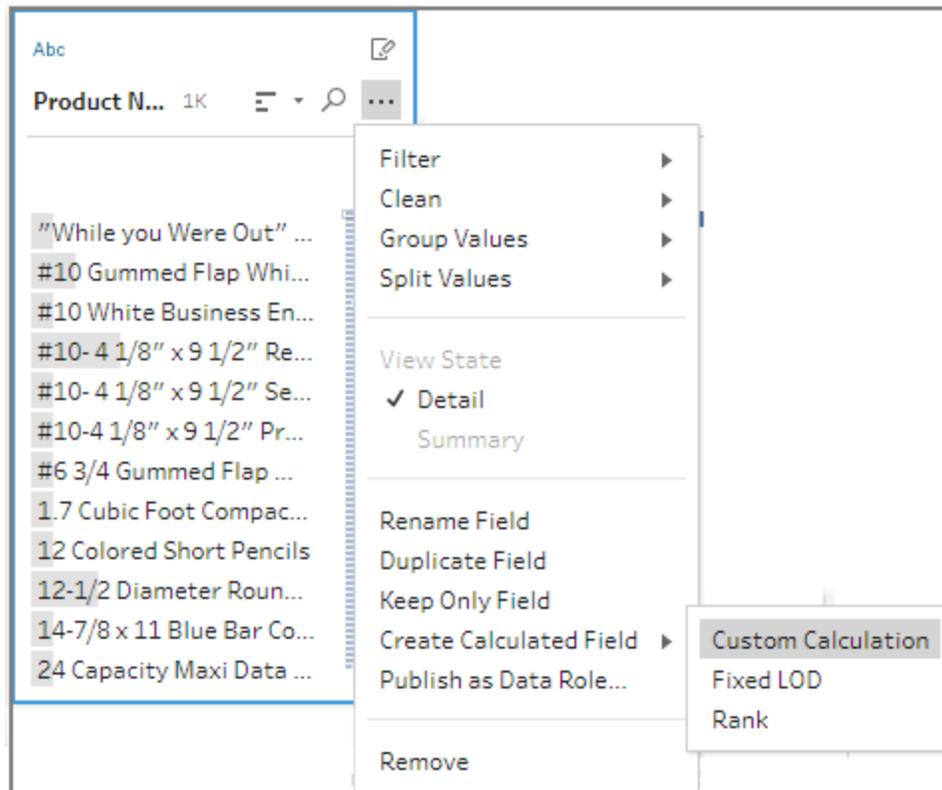
- INCLUDE and EXCLUDE LOD expressions aren't supported.
- Aggregation calculations are only supported inside an LOD expression. For example, `SUM([Sales])` would not be valid, but `{FIXED [Region] : SUM([Sales])}` is valid.
- Nesting expressions inside an LOD expression isn't supported. For example, `{ FIXED [Region] : AVG( [Sales] ) / SUM( [Profit] )}` isn't supported.
- Combining an LOD expression with another expression isn't supported. For example `[Sales]/{ FIXED [Country / Region]:SUM([Sales])}` isn't supported.

## Create Level of Detail (LOD) calculations

To create a level of detail calculation, you can use the Calculation editor to write the calculation yourself or if you want a more guided experience, you can use the Visual Calculation editor where you select your fields and Tableau Prep writes the calculation for you.

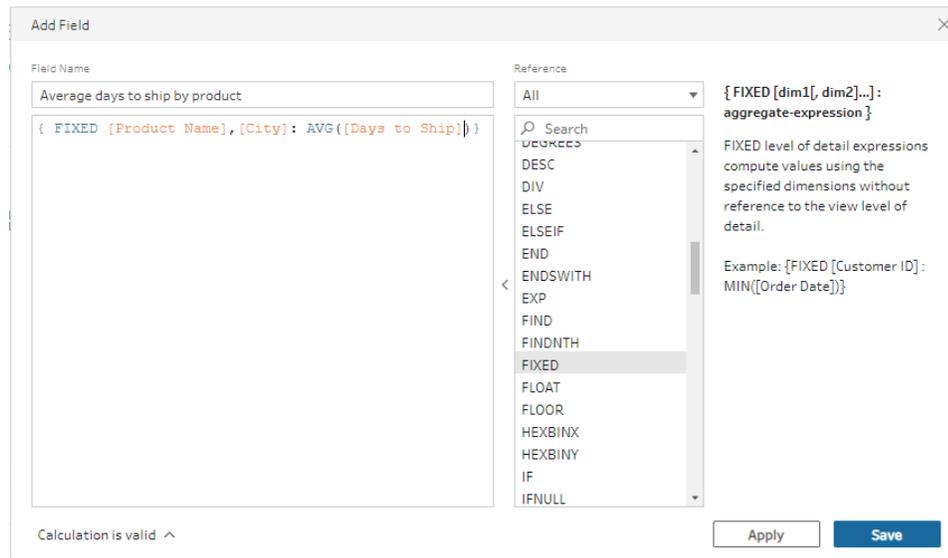
## Calculation editor

1. In the Profile pane toolbar click **Create Calculated Field**, or in a profile card or data grid, click the **More options** ... menu and select **Create Calculated Field > Custom Calculation**.



2. In the Calculation editor, enter a name for your calculation and enter the expression.  
For example, to find the average days to ship products by city, create a calculation

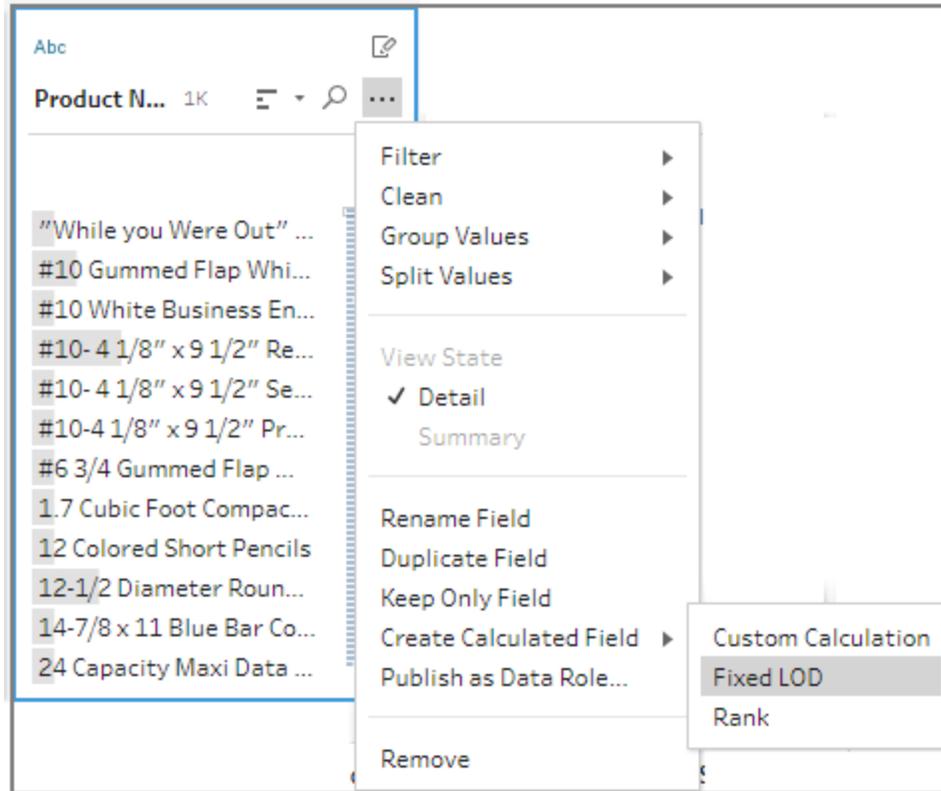
like the one shown below.



## Visual Calculation editor

Select fields from a list and Tableau Prep builds the calculation for you as you make your selections. A preview of the results is shown in the left pane so you can see the results of your selections as you go.

1. In a profile card or results pane, click the **More options** ... menu and select **Create Calculated Field >Fixed LOD**.



2. In the Visual Calculation editor, do the following:
  - In the **Group by** section, select the fields that you want to calculate the values for. The field where you selected the **Create Calculated Field >Fixed LOD** menu option is added by default. Click the plus  $\oplus$  icon to add any additional fields to your calculation. This populates the left side of the equation, `{FIXED [Field1],[Field2] :.`
  - In the **Compute using** section, select the field that you want to use to calculate your new values. Then select your aggregation. This populates the right side of the equation, `Aggregation([Field])`.

A graphic below the field shows the distribution of values and a total count for each value combination. Depending on the type of data, this can be a box plot, range of values, or the actual values.

Customer ID	Region	Sales
AA-10315	Central	3,930.072
AA-10375	Central	149.97
AA-10480	Central	479.97
AA-10645	Central	1,323.9
AB-10015	Central	341.96
AB-10060	Central	167.94
AB-10105	Central	9,892.74
AB-10150	Central	99.136

**Note:** Available aggregation values vary by the data type assigned to the field.

- To remove a field, right-click or Cntrl-click (MacOS) in the drop-down box for the fields in the **Group by** section and select **Remove Field**.
  - In the left pane, double-click in the field header and enter a name for your calculation.
3. Click **Done** to add your new calculated field. In the **Changes** pane, you can see the calculation that Tableau Prep generated. Click **Edit** to open the visual calculation editor to make any changes.

```
Fixed LOD
[Fixed LOD1]
{{ FIXED [Product Name], [City] : AVG([Days to Ship]) }}
```

## Calculate rank or row number

Analytic functions, sometimes referred to as window calculations, enable you to perform calculations across the entire table, or a selection of rows (partition) in your data set. For example, when applying a rank to a selection of rows, you would use the following calculation syntax:

```
{PARTITION [field]: {ORDERBY [field]: RANK() }
```

- **PARTITION** (optional): Designate the rows you want to perform the calculation on. You can specify more than one field, but if you want to use the entire table, omit this part of

the function and Tableau Prep treats all the rows as the partition. For example

```
{ORDERBY [Sales] : RANK() }.
```

- **ORDERBY** (required): Specify one or more fields that you want to use to generate the sequence for the rank.
- **Rank ()** (required): Specify the rank type or ROW\_NUMBER () you want to calculate. Tableau Prep supports RANK(), RANK\_DENSE(), RANK\_MODIFIED(), RANK\_PERCENTILE(), and ROW\_NUMBER() functions.
- **DESC** or **ASC** (optional): Represents descending (DESC) or ascending (ASC) order. By default, rank is sorted in descending order, so you don't need to specify this in the expression. If you want to change the sort order, add **ASC** to the expression.

You can also include both options in the function. For example if you wanted to rank a selection of rows, but wanted to sort the rows in ascending order, then apply the rank in descending order, you would include these two options in the expression. For example:

```
{PARTITION [Country], [State]: {ORDERBY [Sales] ASC, [CUSTOMER] DESC: RANK() }}
```

When using this feature, the following requirements apply:

- Nesting expressions inside a RANK () function isn't supported. For example, [Sales] / {PARTITION [Country]: {ORDERBY [Sales]: RANK() }} / SUM([Profit] )} isn't supported.
- Combining a RANK () function with another expression isn't supported. For example [Sales] / {PARTITION [Country]: {ORDERBY [Sales]: RANK() }} isn't supported.

### Supported analytic functions

Function	Description	Example																								
RANK ()	Assigns a whole number rank starting with 1, in ascending or descending order to each row. If rows have the same value, they share the rank that is	<table border="1"> <thead> <tr> <th>Sales Person</th> <th>Region</th> <th>Commission</th> <th>Rank</th> </tr> </thead> <tbody> <tr> <td>Jorge Ramire</td> <td>Central</td> <td>7000</td> <td>1</td> </tr> <tr> <td>Lisa Martin</td> <td>Central</td> <td>15000</td> <td>2</td> </tr> <tr> <td>Sarah Scott</td> <td>Central</td> <td>15000</td> <td>2</td> </tr> <tr> <td>Barbara Davis</td> <td>East</td> <td>13000</td> <td>4</td> </tr> <tr> <td>Charles Lee</td> <td>East</td> <td>9000</td> <td>5</td> </tr> </tbody> </table>	Sales Person	Region	Commission	Rank	Jorge Ramire	Central	7000	1	Lisa Martin	Central	15000	2	Sarah Scott	Central	15000	2	Barbara Davis	East	13000	4	Charles Lee	East	9000	5
Sales Person	Region	Commission	Rank																							
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Sarah Scott	Central	15000	2																							
Barbara Davis	East	13000	4																							
Charles Lee	East	9000	5																							

	<p>assigned to the first instance of the value. The number of rows with the same rank is added when calculating the rank for the next row, so you may not get consecutive rank values.</p>																									
RANK_DENSE()	<p>Assigns a whole number rank starting with 1 in ascending or descending order to each row. If rows have the same value, they share the rank that is assigned to the first instance of the value, but no rank values are skipped so you will see consecutive rank values.</p>	<table border="1"> <thead> <tr> <th>Sales Person</th> <th>Region</th> <th>Commission</th> <th>Rank</th> </tr> </thead> <tbody> <tr> <td>Jorge Ramirez</td> <td>Central</td> <td>7000</td> <td>1</td> </tr> <tr> <td>Lisa Martin</td> <td>Central</td> <td>15000</td> <td>2</td> </tr> <tr> <td>Sarah Scott</td> <td>Central</td> <td>15000</td> <td>2</td> </tr> <tr> <td>Barbara Davis</td> <td>East</td> <td>13000</td> <td>3</td> </tr> <tr> <td>Charles Lee</td> <td>East</td> <td>9000</td> <td>4</td> </tr> </tbody> </table>	Sales Person	Region	Commission	Rank	Jorge Ramirez	Central	7000	1	Lisa Martin	Central	15000	2	Sarah Scott	Central	15000	2	Barbara Davis	East	13000	3	Charles Lee	East	9000	4
Sales Person	Region	Commission	Rank																							
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Sarah Scott	Central	15000	2																							
Barbara Davis	East	13000	3																							
Charles Lee	East	9000	4																							
RANK_MODIFIED()	<p>Assigns a whole number rank starting with 1, in ascending or descending order to each row. If rows have the same value, they share the rank that is assigned to the last instance of the value. No rank values are skipped. Rank_Modified is calculated as</p>	<table border="1"> <thead> <tr> <th>Sales Person</th> <th>Region</th> <th>Commission</th> <th>Rank</th> </tr> </thead> <tbody> <tr> <td>Jorge Ramirez</td> <td>Central</td> <td>7000</td> <td>1</td> </tr> <tr> <td>Lisa Martin</td> <td>Central</td> <td>15000</td> <td>3</td> </tr> <tr> <td>Sarah Scott</td> <td>Central</td> <td>15000</td> <td>3</td> </tr> <tr> <td>Barbara Davis</td> <td>East</td> <td>13000</td> <td>4</td> </tr> <tr> <td>Charles Lee</td> <td>East</td> <td>9000</td> <td>5</td> </tr> </tbody> </table>	Sales Person	Region	Commission	Rank	Jorge Ramirez	Central	7000	1	Lisa Martin	Central	15000	3	Sarah Scott	Central	15000	3	Barbara Davis	East	13000	4	Charles Lee	East	9000	5
Sales Person	Region	Commission	Rank																							
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Sarah Scott	Central	15000	3																							
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Charles Lee	East	9000	5																							

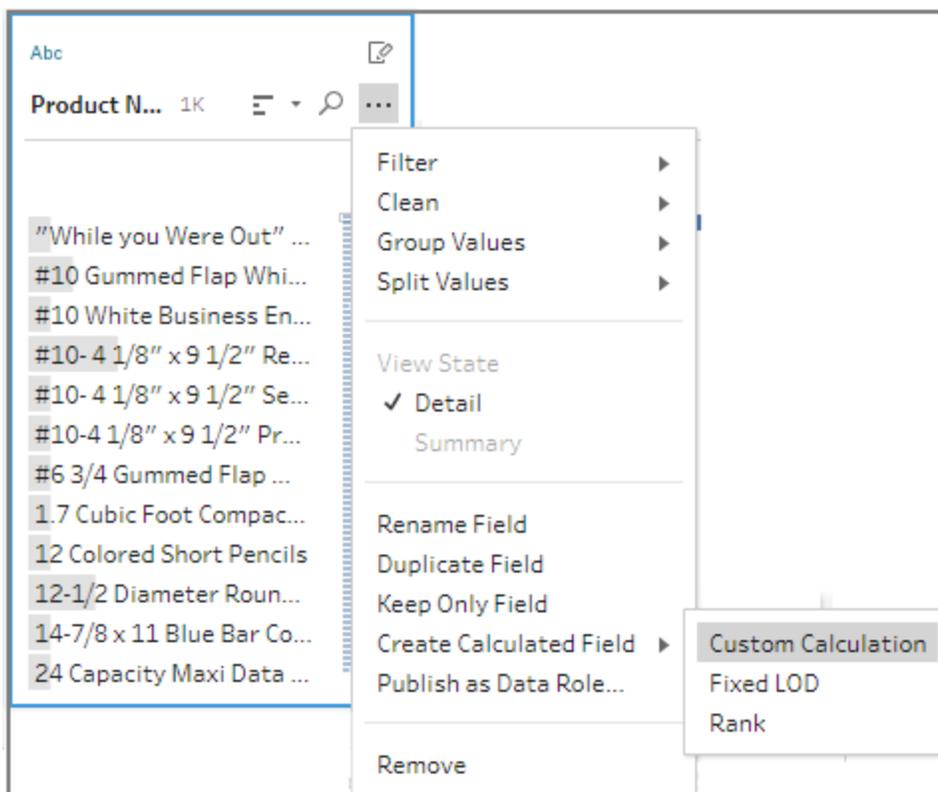


**Note:** ROW\_NUMBER () calculations aren't available in the visual calculation editor.

## Calculation editor

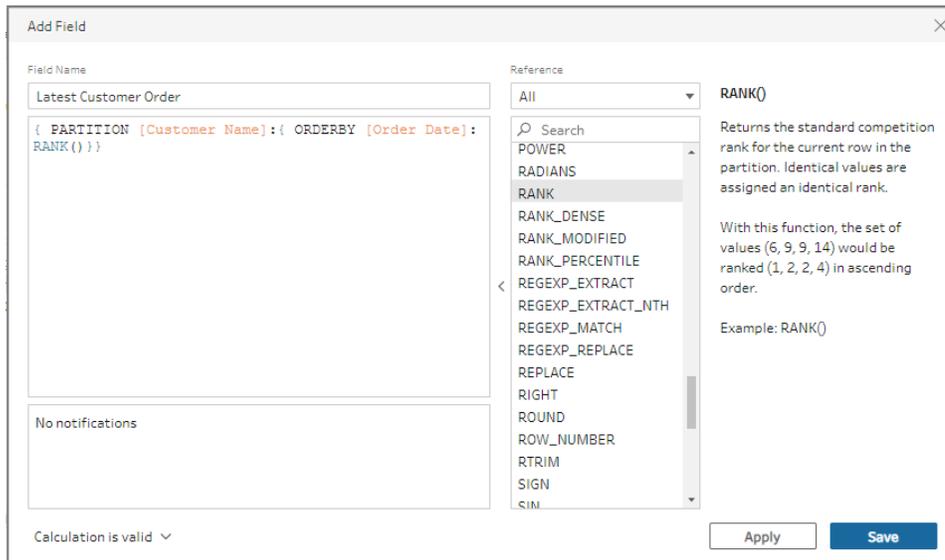
Use the Calculation editor to create any of the supported RANK () or ROW\_NUMBER() calculations. The list of supported analytic calculations is shown in the Calculation editor in the **Reference** drop-down under **Analytic**.

1. In the Profile pane toolbar click **Create Calculated Field**, or in a profile card or data grid, click the **More options** ⋮ menu and select **Create Calculated Field > Custom Calculation**.



2. In the Calculation editor, enter a name for your calculation and enter the expression.  
For example to find the latest customer order, create a calculation like the one shown

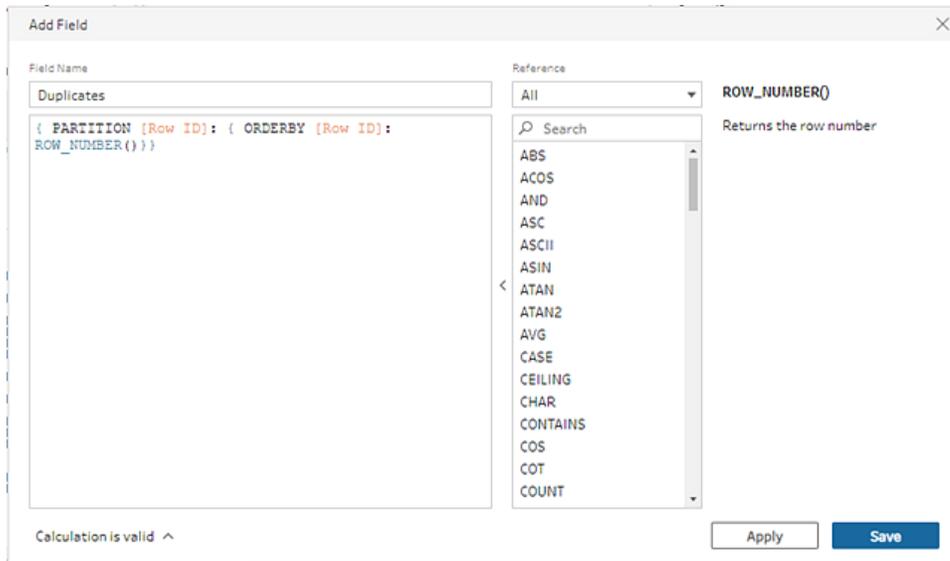
below, then keep only the customer order rows that are ranked with the number **1**.



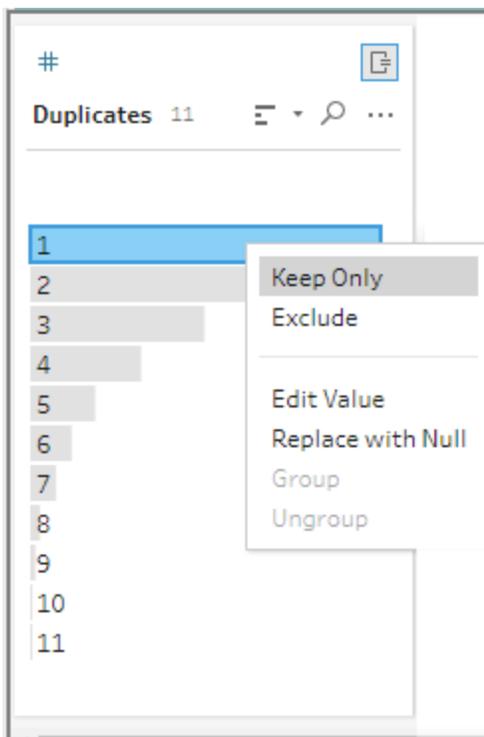
**Example:** Use ROW\_NUMBER to find and remove duplicate values

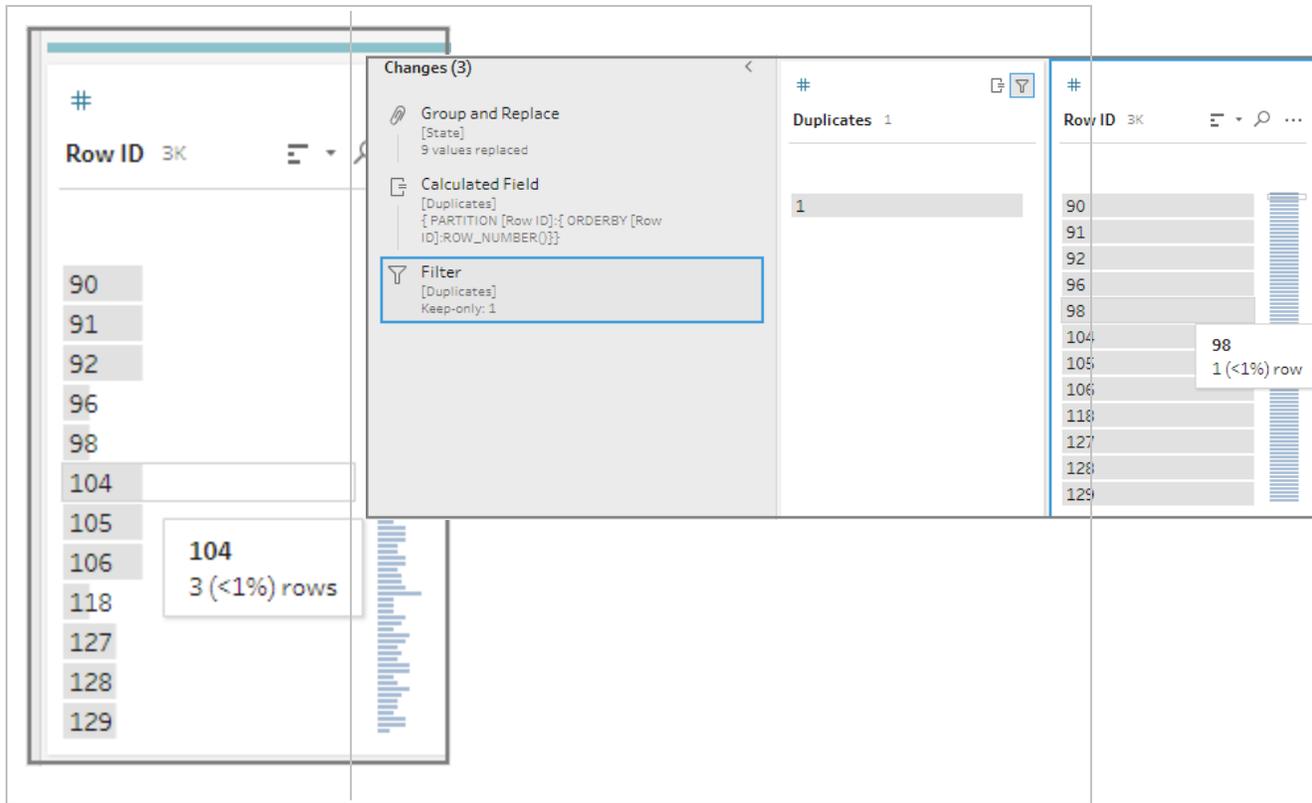
This example uses the Superstore sample data set in Tableau Prep Builder to find and remove exact duplicate values for the field **Row ID** using the ROW\_NUMBER function.

1. Open the **Sample Superstore** flow.
2. In the Flow pane, for the Input step **Orders West**, click on the Clean step **Rename States**.
3. In the toolbar, click **Create Calculated Field**.
4. In the Calculation editor, use the ROW\_NUMBER function to add a row number to the field **Row ID** using the expression `{ PARTITION [Row ID] : { ORDERBY [Row ID] : ROW_NUMBER ( ) } }` and click **Save**.



- In the new calculated field, right-click or Cmd-click (MacOS) on the field value **1**, then select **Keep Only** from the menu.

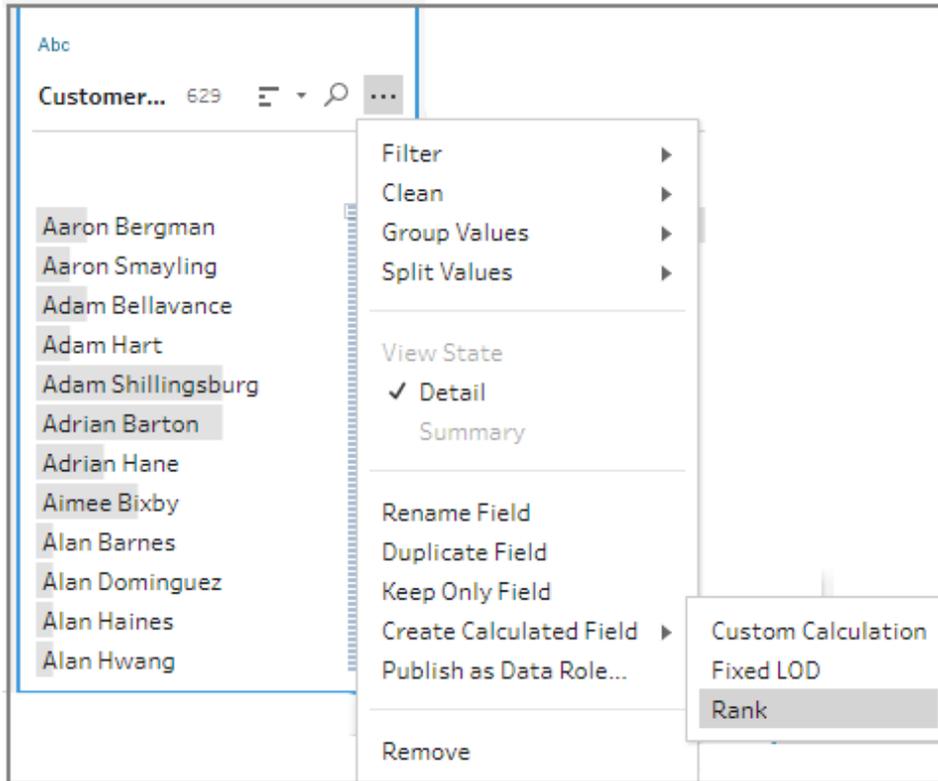




### Visual Calculation editor

Just like when creating a level of detail calculation, you can use the visual calculation editor to build a rank calculation. Select the fields you want to include in the calculation, then select the fields you want to use to rank the rows and the type of rank you want to calculate. A preview of the results is shown in the left pane so you can see the results of your selections as you go.

1. In a profile card or results pane, click the **More options** ... menu and select **Create Calculated Field > Rank**.



2. In the Visual calculation editor, do the following:

- In the **Group by** section, select the fields whose rows you want to compute values for. This creates the Partition part of the calculation.

Click the plus (+) icon to add any additional fields to your calculation. If you want to include all rows or remove a selected field, right-click or Cmd-click (MacOS) in the drop-down box for the fields in the **Group by** section and select **Remove Field**.

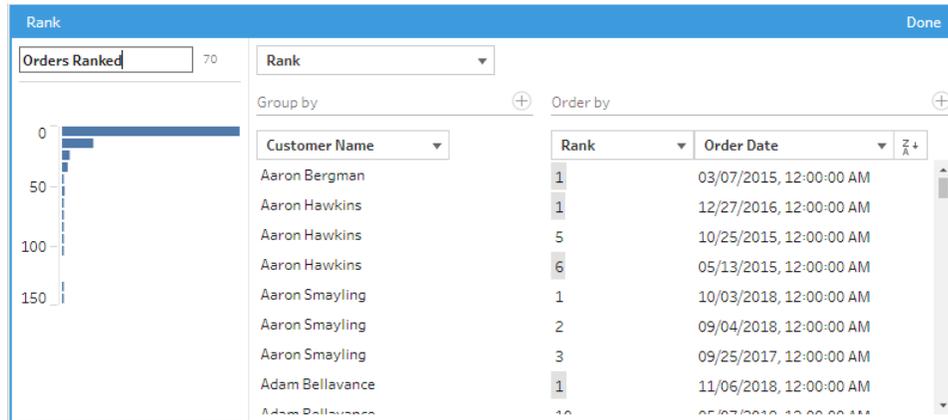
- In the **Order by** section, select the fields that you want to use to rank your new values. The field where you selected the **Create Calculated Field > Rank** menu option is added by default.

Click the plus (+) icon to add any additional fields to your calculation, then select

your **Rank** type. Click the sort icon  to change the rank order from descending (DESC) to ascending (ASC).

**Note:** Rank values vary by the data type assigned to the field.

- In the left pane, double-click in the field header and enter a name for your calculation.



3. Click **Done** to add your new calculated field. In the **Changes** pane, you can see the calculation that Tableau Prep Builder generated. Click **Edit** to open the visual calculation editor to make any changes.

```

Rank
[Rank1]
{{PARTITION [Customer Name]: {ORDERBY
[Order Date] DESC: RANK()}}}
    
```

## Pivot Your Data

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web](#) on page 166.

Sometimes analyzing data from a spreadsheet or crosstab format can be difficult in Tableau. Tableau prefers data to be "tall" instead of "wide", which means that you often have to pivot your data from columns to rows so that Tableau can evaluate it properly.

However you may also have scenarios where your data tables are tall and narrow and are too normalized to properly analyze. For example a sales department that tracks advertising spend in two columns, one called **Advertising** that contains rows for **radio**, **television** and **print** and one column for total spent. In this type of scenario, to analyze this data as separate measures you would need to pivot that row data to columns.

But what about pivoting larger data sets or data that changes frequently over time? You can use a wildcard pattern match to search for fields that match the pattern and automatically pivot the data.

Use one of the following options when pivoting your data:

- Pivot columns to rows
- Use wildcard search to instantly pivot fields based on a pattern match (Tableau Prep Builder version 2019.1.1 and later and on the web).
- Pivot rows to columns (Tableau Prep Builder version 2019.1.1 and later and on the web).

No matter how you pivot your fields, you can interact directly with the results and perform any additional cleaning operations to get your data looking just the way you want it. You can also use Tableau Prep's smart default naming feature to automatically rename your pivoted fields and values.

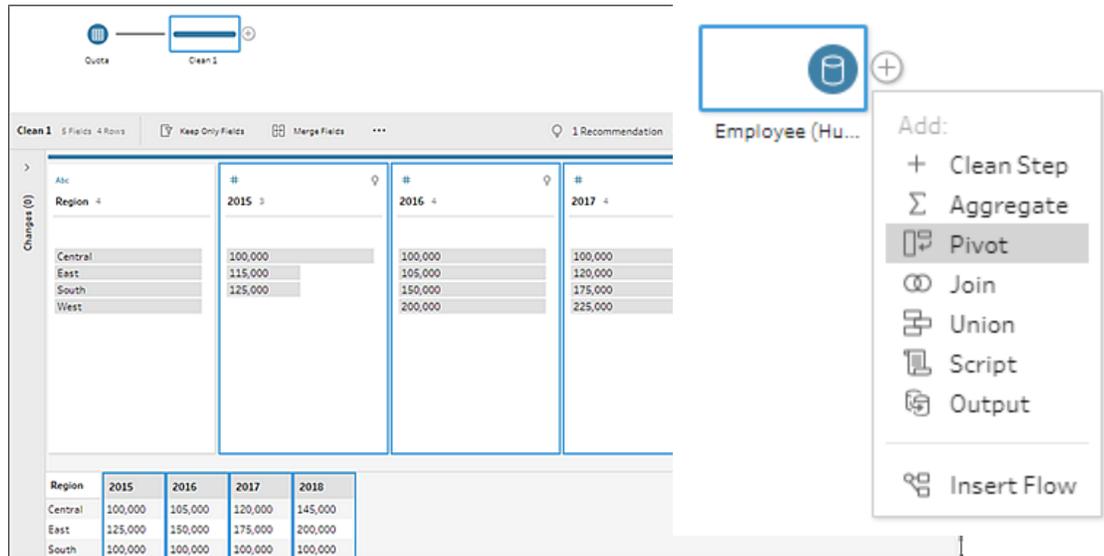
## Pivot columns to rows

Use this pivot option to go from wide data to tall data. Pivot from columns to rows on one or more groups of fields. Select the fields that you want to work with and pivot the data from columns to rows.

1. Connect to your data source.
2. Drag the table that you want to pivot to the **Flow** pane.
3. Do one of the following:
  - **Tableau Prep Builder Version 2019.4.2 and later and on the web:** In the Profile pane, select the fields that you want to pivot, then right-click or Ctrl-click (MacOS) and select **Pivot Columns to Rows** from the menu. If using this option, skip to step 7.

- **All versions:** Click the plus (+) icon, and select **Add Pivot** from the context menu.

**Select Fields (Tableau Prep Builder version 2019.4.2 and later and on the web)      Flow Step Menu (all versions)**



4. (Optional) In the **Fields** pane, enter a value in the **Search** field to search the field list for fields to pivot.
5. (Optional) Select the **Automatically rename pivoted fields and values** check box to enable Tableau Prep to rename the new pivoted fields using common values in the data. If no common values are found, the default name is used.
6. Select one or more fields from the left pane, and drag them to the **Pivot1 Values** column in the **Pivoted Fields** pane.
7. (Optional) In the **Pivoted Fields** pane, click the plus (+) icon to add more columns to pivot on, then repeat the previous step to select more fields to pivot. Your results appear immediately in both the **Pivot Results** pane and the data grid.

**Note:** You must select the same number of fields that you selected in Step 5. For example if you selected 3 fields to initially pivot on, then each subsequent column that you pivot on must also contain 3 fields.

8. If you didn't enable the default naming option or if Tableau Prep couldn't automatically

detect a name, edit the names of the fields. You can also edit the names of the original fields in this pane to best describe the data.

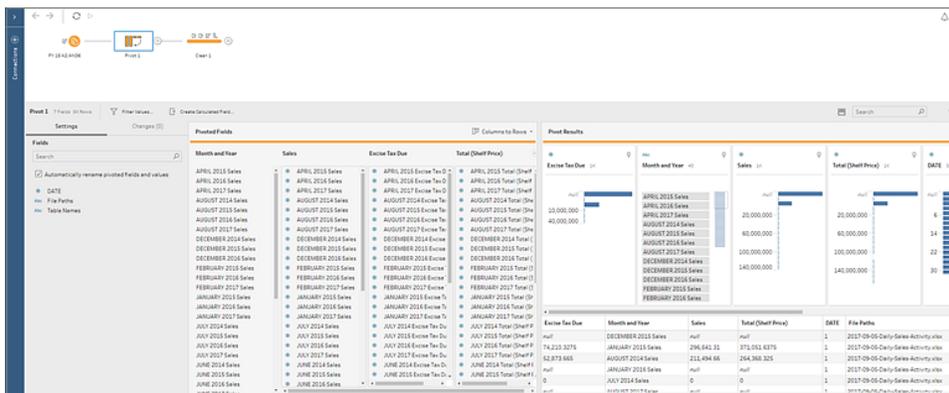
9. (Optional) Rename the new Pivot step to keep track of your changes. For example "Pivot months".
10. To refresh your pivot data when data changes, run your flow. If new fields are added to your data source that need to be added to the pivot, manually add them to the pivot.

**Example:** Pivoting on multiple fields

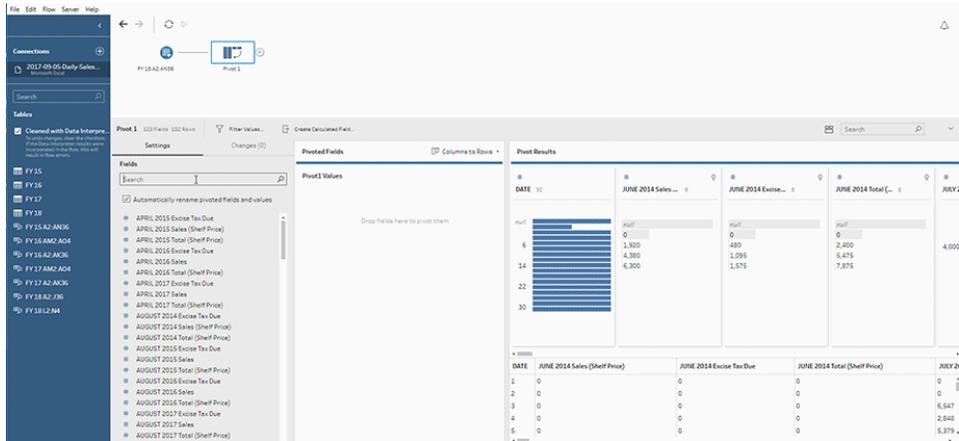
This example shows a spreadsheet for pharmaceutical sales, taxes and totals by month and year.

	A	T	U	V	W	X	Y	Z	AA	AB
2	DATE	DECEMBER 2014			JANUARY 2015			FEBRUARY 2015		
3	Sales (Shell Price)	Excise Tax Due	Total (Shell Price)	Sales (Shell Price)	Excise Tax Due	Total (Shell Price)	Sales (Shell Price)	Excise Tax Due	Total (Shell Price)	
4	1	\$ 448,111	\$ 112,028	\$ 560,139	\$ 296,841	\$ 74,210	\$ 371,052	\$ 212,919	\$ 53,230	\$ 266,148
5	2	\$ 425,472	\$ 106,368	\$ 531,840	\$ 754,061	\$ 188,555	\$ 942,577	\$ 449,897	\$ 112,474	\$ 562,371
6	3	\$ 435,525	\$ 108,881	\$ 544,406	\$ 482,497	\$ 120,624	\$ 603,121	\$ 627,711	\$ 156,928	\$ 784,639
7	4	\$ 634,765	\$ 158,691	\$ 793,456	\$ 332,228	\$ 83,657	\$ 415,284	\$ 688,263	\$ 172,066	\$ 860,329
8	5	\$ 695,425	\$ 173,856	\$ 869,282	\$ 601,529	\$ 150,382	\$ 751,912	\$ 789,233	\$ 197,308	\$ 986,541
9	6	\$ 436,720	\$ 109,180	\$ 545,899	\$ 527,374	\$ 131,843	\$ 659,217	\$ 867,501	\$ 216,875	\$ 1,084,377
10	7	\$ 238,481	\$ 59,620	\$ 298,101	\$ 560,102	\$ 140,026	\$ 700,128	\$ 554,459	\$ 138,615	\$ 693,874
11	8	\$ 421,422	\$ 105,356	\$ 526,778	\$ 539,974	\$ 134,993	\$ 674,967	\$ 448,846	\$ 112,211	\$ 561,057
12	9	\$ 543,816	\$ 135,954	\$ 679,770	\$ 683,408	\$ 170,852	\$ 854,260	\$ 768,266	\$ 192,067	\$ 960,333
13	10	\$ 616,271	\$ 154,068	\$ 770,339	\$ 442,352	\$ 110,588	\$ 552,940	\$ 719,637	\$ 179,909	\$ 899,546
14	11	\$ 756,442	\$ 189,135	\$ 945,577	\$ 288,605	\$ 72,151	\$ 360,756	\$ 1,154,919	\$ 288,730	\$ 1,443,649
15	12	\$ 726,270	\$ 181,567	\$ 907,837	\$ 674,121	\$ 168,530	\$ 842,651	\$ 1,019,936	\$ 254,984	\$ 1,274,921
16	13	\$ 477,208	\$ 119,302	\$ 596,510	\$ 526,451	\$ 131,613	\$ 658,064	\$ 951,242	\$ 237,811	\$ 1,189,853
17	14	\$ 245,898	\$ 61,475	\$ 307,373	\$ 573,842	\$ 143,461	\$ 717,303	\$ 798,392	\$ 199,598	\$ 997,991
18	15	\$ 456,254	\$ 114,064	\$ 570,318	\$ 658,952	\$ 164,738	\$ 823,690	\$ 453,091	\$ 113,273	\$ 566,364

By pivoting the data you can create rows for each month and year and individual columns for sales, taxes and totals so that Tableau can more easily interpret this data for analysis.



## Watch "pivot on multiple field" in action.

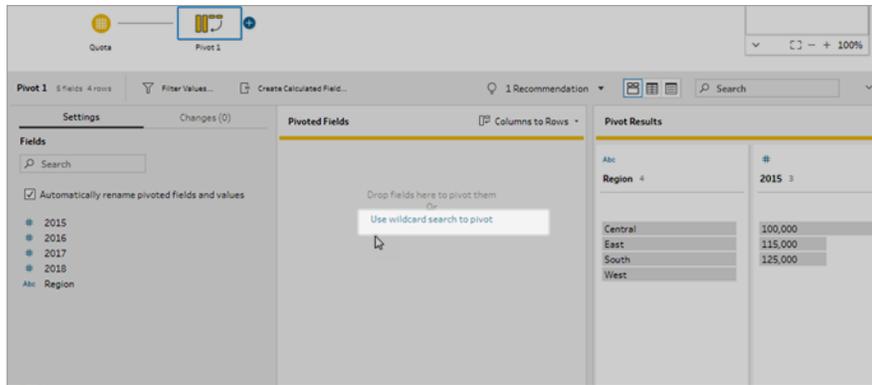


## Use wildcard search to pivot

If you work with large data sets or if your data frequently changes over time, starting in Tableau Prep Builder version 2019.1.1 and on the web, you can use a wildcard search when pivoting columns to rows to instantly pivot your data based on a wildcard pattern match.

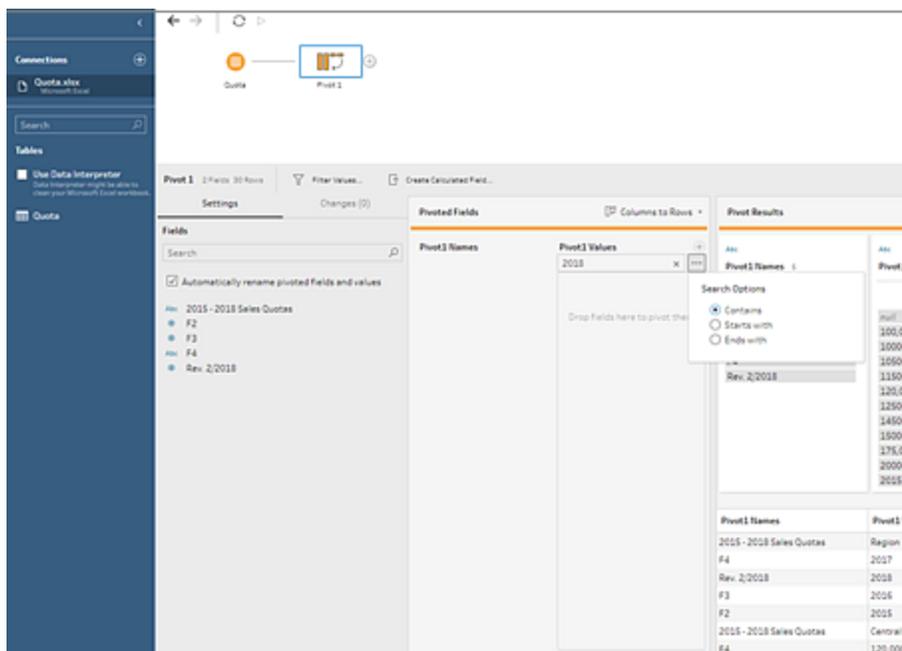
If new fields are added or removed that match the pattern, Tableau Prep detects the schema change when the flow is run and the pivot results are automatically updated.

1. Connect to your data source.
2. Drag the table that you want to pivot to the **Flow** pane.
3. Click the plus **+** icon, and select **Add Pivot** from the context menu.
4. In the **Pivoted Fields** pane, click on the link **Use wildcard search to pivot** .



5. Enter a value or partial value that you want to search for. For example, enter **Sales\_** to match fields that are labeled as **sales\_2017**, **sales\_2018** and **sales\_2019**.

Do not use asterisks to match the pattern unless they are part of the field value that you are searching for. Instead click the **Search Options**  button to select how you want to match the value. Then press **Enter** to apply the search and pivot the matching values.



6. (Optional) In the **Pivoted Fields** pane, click the plus  icon to add more columns to pivot on, then repeat the previous step to select more fields to pivot.
7. If you didn't enable the default naming option or if Tableau Prep couldn't automatically

detect a name, edit the names of the fields.

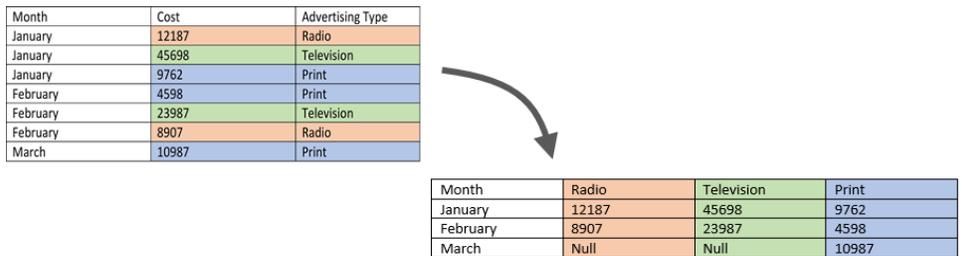
8. To refresh your pivot data when data changes, run your flow. Any new fields added to your data source that match the wildcard pattern are automatically detected and added to the pivot.
9. If the results aren't what you expect, try one of the following options:
  - Enter a different value pattern in the Search field and press enter. The pivot will automatically refresh and show the new results.
  - Manually drag additional fields to the **Pivot1 Values** column in the **Pivoted Fields** pane. You can also remove fields that were added manually by dragging them off the **Pivot1 Values** column and dropping them in the **Fields** pane.

**Note:** Fields that were added from the wildcard search results can't be removed by dragging them off the **Pivot1 Values** column. Instead try using a more specific pattern to match the search results you are looking for.

## Pivot rows to columns

In Tableau Prep Builder version 2019.1.1 and later and on the web, pivot rows to columns if your data is too normalized and you need to create new columns - going from tall data to wider data.

For example if you have advertising costs for each month that includes all advertising types in one column, if you pivot the data from rows to columns you can then have a separate column for each advertising type instead, making the data easier to analyze.



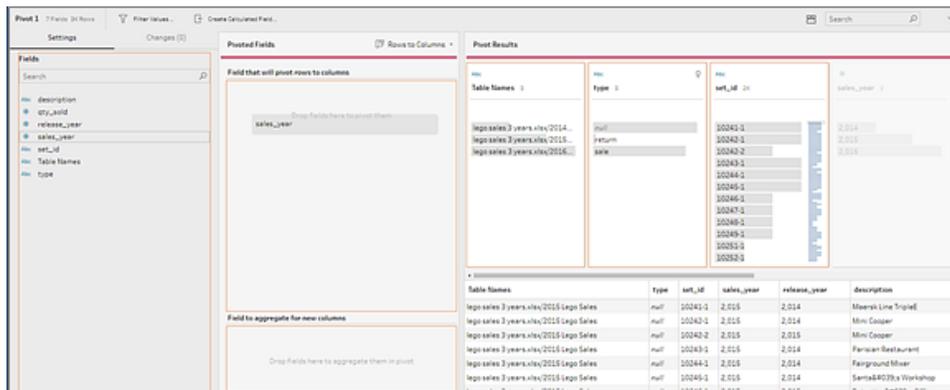
You can select one field to pivot on. The field values for that field are then used to create the new columns. Then, select a field to use to populate the new columns. These field values are aggregated and you can select the type of aggregation to apply.

Because aggregation is applied, pivoting columns back to rows won't reverse this pivot action. To reverse a row to column pivot type, you will need to undo the action. Either click the **Undo** button on the top menu, remove the fields from the **Pivoted Fields** pane or delete the pivot step.

1. Connect to your data source.
2. Drag the table that you want to pivot to the **Flow** pane.
3. Click the plus  $\oplus$  icon, and select **Add Pivot** from the context menu.
4. In the **Pivoted Fields** pane, select **Rows to Columns** from the drop-down list.
5. (Optional) In the **Fields** pane, enter a value in the **Search** field to search the field list for fields to pivot
6. Select a field from the left pane, and drag it to the **Field that will pivot rows to columns** section in the **Pivoted Fields** pane.

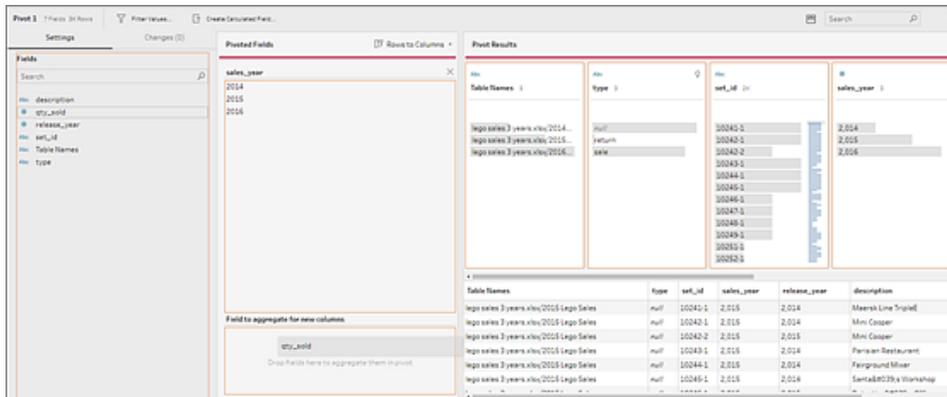
**Note:** If the field you want to pivot on has a data type of date or datetime, you will need to change the data type to string to pivot it.

The values in this field will be used to create and name the new columns. You can change the column names in the **Pivot Results** pane later.

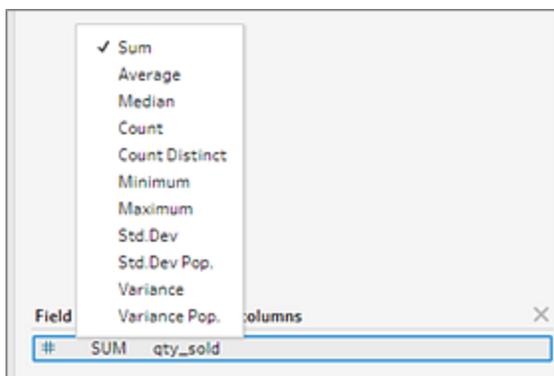


7. Select a field from the left pane and drag it to the **Field to aggregate for new columns** section in the **Pivoted Fields** pane. The values in this field are used to populate the new columns created from the previous step.

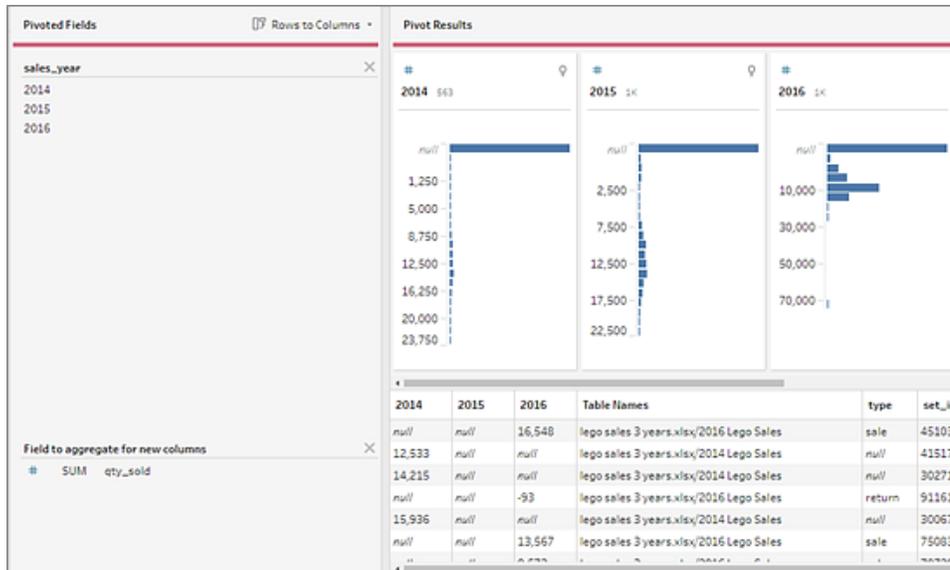
## Tableau Prep Help



A default aggregation type is assigned to the field. Click the aggregation type to change it.



8. In the **Pivot Results** pane, review the results and apply any cleaning operations to the new columns that you created.

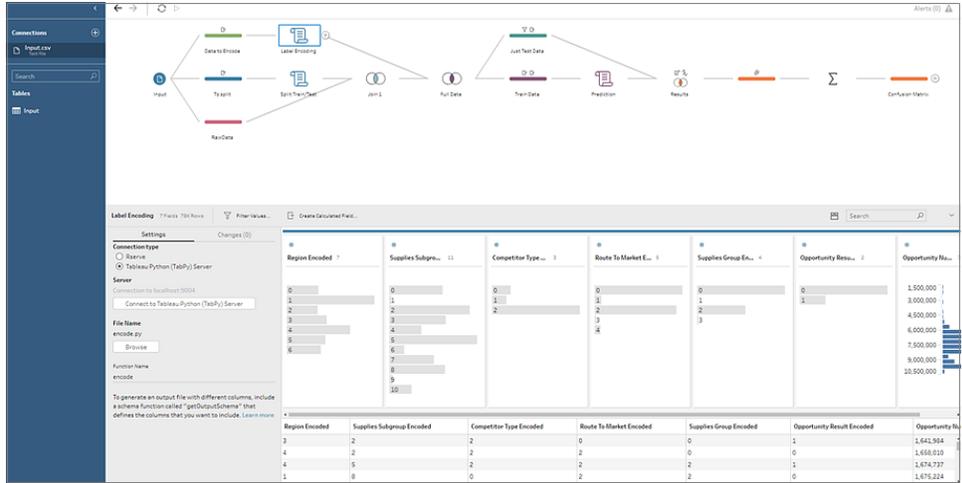


- If the field being pivoted has a change in its row data, right-click or Ctrl-click (MacOS) on the Pivot step in the flow pane and select **Refresh**.

## Use R and Python scripts in your flow

Starting in version 2019.3.1 you can use R and Python scripts to perform more complex cleaning operations or incorporate predictive modeling data into your flow. Data is passed from the flow as input through the R or Python script step, then returned as output data that you can continue cleaning using the features and functions of Tableau Prep Builder.

**Note:** Connecting to scripts as an input step for your flow is not yet supported. Also, script steps are not yet supported for flows authored or published to Tableau Online.



Configure your Rserve server or Tableau Python (TabPy) server and add a script step to your flow. Tableau Prep passes the data to Rserve for R or Tableau Python server (TabPy) for Python and returns the resulting data back to the flow in the form of a table. You can continue to apply cleaning operations to the results and generate your output for analysis.

When you create your script, you will need to include a function that specifies a data frame as an argument of the function. If you want to return different fields than what you input, you'll need to include a `getOutputSchema` function in your script that defines the output and data types. Otherwise, the output will use the fields from the input data.

If you author or edit flows in Tableau Server (version 2020.4.1 and later) that include script steps, Tableau Server must also have a connection to an Rserve or TabPy server to run script steps. For information about how to configure R or Python to use in your flows and how to create your scripts, see [Use R \(Rserve\) scripts in your flow](#) below or [Use Python scripts in your flow](#) on page 351.

## Use R (Rserve) scripts in your flow

**Disclaimer:** This topic includes information about a third-party product. Please note that while we make every effort to keep references to third-party content accurate, the information we provide here might change without notice as R and Rserve changes. For the most up-to-date information, please consult the R and Rserve documentation and support.

R is an open source software programming language and a software environment for statistical computing and graphics. To extend the functionality of Tableau Prep Builder, you can create

scripts in R to use in your flow that run through an Rserve server to produce output that you can further work with in your flow.

For example, you might want to add statistical modeling data or forecasting data to the data that you already have in your flow using a script in R, then use the power of Tableau Prep Builder to clean the resulting data set for analysis.

To include R scripts in your flow, you need to configure a connection between Tableau Prep Builder and an Rserve server. Then you can use R scripts to apply supported functions to data from your flow using R expressions. After you enter the configuration details and point Tableau Prep Builder to the file and function that you want to use, data is securely passed to the Rserve server, the expressions are applied, and the results are returned as a table (R data.frame) that you can clean or output as needed.

You can run flows that include script steps in Tableau Server as long as you have configured a connection to your Rserve server. Running flows with script steps in Tableau Online, isn't currently supported. To configure Tableau Server, see [Configure Rserve Server for Tableau Server](#) below.

## Prerequisites

To include R script steps in your flow, install R and configure a connection to an Rserve server.

## Resources

- [Download and Install R](#). Download and install the most current version of R for Linux, Mac, or Windows.
- [R Implementation notes](#) (community post). Install and configure a connection to R and Rserve for Windows.
- [Install and configure Rserve](#): Instructions for general installation and configuration for all platforms.
  - [Rserve for Windows \(release notes\)](#): This topic covers limitations when installing Rserve locally on Windows.

## Configure Rserve Server for Tableau Server

Use the following instructions to configure a connection between your Rserve server and Tableau Server.

- **Version 2019.3 and later**: You can run published flows that include script steps in Tableau Server.

- **Version 2020.4.1 and later:** You can create, edit, and run flows that include script steps in Tableau Server.
- **Tableau Online:** Creating or running flows with script steps isn't currently supported.

1. Open the TSM command line.
2. Enter the following commands to set the host address, port values, and connect timeout:

```
tsm security maestro-rserve-ssl enable --connection-type  
{maestro-rserve-secure/maestro-rserve} --rserve-host <Rserve  
IP address or host name> --rserve-port <Rserve port> --  
rserve-username <Rserve username> --rserve-password <Rserve  
password> --rserve-connect-timeout-ms <Rserve connect  
timeout>
```

- Select `{maestro-rserve-secure}` to enable a secure connection or `{maestro-rserve}` to enable an unsecured connection.
- If you select `{maestro-rserve-secure}`, specify the certificate file `-cf<certificate file path>` in the command line.
- Specify the `--rserve-connect-timeout-ms <Rserve connect timeout>` in milliseconds. For example `--rserve-connect-timeout-ms 900000`.

3. To disable the Rserve connection enter the following command

```
tsm security maestro-rserve-ssl disable
```

### Additional Rserve configuration (optional)

You can create a file named `Rserv.cfg` to set default configuration values to customize Rserve and place it in the `/etc/Rserve.conf` installation location. To improve stability with the Rserve server and Tableau Prep Builder, you can add additional values to your Rserve configuration. When you launch Rserve you can refer to this file to apply your configuration options. For example:

- **Windows:** `Rserve (args="--RS-conf C:\\folder\\Rserv.cfg")`
- **MacOS and Linux:** `Rserve (args=" --no-save --RS-conf ~/Documents/Rserv.cfg")`

The following example shows some additional options you can include in your `Rserve.conf` configuration file:

```
# If your data includes characters other than ASCII, make it
explicit that data should be UTF8 encoded.
encoding utf8
# Disable interactive behavior for Rserve or Tableau Prep Builder
will stall when trying to run the script as it waits for an input
response.
interactive no
```

For information about setting up an Rserve.conf file, see the [Advanced Rserve configuration](#) section in the [R Implementation notes](#) (community post).

## Create your R script

When you create your script, include a function that specifies a data frame as an argument of the function. This will call your data from Tableau Prep Builder. You will also need to return the results in a data frame using supported data types.

For example:

```
postal_cluster <- function(df) {
  out <- kmeans(cbind(df$Latitude, df$Longitude), 3, iter.max=10)
  return(data.frame(Latitude=df$Latitude, Longitude=df$Longitude,
Cluster=out$cluster))
}
```

The following data types are supported:

Data type in Tableau Prep Builder	Data type in R
String	Standard UTF-8 string
Decimal	Double
Int	Integer
Bool	Logical
Date	String in ISO_DATE format “YYYY-MM-DD” with optional zone offset. For example, “2011-12-03+01:00” is a valid date.

DateTime	String in ISO_DATE_TIME format “YYYY-MM-DDT:HH:mm:ss” with optional zone offset. For example, “2011-12-03T10:15:30+01:00” is a valid date.
----------	--

**Note:** Date and DateTime must always be returned as a valid string. Native Date (DateTime) types in R aren't supported as returned values but can be used in the script.

If you want to return different fields than what you input, you'll need to include a `getOutputSchema` function in your script that defines the output and data types. Otherwise, the output will use the fields from the input data, which are taken from the step that is prior to the script step in the flow.

Use the following syntax when specifying the data types for your fields in the `getOutputSchema`:

Function in R	Resulting data type
<code>prep_string ()</code>	String
<code>prep_decimal ()</code>	Decimal
<code>prep_int ()</code>	Integer
<code>prep_bool ()</code>	Boolean
<code>prep_date ()</code>	Date
<code>prep_datetime ()</code>	DateTime

The following example shows the `getOutputSchema` function for the `postal_cluster` script:

```
getOutputSchema <- function() {
  return (data.frame (
    Latitude = prep_decimal (),
    Longitude = prep_decimal (),
    Cluster = prep_int ());
}
```

## Connect to your Rserve server

**Important:** Starting in Tableau Prep Builder version 2020.3.3, you can configure your server connection once from the top **Help** menu instead of setting up your connection per flow in the Script step by clicking **Connect to Rserve Server** and entering your connection details. You will need to reconfigure your connection using this new menu for any flows that were created in an older version of Tableau Prep Builder that you open in version 2020.3.3.

1. Select **Help > Settings and Performance > Manage Analytics Extension Connection**.
2. In the **Select an Analytics Extension** drop-down list, select **Rserve**.

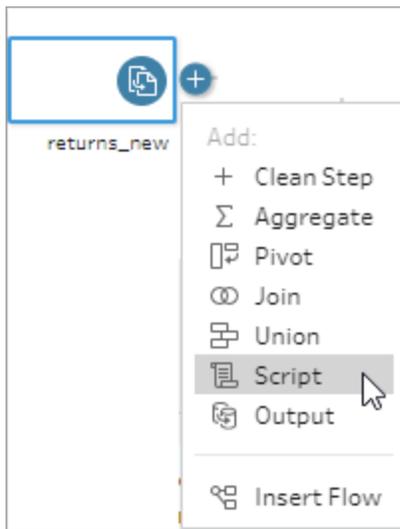
3. Enter your credentials:
  - Port 6311 is the default port for plaintext Rserve servers.
  - Port 4912 is the default port for SSL-encrypted Rserve servers.
  - If the server requires credentials, enter a Username and Password.
  - If the server uses SSL encryption, select the **Require SSL** check box, then click the **Custom configuration file** link to specify a certificate for the connection.

**Note:** Tableau Prep Builder doesn't provide a way to test the connection. If there is a problem with the connection an error message shows when you try and run the flow.

## Add a script to your flow

Start your Rserve server then complete the following steps:

1. Open Tableau Prep Builder click the **Add connection**  button.  
  
In web authoring, from the **Home** page, click **Create > Flow** or from the **Explore** page, click **New > Flow**. Then click **Connect to Data**.
2. From the list of connectors, select the file type or server that hosts your data. If prompted, enter the information needed to sign in and access your data.
3. Click the plus  icon, and select **Add Script** from the context menu.



4. In the Script pane, under **Connection type** , select **Rserve**.

**Script 1** 23 fields 16K rows Filter Values...

**Settings** Changes (0)

**Connection type**

Rserve  
 Tableau Python (TabPy) Server

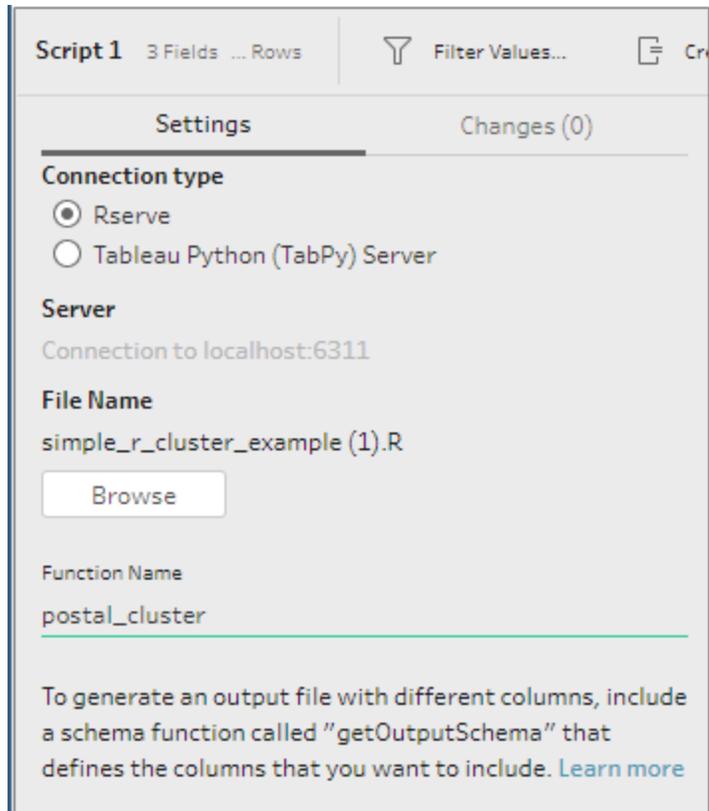
**Server**  
Connection to localhost: 6311

**File Name**  
No file selected.  
Browse

**Function Name**  
No function name provided.

Include the schema function "getOutputSchema" in your script to define the fields and data types that are returned. [Learn more](#)

5. In the **File Name** section, click **Browse** to select your script file.
6. Enter the **Function Name** then press **Enter** to run your script.



## Use Python scripts in your flow

**Disclaimer:** This topic includes information about a third-party product. Please note that while we make every effort to keep references to third-party content accurate, the information we provide here might change without notice as python changes. For the most up-to-date information, please consult the python documentation and support.

Python is a widely used high-level programming language for general-purpose programming. By sending Python commands to an external service through Tableau Prep Builder, you can easily extend your data preparation options by performing actions like adding row numbers, ranking fields, filling down fields and performing other cleaning operations that you might otherwise do using calculated fields.

To include Python scripts in your flow, you need to configure a connection between Tableau and a TabPy server. Then you can use Python scripts to apply supported functions to data from your flow using a pandas dataframe. When you add a script step to your flow and specify the configuration details, file, and function that you want to use, data is securely passed to the

TabPy server, the expressions in the script are applied, and the results are returned as a table that you can clean or output as needed.

You can run flows that include script steps in Tableau Server as long as you have configured a connection to your TabPy server. Running flows with script steps in Tableau Online, isn't currently supported. To configure Tableau Server, see [Configure the Tableau Python \(TabPy\) server for Tableau Server](#) below.

## Prerequisites

To include Python scripts in your flow, complete the following setup. Creating or running flows with script steps in Tableau Online isn't currently supported.

1. Download and install [Python](#). Download and install the most current version of Python for Linux, Mac or Windows.
2. Download and install the Tableau Python server ([TabPy](#)). Follow the installation and configuration instructions for installing TabPy. Tableau Prep Builder uses TabPy to pass data from your flow through TabPy as the input, applies your script, then returns the results back to the flow.
3. Install Pandas. Run `pip3 install pandas`. You must use a pandas data frame in your scripts to integrate with Tableau Prep Builder.

## Configure the Tableau Python (TabPy) server for Tableau Server

Use the following instructions to configure a connection between your TabPy server and Tableau Server.

- **Version 2019.3 and later:** You can run published flows that include script steps in Tableau Server.
- **Version 2020.4.1 and later:** You can create, edit, and run flows that include script steps in Tableau Server.
- **Tableau Online:** Creating or running flows with script steps isn't currently supported.

1. Open the TSM command line/shell .
2. Enter the following commands to set the host address, port values and connect timeout:

```
tsm security maestro-tabpy-ssl enable --connection-type
{maestro-tabpy-secure/maestro-tabpy} --tabpy-host <TabPy IP
address or host name> --tabpy-port <TabPy port> --tabpy-
```

## Tableau Prep Help

```
username <TabPy username> --tabpy-password <TabPy password> -  
-tabpy-connect-timeout-ms <TabPy connect timeout>
```

- **Select** {maestro-tabpy-secure} to enable a secure connection or {maestro-tabpy} to enable an unsecured connection.
- **If you select** {maestro-tabpy-secure}, **specify the certificate file** -cf<certificate file path> **in the command line.**
- **Specify the** --tabpy-connect-timeout-ms <TabPy connect timeout> **in milliseconds. For example** --tabpy-connect-timeout-ms 900000.

3. To disable the TabPy connection enter the following command

```
tsm security maestro-tabpy-ssl disable
```

## Create your python script

When you create your script, include a function that specifies a pandas (pd.DataFrame) as an argument of the function. This will call your data from Tableau Prep Builder. You will also need to return the results in a pandas (pd.DataFrame) using supported data types.

For example to add encoding to a set of fields in a flow, you could write the following script:

```
def encode(input):  
    le = preprocessing.LabelEncoder()  
    Return pd.DataFrame({  
        'Opportunity Number' : input['Opportunity Number'],  
        'Supplies Subgroup Encoded' : le.fit_transform(input['Supplies Subgroup']),  
        'Region Encoded' : le.fit_transform(input['Region']),  
        'Route To Market Encoded' : le.fit_transform(input['Route To Market']),  
        'Opportunity Result Encoded' : le.fit_transform(input['Opportunity Result']),  
        'Competitor Type Encoded' : le.fit_transform(input['Competitor Type']),  
        'Supplies Group Encoded' : le.fit_transform(input['Supplies Group']),  
    })
```

The following data types are supported:

Data type in Tableau Prep Builder	Data type in Python
String	Standard UTF-8 string
Decimal	Double
Int	Integer
Bool	Boolean
Date	String in ISO_DATE format “YYYY-MM-DD” with optional zone offset. For example, “2011-12-03” is a valid date.
DateTime	String in ISO_DATE_TIME format “YYYY-MM-DDT:HH:mm:ss” with optional zone offset. For example, “2011-12-03T10:15:30+01:00” is a valid date.

**Note:** Date and DateTime must always be returned as a valid string.

If you want to return different fields than what you input, you'll need to include a `get_output_schema` function in your script that defines the output and data types. Otherwise, the output will use the fields from the input data, which are taken from the step that is prior to the script step in the flow.

Use the following syntax when specifying the data types for your fields in the `get_output_schema`:

Function in Python	Resulting data type
<code>prep_string ()</code>	String
<code>prep_decimal ()</code>	Decimal
<code>prep_int ()</code>	Integer
<code>prep_bool ()</code>	Boolean
<code>prep_date ()</code>	Date

prep_datetime ()	DateTime
------------------	----------

The following example shows the `get_output_schema` function added to the field encoding python script:

```
def get_output_schema():
    return pd.DataFrame({
        'Opportunity Number' : prep_int(),
        'Supplies Subgroup Encoded' : prep_int(),
        'Region Encoded' : prep_int(),
        'Route To Market Encoded' : prep_int (),
        'Opportunity Result Encoded' : prep_int (),
        'Competitor Type Encoded' : prep_int()
        'Supplies Group Encoded' : prep_int()
    })
```

## Connect to your Tableau Python (TabPy) server

**Important:** Starting in Tableau Prep Builder version 2020.3.3, you can configure your server connection once from the top **Help** menu instead of setting up your connection per flow in the Script step by clicking **Connect to Tableau Python (TabPy) Server** and entering your connection details. You will need to reconfigure your connection using this new menu for any flows that were created in an older version of Tableau Prep Builder that you open in version 2020.3.3.

1. Select **Help > Settings and Performance > Manage Analytics Extension Connection**.
2. In the **Select an Analytics Extension** drop-down list, select **Tableau Python (TabPy) Server**.

3. Enter your credentials:
  - Port 9004 is the default port for TabPy.
  - If the server requires credentials, enter a username and password.
  - If the server uses SSL encryption, select the Require SSL check box, then click the **Custom configuration file...** link to specify a certificate for the connection.

**Note:** Tableau Prep Builder doesn't provide a way to test the connection. If there is a problem with the connection an error message shows.

## Add a script to your flow

Start your TabPy server then complete the following steps:

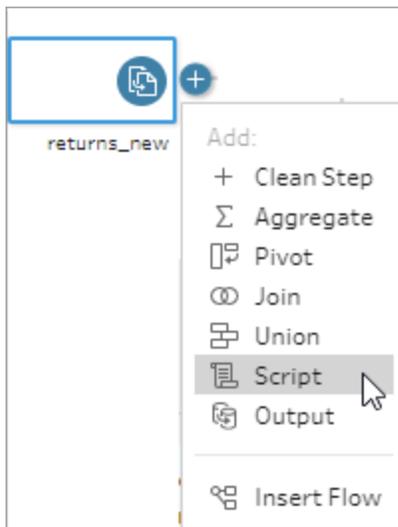
**Note:** TabPy requires tornado package version 5.1.1 to run. If you receive the error 'tornado.web' has no attribute 'asynchronous' when trying to start TabPy, from the command line run `pip list` to check the version of tornado that was installed. If you have a different version installed, download the [tornado package version 5.1.1](#). Then run `pip uninstall tornado` to uninstall your current version, then run `pip install tornado==5.1.1` to install the required version.

## Tableau Prep Help

1. Open Tableau Prep Builder and click the **Add connection**  button.

In web authoring, from the **Home** page, click **Create > Flow** or from the **Explore** page, click **New > Flow**. Then click **Connect to Data**.

2. From the list of connectors, select the file type or server that hosts your data. If prompted, enter the information needed to sign in and access your data.
3. Click the plus  icon, and select **Add Script** from the context menu.



4. In the Script pane, in the **Connection type** section, select **Tableau Python (TabPy) Server**.

**Script 1** 23 fields 16K rows Filter Values...

**Settings** Changes (0)

**Connection type**

Rserve

Tableau Python (TabPy) Server

**Server**

Connection to localhost: 9004

**File Name**

No file selected.

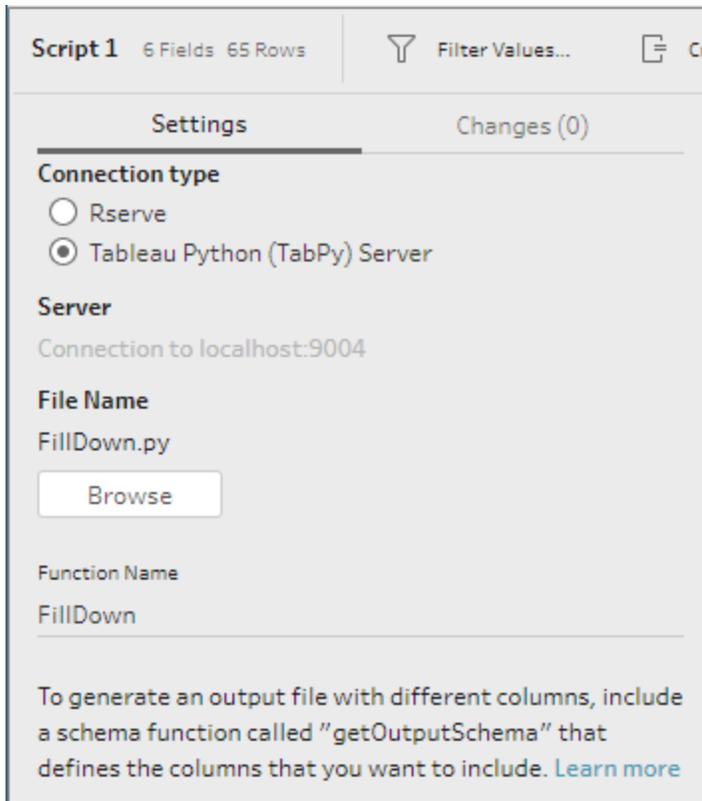
**Browse**

**Function Name**

No function name provided.

Include the schema function "get\_output\_schema" in your script to define the fields and data types that are returned. [Learn more](#)

5. In the **File Name** section, click **Browse** to select your script file.
6. Enter the **Function Name** then press **Enter** to run your script.



# Aggregate, Join, or Union Data

Aggregate, join, or union your data to group or combine data for analysis.

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web](#) on page 166.

## Aggregate and group values

Sometimes you'll need to adjust the granularity of some data, either to reduce the amount of data produced from the flow, or to align data with other data you might want to join or union together. For example, you might want to aggregate sales data by customer before joining a sales table with a customer table.

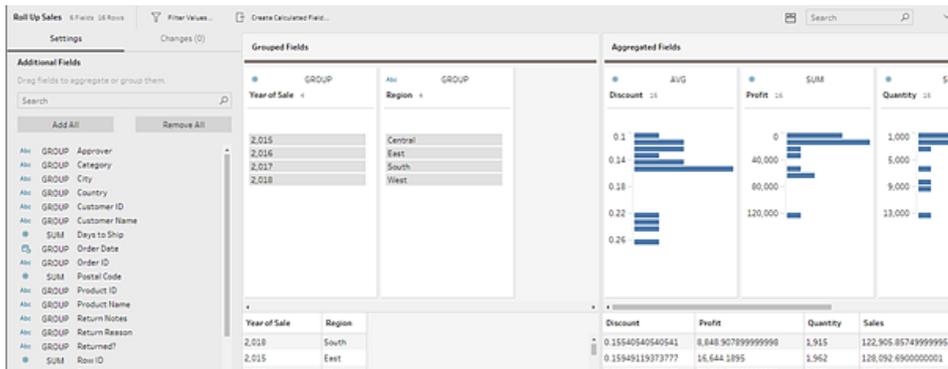
If you need to adjust the granularity of your data, use the **Aggregate** option to create a step to aggregate or group data. Whether data is aggregated or grouped depends on the data type (string, number, or date).

1. In the **Flow** pane, click the plus  icon, and select **Aggregate**. A new aggregation step displays in the **Flow** pane and the **Profile** pane updates to show the aggregate and group profile.
2. To group or aggregate fields, drag them from the left pane to one of the columns in the right pane.

You can also:

- Drag and drop fields between the two panes.
- Search for fields in the list and select only the fields you want to include in your aggregation.
- Double-click a field to add it to the left or right pane.
- Change the function of the field to automatically add it to the appropriate pane.
- Click **Add All** or **Remove All** to bulk apply or remove fields.

- Apply certain cleaning operations to fields. For more information about which cleaning options are available, see [About cleaning operations on page 277](#).



Fields are distributed between the **Grouped Fields** and **Aggregated Fields** columns based on their data type. Click the group or aggregation type (for example, AVG or SUM) headings to change the group or aggregation type.

In the data grids below the aggregation and group profile, you can see a sample of the members of the group or aggregation.

Any cleaning operations that are made to the fields are tracked in the **Changes** pane.

## Join your data

The data that you want to analyze is often made up of a collection of tables that are related by specific fields. Joining is a method for combining the related data on those common fields. The result of combining data using a join is a table that's typically extended horizontally by adding fields of data.

Joining is an operation you can do anywhere in the flow. Joining early in a flow can help you understand your data sets and expose areas that need attention right away.

Tableau Prep supports the following join types:

Join Type	Description
Left 	For each row, includes all values from the left table and corresponding matches from the right table. When a value in the left table doesn't have a corresponding match in the right table, you see a null value in the join results.

<p>Inner</p> 	<p>For each row, includes values that have matches in both tables.</p>
<p>Right</p> 	<p>For each row, includes all values from the right table and corresponding matches from the left table. When a value in the right table doesn't have a corresponding match in the left table, you see a null value in the join results.</p>
<p>leftOnly</p> 	<p>For each row, includes only values from the left table that don't match any values from the right table. Field values from the right table show as null values in the join results.</p>
<p>rightOnly</p> 	<p>For each row, includes only values from the right table that don't match any values from the left table. Field values from the left table show as null values in the join results.</p>
<p>notInner</p> 	<p>For each row, includes all of the values from the right and the left table that don't match.</p>
<p>Full</p> 	<p>For each row, includes all values from both tables. When a value from either table doesn't have a match with the other table, you see a null value in the join results.</p>

To create a join, do the following:

1. Join two tables using one of the following methods:
  - Add at least two tables to the **Flow** pane, then select and drag the related table to the other table until the **Join** option displays.



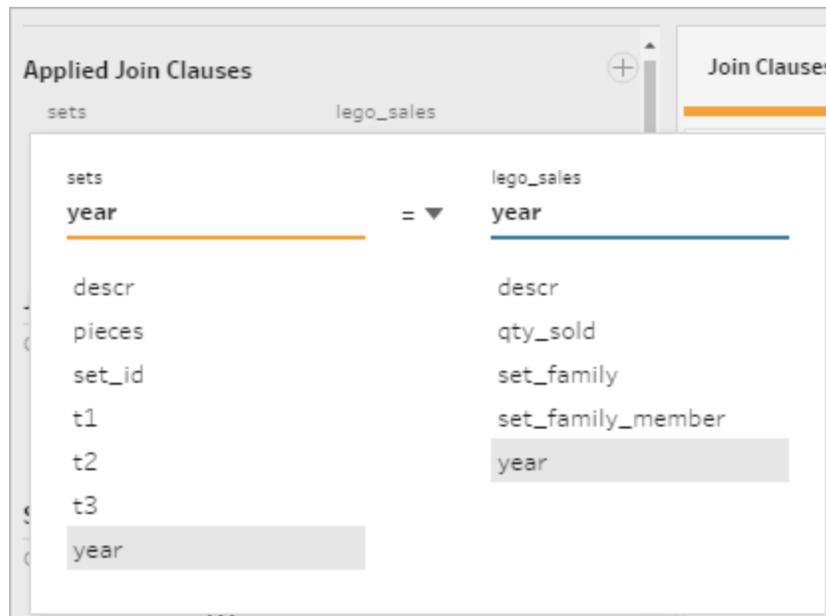
- Click the  icon and select **Join** from the menu, then manually add the other input to the join and add the join clauses.

**Note:** If you connect to a table that has table relationships defined and includes related fields, you can select **Join** and select from a list of related tables. Tableau Prep creates the join based on the fields that make up the relationship between the two tables.

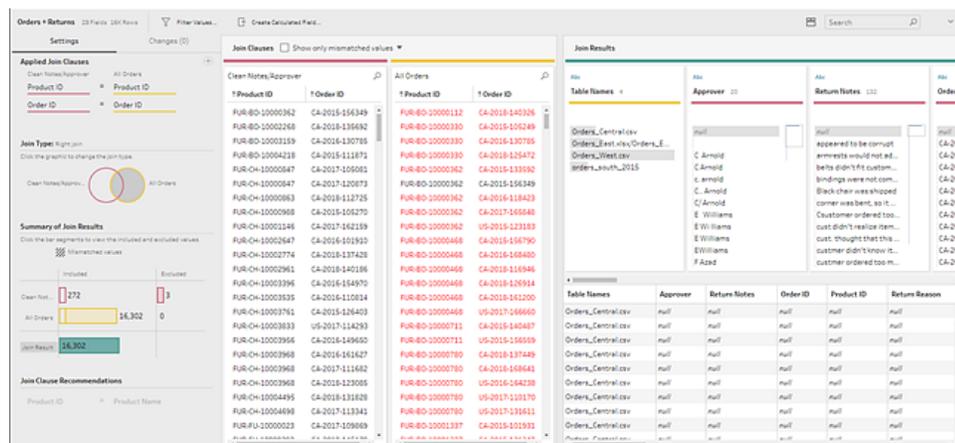
For more information about connectors with table relationships, see [Join data in the Input step](#) on page 223.

A new join step is added to the flow and the profile pane updates to show the join profile.

2. To review and configure the join, do the following:
  - a. Review the **Summary of Join Results** to see the number of fields included and excluded as a result of the join type and join conditions.
  - b. Under **Join Type**, click in the Venn diagram to specify the type of join you want.
  - c. Under **Applied Join Clauses**, click the plus  icon or, on the field chosen for the default join condition, specify or edit the join clause. The fields you selected in the join condition are the common fields between the tables in the join.



- d. You can also click the recommended join clauses shown under **Join Clause Recommendations** to add the clause to the list of applied join clauses.



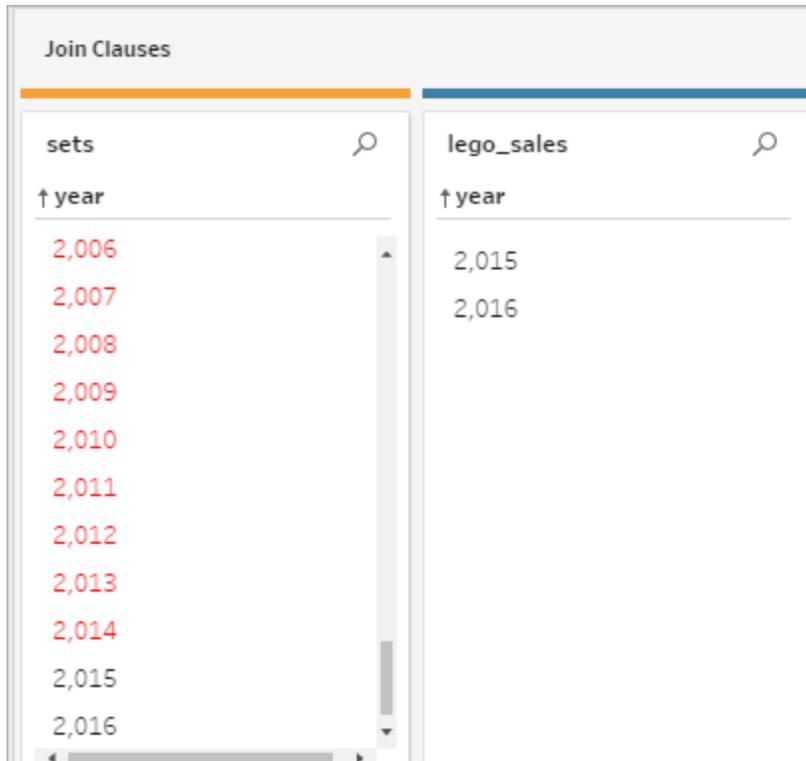
## Inspect the results of the join

The summary in the join profile shows metadata about the join to help you validate that the join includes the data you expect.

- **Applied Join Clauses:** By default, Tableau Prep defines the first join clause based on common field names in the tables being joined. Add or remove join clauses as needed.
- **Join Type:** By default, when you create a join, Tableau Prep uses an inner join between

the tables. Depending on the data that you connect to, you might be able to use left, inner, right, leftOnly, rightOnly,notInner, or full joins.

- **Summary of Join Results:** The Summary of Join Results shows you the distribution of values that are included and excluded from the tables in the join.
  - Click each **Included** bar to isolate and see the data in the join profile included in the join.
  - Click each **Excluded** bar to isolate and see the data in the join profile that are excluded from the join.
  - Click any combination of the **Included** and **Excluded** bars to see a cumulative perspective of the data.
- **Join Clause Recommendations:** Click the plus  icon next to the recommended join clause to add it to the **Applied Join Clauses** list.
- **Join Clauses** pane: In the **Join Clauses** pane, you can see the values in each field in the join clause. The values that don't meet the criteria for the join clause are displayed in red text.



- **Join Results** pane: If you see values in the **Join Results** pane that you want to change, you can edit the values in this pane.

## Common join issues

If you don't see the results you expect after joining your data, you may need to do some additional cleaning on your field values. The following issues will result in Tableau Prep reading the values as not matching and exclude them from the join:

- Different capitalization: My Sales and my sales
- Different spelling: Hawaii and Hawai'i
- Misspelling or data entry errors: My Company Health and My Company Heath
- Name changes: John Smith and John Smith Jr.
- Abbreviations: My Company Limited and My Company Ltd
- Extra separators: Honolulu and Honolulu (Hawaii)
- Extra spaces: This includes extra space between characters, tabbed spaces or extra

leading or trailing spaces

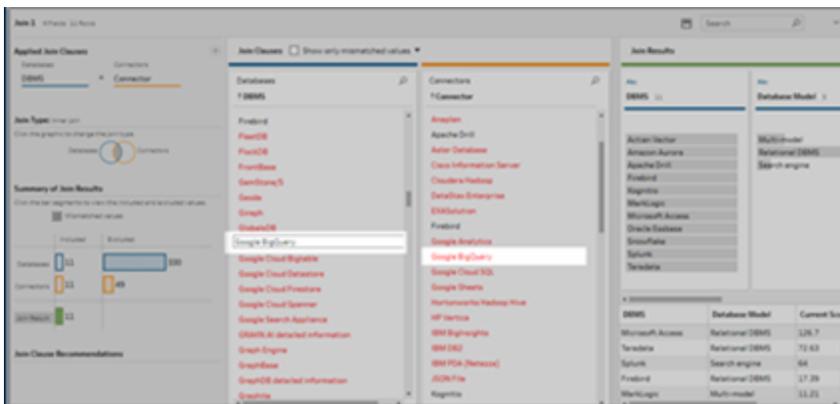
- Inconsistent use of periods: Returned, not needed. and Returned, not needed.

The good news is that if your field values have any of these issues, you can fix the field values directly in the **Join Clauses** or work with excluded values by clicking in the **Excluded** bars in the **Summary of Join Results** and use the cleaning operations in the profile card menu.

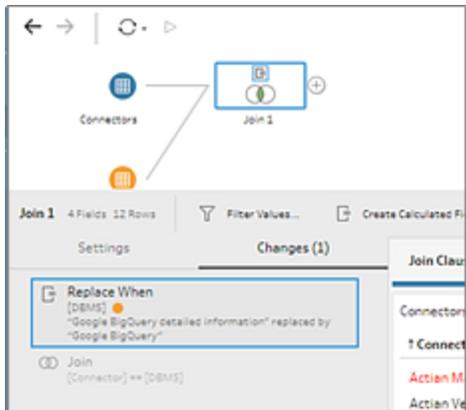
For more information about the different cleaning options available in the Join step, see [About cleaning operations on page 277](#).

## Fix mismatched fields and more

You can fix mismatched fields right in the join clause. Double-click or right-click the value and select **Edit Value** from the context menu on the field that you want to fix and enter a new value. Your data changes are tracked and added to the **Changes** pane right in the Join step.



You can also select multiple values to keep, exclude or filter in the Join Clauses panes, or apply other cleaning operations in the Join Results pane. Depending on which fields you change and where they are in the join process, your change is applied either before or after the join to give you the corrected results.



For more information about cleaning fields see [Apply cleaning operations](#) on page 281.

## Union your data

Union is a method for combining data by appending rows of one table onto another table. For example, you might want to add new transactions in one table to a list of past transactions in another table. Make sure the tables you union have the same number of fields, the same field names, and the fields are the same data type.

**Tip:** To maximize performance a single union can have a maximum of 10 inputs. If you need to union more than 10 files or tables, try unioning files in the Input step. For more information about this type of union, see [Union files and database tables in the Input step](#) on page 217.

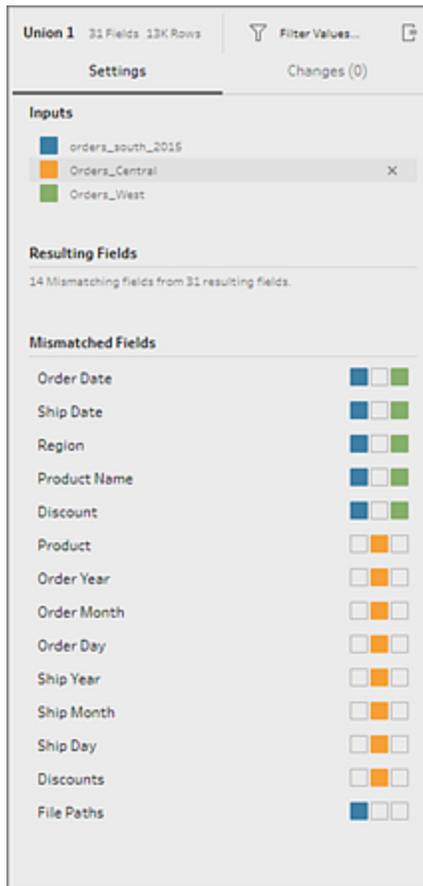
Similar to a join, you can use the union operation anywhere in the flow.

To create a union, do the following:

1. After you add at least two tables to the flow pane, select and drag a related table to the other table until you see the **Union** option. You can also click the  icon and select **Union** from the menu. A new union step is added in the **Flow** pane, and the **Profile** pane updates to show the union profile.

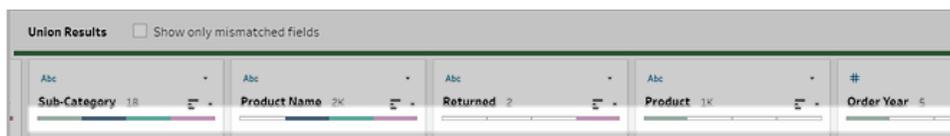


any mismatched fields.



- **Review the colors for each field:** Next to each field listed in the Union summary and above each field in the union profile, is a set of colors. The colors correspond to each table in the union.

If all table colors show for that field, then the union performed correctly for that field. A missing table color indicates that you have mismatched fields.



Mismatched fields are fields that might have similar data but are different in some way. You can see the list of fields that don't match in the Union summary and the tables where they came from. If you want to take a closer look at the data in the fields, select the

**Show only mismatched fields** check box to isolate the mismatched fields in the Union profile.



To fix these field, follow one of the suggestions in the **Fix fields that don't match** below section below.

## Fix fields that don't match

When tables in a union don't match, the union produces extra fields. The extra fields are valid data being excluded from their appropriate context.

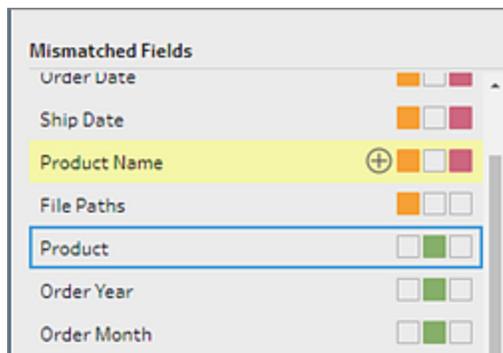
To resolve a field mismatch issue, you must merge the mismatched fields together.

There are a number of reasons why fields might not match.

- **Corresponding fields have different names:** If corresponding fields between tables have different names, you can use union recommendations, manually merge fields in the **Mismatched Fields** list, or rename the field in the union profile to merge the mismatched fields together.

To use union recommendations, do the following:

1. in the **Mismatched Fields** list, click on a mismatched field. If a suggested match exists, the matching field is highlighted in yellow.  
Suggested matches are based on fields with similar data types and field names.
2. Hover on the highlighted field and click the plus button to merge the fields.

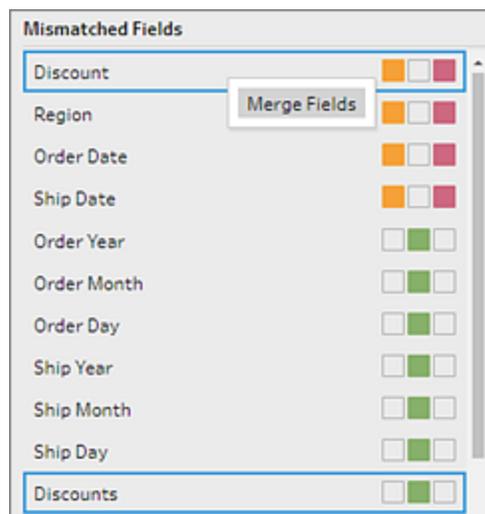


To manually merge fields in the **Mismatched Fields** list, do the following:

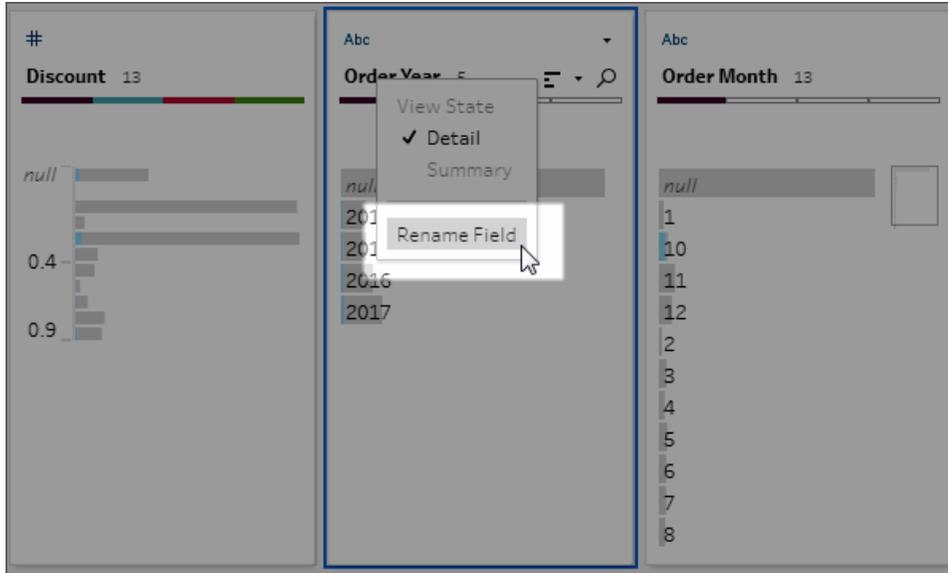
1. Select one or more fields in the list.
2. Right-click or Ctrl-click (MacOS) a selected field and if the merge is valid, the **Merge Fields** menu option appears.

If you see **No options available** when you right-click the field, this is because the fields are not eligible to merge. For example trying to merge two fields from the same input.

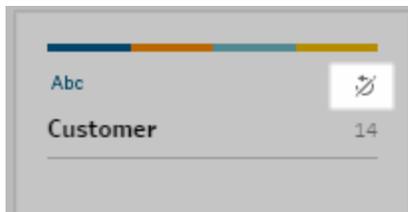
3. Click **Merge Fields** to merge the selected fields.



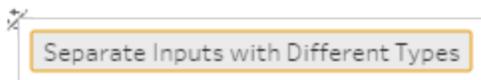
To rename the field in the union profile pane, right-click the field name and click **Rename Field**.



- **Corresponding fields have the same name but are a different type:** By default, when the name of corresponding fields match but the data type of the fields don't, Tableau Prep changes the data type of one of the fields so they are compatible with each other. If Tableau Prep makes this change, it's noted at the top of the merged field by the Change Data Type icon.



In some cases, Tableau Prep might not pick the correct data type. If that happens and you want to undo the merge, right-click or Ctrl-click (MacOS) the **Change Data Type** icon and select **Separate Inputs with Different Types**.



You can then merge the fields again by first changing the data type of one of the fields and then using the suggestions in [Additional merge field options on the next page](#).

- **Corresponding tables have different number of fields:** To union tables, each table

in the union must contain the same number of fields. If a union results in extra fields, merge the field into an existing field.

## Additional merge field options

In addition to the methods described in the above section for merging fields you can also use one of the following methods to merge fields. You can merge fields in any step, except for the Output step.

For information about how to merge fields in the same file, see [Merge fields on page 290](#).

To merge fields, do one of the following:

- Drag and drop one field onto another. A **Drop to merge fields** indicator displays.
- Select multiple fields and right-click within the selection to open the context menu, and then click **Merge Fields**.
- Select multiple fields, and then click **Merge Fields** on the context-sensitive toolbar.

# Add Einstein Discovery Predictions to your flow

*Supported in Tableau Prep Builder version 2021.1.3 and later. Flows that include prediction steps are not currently supported on Tableau Server or Tableau Online.*

Use Einstein Discovery-powered models to bulk score predictions for the data in your flow. Predictions can help you make better-informed decisions and take actions to improve your business outcomes.

When applying these models, a new field for predicted outcomes (in the form of probability scores or estimated averages) is automatically added to your flow. Optionally, you can include top predictors (factors that contributed most significantly to the prediction) and improvements (suggested actions to take to improve the predicted outcome). If you add these, fields for these factors are included in your flow data as well.

For example, to predict employee retention, you could build a model using historical data (where you already know the outcome) in Einstein Discovery, then apply that model to the data set in your flow in Tableau Prep Builder and generate the predicted outcome. Prediction results are applied at the row-level, helping you dive deep into your analysis in Tableau.

If you need to apply multiple models to your data set, you can include multiple prediction steps in your flow. Each prediction step applies a single prediction model to the flow. Signing into Salesforce to apply models using different credentials in a single flow is not supported.

**Note:** You must have a Salesforce license and user account that is configured to access Einstein Discovery to use this feature. See [Prerequisites on the next page](#) for more information.

## What is Einstein Discovery?

Einstein Discovery augments your business intelligence with statistical modeling and supervised machine learning to identify, surface, and visualize insights into your business data. It quickly sifts through millions of rows of data to find important correlations, predict outcomes, and suggest ways to improve those predicted outcomes.

For more information about Einstein Discovery, see [Getting Started with Discovery](#), and [Explain, Predict, and Take Action with Einstein Discovery](#) in Salesforce help. You can also expand your knowledge with the [Gain Insight with Einstein Discovery](#) trail in [Trailhead](#).

**Note:** Einstein Discovery in Tableau is powered by [salesforce.com](#). Consult your agreement with [salesforce.com](#) for applicable terms.

## Prerequisites

To configure and use Einstein Discovery predictions in your flow, you need certain licenses, access, and permissions in Salesforce and Tableau Prep.

### Salesforce Requirements

requirement	description
<b>Salesforce license</b>	<p>One of the following licenses:</p> <ul style="list-style-type: none"> <li>• Einstein Discovery in Tableau license</li> <li>• Tableau CRM Plus license</li> <li>• Einstein Predictions license</li> </ul> <p>These licenses are available for an extra cost.</p>
<b>Salesforce user account</b>	<p>Account that is configured to access Einstein Discovery.</p> <p>If you use the Einstein Discovery in Tableau license, your user account must have the <b>View Einstein Discovery Recommendations Via Connect API</b> system permission assigned to it.</p> <p>If you use either the Tableau CRM Plus license or Einstein Predictions license:</p> <ul style="list-style-type: none"> <li>• To get predictions using already deployed Einstein Discovery models, the account must have the <b>View Einstein Discovery Recommendations</b> system permission assigned to it.</li> <li>• To build, deploy, and manage predictions in Einstein Discovery, the account must have the <b>Manage Einstein</b></li> </ul>

requirement	description
	<p><b>Discovery permission</b> assigned to it.</p> <p>To configure user accounts, see <a href="#">Set Up Einstein Discovery</a> in Salesforce help.</p>

## Tableau Prep Requirements

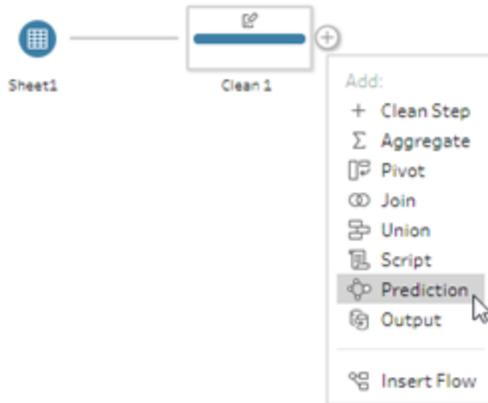
requirement	description
<b>Tableau Prep license and permissions</b>	<p>Creator license.</p> <p>As a creator you need to be able to sign into the Salesforce org account to access prediction definitions and add models to your flow.</p>

## Add prediction data to your flow

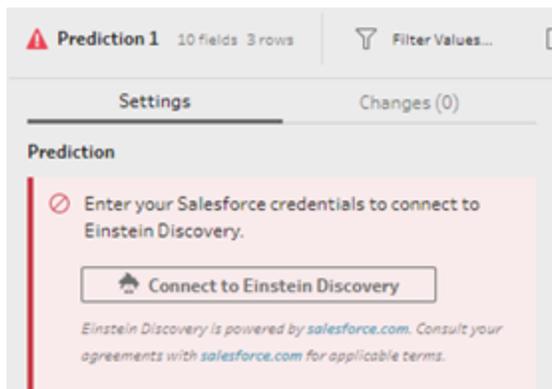
**Note:** Flows that include prediction steps can currently only be run manually in Tableau Prep Builder.

To apply Einstein Discovery predictions to your flow, you will need:

- Access to a Salesforce org and Tableau Prep Builder version 2021.1.3 or later.
  - An Einstein Discovery prediction model that is deployed in Salesforce.
  - Source data in Tableau Prep Builder with fields that match the model fields required by the Einstein Discovery prediction model.
1. Open Tableau Prep Builder and connect to a data source.
  2. Apply any cleaning operations as needed.
  3. Click the plus  icon, and select **Prediction** from the **Add** menu.

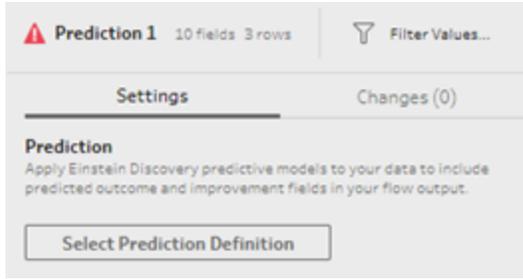


4. In the **Prediction** pane on the **Settings** tab, click **Connect to Einstein Discovery**. You will need to sign in using your Salesforce credentials.

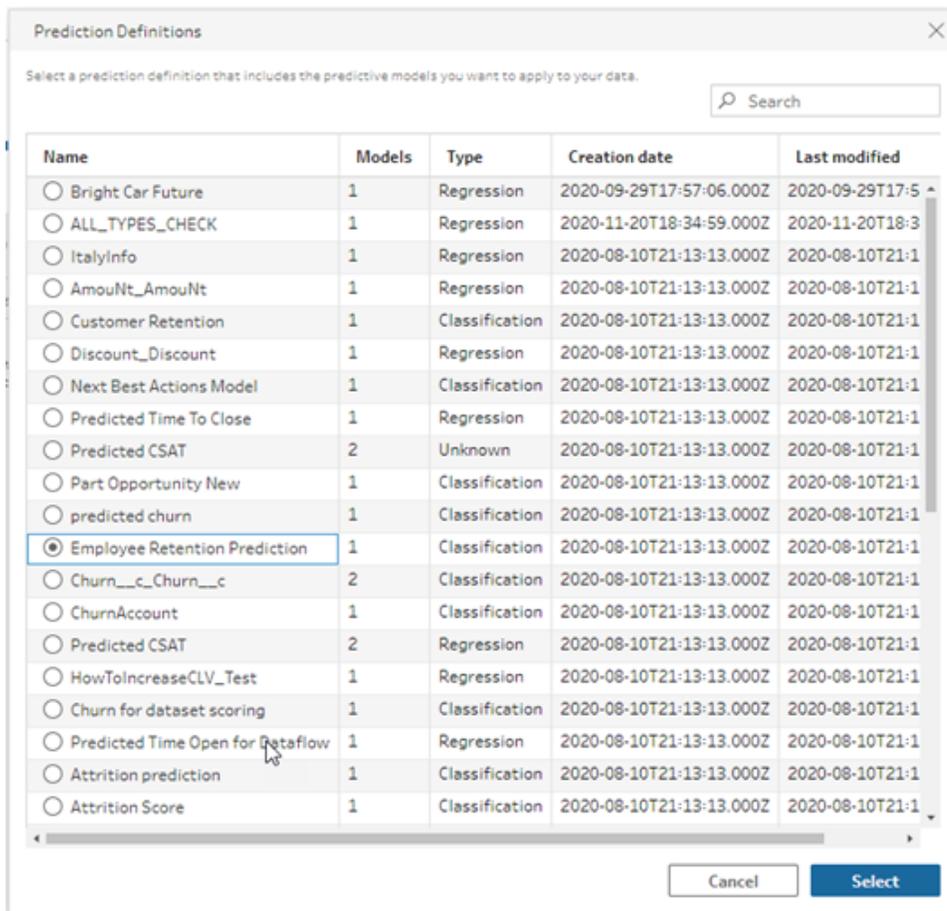


When you click this button, a web page opens, asking you to sign in to your Salesforce account. After you sign in, a web page opens asking if you want to let Tableau access your Salesforce data. Click **Allow** to continue, and then close the resulting tab in your browser.

5. Click **Select Prediction Definition**. This opens the list of deployed models that you have access to. The models are built and deployed in Salesforce using Einstein Discovery. For more information about predictive models see, [About Models](#) in Salesforce help.

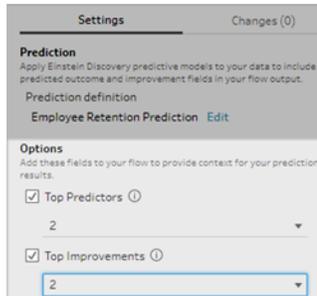


6. In the **Prediction Definitions** dialog, select the prediction definition that maps to your data set. To generate predicted outcomes using your flow data, all fields in the model must map to a corresponding flow field.



7. In the **Options** section, select up to 3 top predictors and improvements to include in your flow data. This is supplemental data you can add to your flow.

- Top predictors indicate which factors contributed the most to the predicted outcome.
- Top improvements suggest actions to take to improve the predicted outcome.

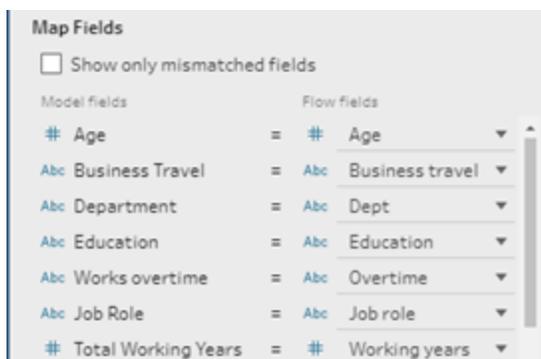


8. In the **Map Fields** section, map your flow fields to your model fields.
- All model fields must be mapped to a corresponding flow field.
  - Field names that match exactly are automatically mapped.
  - You can't map the same flow field to multiple model fields.
  - Model and flow field data types must match.

If your flow field is assigned to a different data type, you'll need to change it to match the data type assigned to the model field.

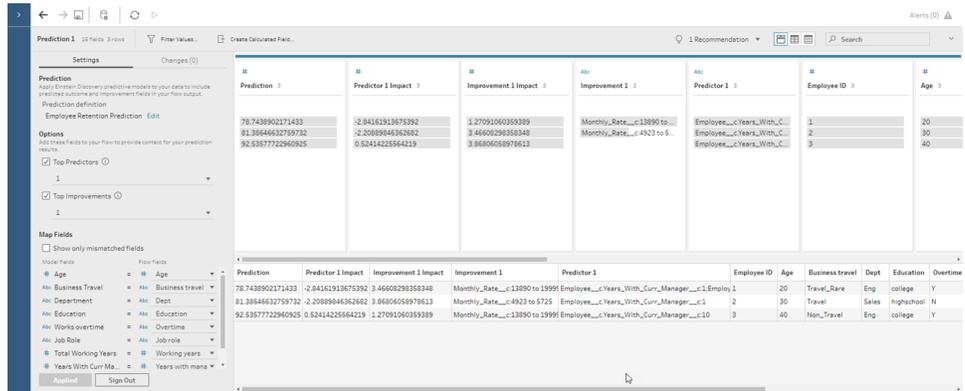
To change the data type, in the **Map Fields** section, simply click the data type for the flow field, then select the new data type in the menu. You can then change the data type back in a subsequent cleaning step.

For more information about changing data types, see [Review the data types assigned to your data](#) on page 245.



- To apply your settings and run the model against your data, click **Apply**. The prediction results show in the profile pane and data grid.

If you change any settings, you can click **Apply** again to re-run the model with your changes. If you leave the **Prediction** step before clicking **Apply**, the model won't run and your changes will be lost.



## Reviewing your results

After you apply the predictive model to your flow data you can generate your flow output and use the new data source to analyze the predicted outcomes at the row level in Tableau. To understand the results of the prediction model, let's look at an example.

In this topic, we applied the Employee Retention Prediction model to our employee data in Tableau Prep Builder to get a probability score that an employee will stay with the company.

This gave us the following results:

Prediction	Predictor 1 Impact	Improvement 1 Impact	Improvement 1	Predictor 1	Employee ID	Age	Business travel
78.7438902171433	-2.84161913675392	3.46608298358348	Monthly_Rate__c:13890 to 1999	Employee__c:Years_With_Curr_Manager__c:1:Emplo	1	20	Travel_Rare
81.38646632759732	-2.20898946362682	3.86806058978613	Monthly_Rate__c:4923 to 5725	Employee__c:Years_With_Curr_Manager__c:1	2	30	Travel
92.5357722960925	0.52414225564219	1.27091060359389	Monthly_Rate__c:13890 to 1999	Employee__c:Years_With_Curr_Manager__c:10	3	40	Non_Travel

Let's look at what these results tell us for Employee 2:

Question	Prediction	Where is this?
How likely will this employee stay?	Einstein Discovery predicts that there is an 81.38% chance that they will stay.	Prediction field

What factors impact this result?	The years with the current manager reduces the chance that this employee will stay by 2.2%.	<p>Predictor 1 field (top predictor)</p> <p>Predictor 1 Impact (percent impact of the top predictor)</p>
What can improve this predicted outcome?	Increasing the employee's monthly rate between 4923 to 5725 increases the likelihood that the employee stays by 3.86%.	<p>Improvement 1 field (top improvement)</p> <p>Improvement 1 impact (percent impact of making the suggested change)</p>

# Save and Share Your Work

**Note:** Starting in version 2020.4, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web on page 166](#).

At any point in your flow you can manually save your work, or let Tableau automatically do it for you when creating or editing flows on the web. When working with flows on the web, there are a few differences.

Tableau Prep Builder	Tableau Prep on the web
<ul style="list-style-type: none"><li>• View a preview of the data in your flow in Tableau Desktop.</li><li>• Include direct file connections in your flow input or package your files and publish the packaged flow to your server.</li><li>• Output your flow to a file, published data source, or to a database (version 2020.3.1 and later).</li></ul>	<ul style="list-style-type: none"><li>• Create and edit flows on the web.</li><li>• Upload files for your flow inputs and connect to a variety of data sources.</li><li>• Output your flow to a published data source or to a database.</li></ul>

To keep data fresh you can manually run your flows from Tableau Prep Builder or from the command line. You can also run flows published on Tableau Server or Tableau Online manually or on a schedule. For more information about running flows, see [Run your flow on page 484](#).

## Save a flow

In Tableau Prep Builder, you can manually save your flow to back up your work before performing any additional operations. Your flow is saved in the Tableau Prep flow (.tfl) file format.

You can also package your local files (Excel, Text Files, and Tableau extracts) with your flow to share with others, just like packaging a workbook for sharing in Tableau Desktop. Only local files can be packaged with a flow. Data from database connections, for example, aren't included.

In web authoring, local files are automatically packaged with our flow. Direct file connections aren't yet supported.

When you save a packaged flow, the flow is saved as a Packaged Tableau Flow File (.tflx).

- To manually save your flow, from the top menu, select **File > Save**.
- In Tableau Prep Builder, to package your data files with your flow, from the top menu, do one of the following:
  - Select **File > Export Packaged Flow**
  - Select **File > Save As**. Then in the **Save As** dialog, select **Packaged Tableau Flow Files** from the **Save as type** drop down menu.

## Automatically save your flows on the web (version 2020.4 and later)

If you create or edit flows on the web, as soon as you make a change to the flow (connect to a data source, add a step, and so on) your work is automatically saved every few seconds as a draft so you won't lose your work.

You can only save flows to the server you are currently signed into. You can't create a draft flow on one server and try and save or publish it to another server. If you want to publish the flow to a different project on the server, use the **File > Publish As** menu option, then select your project from the dialog.

Draft flows can only be seen by you until you publish them and make them available to anyone who has permissions to access the project on your server. Flows in a draft status are tagged with a **Draft** badge so you can easily find your flows that are in progress. If the flow has never been published, a **Never Published** badge is shown next to the Draft badge.

Explore		All Flows		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
☰	☆	🔗	↑ Name	Actions
<input type="checkbox"/>	☆	🔗	2019.2.2rc SAP HANA <b>Draft</b>	...
<input type="checkbox"/>	☆	🔗	2019.3.2tc Athena	...
<input type="checkbox"/>		🔗	New Flow <b>Draft</b> <b>Never Published</b>	...

After a flow is published and you edit and republish the flow, a new version is created. You can see a list of flow versions in the **Revision History** dialog. From the **Explore** page, click the **...** **Actions** menu and select **Revision History**.

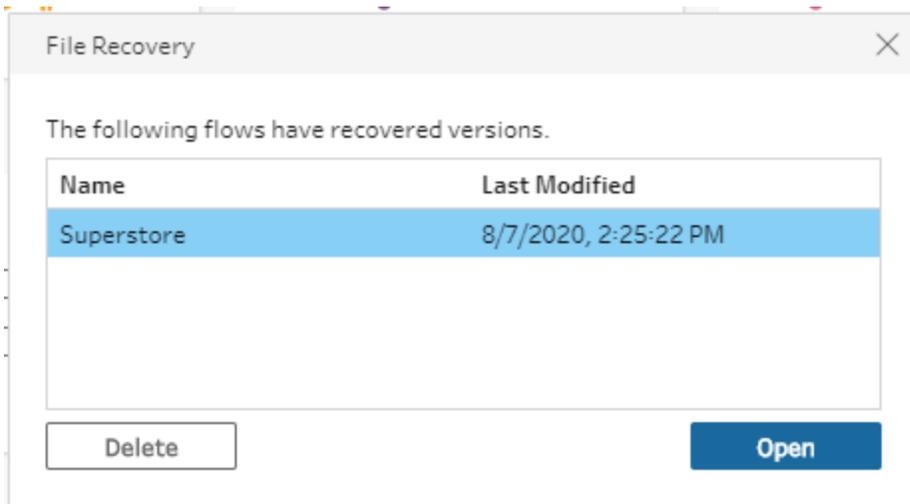
For more information about managing revision history, see [Work with Content Revisions](#) in the Tableau Desktop help.

**Note:** Autosave is enabled by default. It is possible, but not recommended, for administrators to disable autosave on a site. To turn off autosave, use the Tableau Server REST API method "Update Site" and set the `flowAutoSaveEnabled` attribute to false. For more information, see [Tableau Server REST API Site Methods: Update Site](#).

## Automatic file recovery

By default, Tableau Prep Builder (version 2020.3.3 and later), automatically saves a draft of any open flows if the application freezes or crashes. Draft flows are saved in your **Recovered Flows** folder in your **My Tableau Prep repository**. The next time you open the application, a dialog is shown with a list of the recovered flows to select from. You can open a recovered flow and continue where you left off, or delete the recovered flow file if you don't need it.

**Note:** If you have recovered flows in your **Recovered Flows** folder, this dialog shows every time you open the application until that folder is empty.



If you don't want this feature enabled, as an Administrator, you can turn it off during install or after install. For more information about how to turn off this feature, see [Turn off file recovery](#) in the Tableau Desktop and Tableau Prep Deployment Guide.

## View flow output in Tableau Desktop

**Note:** This option is not available on the web.

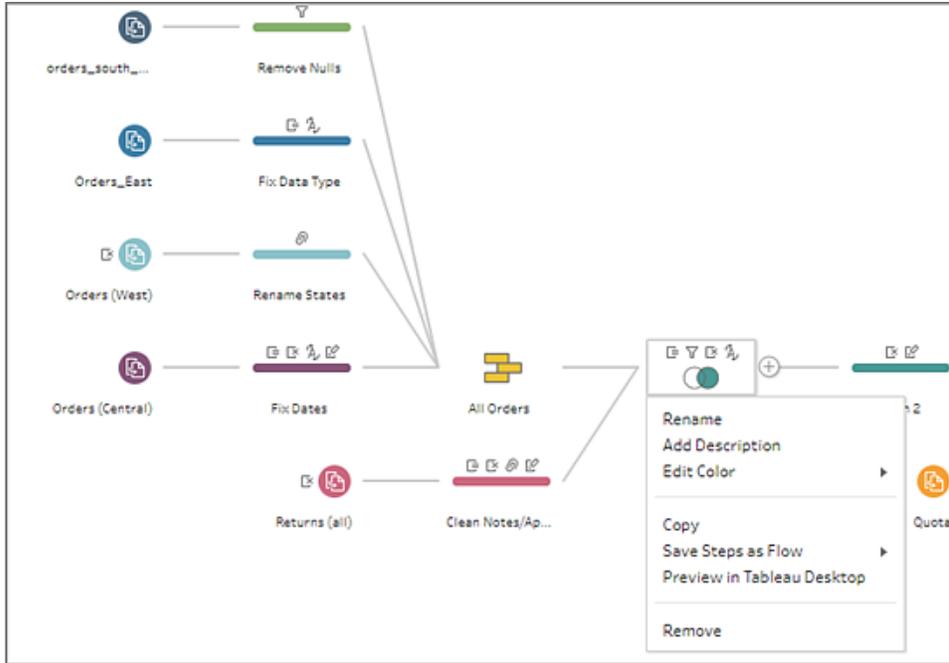
Sometimes when you're cleaning your data you might want to check your progress by looking at it in Tableau Desktop. When your flow opens in Tableau Desktop, Tableau Prep Builder creates a permanent Tableau .hyper file and a Tableau data source (.tds) file. These files are saved in your Tableau repository in the **Datasources** file so you can experiment with your data at any time.

When you open the flow in Tableau Desktop, you can see the data sample that you are working with in your flow with the operations applied to it, up to the step that you selected.

**Note:** While you can experiment with your data, Tableau only shows you a sample of your data and you won't be able to save the workbook as a packaged workbook (.twbx). When you are ready to work with your data in Tableau, create an output step in your flow and save the output to a file or as a published data source, then connect to the full data source in Tableau.

To view your data sample in Tableau Desktop do the following:

1. Right-click the step where you want to view your data, and select **Preview in Tableau Desktop** from the context menu.



2. Tableau Desktop opens on the **Sheet** tab.

## Create data extract files and published data sources

**Important:** Starting in Tableau Prep Builder version 2020.3.1, Tableau Data Extract (.tde) files are no longer supported for flow output. Any flows published to a server version 2020.3 and later that output to this file type must be converted to output to the Hyper Extract (.hyper) file type. Otherwise the flow will fail to run. If the flow is published to Tableau Server or Tableau Online, download the flow, change the output type and republish the flow to avoid flow run errors.

To create your flow output, run your flow. When you run your flow, your changes are applied to your entire data set. Running the flow results in a Tableau Data Source (.tds) and a Tableau Data Extract (.hyper) file.

**Note:** You can publish data extracts or published data sources to Tableau Server version 10.0 and later as well as to Tableau Online.

## Tableau Prep Builder

You can create an extract file from your flow output to use in Tableau Desktop or to share your data with third parties. Create an extract file in the following formats:

- **Hyper Extract (.hyper)**: This is the latest Tableau extract file type and can only be consumed by Tableau Desktop or Tableau Server version 10.5 and later.
- **Comma Separated Value (.csv)**: Save the extract to a .csv file to share your data with third parties. The encoding of exported CSV file will be UTF-8 with BOM.
- **Microsoft Excel (.xlsx)**: Starting in version 2021.1.2, you can output our flow data to a Microsoft Excel spreadsheet. Legacy Microsoft Excel .xls file types are not supported.

## Tableau Prep Builder and on the web

You can publish your output as a published data source to Tableau Server or Tableau Online to share your data and provide centralized access to the data you have cleaned, shaped, and combined.

You can also save your flow output to a database to create, replace, or append the table data with your clean, prepared flow data. For more information, see [Save flow output data to external databases](#) on page 394.

You can also run your flow using incremental refresh. This option saves time and resources and enables you to refresh only new data instead of your full data set. For information about how to configure and run your flow using incremental refresh, see [Refresh Flow Data Using Incremental Refresh](#) on page 400.

**Note:** To publish Tableau Prep Builder output to Tableau Server, the Tableau Server REST API must be enabled. For more information see [Rest API Requirements](#) in the Tableau Rest API Help. To publish to a server that uses Secure Socket Layer (SSL) encryption certificates, additional configuration steps are needed on the machine running Tableau Prep Builder. For more information, see the [Before you Install](#) in the Tableau Desktop and Tableau Prep Builder Deployment Guide.

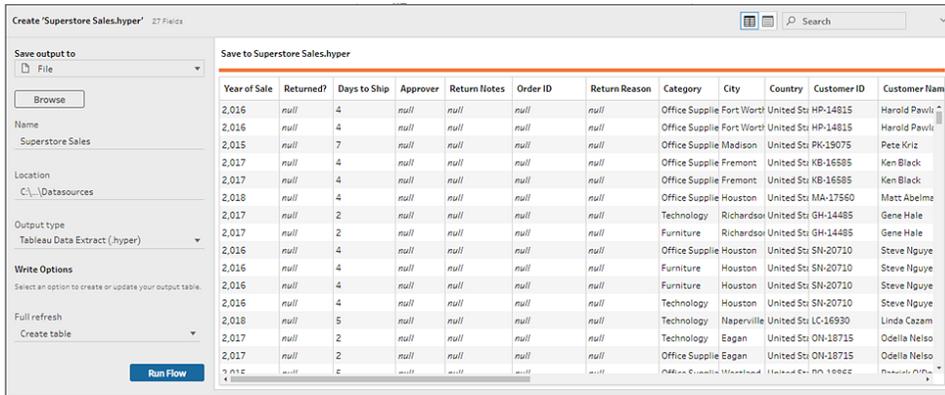
## Create an extract to a file

**Note:** This output option is not available when creating or editing flows on the web.

1. Click the plus icon  on a step and select **Add Output**.

If you have run the flow before, click the run flow  button on the Output step. This runs the flow and updates your output.

The **Output** pane opens and shows you a snapshot of your data.



2. In the left pane select **File** from the **Save output to** drop-down list. In prior versions, select **Save to file**.
3. Click the **Browse** button, then in the **Save Extract As** dialog, enter a name for the file and click **Accept**.
4. In the **Output type** field, select from the following output types:
  - Tableau Data Extract (.hyper)
  - Comma Separated Values (.csv)
5. (Tableau Prep Builder version 2020.2.1 and later) In the **Write Options** section, view the default write option to write the new data to your files and make any changes as needed. For more information, see [Configure write options on page 405](#).
  - **Create table:** This option creates a new table or replaces the existing table with the new output.
  - **Append to table:** This option adds the new data to your existing table. If the table doesn't already exist, a new table is created and subsequent runs will add new rows to this table.

**Note:** **Append to table** isn't supported for .csv output types. For more information about supported refresh combinations, see [Flow refresh options on page 401](#).

6. Click **Run Flow** to run the flow and generate the extract file.

## Create an extract to a Microsoft Excel Worksheet (version 2021.1.2 and later)

**Note:** This output option is not available when creating or editing flows on the web.

When you output flow data to a Microsoft Excel worksheet you can create a new worksheet or append or replace data in an existing worksheet. The following conditions apply:

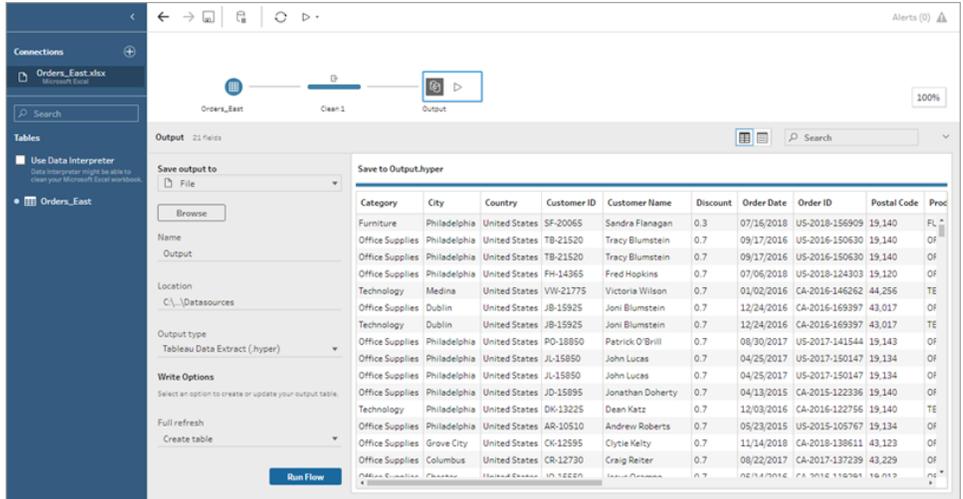
- Only Microsoft Excel .xlsx file formats are supported.
- The worksheet rows begin at cell A1.
- When appending or replacing data, the first row is assumed to be headers.
- Header names are added when creating a new worksheet, but not when adding data to an existing worksheet.
- Any formatting or formulas in existing worksheets aren't applied to the flow output.
- Writing to named tables or ranges is not currently supported.

### Output flow data to a Microsoft Excel worksheet file

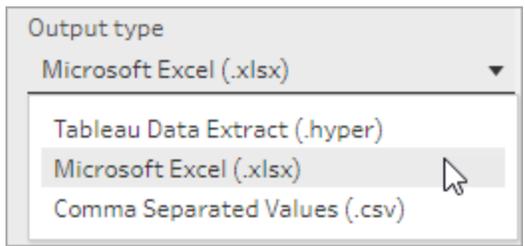
1. Click the plus icon  on a step and select **Add Output**.

If you have run the flow before, click the run flow  button on the Output step. This runs the flow and updates your output.

The **Output** pane opens and shows you a snapshot of your data.

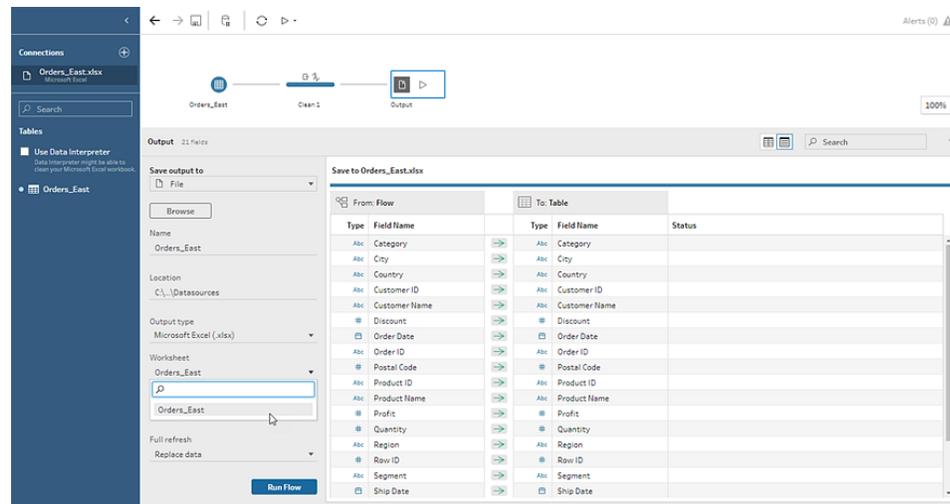


2. In the left pane select **File** from the **Save output to** drop-down list.
3. Click the **Browse** button, then in the **Save Extract As** dialog, enter or select the file name and click **Accept**.
4. In the **Output type** field, select Microsoft Excel (.xlsx).



5. In the **Worksheet** field, select the worksheet you want to write your results to, or enter a new name in the field instead, then click on **Create new table**.
6. In the **Write Options** section, select one of the following write options:
  - **Create table:** Creates or re-creates (if the file already exists) the worksheet with your flow data.
  - **Append to table:** Adds new rows to an existing worksheet. If the worksheet doesn't exist, one is created and subsequent flow runs add rows to that worksheet.
  - **Replace data:** Replaces all of the existing data except the first row in an existing worksheet with the flow data.

A field comparison shows you the fields in your flow that match the fields in your worksheet, if it already exists. If the worksheet is new, then a one-to-one field match is shown. Any fields that don't match are ignored.



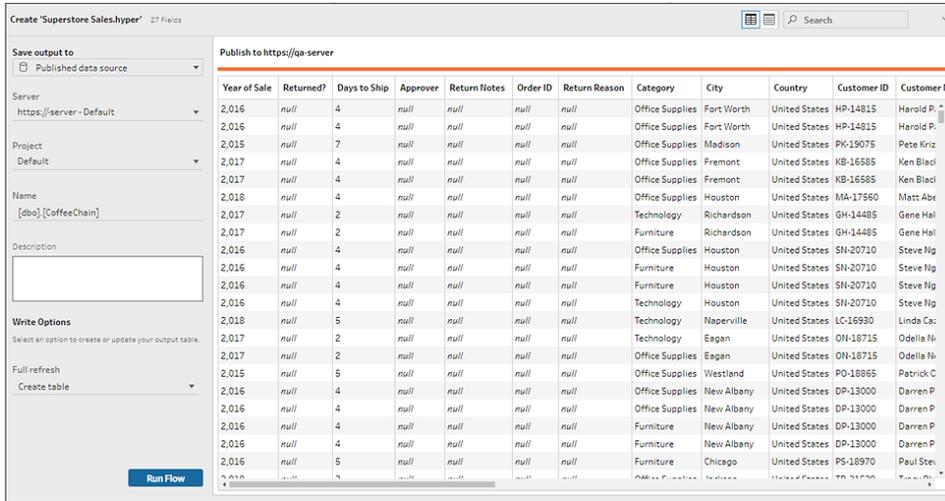
7. Click **Run Flow** to run the flow and generate the Microsoft Excel extract file.

## Create a published data source

1. Click the plus icon (+) on a step and select **Add Output**.

**Note:** Tableau Prep Builder refreshes previously published data sources and maintains any data modeling (for example calculated fields, number formatting, and so on) that might be included in the data source. If the data source can't be refreshed, the data source will be replaced instead.

2. The output pane opens and shows you a snapshot of your data.



3. From the **Save output to** drop-down list, select **Published data source (Publish as data source in previous versions)** . Complete the following fields:

- **Server** (Tableau Prep Builder only): Select the server where you want to publish the data source and data extract. If you aren't signed in to a server you will be prompted to sign in.

**Note:** Starting in Tableau Prep Builder version 2020.1.4, after you sign into your server, Tableau Prep Builder remembers your server name and credentials when you close the application. The next time you open the application, you are already signed into your server.

On the Mac, you may be prompted to provide access to your Mac keychain so Tableau Prep Builder can securely use SSL certificates to connect to your Tableau Server or Tableau Online environment.

If you are outputting to Tableau Online include the pod your site is hosted on in the "serverUrl". For example, "https://eu-west-1a.online.tableau.com" not "https://online.tableau.com".

- **Project:** Select the project where you want to load the data source and extract.
- **Name:** Enter a file name.
- **Description:** Enter a description for the data source.

4. (Tableau Prep Builder version 2020.2.1 and later) In the **Write Options** section, view the

default write option to write the new data to your files and make any changes as needed.

For more information, see [Configure write options on page 405](#)

- **Create table:** This option creates a new table or replaces the existing table with the new output.
  - **Append to table:** This option adds the new data to your existing table. If the table doesn't already exist, a new table is created and subsequent runs will add new rows to this table.
5. Click **Run Flow** to run the flow and publish the data source.

## Save flow output data to external databases

**Important:** This feature enables you to permanently delete and replace data in an external database. Be sure that you have permissions to write to the database.

To prevent data loss, you can use the **Custom SQL** option to make a copy of your table data and run it before writing the flow data to the table.

In Tableau Prep Builder version 2020.3.1 and later and on the web, you can connect to data from any of the connectors that Tableau Prep Builder or the web supports and output data to an external database. This enables you to add or update data in your database with clean, prepped data from your flow each time the flow is run. This feature is available for both incremental and full refresh options. For more information about how to configure incremental refresh, see [Refresh Flow Data Using Incremental Refresh on page 400](#).

When you save your flow output to an external database, Tableau Prep does the following:

1. Generates the rows and runs any SQL commands against the database.
2. Writes the data to a temporary table (or staging area if outputting to Snowflake) in the output database.
3. If the operation is successful, the data is moved from the temporary table (or your staging area for Snowflake) into the destination table.
4. Runs any SQL commands that you want to run after writing the data to the database.

If the SQL script fails, the flow will fail. However your data will still be loaded to your database tables. You can try running the flow again or manually run your SQL script on your database to apply it.

## Output options

You can select the following options when writing data to a database. If the table doesn't already exist, it's created when the flow is first run.

- **Append to table:** This option adds data to an existing table. If the table doesn't exist, the table is created when the flow is first run and data is added to that table with each subsequent flow run.
- **Create table:** This option creates a new table with the data from your flow. If the table already exists, the table and any existing data structure or properties defined for the table is deleted and replaced with a new table that uses the flow data structure. Any fields that exist in the flow are added to the new database table.
- **Replace data:** This option deletes the data in your existing table and replaces it with the data in your flow, but preserves the structure and properties of the database table. If the table doesn't exist, the table is created when the flow is first run and the table data is replaced with each subsequent flow run.

## Additional options

In addition to the write options, you can also include custom SQL scripts or add a new tables to your database.

- **Custom SQL scripts:** Enter your custom SQL and select whether to run your script before, after or both before and after data is written to the database tables. You can use these scripts to create a copy of your database table before the flow data is written to the table, add an index, add other table properties, and so on.
- **Add a new table:** Add a new table with a unique name to the database instead of selecting one from the existing table list. If you want to apply a schema other than the default schema (Microsoft SQL Server and PostgreSQL), you can specify it using the syntax `[schema name].[table name]`.

## Supported databases and database requirements

Tableau Prep supports writing flow data to tables in a select number of databases. Flows that run on a schedule in Tableau Online can only write to these databases if they are cloud-hosted.

Some databases have data restrictions or requirements. Tableau Prep may also impose some limits to maintain peak performance when writing data to the supported databases. The following table lists the databases where you can save your flow data and any database

restrictions or requirements. Data that doesn't meet these requirements can result in errors when running the flow.

**Note** Setting character limits for your fields is not yet supported. However, you can create the tables in your database that include character limit constraints, then use the **Replace data** option to replace your data but maintain the table's structure in your database.

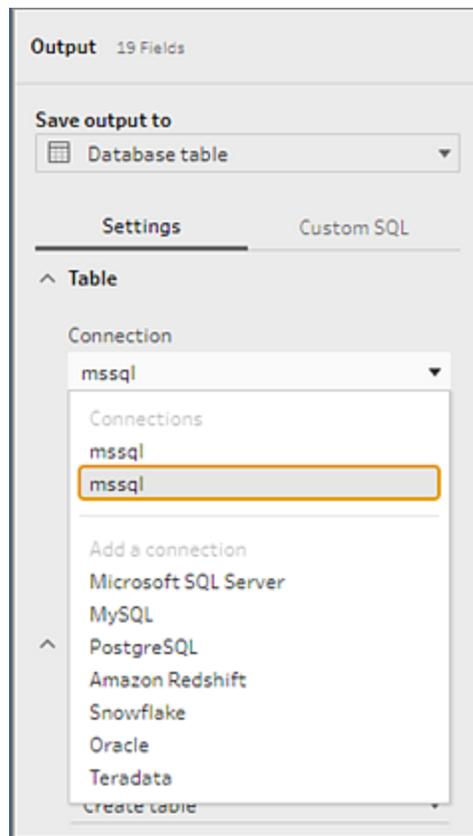
Database	Requirements or restrictions
Amazon Redshift	<ul style="list-style-type: none"> <li>• Collation sequences aren't supported. See the <a href="#">Amazon Redshift</a> documentation for more information.</li> <li>• Field names are converted to all lowercase.</li> <li>• Up to 8192 characters can be written for text field values. Longer values will be truncated.</li> </ul>
Microsoft SQL Server	<ul style="list-style-type: none"> <li>• Up to 3072 characters can be written for text field values. Longer values will be truncated.</li> </ul>
MySQL	<ul style="list-style-type: none"> <li>• Up to 8192 characters can be written for text field values. Longer values will be truncated.</li> </ul>
Oracle	<ul style="list-style-type: none"> <li>• Field and table names can't exceed 30 characters.</li> <li>• Up to 1000 characters can be written for text field values. Longer values will be truncated.</li> <li>• Special characters in field names may cause errors.</li> </ul>
PostgreSQL	<ul style="list-style-type: none"> <li>• Up to 8192 characters can be written for text field values. Longer values will be truncated.</li> </ul>
Snowflake	<ul style="list-style-type: none"> <li>• Up to 8192 characters can be written for text field values. Longer values will be truncated.</li> <li>• Warehouse options must be set to auto-resume to enable Tableau Prep to write data to the database warehouse. For more information, see <a href="#">Auto-suspension and Auto-resumption</a> in the Snowflake documentation.</li> </ul>
Teradata	<ul style="list-style-type: none"> <li>• Up to 1000 characters can be written for text field values. Longer</li> </ul>

values will be truncated.

## Save flow data to a database

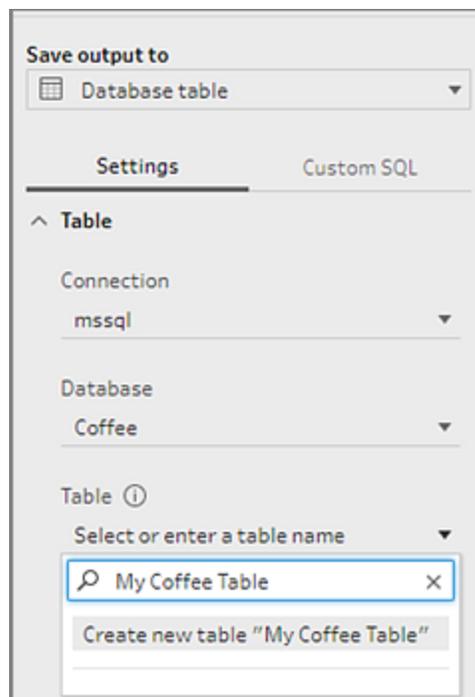
1. Click the plus icon  on a step and select **Add Output**.
2. From the **Save output to** drop-down list, select **Database table**.
3. In the **Settings** tab, enter the following information:
  - In the **Connection** drop down list , select the database connector where you want to write your flow output. Only supported connectors are shown. This can be the same connector that you used for your flow input or a different connector. If you select a different connector, you'll be prompted to sign in.

**Important:** Make sure you have write permission to the database you select. Otherwise the flow might only partially process the data.

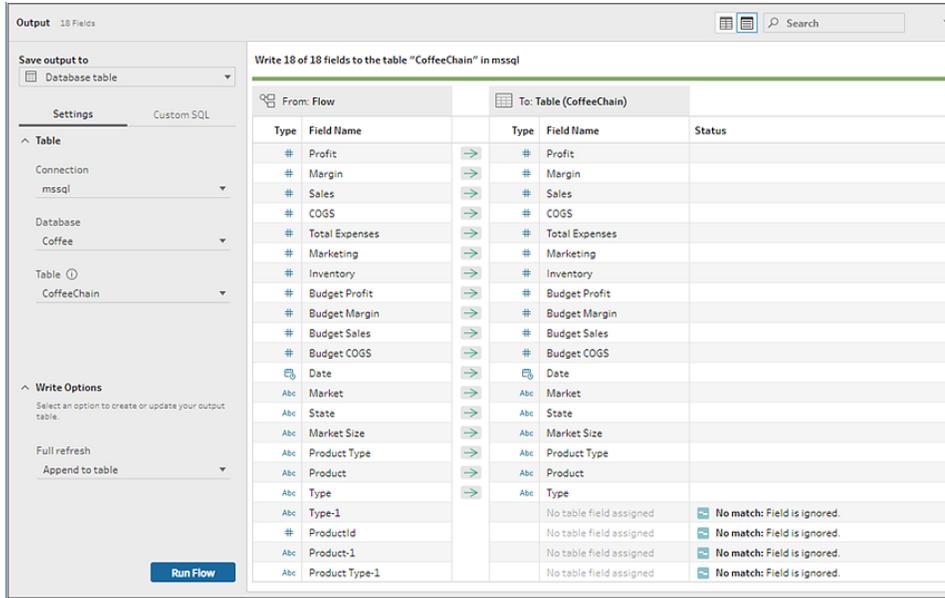


- In the **Database** drop-down list, select the database where you want to save your flow output data.
- In the **Table** drop-down list, select the table where you want to save your flow output data. Depending on the **Write Option** you select, a new table will be created, the flow data will replace any existing data in the table, or flow data will be added to the existing table.

To create a new table in the database, enter a unique table name in the field instead, then click on **Create new table**. When you run the flow for the first time, no matter which write option you select, the table is created in the database using the same schema as the flow.



4. The output pane shows you a snapshot of your data. A field comparison shows you the fields in your flow that match the fields in your table, if the table already exists. If the table is new, then a one-to-one field match is shown.

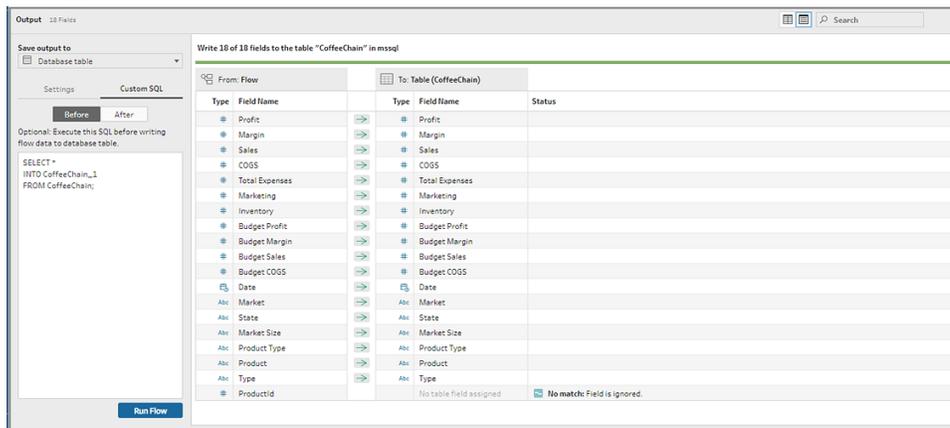


If there are any field mismatches, a status note shows you any errors.

- **No match: Field is ignored:** Fields exist in the flow but not in the database. The field won't be added to the database table unless you select the **Create table** write option and perform a full refresh. Then the flow fields are added to the database table and use the flow output schema.
- **No match: Field will contain Null values:** Fields exist in the database but not in the flow. The flow passes a Null value to the database table for the field. If the field does exist in the flow, but is mismatched because the field name is different, you can navigate to a cleaning step and edit the field name to match the database field name. For information about how to edit field name, see [Apply cleaning operations on page 286](#).
- **Error: Field data types do not match:** The data type assigned to a field in both the flow and the database table you are writing your output to must match, otherwise the flow will fail. You can navigate to a cleaning step and edit the field data type to fix this. For more information about changing data types, see [Review the data types assigned to your data on page 245](#).

5. Select a write option. You can select a different option for full and incremental refresh and the option is applied when you select your flow run method. For more information about running our flow using incremental refresh, see [Refresh Flow Data Using Incremental Refresh on the next page](#).

- **Append to table:** This option adds data to an existing table. If the table doesn't exist, the table is created when the flow is first run and data is added to that table with each subsequent flow run.
  - **Create table:** This option creates a new table. If the table with the same name already exists, the existing table is deleted and replaced with the new table. Any existing data structure or properties defined for the table are also deleted and replaced with the flow data structure. Any fields that exist in the flow are added to the new database table.
  - **Replace data:** This option deletes the data in your existing table and replaces it with the data in your flow, but preserves the structure and properties of the database table.
6. (optional) Click on the **Custom SQL** tab and enter your SQL script. You can enter a script to run **Before** and **After** the data is written to the table.



7. Click **Run Flow** to run the flow and write your data to your selected database.

## Refresh Flow Data Using Incremental Refresh

**Note:** Starting in version 2020.4.1, you can now create and edit flows in Tableau Server and Tableau Online. The content in this topic applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web](#) on page 166.

Starting in Tableau Prep Builder version 2020.2.1 and on the web, you can configure your flow inputs and outputs to refresh incrementally so that only the new rows are retrieved and processed when the flow runs, saving you time and resources.

For example, if your flow includes transaction data that updates daily, you can set up incremental refresh to retrieve and process only the new transactions every day, then run a full refresh weekly or monthly to refresh all of your flow data.

**Note:** To run incremental refresh on flow inputs that use the Salesforce connector, you must be using Tableau Prep Builder version 2021.1.2 or later.

To run your flow using incremental refresh, Tableau Prep needs the following information:

- The field that detects new rows in the input table.
- The field to use to compare the last processed values in the flow output with the values in the input to determine which rows are new.
- How you want to write the new data to your tables. You can either add new data to your existing tables, overwrite your table data with the new data, or starting in Tableau Prep Builder version 2020.3.1 and on the web, replace data in an existing table.

## Flow refresh options

Tableau Prep enables you to select how your data is refreshed and how your tables are updated with the flow output. The following table describes the different options and their benefits.

Refresh Combination	Data Processed	Table Update	Benefits
<b>Full Refresh + Create Table</b>	All	Create or overwrite the existing table with the full data set.	Refresh all the data on every flow run.
<b>Full Refresh + Append to Table</b>	All	Add new rows to the existing table.	Keep track of both new and existing data on every flow run. <b>Append to table</b> isn't available for .csv output types.
<b>Full Refresh</b>	All	Replace rows in	Maintain your existing table schema

<b>+ Replace data</b>		the existing table.	structure but replace all the data with every flow run.
<b>Incremental Refresh + Create Table</b>	New rows only	Create or over-write the existing table with only the new rows.	Create a new table with only the new rows as the as the complete data set.
<b>Incremental Refresh + Append to Table</b>	New rows only	Add the new rows to the existing table.	Add only the new rows to the existing table. <b>Append to table</b> isn't available for .csv output types.
<b>Incremental Refresh + Replace data</b>	New rows only	Replace all rows in the existing table with only the new rows.	Maintain your existing table schema structure, but replace all the data with only the new rows, making this your complete data set.

## Configure incremental refresh

To configure your flow to use incremental refresh, you need to specify settings on both the **Input** steps and the **Output** steps where you want to use this option. In the **Input** step, specify how Tableau Prep will find your new rows. In the **Output** step, specify how the new rows are written to your table. When you run the flow, you can select either a full or incremental refresh type.

**Tip:** After you configure your input and output steps for incremental refresh, you can preserve your configurations and reuse them. Copy and paste the steps to use them elsewhere in your current flow or in Tableau Prep Builder, use **Save Steps as Flow** to save the selected steps to a local file or to your server to reuse the steps in other flows. For more information about copying, pasting or reusing steps, see [Copy steps, actions and fields on page 309](#).

1. In the flow pane, select the input step that you want to configure for incremental refresh.
2. In the **Input** pane on the **Settings** tab, under the **Incremental Refresh (Set up Incremental Refresh** section in prior versions), set the following options:
  - Select **Enable incremental refresh (Enable** in prior versions).
  - **Input field (Identify new rows using field** in prior versions): Select the field

that you want to refresh in your input data. This field must be assigned a data type of **Number (whole)**, **Date**, or **Date & Time**. Currently, you can only select a single field.

**Note:** You can remove or rename this field later in the flow, as long as the field you specify in the **Output field (Field name in output** in prior versions) can be used to compare this field with the latest output to find new rows.

- **Output:** Select the output that is related to your input and that includes the field that will be used to compare rows.
- **Output field (Field name in output** in prior versions): Select the field to use to compare the last processed values in the flow output with the values in the input to find new rows. This field must have the same data type as the field you specified in the **Input field (Identify new rows using field** in prior versions).

**Input**

Settings    Multiple Files    Data Sample    Changes (0)

---

**Connection**  
Text file  
Orders\_Central.csv    Edit  
Original Table Name: Orders\_Central

**Text Options**

First line contains header  
 Generate field names automatically

Field Separator  
Comma ▼

Text Qualifier  
Automatic ▼

Character Set  
▼

Locale  
English (United States) ▼

---

**Incremental Refresh**  
Specify the input and output fields to use to identify new rows.

Enable incremental refresh

Input field  
# Row ID ▼

Output  
Create 'Superstore Sales.hyper' ▼

Select the output and field with the last processed value for field "Row ID".

Output field  
# Row ID ▼

## Configure write options

To finish setting up incremental refresh, set your output **Write Options** to specify how the new rows are written to your tables. All outputs that are related to the configured input step have a default write option selected, but you can change it to a supported option.

You can output your rows to a file (Tableau Prep Builder only), a published data source or a database. By default, outputs to local or published .hyper extracts are set to **Append to table**. Outputs to .csv file types are set to **Create table**.

1. In the flow pane, select the output step that you want to configure for incremental refresh.
2. In the Output pane, in the **Write Options** section, view the default write option and make any changes as needed.
  - **Create table:** This option creates a new table or replaces the existing table with the new output.
  - **Append to table:** This option adds the new data to your existing table. If the table doesn't already exist, a new table is created when the flow is first run and subsequent runs will add new rows to this table. Not available for .csv output types. For more information about supported refresh combinations, see [Flow refresh options on page 401](#)
  - **Replace data** (Tableau Prep Builder version 2020.3.1 and later and on the web): This option is available when you want to write your output back to an existing table in a database. It replaces the data in the database table with the flow data, but

maintains the table schema structure.

**Save output to**

Database table

Settings Custom SQL

^ **Table**

Connection  
mssql

Database  
global\_superstore

Table ⓘ  
Orders

^ **Write Options**

Select an option to create or update your output table.

Full refresh Previewing

Create table

Incremental refresh

Append to table

**Create table**  
If the table already exists, it will be deleted.

**Append to table**  
Add data to the existing table. If the table doesn't exist, it's created when the flow is first run.

**Replace data**  
Replace data in the existing table. If the table doesn't exist, it's created when the flow is first run.

Preview output

Run Flow

## Run your flow

You can run individual flows using incremental refresh in Tableau Prep Builder, on the web, or from the command line. For information about running your flow from the command line, see [Run the flow with incremental refresh enabled \(version 2020.2.1 and later\) on page 421](#).

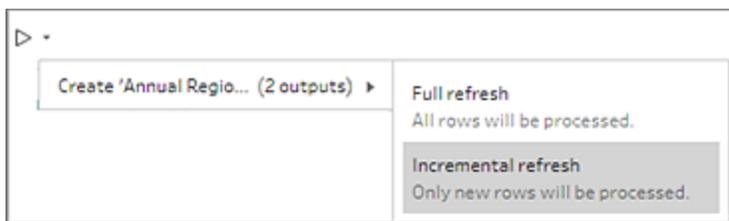
If you have The Data Management Add-on with Tableau Prep Conductor enabled, you can run your flow using incremental refresh using a schedule on Tableau Server or Tableau Online. For information about running your flow on a schedule, see [Schedule a Flow Task on page 504](#).

**Note:** In prior version, write options are set in Tableau Prep Builder and can't be changed when running your flow in Tableau Server or Tableau Online. Starting in Tableau Server and Tableau Online version 2020.4, you can edit the flow directly in the web. For more information about using Tableau Prep On the web see [Tableau Prep on the Web on page 166](#).

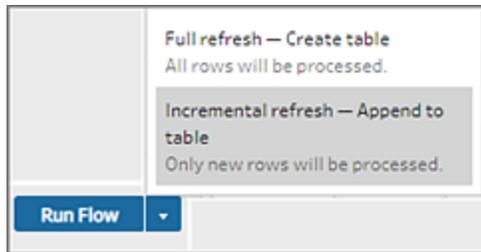
Tableau Prep runs a full refresh for all outputs regardless of the run option you select if no existing output is found. Subsequent flow runs use the incremental refresh process and retrieve and process only the new rows unless incremental refresh configuration data is missing or the existing output is removed.

To run the flow in Tableau Prep using incremental refresh, select **Incremental refresh** from one of the following locations:

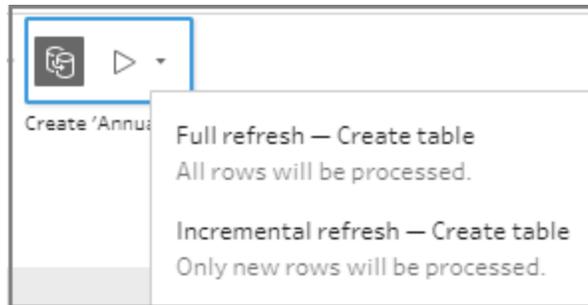
- From the top menu, click the drop-down option on the **Run** button.



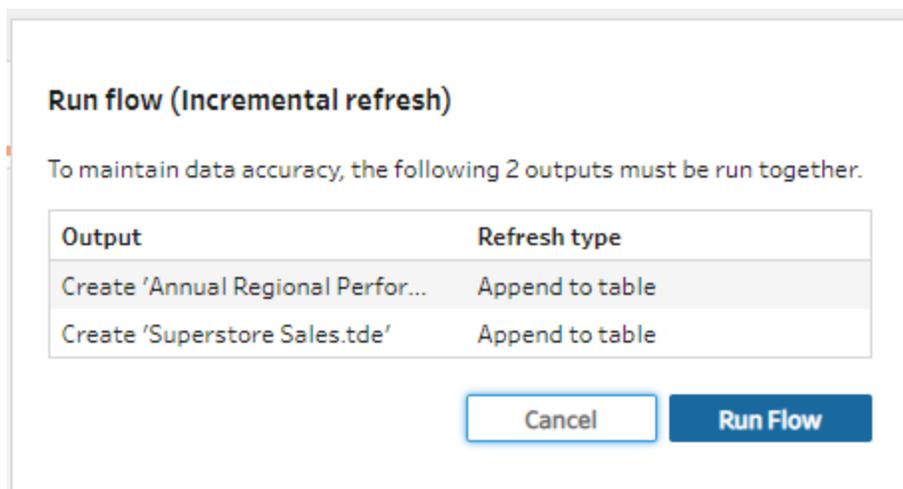
- From the Output pane, click the drop-down option on the **Run Flow** button.



- From the Flow pane, click the drop-down on the Run button next to the Output step.



If one input with incremental refresh enabled is associated with multiple outputs, those outputs must be run together and must use the same refresh type. When you run your refresh in Tableau Prep, a dialog shows letting you know that you must run both outputs together.



# Refresh flow output files from the command line

**Note:** The content in this topic only applies to Tableau Prep Builder.

You can run your flow from the command line to refresh your flow output instead of running the flow from Tableau Prep Builder. You can run one flow at a time using this method. This option is available on both Windows and Mac machines where Tableau Prep Builder is installed.

**Note:** If you use Single Sign-On authentication, running flows from the command line isn't available. You can run the flows from Tableau Prep Builder instead.

## Connector limitations:

- JDBC or ODBC connectors: Flows that include these connectors can be run from the command line starting in version 2019.2.3.
- Cloud connectors: Flows that include cloud connectors, such as Google BigQuery, can't be run from the command line. Instead run the flow manually or run the flow on a schedule in Tableau Server or Tableau Online using Tableau Prep Conductor. For more information, see [Keep Flow Data Fresh on page 440](#).

For Windows machines, you can also schedule this process using Windows Task Scheduler. For more information, see [Task Scheduler](#) in the Microsoft online help.

When you run flows from the command line, Tableau Prep Builder refreshes all outputs for the flow using the settings for the output steps specified in Tableau Prep Builder. For information about how to specify your output locations, see [Create data extract files and published data sources on page 387](#). For information about setting your write options (version 2020.2.1 and later), see [Configure write options on page 405](#).

## Before running the flow

To run the flow from the command line, you'll need administrator privileges on the machine where you are running the flow and you'll need the following information:

- The path where Tableau Prep Builder is installed.
- If connecting to databases and publishing output files to a server or a database (version 2020.3.1 and later) - create a credentials .json file that includes all required credentials.
- The path where the Tableau Flow (.tfl) file is located.

## Credentials .json file requirements

**Note:** Credentials .json files are not required if the flow connects to and outputs to local files, files stored on a network share or input files that use Windows Authentication (SSPI). For more information about Windows Authentication, see [SSPI Model](#) in the Microsoft online help.

Tableau Prep Builder uses information from the flow file and from the credentials .json file to run the flow when you have remote connections. For example, the database name for your remote connections and the project name for your output files come from the flow, and the server name and the sign in credentials come from the credentials .json file.

- If you plan to reuse the file, place it in a folder where it won't be overwritten by the Tableau Prep Builder install process.
- If you are running a flow that includes any of the following, you must include a .json file that includes the credentials that are required to connect.
  - Connects to database files or published data sources.
  - The output is published to a server or to a database (version 2020.3.1 and later).
  - The flow includes script steps for Rserve or TabPy. The .json file must include the credentials that are required to connect to these services. For more information, refer to the array requirements for your version below.
- The credentials specified in your flow and the credentials included in your .json file must match, otherwise the flow will fail to run.
- When you run the process, the hostname, port, and username are used to find the matching connection in the Tableau flow file (.tfl) and updated before running the process. Port ID and Site ID are optional if your connections don't require this information.
- If connecting to a published data source, include hostname, contentUrl, and port (80 for http and 443 for https) in the input connections. The hostname is required to find the matching connection in the Tableau flow file (.tfl), and the contentUrl and port are used to establish the connection to the server.
- If you connect to Tableau Online, include the port (80 or 443) in the input connections for the pod that you are connecting to. For more information about Tableau Online, see [Tableau Bridge connections to Tableau Online](#) in the Tableau Online help.

Depending on your Tableau Prep Builder version, your credential information may be formatted differently. Click on the tab below to view the credential format for your Tableau Prep Builder version.

## Version 2020.3.1 and later

Depending on your connections, include your server or database credentials or both. When your flow connects to and outputs to the same server or database, you only need to include a single block in the .json file. If you connect to a server or database that uses different credentials, use a comma delimited array.

Server connections	Database connections	Rserver or Tableau Python connections
<p>Connection block name: "tableauServerConnections"</p> <p>Include the following data in the array:</p> <ul style="list-style-type: none"> <li>• serverUrl (Server name)</li> <li>• contentUrl (Site ID. This appears after /site/ in the URL for Tableau Server or Tableau Online. For example "https://my.server-#/site/mysite" set "contentUrl": "mysite".))</li> <li>• port (Port ID)</li> <li>• username</li> <li>• password</li> </ul>	<p>Connection block name: "databaseConnections"</p> <p>Include the following data in the array:</p> <ul style="list-style-type: none"> <li>• hostname (Server name)</li> <li>• port (Port ID)</li> <li>• username</li> <li>• password</li> </ul>	<p>Only include this array if your flow includes script steps for R or TabPy.</p> <p>Connection block name: "extensions"</p> <p>Include the following data in the array:</p> <ul style="list-style-type: none"> <li>• extensionName: Specify "rSupport" or "pythonSupport"</li> <li>• regular: Include "host" and "port". You can also include "username" or "sslCertificate" (content of your public .pem file encoded as base64 string) if applicable.</li> <li>• sensitive: Include "password" if you use one. Otherwise include a blank array.</li> </ul>

**Note: ContentUrl** is always required in the .json file for sever connections. If connecting to a default site, for example "https://my.server/#/site/", set ContentUrl to blank. For example "contentUrl": ""

## Examples

This section shows different examples of credentials files that you can create using the credentials .json requirements.

### Connecting to a server connection

This example shows a .json credentials file that connects to and outputs to a server connection that uses the same credentials:

```
{
  "tableauServerConnections": [
    {
      "serverUrl": "https://my.server",
      "contentUrl": "mysite",
      "port": 443,
      "username": "jsmith",
      "password": "passw0rd$"
    }
  ]
}
```

### Connecting to a server connection and output to a database connection

This example shows a .json credentials file that connects to a server connection and outputs to a database connection:

```
{
  "tableauServerConnections": [
    {
      "serverUrl": "https://my.server",
      "contentUrl": "mysite",
      "port": 443,
      "username": "jsmith",
```

## Tableau Prep Help

```
    "password": "passw0rd$"
  }
],
"databaseConnections":[
  {
    "hostname":"example123.redshift.amazonaws.com",
    "port":"5439",
    "username":"jsmith",
    "password":"p@s$w0rd!"
  }
]
}
```

### Flow includes Rserve and TabPy script connections and outputs to a database connection

This example shows a .json credentials file that includes Rserve and Tabpy credentials and outputs to a database connection:

```
{
  "extensions": [
    {
      "extensionName": "rSupport",
      "regular": {
        "host": "localhost",
        "port": "9000",
        "username": "jsmith"
      },
      "sensitive": {
        "password": "pwd"
      }
    },
    {
      "extensionName": "pythonSupport",
      "regular": {
        "host": "localhost",
```

```

        "port": "9000"
      },
      "sensitive": {
      }
    }
  ],
  "databaseConnections": [
    {
      "hostname": "example123.redshift.amazonaws.com",
      "port": "5439",
      "username": "jsmith",
      "password": "p@s$w0rd!"
    },
    {
      "hostname": "mysql.mydb.tsi.lan",
      "port": "3306",
      "username": "jsmith",
      "password": "m$pa$w0rd"
    }
  ]
}

```

## Connecting to and outputting to different database connections

This example shows a .json credentials file that connects to and outputs to different database connections:

```

{
  "databaseConnections": [
    {
      "hostname": "example123.redshift.amazonaws.com",
      "port": "5439",
      "username": "jsmith",
      "password": "p@s$w0rd!"
    },
    {
      "hostname": "mysql.mydb.tsi.lan",

```

```

    "port": "3306",
    "username": "jsmith",
    "password": "mspa$$w0rd"
  }
]
}

```

## Version 2020.2.3 and earlier

Enter an array for your input and output connections.

**Note:** If using Tableau Prep Builder version 2018.2.2 through 2018.3.1, always include the "inputConnections" and "outputConnections" arrays even if the flow doesn't have remote connections for inputs or outputs. Just leave those arrays blank. If you are using Tableau Prep Builder version 2018.3.2 and later you don't need to include the blank arrays.

Input connections	Output connections	Rserver or Tableau Python connections
<ul style="list-style-type: none"> <li>• hostname (Server name)</li> <li>• contentUrl (Always required for published data sources. See <b>Output connections</b> for description.)</li> <li>• port (Port ID)</li> <li>• username</li> <li>• password</li> </ul>	<ul style="list-style-type: none"> <li>• serverUrl</li> <li>• contentUrl (Site ID. This appears after /site/ in the URL for Tableau Server or tableau Online. For example "https://my.server/#/site/mysite" set "contentUrl": "mysite".)</li> <li>• username</li> <li>• password</li> </ul>	<p>Only include this array if your flow includes script steps for R or TabPy that require a password.</p> <ul style="list-style-type: none"> <li>• extensionName: Specify "rSupport" or "pythonSupport"</li> <li>• credentials: Include "password" .</li> </ul>

## Examples

This section shows two different examples of credentials files that you can create using the credentials .json requirements.

### Connecting to a published data source

This example shows a .json credentials file that connects to a published data source and outputs data to a server that includes a Site ID

**Note:** If the inputConnection or outputConnection uses the Default site, for example "https://my.server/#/site/", set ContentUrl to blank. For example "contentUrl": ""

```
{
  "inputConnections": [
    {
      "hostname": "https://my.server",
      "contentUrl": "mysite",
      "port": 443,
      "username": "jsmith",
      "password": "passwd$"
    }
  ],
  "outputConnections": [
    {
      "serverUrl": "https://my.server",
      "contentUrl": "mysite",
      "username": "jsmith",
      "password": "passwd$"
    }
  ]
}
```

### Connecting to two databases

This example shows a .json credentials file that connects to MySQL and Oracle and outputs data to a server that includes a Site ID.

## Tableau Prep Help

```
{
  "inputConnections": [
    {
      "hostname": "mysql.example.lan",
      "port": 1234,
      "username": "jsmith",
      "password": "passw0rd"
    },
    {
      "hostname": "Oracle.example.lan",
      "port": 5678,
      "username": "jsmith",
      "password": "passw0rd"
    }
  ],
  "outputConnections": [
    {
      "serverUrl": "http://my.server",
      "contentUrl": "mysite",
      "username": "jsmith",
      "password": "passw0rd$"
    }
  ]
}
```

Flow includes script steps for Rserve and TabPy and connects to a database

This example shows a .json credentials file that includes the password for Rserve and TabPy services and connects to MySQL.

```
{
  "inputConnections": [
    {
      "hostname": "mysql.example.lan",
      "port": 1234,
      "username": "jsmith",
      "password": "passw0rd"
    }
  ]
}
```

```

    }
  ],
  "extensions": [
    {
      "extensionName": "rSupport",
      "credentials": {
        "password": "pwd",
      }
    },
    {
      "extensionName": "pythonSupport",
      "credentials": {
        "password": "pwd"
      }
    }
  ]
}

```

## Tips for creating your credentials file

To avoid errors when running the flow, make sure your credentials file follows these guidelines:

- If using Tableau Prep Builder version 2018.2.2 through 2018.3.1, always include the "inputConnections" and "outputConnections" arrays even if the flow doesn't have remote connections for inputs or outputs. Just leave those arrays blank.

If you are using Tableau Prep Builder version 2018.3.2 and later you don't need to include the blank array.

- No remote input connection? Include this syntax at the top of the .json file

```

{
  "inputConnections": [
  ],

```

- No remote output connection? Include this syntax at the bottom of the .json file

```
"outputConnections": [
  ]
}
```

- No port ID for your input connection or the port is specified as part of the server name.

If there is no port ID for your connection, don't include the "port":xxxx, reference in the .json file, not even "port": ". If the port ID is included in the server name, include the port ID in the host name. For example "hostname":

```
"mssql.example.lan,1234"
```

- When referencing the "serverUrl": don't include a "/" at the end of the address. For example, use this "serverUrl": "http://server" not this "serverUrl": "http://server/".
- If you have multiple input or output connections include the credentials for each one in the file.
- If connecting to published data sources, make sure to include the hostname and contentUrl in the input connections.

## Run the flow

**Important:** The examples below include the name change for "Tableau Prep" version 2019.1.2 to "Tableau Prep Builder". If you are using an earlier version of the product use "Tableau Prep" instead.

1. Open the command prompt or terminal command prompt (MacOS) as an Administrator.
2. Run one of the following commands using the syntax shown below.
  - The flow connects to local files or files stored on a network share and publishes to local files, files stored on a network share or uses Windows authentication:

**Note:** If connecting to or outputting to files stored on a network share, use the UNC format for the path: \\server\path\file name. It can't be password protected.

### Windows

```
"\[Tableau Prep Builder install location]\Tableau Prep
Builder <version>\scripts"\tableau-prep-cli.bat -t
"path\to\[your flow file name].tfl"
```

### Mac

```
/Applications/Tableau\ Prep\ Builder\ [Tableau Prep
Builder version].app/Contents/scripts/./tableau-prep-cli
-t path/to/[your flow file name].tfl
```

- The flow connects to databases or publishes to a server:

### Windows

```
"\[Tableau Prep Builder install location]\Tableau Prep
Builder <version>\scripts"\tableau-prep-cli.bat -c
"path\to\[your credential file name].json" -t "path\to\
[your flow file name].tfl"
```

### Mac

```
/Applications/Tableau\ Prep\ Builder\ [Tableau Prep
Builder version].app/Contents/scripts/./tableau-prep-cli
-c path/to/[your credential file name].json -t path/to/
[your flow file name].tfl
```

- The flow file or credentials file is stored on a network share (use the UNC format for the path: \\server\path\file name):

### Windows

```
"\[Tableau Prep Builder install location]\Tableau Prep
Builder <version>\scripts"\tableau-prep-cli.bat -c
"\server\path\[your credential file name].json" -t
"\server\path\[your flow file name].tfl"
```

**Mac:** Map the network share to /Volumes in Finder so that it is persistent, then use /Volumes/.../[your file] to specify the path:

```
/Applications/Tableau\ Prep\ Builder\ [Tableau Prep  
Builder version].app/Contents/scripts/./tableau-prep-cli  
-c /Volumes/.../[your credential file name].json -t  
path/to/[your flow file name].tfl
```

For common errors and resolutions see [Common errors when using the command line to run flows](#) on page 587.

## Run the flow with incremental refresh enabled (version 2020.2.1 and later)

If you don't have Tableau Prep Conductor enabled on your server to schedule your flow runs, you can run your flow using incremental refresh from the command line. Simply include the parameter `--incrementalRefresh` in your command line as shown in the example below.

### Windows

```
"\[Tableau Prep Builder install location]\Tableau Prep Builder  
<version>\scripts"tableau-prep-cli.bat --incrementalRefresh -t  
"path\to\[your flow file name].tfl"
```

### Mac

```
/Applications/Tableau\ Prep\ Builder\ [Tableau Prep Builder ver-  
sion].app/Contents/scripts/./tableau-prep-cli --incre-  
mentalRefresh -t path/to/[your flow file name].tfl
```

If the input steps in your flow have incremental refresh enabled and the incremental refresh parameters are properly configured, Tableau Prep Builder will do the following:

- All inputs in the flow that have incremental refresh enabled will run all corresponding outputs using incremental refresh.
- If no input in the flow has incremental refresh enabled, all outputs will be run using full refresh. A message will show the refresh method details.
- If some inputs in the flow have incremental refresh enabled, the corresponding outputs will run using incremental refresh. The other outputs will be run using full refresh and a message will show the refresh method details.

For more information about configuring flows to use incremental refresh, see [Refresh Flow Data Using Incremental Refresh](#) on page 400

## Command options

If you want to view the help options, include `-h` in the command line.

Command options	Description	Notes
<code>-c, --connections &lt;arg&gt;</code>	The connection path to the credentials file.	Requires the path to where the credentials file is located.
<code>-d, --debug</code>	Debug the flow process.	Include this option to view more information to help debug a problem with refreshing the flow. Log files are stored in: <code>My Tableau Prep Builder Repository\Command Line Repository\Logs</code>
<code>-dsv, --disableSslValidation</code>	Disable SSL validation (MacOS)	When running flows using the command line on the MacOS, a dialog may show asking for the keychain user and password. Starting with Tableau Prep Builder version 2019.3.2, you can pass in this additional parameter to disable this keychain dialog. For example: <code>/Applications/Tableau\ Prep\ Builder\ [Tableau Prep Builder version].app/Contents/scripts/./tableau-prep-cli -dsv -c path/to/[your credential file name].json -t path/to/[your flow file name].tfl</code>

Tableau Prep Help

<p>-h, --help</p>	<p>View the help for syntax options.</p>	<p>The help option or a syntax error shows the following information:</p> <pre>usage: tableau-prep-cli [-c &lt;arg&gt;] [-d] [-h] [-t &lt;arg&gt;]</pre> <p>-c, --connections &lt;arg&gt; Path to a file with all connection information</p> <p>-d, --debug This option is for debugging</p> <p>-dsv, --disableSslValidation Disable SSL validation</p> <p>-h, --help Print usage message</p> <p>-inc, --incrementalRefresh Run incremental refresh for all outputs that are configured to support it</p> <p>-t, --tflFile &lt;arg&gt; The Tableau Prep Builder flow file</p>
<p>-inc, --incrementalRefresh</p>	<p>Run incremental refresh for all outputs that are con-</p>	<p>Include this option to run incremental refresh for all inputs that are configured to use it. Incremental refresh enables Tableau Prep Builder to retrieve and process only new rows instead of all rows in a flow.</p> <p>The incremental refresh configuration settings on the input steps determine which flow outputs can be run incrementally. All other outputs will be run using a full refresh and a message will show the refresh method details.</p> <p>For more information about running flows using incremental refresh, see <a href="#">Refresh Flow Data Using Incremental Refresh</a> on <a href="#">page 400</a>.</p>

	figured to use it.	
-t, -- tflFile <arg>	The .tfl flow file	Requires the path to where the .tfl flow file is located.

## Syntax examples

The command lines below show four different examples for running a flow using the following criteria:

- **Tableau Prep Builder version:** 2020.3.1  
**Important:** The examples below include the name change for Tableau Prep version 2019.1.2 to Tableau Prep Builder. If you are using an earlier version of the product use "Tableau Prep" instead.
- **Flow name:** Flow1.tfl
- **Flow location:** C:\Users\jsmith\Documents\My Tableau Prep Builder Repository\Flows
- **Credentials file name:** Flow 1.json
- **Credentials file location:** C:\Users\jsmith\Desktop\Flow credentials
- **Credentials file location stored on a network share:** \\tsi.lan\files\Flow credentials

The flow connects to and publishes to local files

### Windows

```
"\Program Files\Tableau\Tableau Prep Builder 2020.3.1\scripts"\tableau-prep-cli.bat -t "C:\Users\jsmith\Documents\My Tableau Prep Builder Repository\Flows\Flow1.tfl"
```

### Mac

## Tableau Prep Help

```
/Applications/Tableau\ Prep\ Builder\ 2020.3.1.ap-  
p/Contents/scripts/./tableau-prep-cli -t /User-  
s/jsmith/Documents/My\ Tableau\ Prep\ Builder\  
Repository/Flows.Flow1.tfl
```

The flow connects to and publishes to local files and uses the short form for incremental refresh

### Windows

```
"\Program Files\Tableau\Tableau Prep Builder 2020.3.1\scripts"\t-  
ableau-prep-cli.bat -inc -t "\C:\Users\jsmith\Documents\My  
Tableau Prep Builder Repository\Flows\Flow1.tfl"
```

### Mac

```
/Applications/Tableau\ Prep\ Builder\ 2020.3.1.ap-  
p/Contents/scripts/./tableau-prep-cli -inc -t /User-  
s/jsmith/Documents/My\ Tableau\ Prep\ Builder\  
Repository/Flows.Flow1.tfl
```

The flow connects to databases and publishes to a server

### Windows

```
"\Program Files\Tableau\Tableau Prep Builder 2020.3.1\scripts"\t-  
ableau-prep-cli.bat -c "\C:\Users\jsmith\Desktop\Flow cre-  
dentials\Flow1.json" -t "\C:\Users\jsmith\Documents\My Tableau  
Prep Builder Repository\Flows\Flow1.tfl"
```

### Mac

```
/Applications/Tableau\ Prep\ Builder\ 2020.3.1.ap-  
p/Contents/scripts/./tableau-prep-cli -c /User-  
s/jsmith/Desktop/Flow\ credentials/Flow1.json -t  
/Users/jsmith/Documents/My\ Tableau\ Prep\ Builder\ Repos-  
itory/Flows.Flow1.tfl
```

The flow publishes to a server and the credentials file is stored on a network share

### Windows

```
"\Program Files\Tableau\Tableau Prep Builder 2020.3.1\scripts"\tableau-prep-cli.bat -c "\\tsi.lan\files\Flow credentials\Flow1.json" -t "C:\Users\jsmith\Documents\My Tableau Prep Builder Repository\Flows\Flow1.tfl"
```

**Mac**

```
/Applications/Tableau\ Prep\ Builder\ 2020.3.1.app/Contents/scripts/./tableau-prep-cli -c /Volumes/files/Flow\ credentials/Flow1.json -t /Users/jsmith/Documents/My\ Tableau\ Prep\ Builder\ Repository/Flows.Flow1.tfl
```

# Version Compatibility with Tableau Prep

Tableau Prep Builder frequently releases new versions, generally every month. If new features or connectors are introduced in a new version and you are working in an older version of Tableau Prep Builder, compatibility may be an issue if you try to open a flow.

**Note:** Starting in version 2020.4, you can create and edit flows directly on Tableau Server and Tableau Online. Flows created on the web will always be compatible with the server version you are using. For more information about web authoring, see [Tableau Prep on the Web](#) on page 166.

Similarly, if you publish flows to Tableau Server or Tableau Online to schedule them to run using Tableau Prep Conductor and your flows include new features or connectors that aren't supported in your version of Tableau Server or Tableau Online, you can run into compatibility errors that might prevent you from scheduling and running your flows.

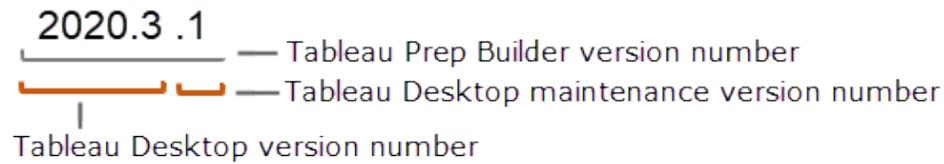
## Finding our version

**Note:** To download a specific version of Tableau Prep Builder, open the [Product Downloads and Release Notes](#) page and select **Tableau Prep Builder** from the list on the left side of the page.

Follow the instructions below to find your product version number.

### Tableau Prep Builder

Tableau Prep Builder release versions are numbered like Tableau Desktop and Tableau Server maintenance versions, for example 2020.2.3. Except Tableau Prep Builder doesn't release maintenance versions, only major releases.

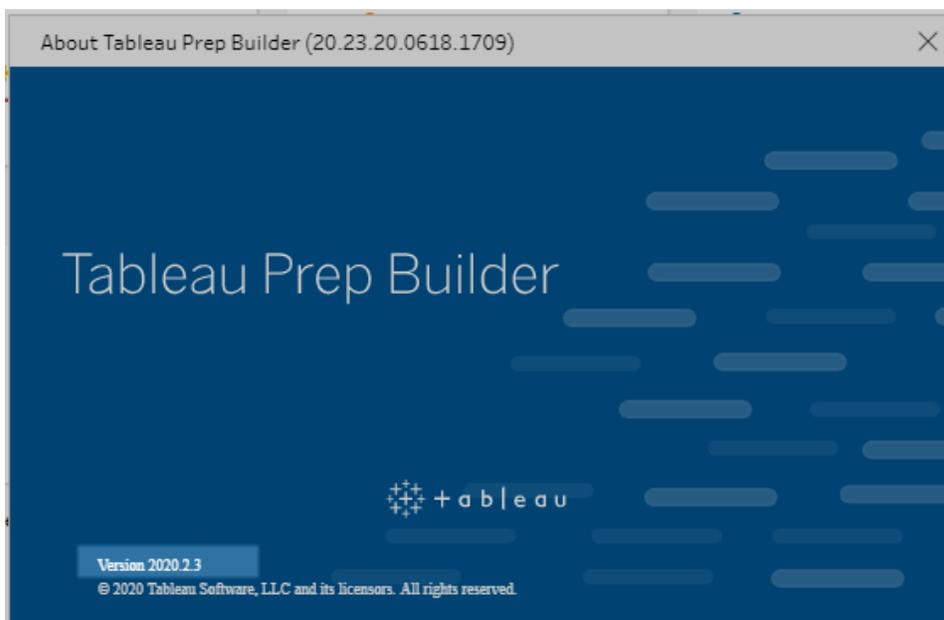


Each release represents the latest version of the product, including any new features and updates. For example, flows built using Tableau Prep Builder version 2020.3.2 might not be fully compatible with Tableau Server version 2020.3.2, but would be compatible with the next major release version of Tableau Server, for example 2020.4.

To find the release version for your product, open Tableau Prep Builder, then in the top menu do one of the following:

- **Windows:** In the top menu, click **Help > About Tableau Prep Builder** or **About Tableau Prep**, depending on your version.
- **Mac:** In the top menu, click **Tableau Prep Builder > About Tableau Prep Builder** or **Tableau Prep > About Tableau Prep**, depending on your version.

The release number displays in the lower left corner of the dialog.

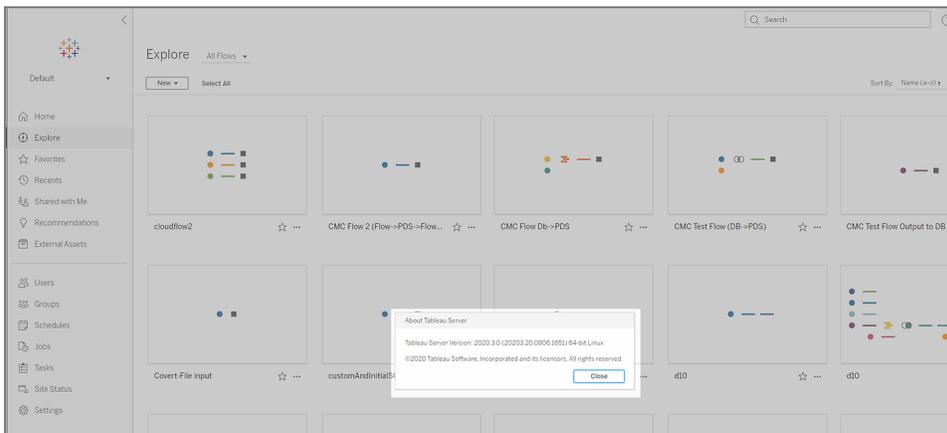


## Tableau Server

## Tableau Prep Help

Tableau Prep Conductor was introduced as part of the Data Management Add-on in Tableau Server version 2019.1. To schedule flows to run on Tableau Server, you must be using Tableau Server version 2019.1 or later and Tableau Prep Conductor must be enabled.

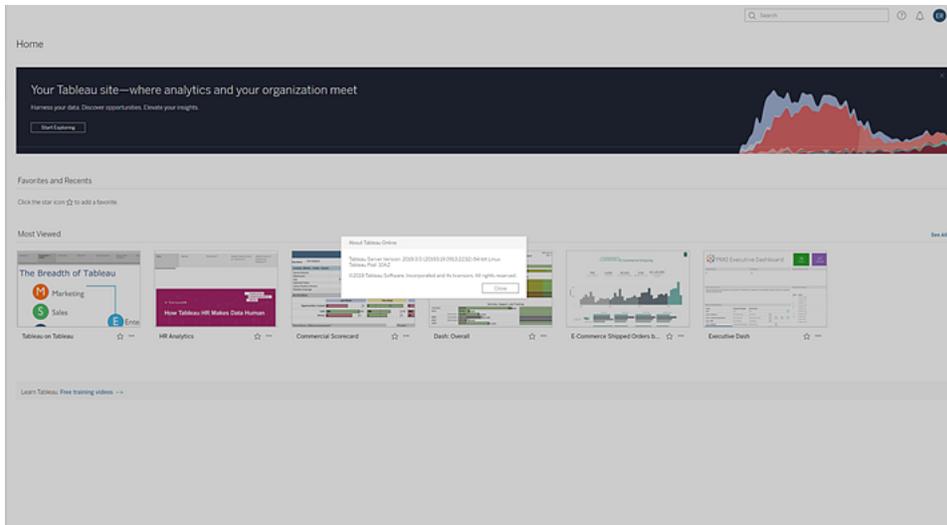
To find your version of Tableau Server, open Tableau Server in your web browser. In the top menu bar click the information icon  in the top right corner and select **About Tableau Server**. A dialog opens that tells you which version of Tableau Server you are using. For information about how to enable Tableau Prep Conductor, see [Step 2: Configure Flow Settings for your Tableau Server on page 469](#).



## Tableau Online

Tableau Prep Conductor was introduced as part of the Data Management Add-on in Tableau Online version 2019.3. To schedule flows to run on Tableau Online, you must be using Tableau Online version 2019.3 or later and Tableau Prep Conductor must be enabled.

To find your version of Tableau Online, open Tableau Online in your web browser. In the top menu bar click the information icon in the top right corner and select **About Tableau Online**. A dialog opens that tells you which version of Tableau Online you are using. For information about enabling Tableau Prep Conductor, see [Enable Tableau Prep Conductor on your Tableau Online Site on page 478](#).



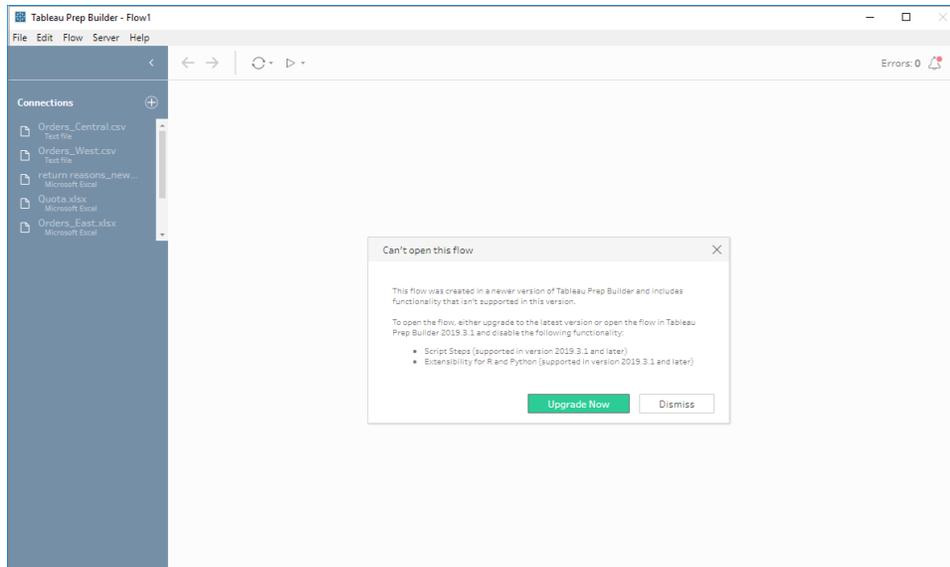
## Compatibility between different versions of Tableau Prep Builder

Generally, a new version of Tableau Prep Builder can open flows created in an older version. However, compatibility issues can occur when you try to open a flow between newer and older versions of Tableau Prep Builder or even when opening flows in the same version of Tableau Prep Builder using different computers.

For example:

- The flow includes input connectors or features that aren't supported in the version where the flow is opened.
- The machine that you use to open the flow doesn't have the required input connectors installed or has a driver version for the connector that isn't compatible. Tableau Prep Builder requires 64-bit drivers to be installed to work with flow input connectors.

If compatibility is an issue, when you try to open the flow, the flow may open but contains errors or the flow won't open at all and you receive an error message. In the example below, the flow won't open and an error message displays and lists the incompatible features and options for resolving the issue.



## Fix compatibility issues with Tableau Prep Builder

To fix compatibility issues, try one of the following:

- Upgrade to the latest version of Tableau Prep Builder.

Click the update button on the bottom of the Discover pane to download the latest version of the product and follow the instructions to [Install Tableau Prep Builder](#) in the Tableau Desktop and Tableau Prep Builder Deployment Guide. If you don't have access to the update button on the Discover pane, instructions about how to download the latest version of the product are included in the [Install Tableau Prep Builder](#) topic.

- Make sure your computer is compatible with Tableau Prep Builder. For example, make sure that you have the 64-bit drivers installed for the connectors used by the flow. To install drivers, see the [Driver Download](#) page.
- Open a copy of the flow that has the incompatible features removed.

## Compatibility between different versions of Tableau Prep Builder and Tableau Server

Publishing from a newer version of Tableau Prep Builder to an older version of Tableau Server can result in compatibility issues. For example, new features added in Tableau Prep Builder version 2020.3.2 may not be compatible with Tableau Server version 2020.3.2 but would be

compatible with Tableau Server version 2020.4 and any later major versions of Tableau Server, such as version 2021.1.

In Tableau Server, Tableau Prep Conductor detects the features that are included in a flow when it has been published. If it finds features that it doesn't support, the flow can still be published to Tableau Server, but the flow can't be run, scheduled, or added to a task. Tableau Online is updated automatically on a regular basis, so is generally compatible with all versions of Tableau Prep Builder.

If you have an older version of Tableau Server, you can still run incompatible flows manually in Tableau Prep Builder or using the command line. For more information about using this process, see [Refresh flow output files from the command line on page 409](#).

## Detect incompatible features

Depending on the version of Tableau Prep Builder you are using, you can spot incompatible features in different ways.

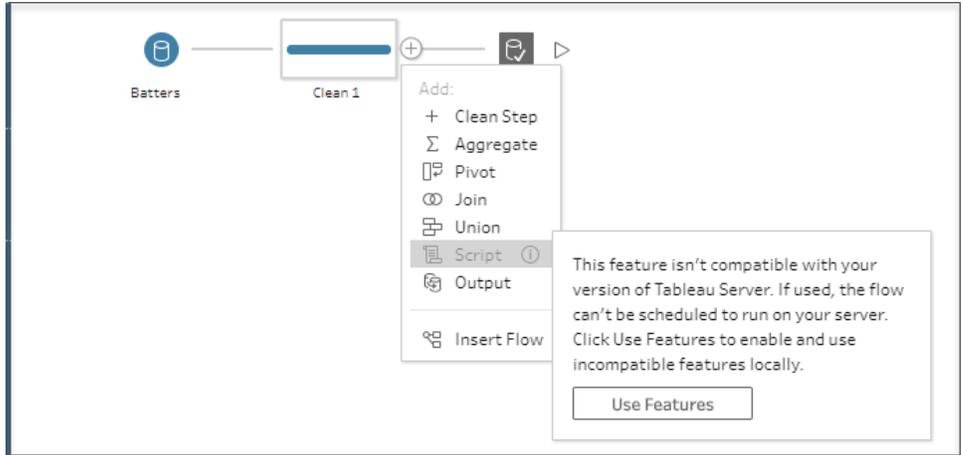
### Tableau Prep Builder (version 2020.1.1 and later)

Sign into Tableau Server, and Tableau Prep Builder will detect and disable incompatible features for you. Any features that aren't compatible will show as grayed out. If you want to still use the feature and run the flow manually or from the command line, you can enable it from the menu.

**Note:** Starting in Tableau Prep Builder version 2020.1.4, once you sign into your server, Tableau Prep Builder remembers your server name and credentials when you close the application so that the next time you open the application you are already logged into your server.

1. Hover over the disabled feature to see if it's disabled because it isn't compatible with your server version, then click the **Use Features** button. This option is available in the Flow pane and from the menus in the Profile pane, Results pane and data grid.

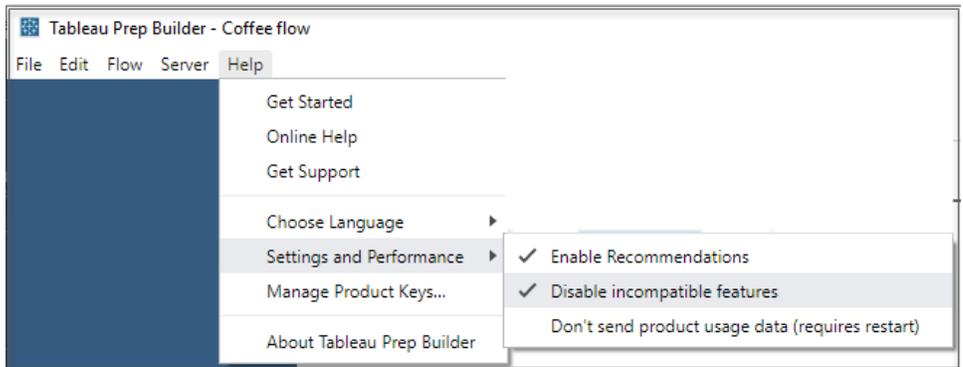
**Note:** Features can be disabled for other reasons, such as data updates being paused or if the option isn't available for a particular step or data type.



2. The selected feature is applied and all incompatible features are enabled and available to use. Incompatible features are flagged with a warning so that you can easily find and remove them if you want to run the flow using a schedule in your version of Tableau Server.

To disable this feature entirely and enable all incompatible features, do the following:

1. From the top menu, select **Help > Settings and Performance > Disable Incompatible Features**.



2. Select **Disable Incompatible Features** to clear the check mark next to this option. To enable the feature again, select **Disable Incompatible Features**. This option should be enabled by default.

## Tableau Prep Builder (version 2019.3.1 and later)

As you build your flow, Tableau Prep Builder can detect incompatible features as you add them and flags these features with an alert icon. You must be signed into your server to see these

alerts. This new alert system helps you quickly identify incompatible features in your flow so you can decide whether to keep the feature in your flow or remove it.

Hover over alerts in the Flow pane to view information about the incompatible feature, or use the new alert center to see more details. In the alert center, click the **View in Flow** link to navigate directly to the step, annotation, field or change that triggered the warning.

The screenshot shows the Tableau Prep Builder interface. The top part displays a flow diagram with various steps and data sources. The bottom part shows a data preview table with columns: Days to Ship-1, Year of Sale, Returned?, Days to Ship, Approver, Return Notes, Order ID, Return Reason, Category, City, Country, Customer ID, Customer Name, Discount, and Order ID. The Alerts pane on the right lists three warnings:

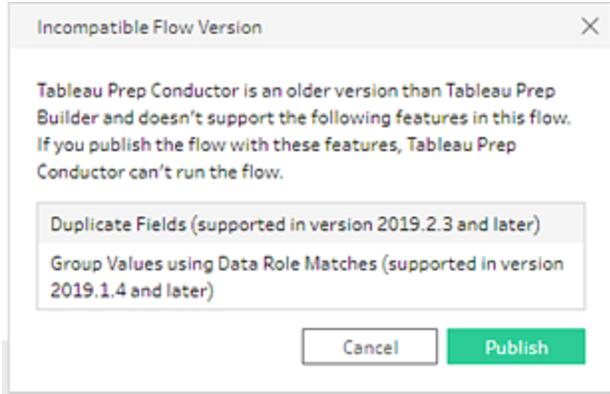
- Duplicate Fields Not Supported:** Duplicate Fields isn't compatible with your server version. To run this flow on the server, either upgrade your version of Tableau Server or remove this feature from the flow.
- Group Values using Data Role Matches Not Supported:** Group Values using Data Role Matches isn't compatible with your server version. To run this flow on the server, either upgrade your version of Tableau Server or remove this feature from the flow.
- Group Values using Data Role Matches Not Supported:** Group Values using Data Role Matches isn't compatible with your server version. To run this flow on the server, either upgrade your version of Tableau Server or remove this feature from the flow.

## Tableau Prep Builder (all versions)

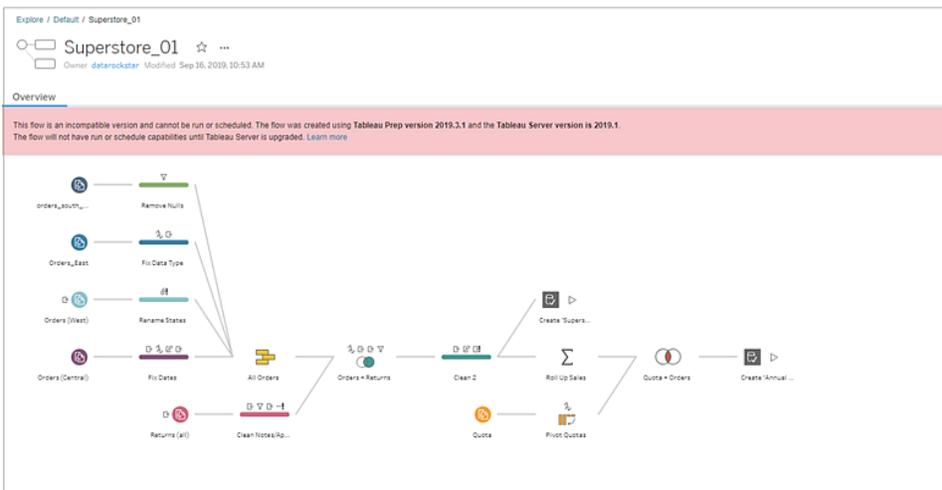
If you publish a flow with incompatible features, the following message is displayed and lists the features that aren't supported in the version of Tableau Server that you are signed into. In Tableau Prep Builder version 2019.2.3 and earlier, this is the only way to see which features are incompatible in your flow.

**Note:** The error message lists the Tableau Prep Builder version when the feature was introduced. Tableau Prep Builder doesn't release maintenance versions, so for the feature to be compatible, Tableau Server must be running the next major release version. In the example below, the Duplicate Fields feature was introduced in Tableau Prep Builder version 2019.2.3 so it won't be compatible with the 2019.2.3 Tableau Server maintenance release version. Instead it would be compatible with the next major release for Tableau Server, version 2019.3.

## Tableau Prep Help



If you continue to publish the flow, publishing will complete successfully. However, when you open the flow in Tableau Server or Tableau Online, you will see the following message:



To schedule and run the flow in Tableau Server, you can do one of the following:

- Look for the latest major release of **Tableau Server** that is compatible with the version of Tableau Prep Builder that you are using. For example, if you are using features introduced in Tableau Prep Builder version 2019.2.3, to run the flow in Tableau Server, you would need the server version to be 2020.3 or later.

Tableau Online is updated automatically on a regular basis, usually every quarter. Test your flow first, to make sure it is compatible with your current version of Tableau Online before publishing.

- Before publishing the flow, remove the incompatible features from the flow, then publish the flow.
- If you already published your flow to Tableau Server, try editing the flow directly on the

server (version 2019.4 and later), download the flow and remove the features, or create the flow in an older version of Tableau Prep Builder using only the features available in that version.

**Note:** To download a specific version of Tableau Prep Builder, open the [Product Downloads and Release Notes](#) page and select **Tableau Prep Builder** from the list on the left side of the page.

## Fixing compatibility issues

If the flow is already published to Tableau Server, try the steps below to remove the incompatible features using your current version of Tableau Prep Builder. After you remove the features and no longer see the version incompatibility message or warnings, republish your flow to Tableau Server or Tableau Online and schedule it using the Tableau Prep Conductor.

**Note:** Tableau Prep Conductor is part of the Data Management Add-on. It must be enabled in Tableau Server or Tableau Online to run flows using the scheduling functionality. For more information about the Data Management Add-on, see [Tableau Data Management Add-On](#). For more information about enabling Tableau Prep Conductor in Tableau Server or Tableau Online, see [Step 2: Configure Flow Settings for your Tableau Server](#) on page 469 or [Enable Tableau Prep Conductor on your Tableau Online Site](#) on page 478.

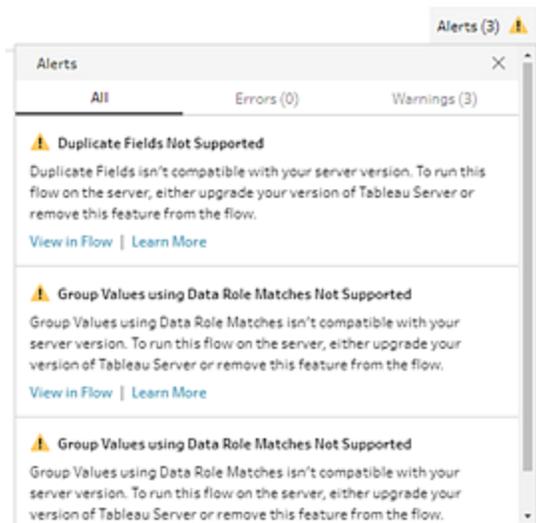
## Identify incompatible features

If you are working in Tableau Server, it doesn't currently list the incompatible features in your flow. To identify the list of features to remove from the flow, you need to open the flow in Tableau Prep Builder then find and remove them in your flow.

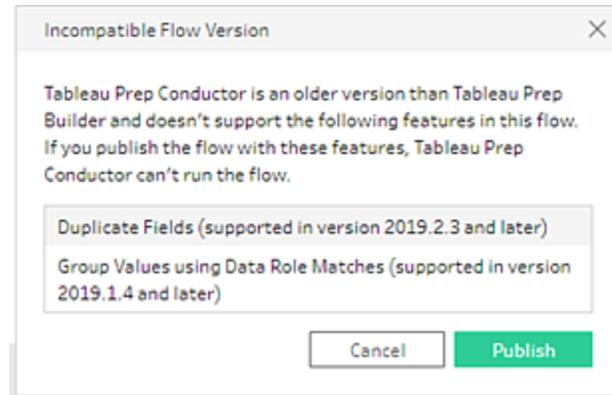
1. Open your flow. If you are in Tableau Prep Conductor, from the **More actions** ... menu, click **Download** to download and open the flow in Tableau Prep Builder or simply open the flow in Tableau Prep Builder.
2. If you downloaded the flow, click on the downloaded flow to open it.
3. Depending on your version, do one of the following:

- **Version 2019.3.1 and later:** From the top menu select **Server >Sign In**. Make sure you select the same server that is incompatible with the flow. Any incompatible steps, annotations, fields, or changes should be marked with an alert icon.

In the top right corner of the flow pane, click **Alert** to view the details for each incompatible feature. Click **View in Flow** to navigate to the incompatible feature to take action.



- **Version 2019.2.3 and earlier:** From the top menu select **Server >Publish Flow**. If you need to sign into the server again, make sure you select the same server that is incompatible with the flow. A warning dialog opens that lists the features that are not compatible with your server version. Note the features so you can identify and remove them from the flow. Then click **Cancel** to close the dialog.



4. From the top menu, click **File > Save As** to save a copy of your flow. Use the options in the following sections to remove incompatible features from your flow.

## Remove incompatible features from the flow

You can use various methods to find and remove features from your flow. This section shows some options to help you resolve incompatibility errors.

## Incompatible data sources

If the data source isn't compatible, for example a new connector was added that isn't yet supported in Tableau Prep Conductor, you'll need to connect to a data source that is supported.

To change your data connection do the following:

1. In the **Connections** pane, click the drop-down arrow on the connector and select **Remove** to remove the data source connection.  
This will temporarily put your flow in an error state.
2. Connect to a compatible data source and drag it to the Flow pane. To connect the new Input step with your flow, drag the step to the first step in the flow where you want to connect it and drop it on the connecting step on the **Add** option.



3. Repeat these steps to replace any other connectors. Then save your flow and republish it.

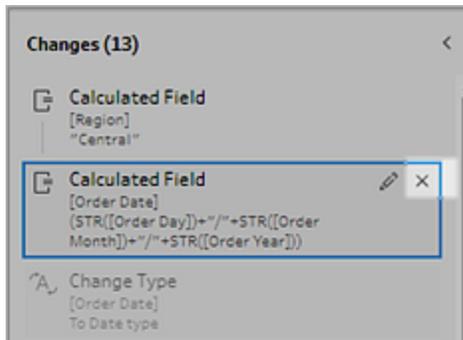
## Incompatible features

To remove incompatible features you'll need to find the steps where the features were used and remove them. You can follow the instructions in [Identify incompatible features on page 436](#) to locate the incompatible features.

1. If the feature is a step type, in the Flow pane click on the step where the feature is used. Right-click or Ctrl-click (MacOS) on the step and select **Remove**.
2. If the feature is a cleaning operation, in the Flow pane click on the step where the feature is used. You can hover over the annotations in the **Flow** pane or in the **Profile** or **Results** panes to see a list of changes.

**Note:** In Tableau Prep Builder version 2019.1.3 and later you can hover on the icon that represents the change you are looking for over a step in the Flow pane or in the profile card then select the annotation from the list of changes. The change is highlighted in the **Changes** pane, **Profile** or **Results** pane and data grid.

3. Open the **Changes** pane if needed, and select the change that matches the feature you need to remove. Click on the change to select it and click **Remove** to delete it from the flow.



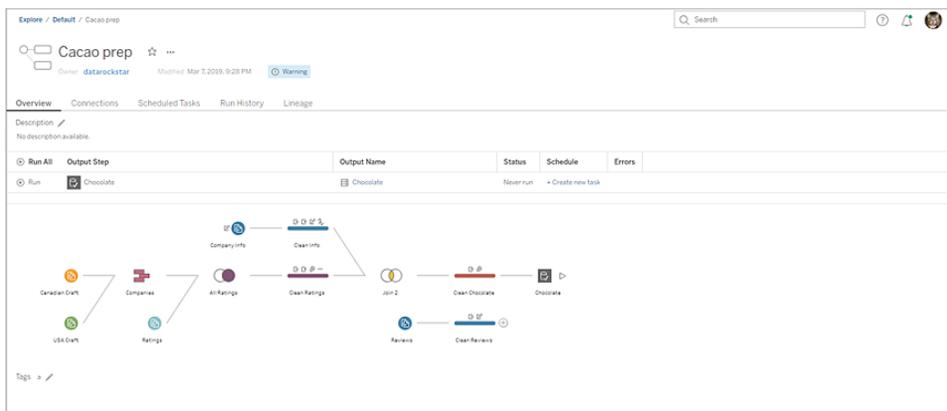
4. Repeat these steps to replace any other features. Then save your flow and republish it.

# Keep Flow Data Fresh

**Note:** The content in this topic is focused on running flows on a schedule, which requires the Data Management Add-on with Tableau Prep Conductor enabled. Starting in version 2020.4.1, the Data Management Add-on isn't required to create and edit flows in Tableau Server and Tableau Online and to run your flows manually.

You've built your flow and cleaned your data, but now you want to share your data set with others and you want to keep that data fresh. You can always manually run your flows in Tableau Prep Builder and on the web and publish an extract to Tableau Server, but now there's a better way.

Meet Tableau Prep Conductor, part of the new Data Management Add-on to Tableau Server version 2019.1 and later. If you add this option to your Tableau Server or Tableau Online installation, you can use Tableau Prep Conductor to run your flows on a schedule to keep your flow data fresh.



**Note:** If Tableau Catalog is installed, you can also see data quality warnings about your flow input data and view the upstream and downstream impact of fields in your flow on the new **Lineage** tab. For more information about Tableau Catalog, see [About Tableau Catalog](#) in the Tableau Server online help.

With Tableau Prep Conductor you can do the following:

- Configure your Server or Site to use Tableau Prep Conductor
  - Enable or disable Tableau Prep Conductor for individual sites
  - Set up email notifications for flow failures for flows that are run either on-demand or using a schedule
  - Configure flow timeout settings
- Publish a flow from Tableau Prep Builder to Tableau Server or Tableau Online. Starting in version 2020.4.1, the Data Management Add-on is not required to publish flows to the web.
  - Upload data files or connect directly to your files (Tableau Prep Builder only) or databases. If connecting to databases, you can either embed the database credentials or require a user prompt.

**Note:** If you connect to data files through a direct connection or publish your flow output to a file share, the files need to be in a location that Tableau Server can access. This option is not available for flows created on the web. For more information see [Step 4: Safe list Input and Output locations on page 474](#).

- Select from a project hierarchy when publishing your flows
- Enter tags and a description to help others find your flow
- Manage the flow
  - Set permissions
  - Move the flow to a different project
  - Change the flow owner
  - Add or edit tags
  - View the version history and select from the list to restore the flow to a previous version
  - Mark a flow as a favorite and add it to your favorites list
  - Edit an input connection and update credentials
  - View data sources created from a flow and link back to the flow that created it
- Create schedules to run your flows

- Add scheduled tasks to run the flow and select which flow outputs to update
- Run the flow on demand without a schedule
- Monitor the flow
  - Set up email alert notifications
  - View errors
  - Monitor and restart flows that have been suspended
  - View run history
  - Use Admin views

## About Tableau Prep Conductor

Tableau Prep Conductor enables you to leverage the scheduling and tracking functionality available in Tableau Server or Tableau Online to run your flows automatically to update the flow output. Tableau Prep Conductor is part of the Tableau Data Management Add-on introduced in Tableau Server version 2019.1 and must be enabled to schedule your flows to run.

**Note:** Starting in Tableau Prep Builder version 2020.4.1, you no longer need the Data Management Add-on on your server to publish flows to the web or manually run flows. As a Creator, you can also create and edit flows directly on your server. If you want to schedule flows to run on your server, the Data Management Add-on is still required.

If you create your flows in Tableau Prep Builder, you'll need to first publish them to Tableau Server or Tableau Online to run them on a schedule. Publishing flows is similar to publishing data sources and workbooks with Tableau Desktop. You can package files with the flow or specify a direct connection to data sources to update the flow input as data changes. If your flow connects to databases, specify the authentication type and set credentials to access the data.

You can also publish a flow to share it with others or to continue editing it on the web. For example, publish an incomplete flow to Tableau Server or Tableau Online and then open the flow on the web in Edit mode to continue working on it. You could also create a flow with only Input steps (that are properly configured) and share it with co-workers who can then download the flow to their computers and create and publish their own flows.

Flows can only be run in Tableau Server or Tableau Online if the flow is published, includes output steps, and has no errors or incompatible features. For more information about publishing a flow, see [Publish a Flow to Tableau Server or Tableau Online on page 479](#). For more information about incompatibility, see [Version Compatibility with Tableau Prep on page 427](#).

Keeping track of the health of your flows is easy. With the Data Management Add-on with Tableau Prep Conductor enabled, you can:

- View and monitor the details about your flow, including recent activity in the **Content** pages.
- Edit your flow (starting in version 2020.4).
- View the results of the flow runs and any errors in the **Run History** tab.
- Use **Administrative Views** to monitor server and site activity including a new view that tracks flow performance history.
- View detailed alerts for failed flow runs.
- Set up email notification alerts to send emails to flow owners notifying them when the flow failed to run and why.

For more information about setting up alerts, see [Monitor Flow Health and Performance on page 517](#).

If you don't have the Data Management Add-on, you can:

- View the details about your flow, including recent activity in the **Content** pages.
- Edit your flow (starting in version 2020.4).
- View and edit your connections on the **Connections** tab.

If a flow fails to run due to errors, such as a calculation that isn't valid, or a connection failed, you can fix the error right in Tableau Server or Tableau Online. Edit the connection or edit the flow to fix the error, then republish it to pick up where you left off.

## Enabling Tableau Prep Conductor

Tableau Prep Conductor is available with the Data Management Add-on and can be installed with Tableau Server or Tableau Online or added to an existing installation of Tableau Server or Tableau Online version 2019.1 or later. For more information about how to install and enable Tableau Prep Conductor, see [Enable and Configure Tableau Prep Conductor on](#)

[Tableau Server on page 449](#) or [Enable Tableau Prep Conductor on your Tableau Online Site on page 478](#).

To publish flows to Tableau Server or Tableau Online from Tableau Prep Builder, use Tableau Prep Builder version 2019.1.2 or later. For information about how to install Tableau Prep Builder, see [Install Tableau Desktop or Tableau Prep Builder from the User Interface](#).

## Getting to know the flow workspace

After you publish your flow you can schedule tasks in Tableau Server or Tableau Online to automatically run your flow on a regular basis to keep your output data fresh.

Tableau Prep Conductor leverages much of the same functionality for managing flows that you might see when managing workbooks or data sources from Tableau Desktop in Tableau Server or Tableau Online. For example, just like extract refreshes, scheduled flow tasks and on-demand flow runs are queued as background tasks. But when it comes to working with flows, there are a few differences.

### Flow Overview page

The flow **Overview** page is the main landing page where you can view data about your flow and schedule, monitor, and maintain the flow. If you don't have the Data Management Add-on, you will have different options.

Open the flow **Overview** page by clicking on a flow in your list. You can navigate there from **Content > Explore > All Flows** or by opening the project that contains your flows.

The screenshot displays the 'Overview' page for a flow named 'Superstore2'. The interface includes a search bar, a breadcrumb trail, and a navigation menu with options like 'Overview', 'Connections', 'Scheduled Tasks', 'Run History', and 'Lineage'. The main content area shows a flow diagram with various data processing steps. Below the diagram is a table with the following columns: 'Run All', 'Output step', 'Output name', 'Status', 'Schedule', and 'Errors'.

Run All	Output step	Output name	Status	Schedule	Errors
Run	Create 'Annual Regional Performance.hyper'	Create 'Annual Regional Performance.hyper'...	Never run	+ Create new task	
Run	Create 'Superstore Sales.hyper'	Create 'Superstore Sales.hyper' (not pub...	Never run	+ Create new task	

- A. The header lists the name of the flow, the flow owner and the date that the flow was last modified. Starting in version 2020.4, click **Edit** to edit existing flows.

Add a flow to your favorites, or from the **More actions** ... menu you can also edit, run, download the flow, set permissions, change the flow owner, restore previous flow versions, and more.

- B. View and edit the flow description and set tags to help others find the flows they are looking for.
- C. View the output steps for a flow along with the status of the last update, any schedule the output is assigned to, and any errors from the last flow run. You can also click the **Run**  button to run all output steps or individual output steps on-demand.

If the flow has errors, the flow run will fail. Connectivity errors can be resolved directly by navigating to the **Connections** tab for the flow and editing the input connections. To resolve any other flow errors, edit the flow then republish it and try running the flow again.

If you are using an earlier version of Tableau Prep Builder, from the **More actions** ... menu, you can also download and open the flow in Tableau Prep Builder, then republish it and try running the flow again.

After a flow has run successfully, outputs that are data sources become links that you can click to open the **Data Source** page to view more information about the data source or edit the flow input connection.

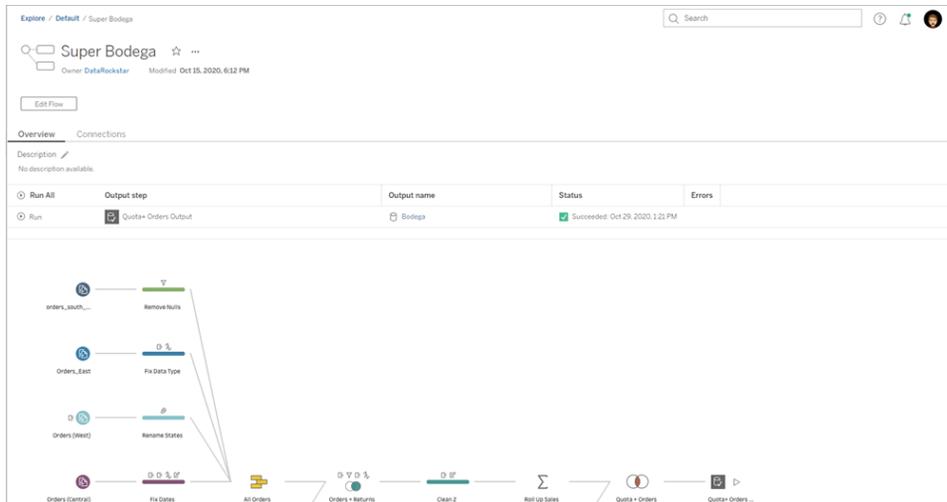
In the **Schedule** field, view the scheduled tasks that the output step is assigned to. A flow output can be assigned to one or more tasks.

If no schedule has been assigned yet, click **Create new task** to add the output step to a schedule. To immediately run the flow to update a specific output step, click the **Run**  button on the left-hand side of the row.

- D. View an image of the flow.

### Flow Overview page without the Data Management Add-on

If you don't have the Data Management Add-on installed on your server, you can still publish flows to Tableau Server and Tableau Online, but you will see fewer options to manage your flow.



## Flow Connections page

View both the input and output locations for a flow, connection types, authentication settings, input and output steps and any connectivity errors. You can set authentication settings when publishing a flow. For more information, see [Publish a flow from Tableau Prep Builder on page 486](#).

For database input types, click the **More actions** ... menu for an input connection to edit the connection and change the server name, port, user name and password.

Connects to	Connection type	Authentication	Username	Input steps	Output Steps	Errors
<input type="checkbox"/> Crane Job Forecast 2018.xlsx	Microsoft Excel	None		Aluminum...		
<input type="checkbox"/> Age of Cranes.csv	Text file	None		Age of Cra...		
<input type="checkbox"/> https://server	Tableau Server Site				Output 2	
<input type="checkbox"/> https://server	Tableau Server Site				Output	

## Flow Scheduled Tasks page (Data Management Add-on required)

View any schedules that the flow is assigned to and the outputs that are included in those schedules. Click the schedule link at the top of the task card to open the **Schedules** page and see a list of flows that are assigned to that schedule. For more information about assigning flows to a schedule, see [Schedule a Flow Task on page 504](#).

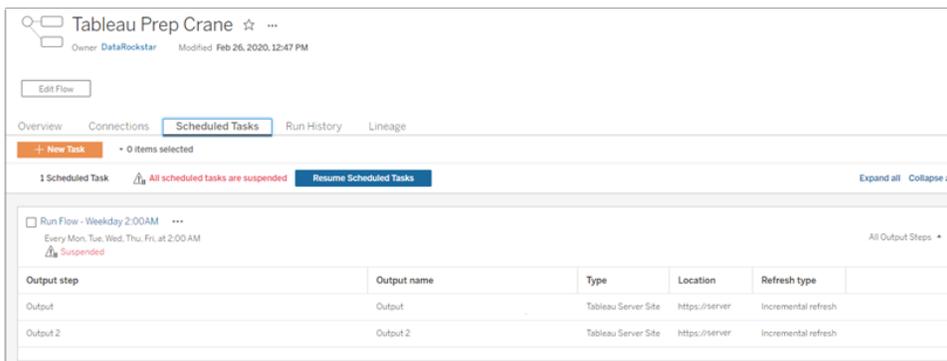
## Tableau Prep Help

You can also add new tasks or manage existing ones from this page. To take action on an existing task, select the check box on a task card then click the **Actions** drop-down menu to run, edit, or delete the task.

In Tableau Server, if the flow fails to run after a configured number of consecutive attempts, the flow is automatically suspended. In Tableau Online, if a flow task fails to run after 5 consecutive attempts, the flow is automatically suspended.

You can see that status on the **Overview** tab as well as this tab. You can resume suspended tasks from this menu.

For information about how to set the threshold for suspended flow tasks, see [Step 5: Optional Server Configurations on page 477](#). For more information about suspended flow tasks, see [View and resolve errors on page 517](#).



## Schedules page

On the **Schedules** page, you can view the flows assigned to a schedule and the details about the flow runs. You can run the schedule on-demand and run all flows assigned to it. You can also select one or more flows, then use the **Actions** menu to change the flow schedule or priority, delete selected flows from the schedule or resume suspended flows.

For information about how to set up a schedule, see [Step 3: Create Schedules for Flow Tasks on page 473](#).



## Flow Run History (Data Management Add-on required)

See, search, and sort through a list of historical runs for a flow. This page also includes details about the flow run such as run type, duration and number of rows that were generated.

If the flow output has an error, hover over the error to view the messages. If applicable, click the **Go to Connections** link in the error message to navigate to the **Connections** page to fix connectivity errors. You can also edit the flow directly to fix any errors, or click **Download the flow** to download and fix flow errors in Tableau Prep Builder, then republish the flow to continue to manage it using Tableau Prep Conductor.

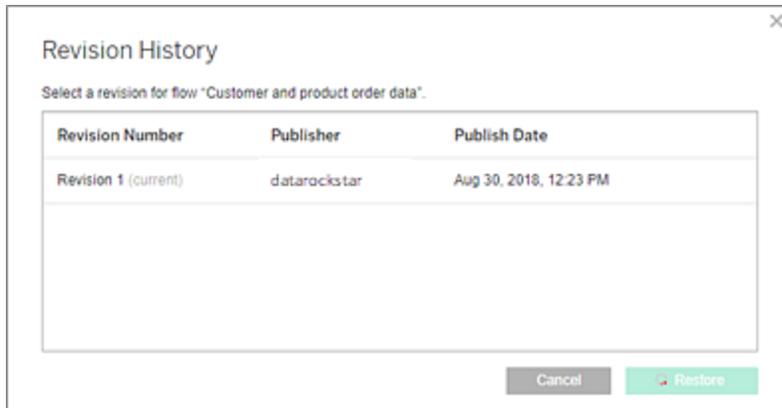
**Note:** The run history for a flow will persist unless the flow is deleted.

Output step	Run type	Run start	Run end	Duration	Status	Rows generated	Errors
Output 2	Full refresh	Jul 3, 2020, 2:29 AM	Jul 3, 2020, 2:29 AM	00:00:06	Succeeded	7	
Output	Incremental refresh	Jul 3, 2020, 2:29 AM	Jul 3, 2020, 2:29 AM	00:00:04	Failed	0	<a href="#">1 error</a>
Output	Incremental refresh	Jul 2, 2020, 2:28 AM	Jul 2, 2020, 2:28 AM	00:00:04	Failed	0	<a href="#">1 error</a>
Output 2	Full refresh	Jul 2, 2020, 2:28 AM	Jul 2, 2020, 2:28 AM	00:00:06	Succeeded	7	
Output 2	Full refresh	Jul 1, 2020, 2:29 AM	Jul 1, 2020, 2:29 AM	00:00:06	Succeeded	7	
Output	Incremental refresh	Jul 1, 2020, 2:29 AM	Jul 1, 2020, 2:29 AM	00:00:04	Failed	0	<a href="#">1 error</a>
Output 2	Full refresh	Jun 30, 2020, 2:30 AM	Jun 30, 2020, 2:30 AM	00:00:06	Succeeded	7	
Output	Incremental refresh	Jun 30, 2020, 2:30 AM	Jun 30, 2020, 2:30 AM	00:00:04	Failed	0	<a href="#">1 error</a>
Output	Incremental refresh	Jun 29, 2020, 2:29 AM	Jun 29, 2020, 2:29 AM	00:00:04	Failed	0	<a href="#">1 error</a>
Output 2	Full refresh	Jun 29, 2020, 2:29 AM	Jun 29, 2020, 2:29 AM	00:00:06	Succeeded	7	

**1 error**  
Incremental refresh on step "Output" failed. The last processed filter value was blank or null. Try running the output again in full refresh setting.  
[Download the flow](#)

## Flow Revision History

If you need to revert a flow to a previous version, from the **More actions** ... menu for the flow, select **Revision History**. On the **Revision History** dialog, select the flow version from the list that you want to revert to.



## Who can do this

Server Administrators can activate Data Management Add-on license keys.

Server administrators can enable Tableau Prep Conductor.

Creators can create, edit, and run flows manually. If the Data Management Add-on is installed, creators can run flows on a schedule.

## Licensing Tableau Prep Conductor

Tableau Prep Conductor is licensed through the Data Management Add-on.

For more information, see:

- [License the Data Management Add-on for Tableau Server](#)
- [License the Data Management Add-on for Tableau Online](#)

## Enable and Configure Tableau Prep Conductor on Tableau Server

Tableau Prep Conductor is supported only on Tableau Server versions 2019.1 or later.

Tableau Prep Conductor is licensed through the Data Management Add-on, on a per Deployment basis, which is User-Based or Core-Based. A Deployment includes a licensed production Tableau Server installation and licensed non-production Tableau Server installations that support the production installation. For more information on Deployment, see the [EULA Documentation](#).

For more information on how Tableau Prep Conductor licensing works, see [Licensing Tableau Prep Conductor for Tableau Server](#).

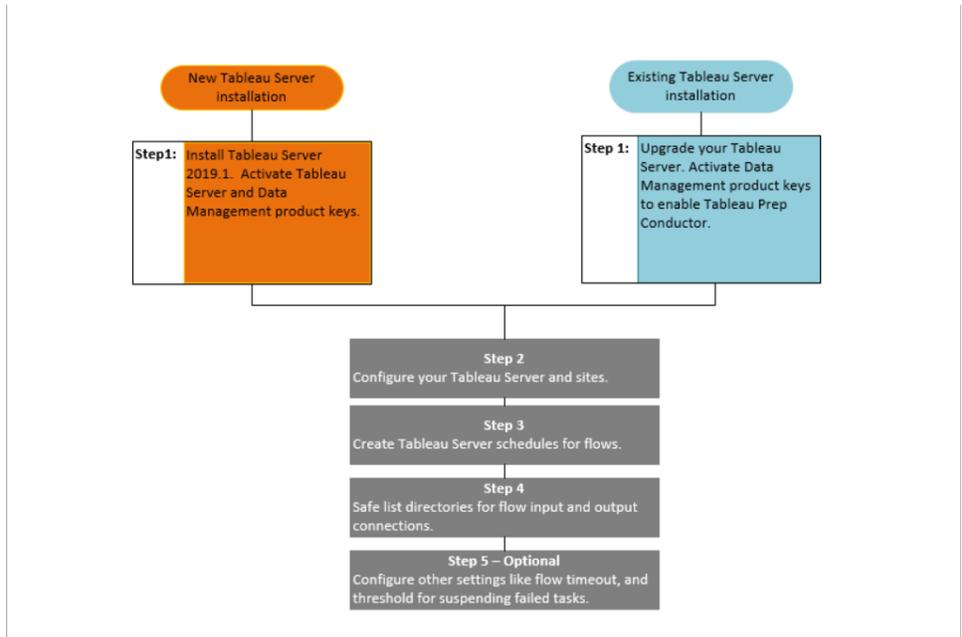
## Server Topology

When you install Tableau Server and enable Tableau Prep Conductor, using the Data Management product key, Tableau Prep Conductor is automatically enabled by default by the setup program.

For multi-node installations, by default, one instance of Tableau Prep Conductor is enabled on any node that has backgrounder installed. In the example below, Tableau Prep Conductor is enabled on node 2 and 3 where the backgrounders are also enabled, but not on node 1,4, and 5.

+ a b   e a u					
	STATUS	MAINTENANCE	CONFIGURATION		
Process	node1	node2	node3	node4	node5
Gateway	✓				
Application Server	✓				
Interactive Microservice Container	✓				
VizQL Server	✓ ✓ ✓ ✓				
Cache Server	✓ ✓				
Cluster Controller	✓	✓	✓	✓	✓
Search & Browse	✓				
Backgrounder		✓ ✓ ✓ ✓	✓ ✓ ✓ ✓		
Background Microservice Container		✓ ✓ ✓ ✓	✓ ✓ ✓ ✓		
Data Server	✓ ✓				
Data Engine	✓	✓	✓		
File Store	✓				
Repository	✓				
Tableau Prep Conductor		✓	✓		
Ask Data	✓				
Elastic Server	✓				

Below is a visual representation of that work-flow:



## Next step:

New Tableau Server Installations: [Step 1 \(New Install\): Install Tableau Server with Tableau Prep Conductor](#) below

Existing Tableau Server Installations: [Step 1 \(Existing Install\): Enable Tableau Prep Conductor](#) on page 456

## Who can do this

Server administrators can install Tableau Server and enable Tableau Prep Conductor.

Server-level settings can be configured by Tableau Server administrators, and site-level settings can be configured by Tableau Server and Site administrators.

## Step 1 (New Install): Install Tableau Server with Tableau Prep Conductor

This topic describes how to Tableau Prep conductor on a new installation of Tableau Server.

Tableau Prep Conductor is supported only on Tableau Server versions 2019.1 or later.

Tableau Prep Conductor is licensed through the Data Management Add-on, on a per Deployment basis. A Deployment includes a licensed production Tableau Server installation

and licensed non-production Tableau Server installations that support the production installation. For more information on Deployment, see the [EULA Documentation](#).

## Before you install

The recommended topology for a production Tableau Server installation is a dedicated node for running flows. If you are currently planning to have a single node Tableau Server installation it is recommend that you add a second node and dedicate it to run flows.

- Review the hardware recommendations for Tableau Server and Tableau Prep conductor.
  - [Minimum Hardware Requirements and Recommendations for Tableau Server installation on Windows](#).
  - [Minimum Hardware Requirements and Recommendations for Tableau Server installation on Linux](#).

## Install Tableau Server and enable Tableau Prep Conductor

Use the instructions provided in the following topics to install Tableau Server.

[Windows: Install Tableau Server](#)

[Linux: Install Tableau Server topic](#)

When you get to the **Activate** step, use the Tableau Server product keys to activate Tableau Server.

All product keys are available through the [Customer Portal](#).

## Configure public gateway settings

If your Tableau Server is set up with one of the following:

- Load balancer to distribute requests across gateways.
- Reverse proxy to authenticate external (internet) client requests and offloading SSL-based encryption.

You must configure the following public gateway settings:

```
tsm configuration set -k gateway.public.host -v <name> (This should be the URL that your users are using to access Tableau Server)
```

```
tsm configuration set -k gateway.public.port -v 443
```

For more information on configuring gateway settings, see [Configuring Proxies for Tableau Server](#).

## Enable Tableau Prep Conductor

**Use the following steps to add the Data Management product key to your Tableau Server:**

**Note:** This process requires a restart of the Tableau Server.

**Note:** If you are using core-based licensing, you must apply both the Data Management product key and the Resource Core product key to your Tableau Deployment. The first key allows flows to be run on Tableau Server through the Tableau Prep Conductor and the second key adds the additional cores for the Tableau Prep Conductor nodes. All product keys are available through the [Customer Portal](#).

1. If the computer where you are running Tableau Server has been configured to connect to the internet through a forward proxy, follow the procedure in the topic, [Configure Product Key Operations with Forward Proxy](#), before continuing.
2. Open TSM in a browser:  
`https://<tsm-computer-name>:8850`
3. Click **Licensing** on the **Configuration** tab and click **Activate License**.
4. Enter or paste your **Data Management product key** and click **Activate**.
5. On the Register page, enter your information into the fields and click **Register**.
6. Follow the prompts and restart Tableau Server after registration is complete.

## Verify Tableau Prep Conductor is enabled and running

When you activate the Data Management product key, a single instance of Tableau Prep Conductor is automatically enabled on any node that has Backgrounder enabled.

**Use the following steps to verify that it is enabled and running:**

1. Open a browser and enter the Tableau Server URL, and append the dedicated TSM web UI port. Here are some examples of what the URL might look like:  
`https://localhost:8850/` (if you're working directly on the server computer)

<https://MarketingServer:8850/> (if you know the server's name)

<https://10.0.0.2:8850/> (if you know the server's IP address)

In the sign-in page that appears, enter your administrator user name and password.

**Note:** Tableau Server creates and configures a self-signed certificate during the installation process. This certificate is used to encrypt traffic to the TSM Web UI. Because it's a self-signed certificate, your browser will not trust it by default. Therefore, your browser will display a warning about the trustworthiness of the certificate before allowing you to connect.

- In the Tableau Services Manager web interface, click the **Status** tab to see the status.
  - If Tableau Prep Conductor is enabled and running, you should see Tableau Prep Conductor in the list of processes as **Active** on at least on one node. If Tableau Prep Conductor is not enabled, you will see Tableau Prep Conductor in the list of processes, but with no status information for any of the nodes.

#### Tableau Prep Conductor not enabled:

Process	node1	node2	node3
Gateway	✓		
Application Server	✓		
Interactive Microservice Container	✓		
VizQL Server	✓ ✓ ✓ ✓		
Cache Server	✓ ✓		
Cluster Controller	✓	✓	✓
Search & Browse	✓		
Backgrounder	✓ ✓		✓ ✓
Non-Interactive Microservice Container	✓		✓
Data Server	✓ ✓		
Data Engine	✓	✓	✓
File Store	✓	✓	
Repository	✓		
Tableau Prep Conductor			
Ask Data	✓		
Elastic Server	✓		
TSM Controller	✓		
License Server	✓		

Refresh Status

✓ Active
⌚ Busy
⚠ Degraded
! Error
⌛ Stopped

**Tableau Prep Conductor enabled and running. In the image below Tableau Prep Conductor is enabled on node1 and node3:**

Process	node1	node2	node3
Gateway	✓		
Application Server	✓		
Interactive Microservice Container	✓		
VizQL Server	✓ ✓ ✓ ✓		
Cache Server	✓ ✓		
Cluster Controller	✓	✓	✓
Search & Browse	✓		
Backgrounder	✓ ✓		✓ ✓
Non-Interactive Microservice Container	✓		✓
Data Server	✓ ✓		
Data Engine	✓	✓	✓
File Store	✓	✓	
Repository	✓		
<b>Tableau Prep Conductor</b>	<b>✓</b>		<b>✓</b>
Ask Data	✓		
Elastic Server	✓		
TSM Controller	✓		
License Server	✓		

Refresh Status Active Busy Degraded Error Stopped

## Dedicate a node for Tableau Prep Conductor

On the node you are planning to dedicate to running flows, enable Backgrounder process if it is not already enabled. It is recommended that you do not run other processes like VizQL server on this node.

Because you are dedicating this node to running flows, you must configure Backgrounder to run only flow tasks. By default, the Backgrounder process runs tasks of all types, including flows, extract refreshes, and subscriptions. For more information, see [Node Roles in Tableau Server](#).

Run the following tsm commands on that dedicated node to run only flow tasks:

1. Run the following command to allow Backgrounders on this node to run only flow tasks.

```
tsm topology set-node-role -n node1 -r flows
```

2. Set the node role on the initial node to no flows. The backgrounder on this node will run all jobs except flows:

```
tsm topology set-node-role -n node1 -r no-flows
```

3. Apply the changes and restart Tableau Server:

```
tsm pending-changes apply
```

## Multi-node installations

If you have more than 2 nodes in your Tableau Server installation, you can choose to configure other nodes to run all tasks other than flows:

1. Restrict a node to not allow flows. This command removes Tableau Prep Conductor from this node and Backgrounders on this node will not run flow tasks.

```
tsm topology set-node-role -n node1 -r no-flows
```

2. Apply the changes and restart Tableau Server:

```
tsm pending-changes apply
```

## Next step

**Step 2: Configure Flow Settings for your Tableau Server** on page 469

### Who can do this

Server administrators can install Tableau Server and enable Tableau Prep Conductor.

## Step 1 (Existing Install): Enable Tableau Prep Conductor

This topic describes how to enable Tableau Prep conductor on your existing installation of Tableau Server.

Tableau Prep Conductor is supported only on Tableau Server versions 2019.1 or later. If you are using Tableau Server 2018.3 or earlier, you must first upgrade your Tableau Server to 2019.1 before enabling Tableau Prep Conductor on your Tableau Server installation.

Tableau Prep Conductor is licensed through the Data Management Add-on, on a per Deployment basis, which is User-Based or Core-Based. A Deployment includes a licensed production Tableau Server installation and licensed non-production Tableau Server installations that support the production installation. For more information on Deployment, see the [EULA Documentation](#).

This topic describes how to enable Tableau Prep conductor on your existing installation of Tableau Server.

## Before you upgrade

Prepare for upgrade:

- [Know before you upgrade](#)
- [Licensing Tableau Prep Conductor](#)
- [Tableau Server Hardware Requirements and Recommendations](#)

## Configure public gateway settings

If your Tableau Server is set up with one of the following:

- Load balancer to distribute requests across gateways.
- Reverse proxy to authenticate external (internet) client requests and offloading SSL-based encryption.

You must configure the following public gateway settings:

```
tsm configuration set -k gateway.public.host -v <name> (This should be the URL that your users are using to access Tableau Server)
```

```
tsm configuration set -k gateway.public.port -v 443
```

For more information on configuring gateway settings, see [Configuring Proxies for Tableau Server](#).

## Tableau Server Installations using User-Based licenses

The recommended topology for a production Tableau Server installation is a dedicated node for running flows. For more information, see [Minimum Hardware Requirements and Recommendations for Tableau Server](#).

## Tableau Server single-node installations

If you currently have a single node Tableau Server installation, it is recommended that you add a second node and dedicate it to running flows.

1. Run upgrade on your current Tableau Server installation using the information in the topics below:
  - [Windows](#)
  - [Linux](#)

When you get to the **Activate** step, use the Tableau Server product keys to activate Tableau Server.

All product keys are available through the [Customer Portal](#).

2. After completing the installation, add the Data Management product key to enable Tableau Prep Conductor on your node. The Data Management product key, like your other server keys, are available through the [Customer Portal](#).
  - In the Tableau Services Manager web interface, click **Licensing** on the **Configuration** tab and click **Activate License**.
  - Enter or paste your new product key and click **Activate**.
  - On the **Register** page, enter your information into the fields and click **Register**.
3. You will be prompted to restart the server. Restart the server and verify that Tableau Prep Conductor is enabled and running.
  - In the Tableau Services Manager web interface, click the **Status** tab to see the status. If Tableau Prep Conductor is enabled and running, you should see Tableau Prep Conductor in the list of processes as **Active**. If Tableau Prep Conductor is not enabled, you will see Tableau Prep Conductor in the list of processes, but with no status information.

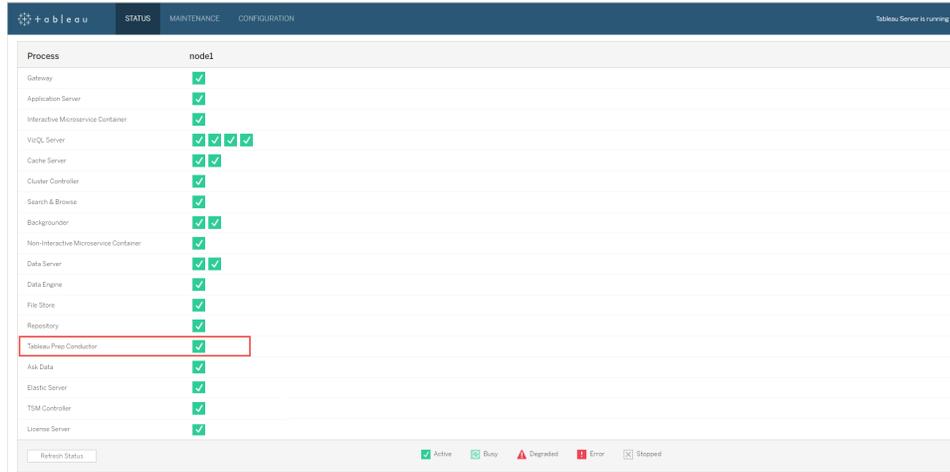
### Tableau Prep Conductor not enabled:

Process	node1
Gateway	✓
Application Server	✓
Interactive Microservice Container	✓
VizQL Server	✓ ✓ ✓ ✓
Cache Server	✓ ✓
Cluster Controller	✓
Search & Browse	✓
Backgrounder	✓ ✓
Non-Interactive Microservice Container	✓
Data Server	✓ ✓
Data Engine	✓
File Store	✓
Repository	✓
Tableau Prep Conductor	
Ask Data	✓
Elastic Server	✓
TSM Controller	✓
License Server	✓

Refresh Status

✓ Active
⏸ Busy
⚠ Degraded
✖ Error
⏹ Stopped

**Tableau Prep Conductor enabled and running:**



4. Add a second node to your Tableau Server installation. The installer will enable certain required processes like the Cluster Controller. Enable Backgrounder process on it as it is required to run scheduled flow tasks. When you enable the Backgrounder process, the installer automatically enables a single instance of Data Engine and Tableau Prep Conductor on the node. Do not add any other processes on this node.
5. Run the following commands to dedicate this node to do only flow tasks. For more information on node roles, see [Node Roles in Tableau Server](#).

- Get the nodeID for your dedicated node to see the list of services on each node:

```
tsm topology list-nodes -v.
```

- Set the node role for the dedicated node using the nodeID that you got from running the command described above:

```
tsm topology set-node-role -n <nodeID> -r flows.
```

- Apply the changes, and restart the server:

```
tsm pending-changes apply.
```

- Review the status to ensure that all the processes are up and running and configured correctly:

```
tsm status -v.
```

You have successfully added Tableau Prep Conductor to your Tableau Server installation.

## Tableau Server multi-node installations

1. Run upgrade on your current Tableau Server Installation using the information in the topics below:

- [Windows](#)
- [Linux](#)

When you get to the **Activate** step, use the Tableau Server product keys to activate Tableau Server.

All product keys are available through the [Customer Portal](#).

2. After completing the installation, add the Data Management product key to enable Tableau Prep Conductor. Tableau Prep Conductor is automatically enabled on the nodes where you already have the Backgrounder process enabled. The Data Management product key, like your other server keys, are available through the [Customer Portal](#).
  - In the Tableau Services Manager web interface, click **Licensing** on the **Configuration** tab and click **Activate License**.
  - Enter or paste your new product key and click **Activate**.
  - On the **Register** page, enter your information into the fields and click **Register**.
3. You will be prompted to restart the server. Restart the server and verify that Tableau Prep Conductor is enabled and is running.
  - In the Tableau Services Manager web interface, click the **Status** tab to see the status of all the processes. If Tableau Prep Conductor is enabled and running, you should see Tableau Prep Conductor in the list of processes as **Active**. If Tableau Prep Conductor is not enabled, you will see Tableau Prep Conductor in the list of processes, but with no status information.

**Tableau Prep Conductor not enabled:**

Process	node1	node2	node3
Gateway	✓		
Application Server	✓		
Interactive Microservice Container	✓		
VizQL Server	✓ ✓ ✓ ✓		
Cache Server	✓ ✓		
Cluster Controller	✓	✓	✓
Search & Browse	✓		
Backgrounder	✓ ✓		✓ ✓
Non-interactive Microservice Container	✓		✓
Data Server	✓ ✓		
Data Engine	✓	✓	✓
File Store	✓	✓	
Repository	✓		
<b>Tableau Prep Conductor</b>	✓		
Ask Data	✓		
Elastic Server	✓		
TSM Controller	✓		
License Server	✓		

Refresh Status Active Busy Degraded Error Stopped

**Tableau Prep Conductor enabled and running:**

Process	node1	node2	node3
Gateway	✓		
Application Server	✓		
Interactive Microservice Container	✓		
VizQL Server	✓ ✓ ✓ ✓		
Cache Server	✓ ✓		
Cluster Controller	✓	✓	✓
Search & Browse	✓		
Backgrounder	✓ ✓		✓ ✓
Non-interactive Microservice Container	✓		✓
Data Server	✓ ✓		
Data Engine	✓	✓	✓
File Store	✓	✓	
Repository	✓		
<b>Tableau Prep Conductor</b>	✓		✓
Ask Data	✓		
Elastic Server	✓		
TSM Controller	✓		
License Server	✓		

Refresh Status Active Busy Degraded Error Stopped

4. Add a new node to your Tableau Server installation. The installer will enable certain required processes like the Cluster Controller. Enable Backgrounder process on it as it is

required to run scheduled flow tasks. When you enable the Backgrounder process, the installer automatically enables a single instance of Data Engine and Tableau Prep Conductor on the node. Do not add any other processes on this node.

**Note:** The dedicated node counts towards the total count of the Coordination Service ensemble. You may need to deploy a Coordination Service on the new node depending on the total number of nodes you have in your cluster including the new dedicated node. For more information, see [Deploy a Coordination Service Ensemble](#).

5. Run the following command to dedicate this node to only doing flow related operations.

For more information on node roles, see [Node Roles in Tableau Server](#).

- Get the nodeID for your dedicated node to see the list of services on each node:
- `tsm topology list-nodes -v.`
- Set the node role for the dedicated node using the nodeID that you got from running the command described above:
- `tsm topology set-node-role -n <nodeID> -r flows.`
- Apply the changes and restart the server:
- `tsm pending-changes apply.`
- Review the status to ensure that all the processes are up and running and configured correctly:
- `tsm status -v.`

6. At this stage, you may have Tableau Prep Conductor enabled on other nodes. By default, the Backgrounder process on a node performs all tasks of all types including flow tasks. To isolate Tableau Prep Conductor and flow tasks to only certain nodes, you can configure the Backgrounders to do one of the following:

- To run only flow tasks: `tsm topology set-node-role -n <nodeID> -r flows.`
- To run all other tasks except flows: `tsm topology set-node-role -n <nodeID> -r no-flows.`

You have successfully added Tableau Prep Conductor to your Tableau Server installation.

## Tableau Server Installations using Core-Based licenses

The recommended topology for a production Tableau Server installation is a dedicated node for running flows. For more information, see [Minimum Hardware Requirements and](#)

### Recommendations for Tableau Server.

The Data Management Add-on for Core-Based licenses includes product keys that enable Tableau Prep Conductor for your Tableau Server, and Tableau Prep Conductor cores that comes in units of four. The Tableau Prep Conductor cores should be applied to the node dedicated to running the flows. These product keys, like your other server keys, are available through the [Customer Portal](#).

To learn more about Tableau Prep Conductor licensing, see [Licensing Tableau Prep Conductor for Tableau Server](#).

### Tableau Server single-node installations

If you currently have a single node Tableau Server installation, it is recommended that you add a second node and dedicate it to running flows.

1. Run upgrade on your current Tableau Server Installation using the information in the topics below:
  - [Windows](#)
  - [Linux](#)
2. Activate the product keys. This will enable Tableau Prep Conductor on the nodes where you already have the Backgrounder process enabled. When you are using core-based licensing, you must apply both the Data Management product key and the Resource Core product key to your Tableau Deployment. The first key allows flows to be run on Tableau Server through the Tableau Prep Conductor and the second key adds the additional cores for the Tableau Prep Conductor nodes. All product keys are available through the [Customer Portal](#).
  - In the Tableau Services Manager web interface, click **Licensing** on the **Configuration** tab and click **Activate License**.
  - Enter or paste your new product key and click **Activate**.
  - On the **Register** page, enter your information into the fields and click **Register**.
3. You will be prompted to restart the server. Restart the server and verify that Tableau Prep Conductor is enabled and is running.
  - In the Tableau Services Manager web interface, click the **Status** tab to see the status. If Tableau Prep Conductor is enabled and running, you should see Tableau Prep Conductor in the list of processes as **Active**. If Tableau Prep Conductor is not

enabled, you will see Tableau Prep Conductor in the list of processes, but with no status information.

### Tableau Prep Conductor not enabled:

The screenshot shows the Tableau Server Status page for 'node1'. The 'Tableau Prep Conductor' process is listed but has no status icon, indicating it is not enabled. A red box highlights the 'Tableau Prep Conductor' row. The legend at the bottom indicates that a green checkmark represents 'Active'.

Process	Status
Gateway	Active
Application Server	Active
Interactive Microservice Container	Active
ViSQL Server	Active
Cache Server	Active
Cluster Controller	Active
Search & Browse	Active
Backgrounder	Active
Non-Interactive Microservice Container	Active
Data Server	Active
Data Engine	Active
File Store	Active
Repository	Active
Tableau Prep Conductor	Not Enabled
Ask Data	Active
Elastic Server	Active
TSM Controller	Active
License Server	Active

### Tableau Prep Conductor enabled and running:

The screenshot shows the Tableau Server Status page for 'node1'. The 'Tableau Prep Conductor' process is now listed with a green checkmark, indicating it is active. A red box highlights the 'Tableau Prep Conductor' row. The legend at the bottom indicates that a green checkmark represents 'Active'.

Process	Status
Gateway	Active
Application Server	Active
Interactive Microservice Container	Active
ViSQL Server	Active
Cache Server	Active
Cluster Controller	Active
Search & Browse	Active
Backgrounder	Active
Non-Interactive Microservice Container	Active
Data Server	Active
Data Engine	Active
File Store	Active
Repository	Active
Tableau Prep Conductor	Active
Ask Data	Active
Elastic Server	Active
TSM Controller	Active
License Server	Active

4. Add a second node to your Tableau Server installation. The installer will enable certain required processes like the Cluster Controller. Enable Backgrounder process on it as it is required to run scheduled flow tasks. When you enable the Backgrounder process, the installer automatically enables a single instance of Data Engine and Tableau Prep Conductor on the node. Do not add any other processes on this node.

**Important:** The number of physical cores on this machine must be equal to, or less than the Tableau Prep Conductor cores you purchased. For example, if you purchased four Tableau Prep Conductor cores, your node can only have up to four physical cores. To understand about how Tableau Prep Conductor licensing works, see [Licensing Tableau Prep Conductor for Tableau Server](#).

5. Run the following commands to dedicate this node to only doing flow tasks. For more information on node roles, see [Node Roles in Tableau Server](#).
  - Get the nodeID for your dedicated node to see the list of services on each node:

```
tsm topology list-nodes -v.
```
  - Set the node role for the dedicated node using the nodeID that you got from running the command described above:

```
tsm topology set-node-role -n <nodeID> -r flows.
```
  - Apply the changes and restart the server: `tsm pending-changes apply.`
  - Review the status to ensure that all the processes are up and running and configured correctly:

```
tsm status -v.
```

You have successfully added Tableau Prep Conductor to your Tableau Server installation.

### Tableau Server multi-node installations

1. Run upgrade on your current Tableau Server installation using the information in the topics below:
  - [Windows](#)
  - [Linux](#)
2. Activate the product keys. This will enable Tableau Prep Conductor on the nodes where you already have the Backgrounder process enabled. When you are using core-based licensing, you must apply both the Data Management product key and the Resource Core product key to your Tableau Deployment. The first key allows flows to be run on Tableau Server through the Tableau Prep Conductor and the second key adds the additional cores for the Tableau Prep Conductor nodes. All product keys are available through the [Customer Portal](#).

- In the Tableau Services Manager web interface, click **Licensing** on the **Configuration** tab and click **Activate License**.
  - Enter or paste your new product key and click **Activate**.
  - On the **Register** page, enter your information into the fields and click **Register**.
3. You will be prompted to restart the server. Restart the server and verify that Tableau Prep Conductor is enabled and is running.
- In the Tableau Services Manager web interface, click the **Status** tab to see the status. If Tableau Prep Conductor is enabled and running, you should see Tableau Prep Conductor in the list of processes as **Active**. If Tableau Prep Conductor is not enabled, you will see Tableau Prep Conductor in the list of processes, but with no status information.

### Tableau Prep Conductor not enabled:

Process	node1	node2	node3
Gateway	✓		
Application Server	✓		
Interactive Microservice Container	✓		
VizQL Server	✓ ✓ ✓ ✓		
Cache Server	✓ ✓		
Cluster Controller	✓	✓	✓
Search & Browse	✓		
Backgrounder	✓ ✓		✓ ✓
Non-Interactive Microservice Container	✓		✓
Data Server	✓ ✓		
Data Engine	✓	✓	✓
File Store	✓	✓	
Repository	✓		
Tableau Prep Conductor			
Ask Data	✓		
Elastic Server	✓		
TSM Controller	✓		
License Server	✓		

Refresh Status

✓ Active
⌚ Busy
⚠ Degraded
✖ Error
⏹ Stopped

**Tableau Prep Conductor enabled and running:**

Process	node1	node2	node3
Gateway	✓		
Application Server	✓		
Interactive Microservice Container	✓		
VizQL Server	✓ ✓ ✓ ✓		
Cache Server	✓ ✓		
Cluster Controller	✓	✓	✓
Search & Browse	✓		
Backgrounder	✓ ✓		✓ ✓
Non-interactive Microservice Container	✓		✓
Data Server	✓ ✓		
Data Engine	✓	✓	✓
File Store	✓	✓	
Repository	✓		
Tableau Prep Conductor	✓		✓
Ask Data	✓		
Elastic Server	✓		
TSM Controller	✓		
License Server	✓		

4. Add a new node to your Tableau Server installation. A dedicated node to run flow related operations is recommended for production Tableau Server installations. The installer will enable certain required processes like the Cluster Controller. Enable Backgrounder process on it as it is required to run scheduled flow tasks. When you enable the Backgrounder process, the installer automatically enables a single instance of Data Engine on the node. Do not add any other processes on this node.

**Note:** The dedicated node counts towards the total count of the Coordination Service ensemble. You may need to deploy a Coordination Service on the new node depending on the total number of nodes you have in your cluster including the new dedicated node. For more information, see [Deploy a Coordination Service Ensemble](#).

**Important:**

The number of physical cores on this machine must be equal to, or less than the Tableau Prep Conductor cores you purchased. For example, if you purchased four Tableau Prep Conductor cores, your node can only have up to four physical cores. To understand

about how Tableau Prep Conductor licensing works, see [Licensing Tableau Prep Conductor for Tableau Server](#).

5. Run the following commands to dedicate this node to only doing flow tasks. This will enable Tableau Prep Conductor on your new node. For more information, see [Node Roles in Tableau Server](#).
  - Get the nodeID for your dedicated node to see the list of services on each node:
 

```
tsm topology list-nodes -v.
```
  - Set the node role for the dedicated node using the nodeID that you got from running the command described above:
 

```
tsm topology set-node-role -n nodeID -r flows.
```
  - Apply the changes and restart the server:
 

```
tsm pending-changes apply.
```
  - Review the status to ensure that all the processes are up and running and configured correctly:
 

```
tsm status -v.
```
  
6. At this stage, you may have Tableau Prep Conductor enabled on other nodes that have the Backgrounder process. By default, the Backgrounder process on a node performs all tasks of all types including flow tasks. To isolate Tableau Prep Conductor and flow operations to only certain nodes, you can configure the backgrounders to do one of the following:
  - To run only flow tasks:
 

```
tsm topology set-node-role -n <nodeID> -r flows.
```
  - To run all other tasks except flows:
 

```
tsm topology set-node-role -n <nodeID> -r no-flows.
```

## Next step

**Step 2: Configure Flow Settings for your Tableau Server** on the facing page.

## Who can do this

Tableau Server Administrators can install or upgrade Tableau Server, and enable Tableau Prep Conductor on Tableau Server.

## Step 2: Configure Flow Settings for your Tableau Server

This topic describes the various flow settings that you can configure for your Tableau Server.

### Publishing, Scheduling, and Credential Settings

When you activate Tableau Prep Conductor using the Data Management product key, Tableau Prep Conductor is enabled for the entire Tableau Server installation. You can further modify and customize the setting for sites.

Use the following instructions to configure settings related to flows for all your sites or for individual sites:

Use the following instructions to sign in to Tableau Server Admin pages:

- Windows: [Tableau Server Admin Pages](#).
- Linux: [Tableau Server Admin Pages](#).

#### **Configure whether publishing and scheduling flow should be allowed for a site:**

1. **Enable users to publish and schedule flows:** This setting is enabled by default when you enable Tableau Prep Conductor. If you have multiple sites, you can selectively turn off Tableau Prep for Server for individual sites. If you disable this setting for a site that once allowed flows, see [Implication of disabling Tableau Prep Conductor](#) below to learn more.

On the **General** page under **Settings**, scroll to the **Tableau Prep Conductor** section and clear the **Allow users to schedule and monitor flows** check box.

2. **Embed Credentials**

**-Allow publishers to embed credentials in a data source, flow or workbook:** This setting allows publishers to attach passwords to published flows that will automatically authenticate web users.

**-Allow publishers to schedule flow runs and data extract refreshes:** This option is only available if setting above is enabled. When this setting is enabled, publishers will see scheduling options in the Publish dialog box.

#### Implication of disabling Tableau Prep Conductor

If you disable Tableau Prep Conductor after using it for a while, you will not be able to see the flows, schedules, tasks, and other things related to flows. The following table gives you more

information on what you can and cannot see when you disable Tableau Prep for Server completely or only for specific sites:

	<b>Prep not enabled at Server level</b>	<b>Prep enabled at Server level, but disabled for a site</b>	<b>Prep enabled for both Server and site</b>
<b>Show flows</b>	No	No	Yes
<b>Show tasks/schedules in Server view</b>	No	Yes	Yes
<b>Show tasks/schedules in Site view</b>	No	No	Yes
<b>Show Site setting (only for Server Admins)</b>	Yes (disabled)	Yes	Yes
<b>Show TSM status</b>	Yes (Tableau Prep Conductor is not shown)	Yes	Yes
<b>Show TSM settings</b>	Yes (disabled)	Yes	Yes

**Important:** Scheduled tasks will continue to run even when Tableau Prep Conductor is disabled for that site, but will fail.

## Configure notifications for flow failures

You can configure Tableau Server to send email notifications for flow run failures. The notifications are sent for failures that occur when running the flows through either a scheduled task or a manual run using the **Run now** menu option. You must first enable the server-wide setting, and then configure at the site level.

### To enable the server-wide email notification

You can either use the Tableau Services Manager (TSM) web interface or TSM CLI as described below:

## Use the TSM web interface

1. Open TSM in a browser:  
`https://<tsm-computer-name>:8850.`
2. Click **Notifications** on the **Configuration** tab and click **Email Server**.
3. Enter the email server information.
4. Click the **Events** tab.
5. Under **Content Updates**, select **Send emails for extract refresh failures and flow run failures** if not already turned on by default.
6. Click **Save Pending Changes** after you've entered your configuration information.
7. Click **Apply Changes and Restart**.

## Use the TSM CLI

The notification values can be set individually with the `tsm configuration set` command:

Windows: [tsm configuration](#).

Linux: [tsm configuration](#).

### Set notification values

Use the `tsm configuration set` command with the following syntax to

to enable flow failure notifications, run the following command:

```
tsm configuration set -k backgrounder.notifications_enabled -v true
```

**Note:** This will enable email notification for both extract refresh failures and flow failures.

After you are done setting values, you must run the following command:

```
tsm pending-changes apply
```

The `pending-changes apply` command displays a prompt to let you know this will restart Tableau Server if the server is running. The prompt displays even if the server is stopped, but in

the case there is no restart. You can suppress the prompt using the `--ignore-prompt` option, but this does not change the restart behavior.

To configure email notification for a site:

On the **General** page under **Settings**, scroll to the **Flow Run and Refresh Failure Notifications** setting and clear the **Send email to data source, flow, and workbook, when flow runs and scheduled refreshes fail** check box to turn off refresh failure and flow run notifications.

The screenshot shows the 'General' settings page for Tableau. The 'General' tab is selected and highlighted with a red box. Below the 'Extensions' header, there are 'Revert' and 'Save' buttons. The 'Offline Favorites for Tableau Mobile' section is visible, with a checked checkbox for 'Enable offline favorites'. Below that, the 'Flow Run and Extract Job Failure Notifications' section is highlighted with a red box. It contains a descriptive paragraph and a checked checkbox for 'Send email to data source, flow, and workbook owners when flow runs, encryption jobs, or scheduled refreshes fail'.

## Next step

### Step 3: Create Schedules for Flow Tasks on the facing page

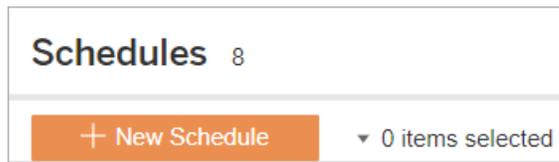
#### Who can do this

Tableau Server Administrators can configure server and site level settings. Tableau Site Administrators can configure site level settings.

## Step 3: Create Schedules for Flow Tasks

Create a new schedule:

1. On the **Schedules** tab, click **New Schedule**.



2. Enter the following information in the **New Schedule** dialog box and click **Create**.
  - **Name:** Enter a descriptive name for the schedule. Typically, this includes the description of the schedule frequency.
  - **Task Type:** Select Flow as the task type.
  - **Default Priority:** You can define a default priority from 1 to 100, where 1 is the highest priority. This value will be assigned to the tasks by default. If two tasks are pending in the queue, the one with the higher priority runs first.
  - **Execution:** Choose whether a schedule will run in parallel or serially. Schedules that run in parallel run on all available background processes so that they can complete faster.

- **Frequency:** You can define an hourly, daily, weekly, or monthly schedule.

### New Schedule

Create a schedule users can choose for running extract refreshes, flows, or subscriptions.

Name:

Task type:

Default priority:   
Tasks are executed in priority order from 1 to 100

Execution:  Parallel: Use all available background processes for this schedule  
 Serial: Limit this schedule to one background process

Frequency:  Hourly  
 Daily  
 Weekly  
 Monthly

every:

from:  :

to:  :

## Next step

### Step 4: Safe list Input and Output locations below

#### Who can do this

Tableau Server Administrators can create and modify schedules. Schedules are created at the server level and apply across all the sites on a server.

## Step 4: Safe list Input and Output locations

This topic describes the rules that apply to this feature and how to safe list the directories on your network.

Flow input and output connections may need to connect to databases or files in the directories on your network. You must safe list the directories you want to allow access to. Input and Output connections will only be allowed to connect to data in the safe listed locations. By default, no connections are allowed.

**Note:** You can still publish the flows and any data that is embedded in the flow file (tflx) to Tableau Server, but the flow will fail to run if the directories aren't included in your organization's safe list.

## How to safe list input and output locations

The following rules apply and must be considered when configuring this setting:

- The directory paths should be accessible by Tableau Server. These paths are verified during server startup and at flow run time and are **not** verified at the time of publishing the flow to Tableau Server.
- Network directory paths have to be absolute and cannot contain wildcards or other path traversing symbols. For example, `\\myhost\myShare\*` **or** `\\myhost\myShare*` are invalid paths and would result in all the paths as disallowed. The correct way to safelist any folder under *myShare* would be `\\myhost\myShare` **or** `\\myhost\myShare\.`

**Note:** The `\\myhost\myShare` configuration will not allow `\\myhost\myShare1`. In order to safe list both of these folders safe list them as `\\myhost\myShare; \\myhost\myShare1`.

- **Windows:**
  - The value can be either `*`, (for example, `tsm configuration set -k maestro.input.allowed_paths -v "*"`) to allow any network directory, or a specified list of network directory paths, delimited by a semicolon (;). If you specify a list of directory paths, be sure to specify particular directories rather than the root of the file share.
  - If the path contains spaces or special characters you will have to either use single or double quotes. Whether you use single or double quotes depends on the shell that you are using.
  - No local directory paths are allowed even when the value is set to `*`.
  - To save flow output to a network share, you must first [configure a Run As user](#) service account on Tableau Server. You cannot save flows to a network share using the default system account. Then configure the target directory on the network share for Full Control permissions for the Run As user account you

created.

Depending on how your organization manages nested folder permissions, you may need to grant additional permissions in the folder hierarchy, with a minimum of Read, Execute, and List Folder permission, to allow the Run As user account access to the target folder.

- **Linux:**

- The value can be either \*, (for example, `tsm configuration set -k maestro.input.allowed_paths -v "*"`) meaning that any path, including local (with the exception of some system paths configured using “`native_api.internal_disallowed_paths`”), or a list of paths, delimited by a semicolon (;).
- You must be using a kernel version of equal to or later than 4.7. Safe listing is not supported on kernel version earlier than 4.7. To check the kernel version, in the Linux terminal, type the command `uname -r`. This will display the full version of the kernel you are running on the Linux machine. Note that for Red Hat Enterprise Linux, kernel version 4.7 and later is only available with Red Hat Enterprise Linux version 8, which is not supported by Tableau Server.
- To save flow output to a network share, the local Linux account that has access to Tableau Server resources must be given Full Control permissions to the target directory on the network share. For information about configuring this, see this Tableau Community post: [Tableau Server on Linux - Connecting to a Windows Shared Directory](#).

**Note:** If a path is both on the flows allowed list and `internal_disallowed` list, `internal_disallowed` takes precedence.

Use the following commands to create a list of allowed network directory paths:

**For input connections:**

```
tsm configuration set -k maestro.input.allowed_paths -v your_networkdirectory_path_1;your_networkdirectory_path_2
tsm pending-changes apply
```

**For output connections:**

```
tsm configuration set -k maestro.output.allowed_paths -v your_networkdirectory_path_1;your_networkdirectory_path_2
```

```
tsm pending-changes apply
```

### Important:

These commands overwrite existing information and replace it with the new information you provided. If you want to add a new location to an existing list, you must provide a list of all the locations, existing, and the new one you want to add. Use the following commands to see the current list of input and output locations:

```
tsm configuration get -k maestro.input.allowed_paths  
tsm configuration get -k maestro.output.allowed_paths
```

## Next step

### [Step 5: Optional Server Configurations](#) below

#### Who can do this

Tableau Server Administrators who also are a member of the **tsmadmin** group can configure settings using *tsm* commands.

## Step 5: Optional Server Configurations

The options described in this topic are not required to enable flow publishing and scheduling flows on Tableau Server. They can be used to customizing your environment according to your requirements.

### Set the timeout period for flows

You can set time limits for how long a flow can run to make sure that subsequent tasks are not held up due to stalled tasks. The following two *tsm* command options determine how long a flow task can run before the flow background task is canceled. These two commands together determine the total timeout value for flow tasks.

Use the following *tsm* commands to change the default timeout period:

```
backgrounder.extra_timeout_in_seconds
```

(Default value: 1800 seconds or 30 minutes)

```
backgrounder.default_timeout.run_flow
```

(Default value: 14400 seconds or 4 hours)

## Set the threshold for suspended flow tasks

By default, a flow task is suspended after 5 consecutive flow task failures. To change the threshold number of flow task failures that can occur before they are suspended, use the following tsm configuration set command:

```
tsm configuration set -k backgrounder.flow_failure_threshold_for_run_prevention -v <number>
```

This sets the threshold for the number of consecutive failed flow tasks necessary before suspending the tasks. This is a server-wide setting.

### Who can do this

Tableau Server administrators can make changes to server configurations.

# Enable Tableau Prep Conductor on your Tableau Online Site

**Note:** Tableau Bridge is not currently supported. You can only connect directly to cloud-hosted data sources. If you connect to on-premises data sources, you can convert those data sources to a published data source and connect using a Tableau Bridge client if Tableau Bridge is configured for the data source. For more information, see [Publish a flow from Tableau Prep Builder on page 486](#) for Tableau Online.

Prep Conductor is automatically enabled on your Tableau Online site after you purchase the Data Management Add-on. For information on how to purchase the Data Management Add-on, contact your account manager.

## Step 1: Install Tableau Prep Builder

Install Tableau Prep Builder on your local machine.

## Step 2: Log into Tableau Online

1. Sign into the server through the **Server->Sign In** menu. For more information about how to sign in to Tableau Online, see [Sign In to Tableau Online](#).

2. On the General page under Settings, if you see a section that says **Notifications for Extract Jobs and Flow Runs** then Tableau Online is licensed with the Data Management Add-on and Prep Conductor is enabled.

**Note:** If you see a section that only says **Notifications for Extract Jobs** then Tableau Online is not licensed with the Data Management Add-on and Prep Conductor is not available. Contact your account manager to purchase the Data Management Add-on.

3. Verify that the flow run failure notification emails are enabled for your site. This should be turned on by default.

## Publish a Flow to Tableau Server or Tableau Online

**Important:** Starting in version 2020.4.1, the Data Management Add-on is no longer required to publish your flows to Tableau Server or Tableau Online, or run flows manually on the web. It is only required if you plan to run your flows on a schedule.

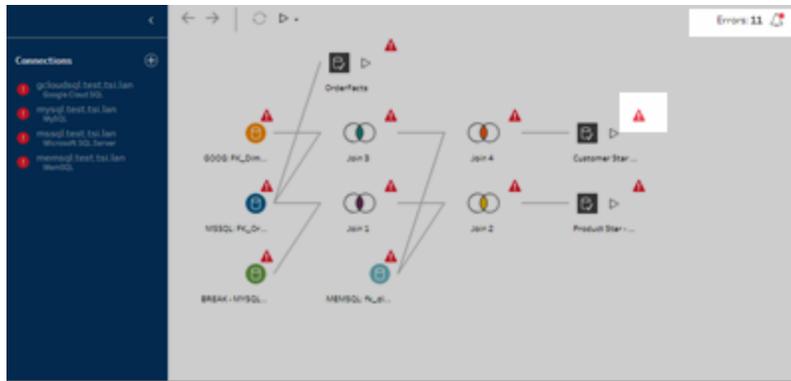
Publish your flows to Tableau Server or Tableau Online to automatically run them on a schedule and refresh the flow output using Tableau Prep Conductor. You can also manually run individual flows on the server. Flows created or edited on the web (version 2020.4.1 and later) must first be published before they can be run.

### Before you publish

To make sure that you can run your flow, check the following:

1. Verify that there are no errors in the flow.

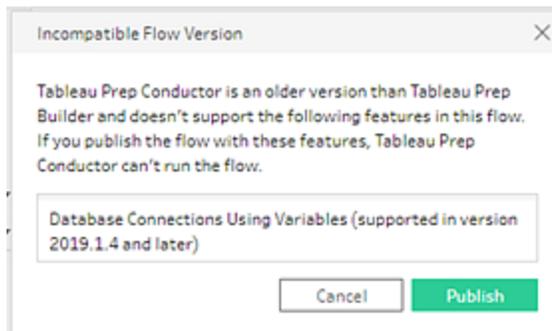
Flows that contain errors will fail when you try to run them in Tableau Server or Tableau Online. Errors in the flow are identified by a red exclamation mark and a red dot with an **Errors** indicator in the upper right corner of the canvas.



2. Verify that your flow doesn't include input connectors or features that aren't compatible with your version of Tableau Server. Tableau Online should always be running the most current version. Flows created on the web are always compatible with the server version they are created on.

You can still publish flows from Tableau Prep Builder that include connectors or features that aren't yet supported in your version of Tableau Server, but you can't schedule them to run.

For example, the SAP HANA connector was introduced in Tableau Prep Builder version 2019.1.4 but this connector isn't supported until Tableau Server version 2019.2 for Tableau Prep Conductor. When you publish the flow, you would see a message like the example below.



**Note:** To schedule flows to run on Tableau Server, you must be using Tableau Server version 2019.1 or later and Tableau Prep Conductor must be enabled.

To run your flow in Tableau Server, you need to take the appropriate actions to make the flow compatible. For more information about working with incompatible flows, see [Version Compatibility with Tableau Prep on page 427](#).

3. Flows that include input or output steps with connections to a network share require safe listing. Tableau Online doesn't support this option and files must be packaged with the flow on publish.

**Note:** Currently, flows that are created on the web can only output to a published data source or a database.

### **For Tableau Prep Builder:**

Flow input and output steps that point to files stored in a network share (UNC path) aren't permitted unless the file and path is accessible by the server and are included in your organization's safe list. If you publish the flow without adding the file location to your safe list, the flow will publish, but you will get an error when you try and schedule or run the flow in Tableau Server.

If the files aren't stored in a safe listed location, you will see a warning message when you publish the flow.

Publish Flow to Tableau Server

Project  
Default

Name  
My Superstore data

Description

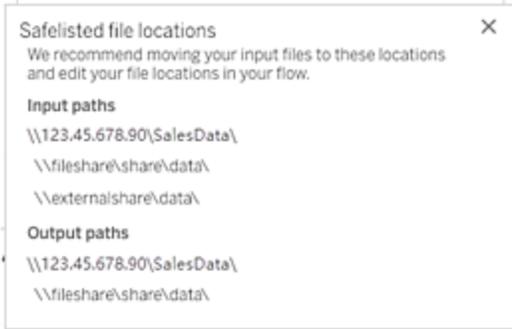
Tags  
Add

Connections [Edit](#)  
6 uploaded files ⓘ  
0 direct file connections ⓘ

Cancel Publish

**⚠** One or more output locations aren't in your organization's safe list. The flow will fail when run in Tableau Server. Save the outputs to a location in this [list](#) or publish the outputs as a data source.

Click the "list" link in the message to see a list of allowed locations. Move your files to one of the locations in the list, and make sure that your flow points to these new locations.



In Tableau Server, to configure the allowed network paths, use the tsm command options described in [Step 4: Safe list Input and Output locations on page 474](#).

If you don't want to move your files to a safe listed location, you will need to package the input files with the flow and publish the flow output to Tableau Server as a published data source. For more information about setting these options, see [Publish a flow from Tableau Prep Builder on page 486](#) in this topic.

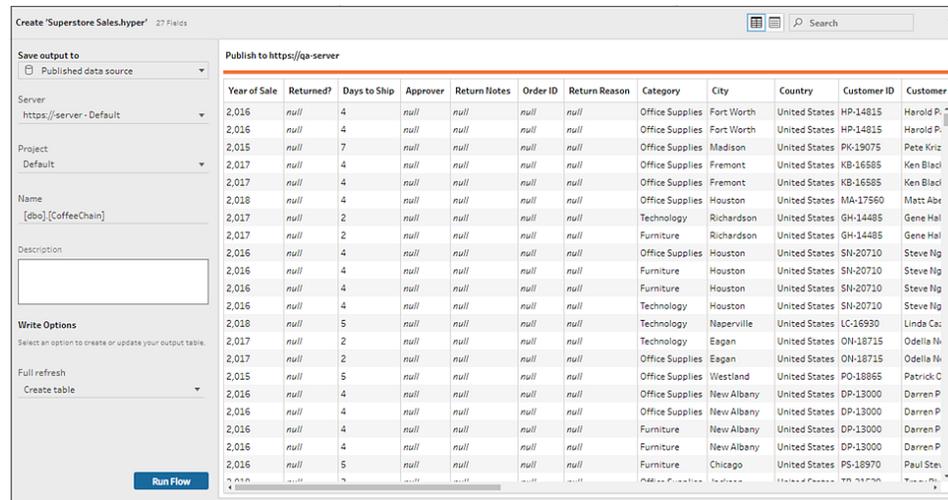
4. **(Tableau Prep Builder only)** If your flow output steps are set to **Publish as a data source**, all flow output steps must point to the same server or site where the flow is published. They can point to different projects on that server or site, but only one server or site can be selected.

To set the publishing location for your output steps, do the following:

- a. In the flow pane, select the output step.
- b. In the publishing pane, select **Publish as a data source**.
- c. Select the server or site and the project where you want to publish the flow. Sign in to the server or site if needed.
- d. Enter a name and description for each output.

The output file name should be distinctive enough so that the person running the flow can easily identify which output files to refresh. The file name shows on the **Overview** and **Connections** page for the flow in Tableau Server or Tableau Online.

- e. Save your flow.



For more information about how to configure output steps for publishing, see [Create data extract files and published data sources on page 387](#).

## Run your flow

To generate your flow output you need to run your flow. When you run your flow, all of your data (not just the data sample you might be working with) will be run through your flow steps. All of your cleaning operations are applied to your full data set, resulting in a tidy, clean data set that you can now use to analyze your data.

In Tableau Prep Builder and on the web, you can run your flows manually at any time. Flows on the web must be published to run.

You can also run your flow from the command line or you can run flows that are published on the server automatically using a schedule. To schedule your flow runs, your server must include the Data Management Add-on with Tableau Prep Conductor enabled. For more information about Tableau Prep Conductor, see [About Tableau Prep Conductor on page 442](#).

For information about running flows from the command line, see [Refresh flow output files from the command line on page 409](#). For information about adding your flow to a schedule, see [Schedule a Flow Task on page 504](#).

## Run flows manually

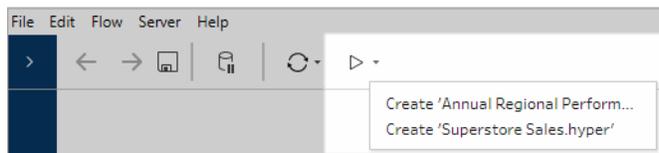
When you run flows manually, you can run one flow at a time. You can run the whole flow or run the flow for a selected output.

## Tableau Prep Help

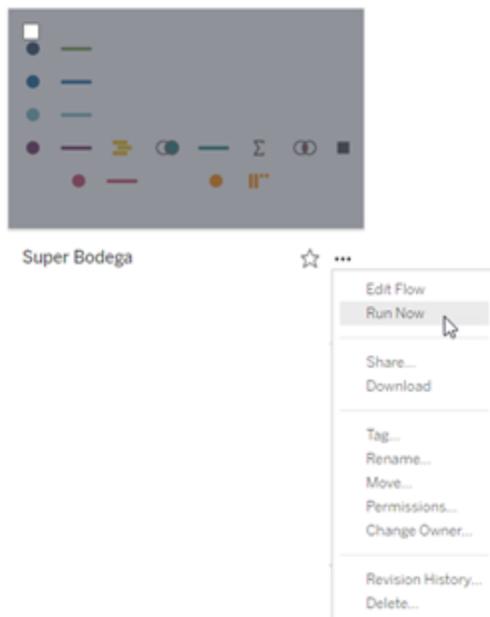
If running flows in web authoring (version 2020.4.1 and later) the flow must be published to the server to run it, and you can't run another flow until the first flow is finished, even from a separate tab.

In Tableau Online, the number of flow runs you can perform in a day is also limited by the site administrator. For more information, see [Tableau Online Site Capacity](#) in the Tableau Online help.

1. In Tableau Prep Builder or on your server, open your flow.
2. Do one of the following:
  - From the top menu, click Run ▾ to run the entire flow, or click the drop down arrow to select a flow output in the list.

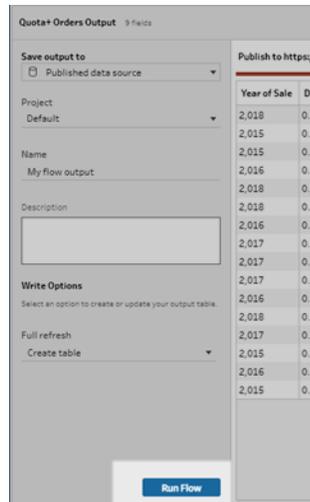


- On the server, from the **Explore** page, right-click or Cmd-click (MacOS) ⋮ **More actions** and select **Run Now** from the menu. This will run your entire flow.



- Click on an Output step in your flow, then in the Output pane, click **Run Flow**.

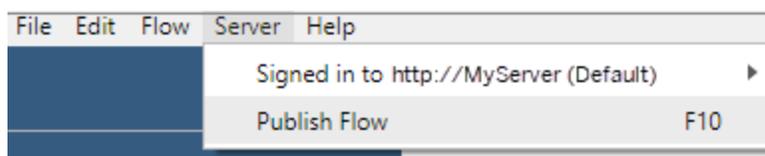
If the flow isn't open on the web you will need to click **Edit Flow** to open your flow in editing mode, then either click **Publish** to publish the flow, or accept the prompt to publish the flow, then click **Run Flow**.



## Publish a flow from Tableau Prep Builder

**Note:** When you publish a flow that includes a published data source as an input, the publisher is assigned as the default flow owner. When the flow runs, it uses the flow owner for the **Run As** account. For more information about the Run As account, see [Run As Service Account](#). Only the Site or Server Administrator can change the flow owner in Tableau Server or Tableau Online.

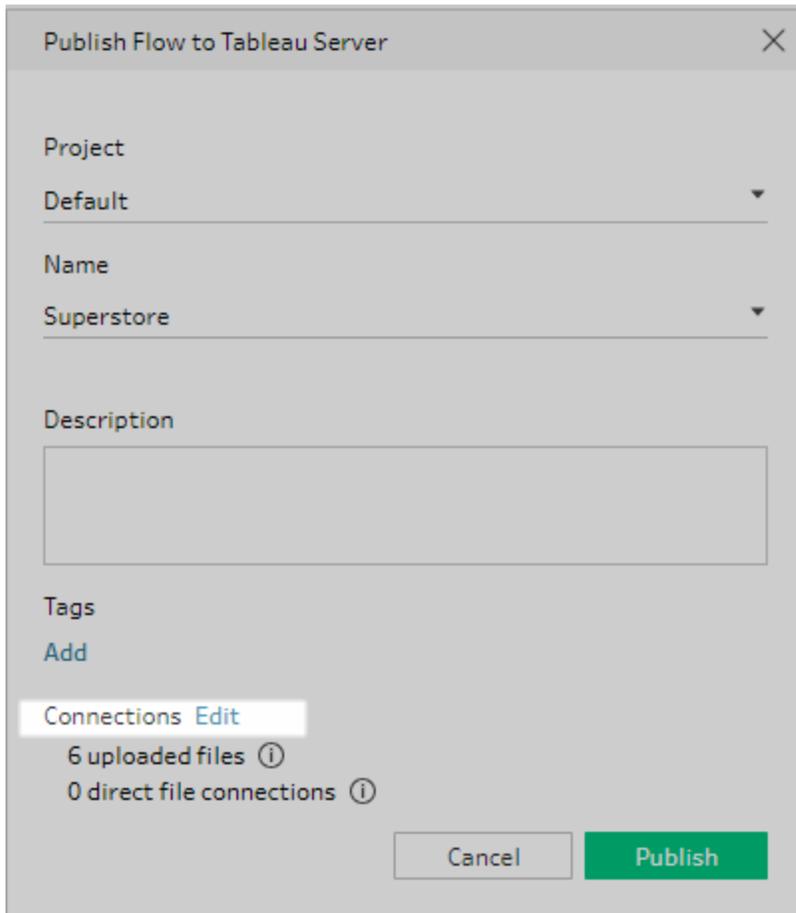
1. Open your flow in Tableau Prep Builder.
2. From the top menu select **Server > Publish Flow**.



3. Complete the fields for your platform. Then click **Publish**. Tableau Server or Tableau Online opens automatically in your default browser on the flow **Overview** page.

## Tableau Server

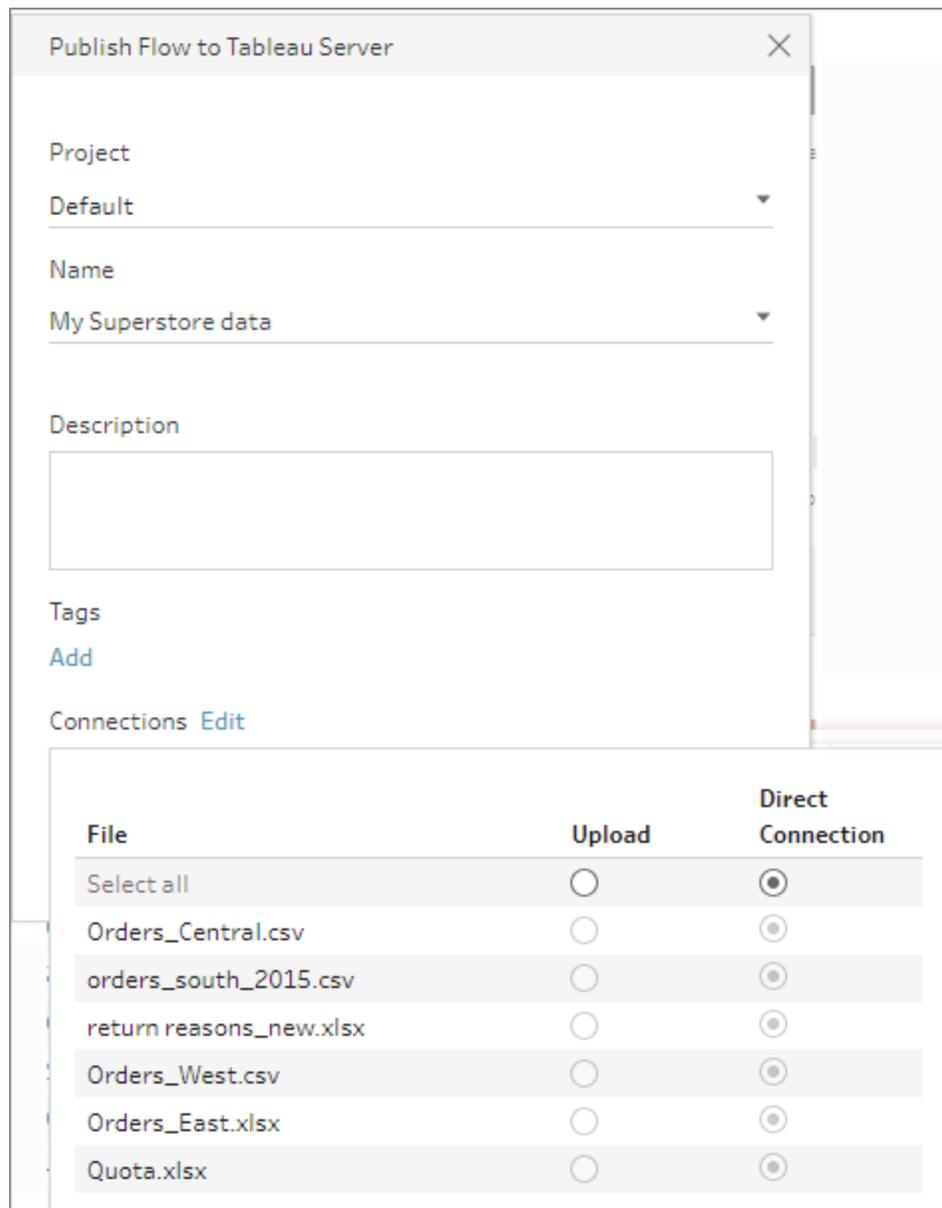
1. In the **Publish to Tableau Server** dialog, complete the following fields:
  - **Project:** Click the drop-down option to select your project from the project hierarchy. This should be the same project that the output files are published to.
  - **Name:** Enter a name for your flow. This name shows on the server on the Flow pages. If you want to overwrite an existing flow, click the drop-down option to select a name from the list.
  - **Description (optional):** Enter a description for the flow.
  - **Tags (optional):** Click **Add** to type in one or more tags to identify your flow so users can easily find it. Tags can also be added after publishing in the Flow pages in Tableau Server.
2. Click **Edit** in the Connections section to edit connections settings or change authentication.



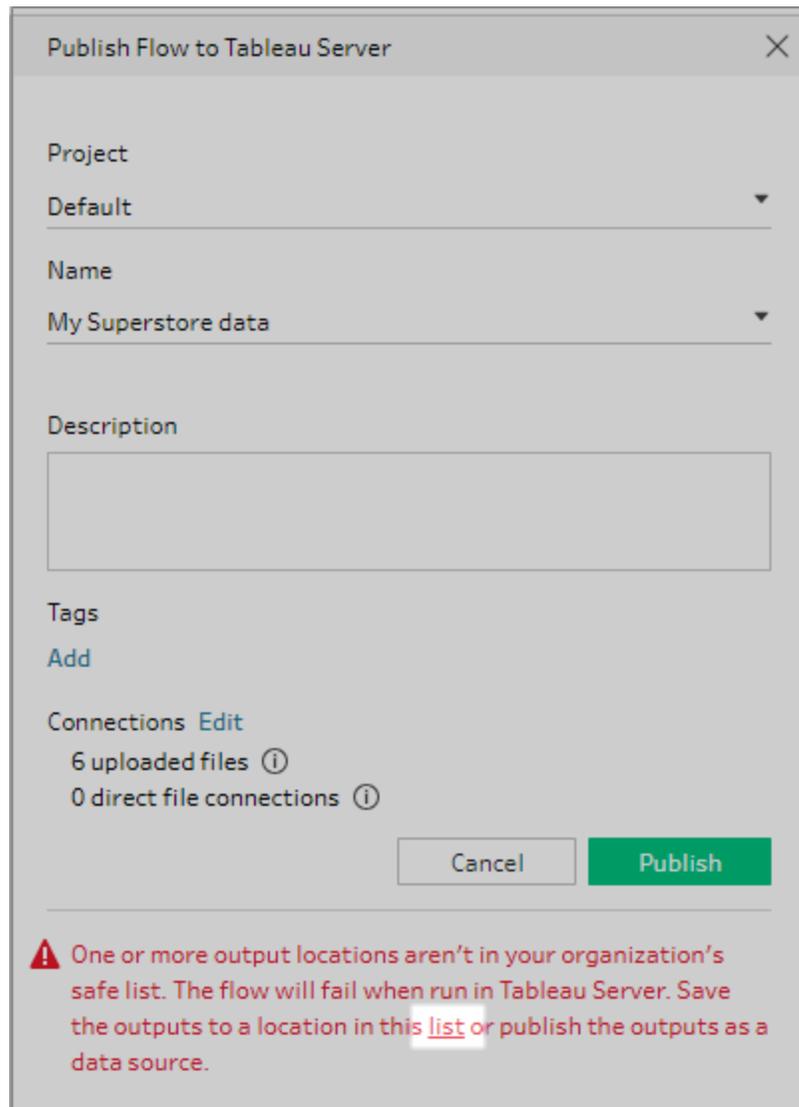
## Files

By default, file input connections are packaged with the flow. Packaged files aren't refreshed when the flow is run in Tableau Server. All files must have the same setting, either **Upload** or **Direct Connection**.

- To retrieve the most current data when refreshing the output files, select **Direct Connection** if Tableau Server can connect to the file location and the location is included in your organization's safe list.



- If your input or output steps point to files stored in a network share (UNC path) and the location isn't included in your organization's safe list, you will see a warning message. Click the link in the message to see a list of safe listed locations, move your files and point your input and output steps to the new file location. For more information, see Step 3 in [Before you publish on page 479](#)



For information about how to add locations to your organization's safe list, see [Step 4: Safe list Input and Output locations on page 474](#).

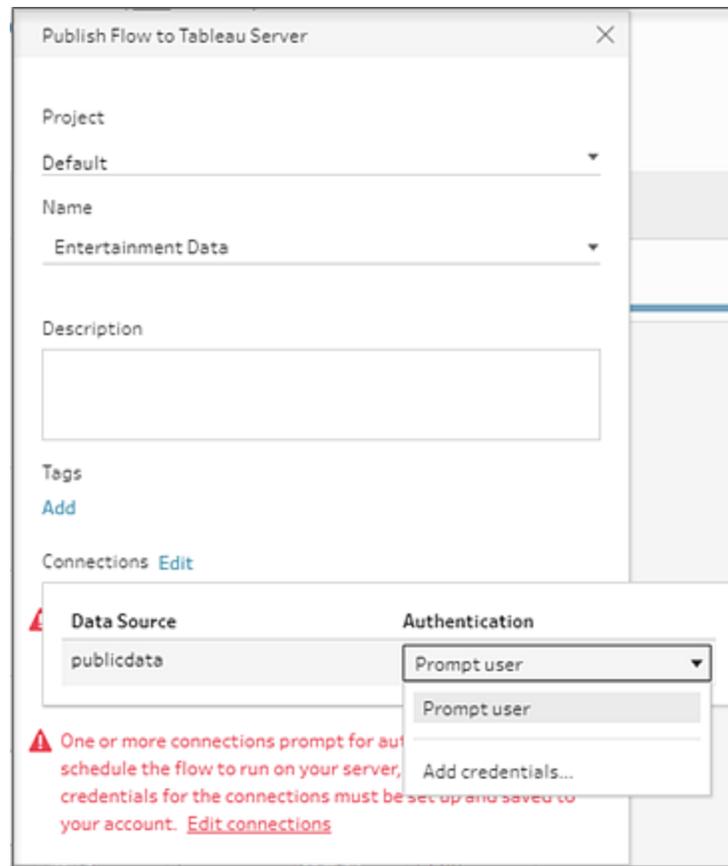
## Databases

If your flow connects to one or more databases, select one of the following authentication types to use to connect to the flow input data sources.

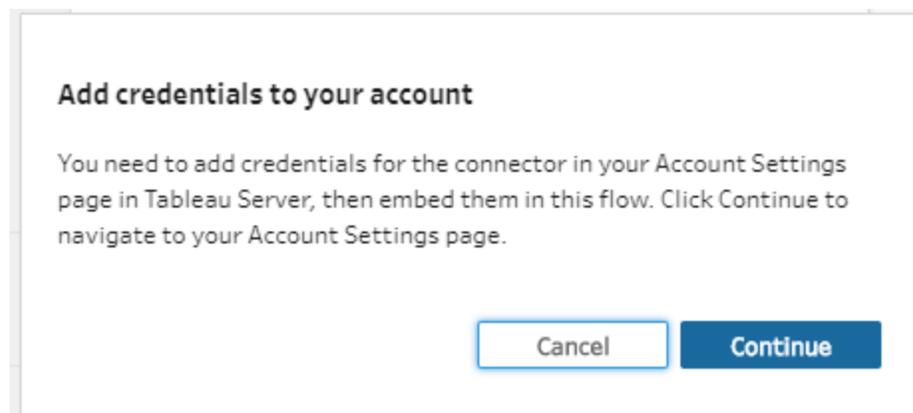
- **Server Run As Account:** The server's **Run As User** account will authenticate all users.
- **Prompt User:** You must edit the connection in Tableau Server and enter the database credentials before running the flow.
- **Embedded Password:** The credentials you used to connect to the data will be saved with the connection and used by everyone who accesses the flow you publish.

Data Source	Authentication
mysql.lan	Embedded password
mssql.lan	Embedded password
gcloudsql.lan	Prompt user
memsql.lan	Embedded password

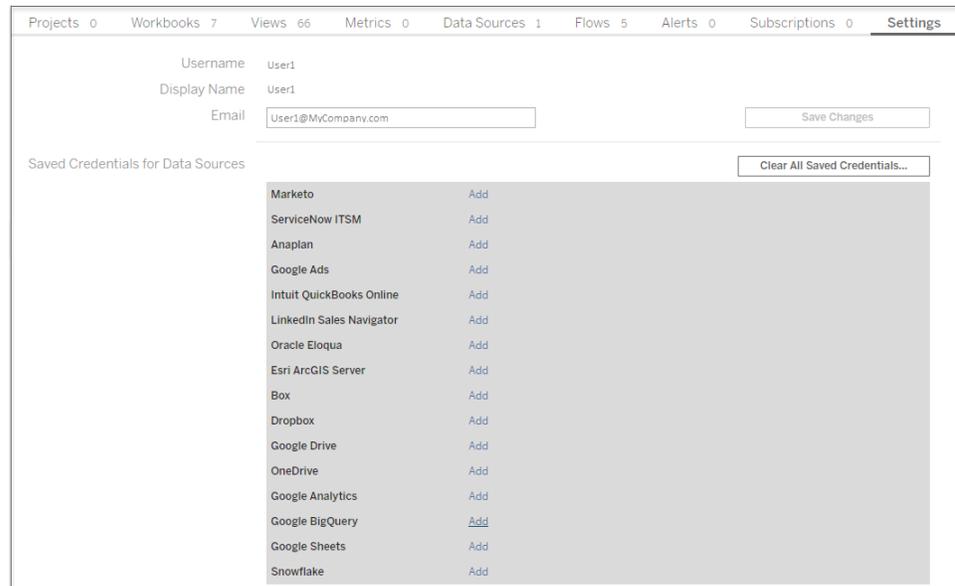
- **Add credentials:** (version 2020.1.1 and later) If you connect to cloud connectors, you can add your credentials directly from the **Publish Flow** dialog to embed them in the flow. To add credentials, do the following:
  - Click **Edit** in the Connections section, or click **Edit credentials** from the warning message. Then click **Add credentials** from the **Authentication** drop-down menu.



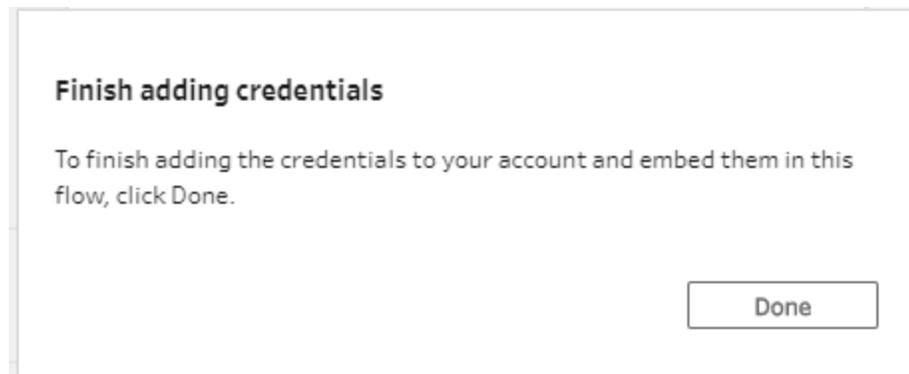
- In the confirmation dialog, click **Continue**. Tableau Prep Builder automatically opens the Account Settings page for the server you are signed into.



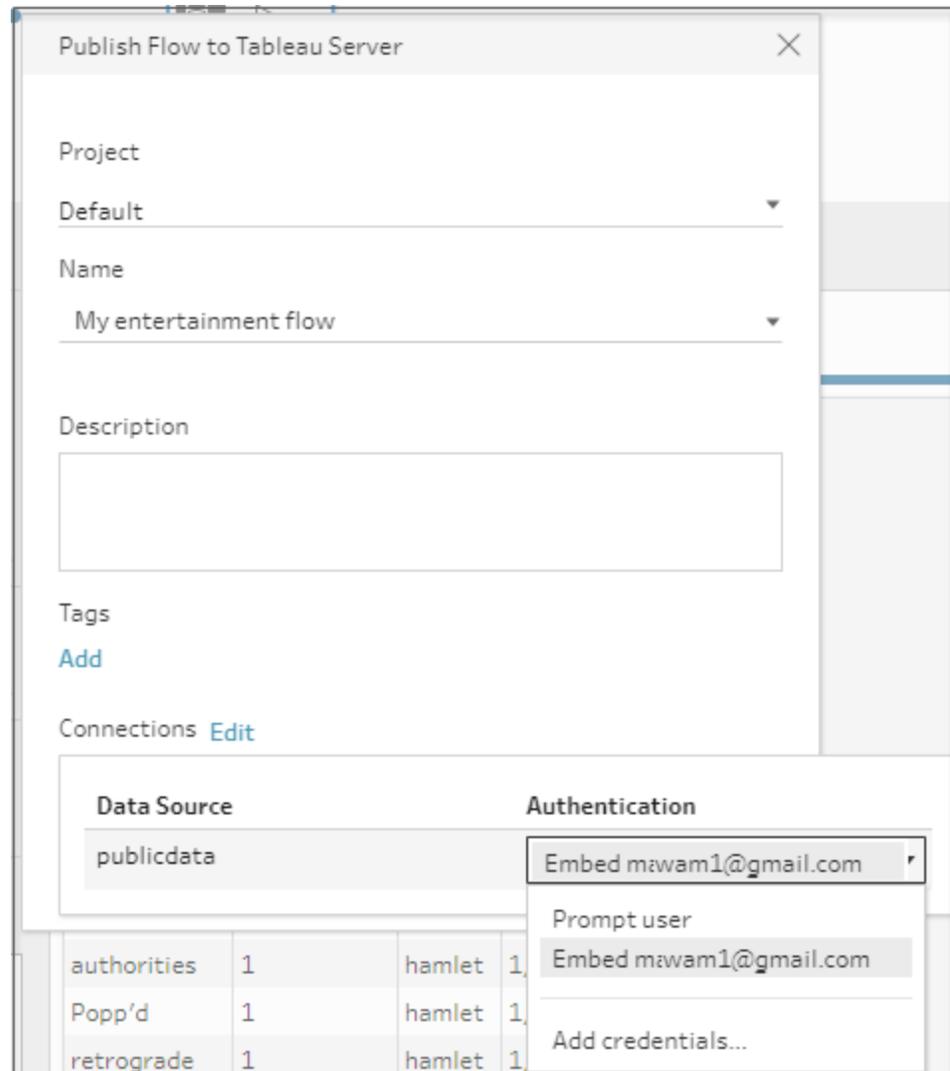
- Add your credentials, then navigate back to Tableau Prep Builder.



- In the **Finish adding credentials** dialog, click **Done**.



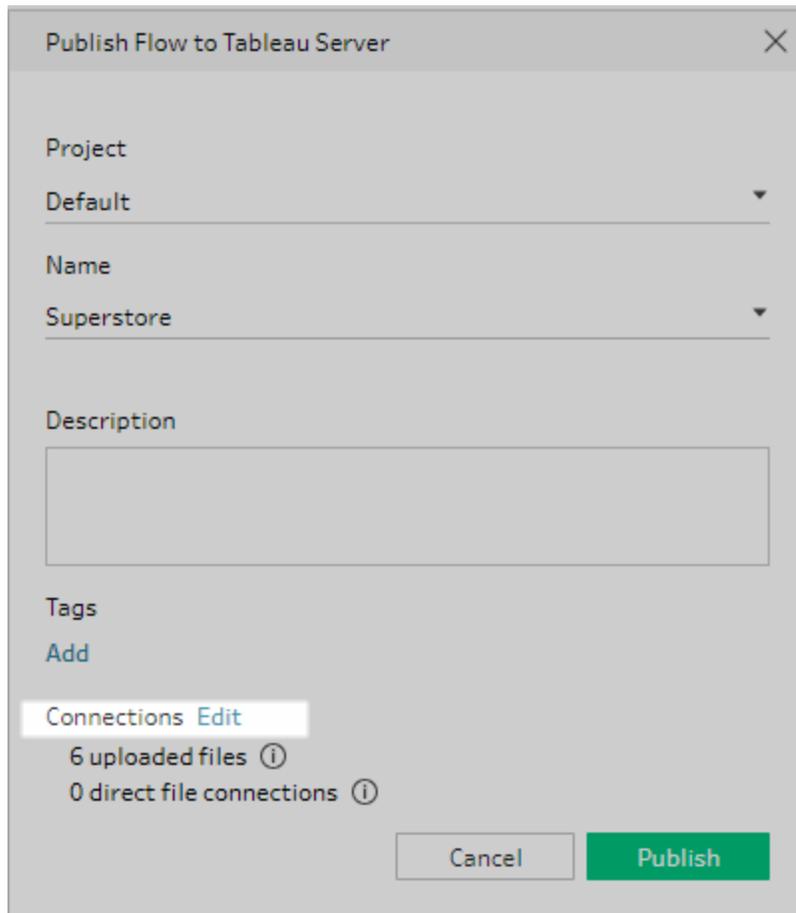
- Click **Edit** in the **Connections** section and verify that your credentials were added and embedded in your flow.



## Tableau Online

1. In the **Publish to Tableau Online** dialog, complete the following fields:
  - **Project:** Click the drop-down option to select your project from the project hierarchy. This should be the same project that the output files are published to.
  - **Name:** Enter a name for your flow. This name shows on the server on the Flow pages. If you want to overwrite an existing flow, click the drop-down option to select a name from the list.
  - **Description (optional):** Enter a description for the flow.

- **Tags (optional):** Click **Add** to type in one or more tags to identify your flow so users can easily find it. Tags can also be added after publishing in the Flow pages in Tableau Server.
2. Click **Edit** in the Connections section to edit connections settings or change authentication.



## Files

Tableau Online doesn't support direct file connections for input step data and you must package your files with the flow. Packaged files aren't refreshed when the flow is run in Tableau Online.

## Databases

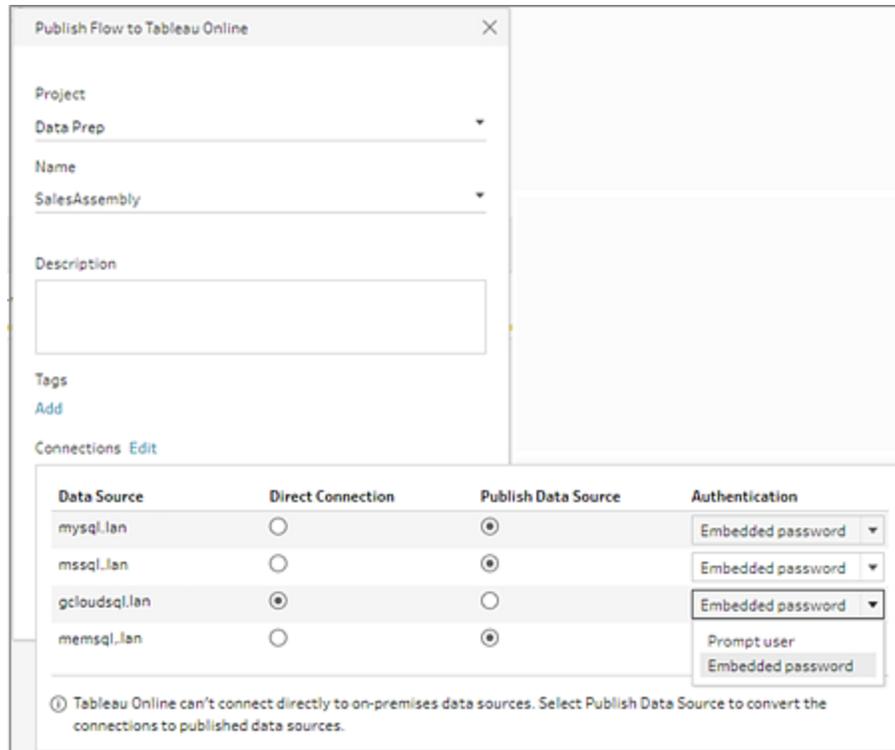
To keep data fresh when publishing flows to Tableau Online, you can only connect directly to cloud-hosted data sources. When connecting to on-premises data sources, you must convert the data sources to a published data source and Tableau Online can use a Tableau Bridge client to connect to your data if Tableau Bridge is configured for the data source.

For more information about direct connections supported by Tableau Online, see [Allow Direct Connections to Data Hosted on a Cloud Platform](#).

For more information about using a Tableau Bridge, see [Allow your Publishers to Maintain Live Connections to On Premises Data](#).

If your flow connects to a cloud-based data source that supports a direct connection, select one of the following authentication types to use to connect to the flow input data sources.

- **Prompt User:** You must edit the connection in Tableau Online and enter the database credentials before running the flow.
- **Embedded Password:** The credentials you used to connect to the data will be saved with the connection and used by everyone who accesses the flow you publish.



- Select the **Publish Data Source** radio button for on-premises data sources. Tableau Online can't connect directly to these data sources to refresh your data. Selecting this option converts the data source input connection to a published data source when you publish the flow to Tableau Online.

If Tableau Bridge is configured for the data source and the data source is supported by Tableau Online, the data can be refreshed when the flow is run. See [Allow Direct Connections to Data Hosted on a Cloud Platform](#) for more information.

- To replace the on-premises data source connections for the flow in Tableau Prep Builder with the published data source, select **Update flow inputs to use published data sources** in the **More options** section before publishing your flow.

If you don't select the check box, the flow in Tableau Prep Builder remains connected to the local on-premises data source and the flow in Tableau Prep Builder can become out of sync with the published version of the flow. To continue working with your flow, you would need to download the flow from Tableau Online to edit it, then republish it.

**Publish Flow to Tableau Online** [X]

Project [▼]

Name  
SalesAssembly

Description  
[Empty text box]

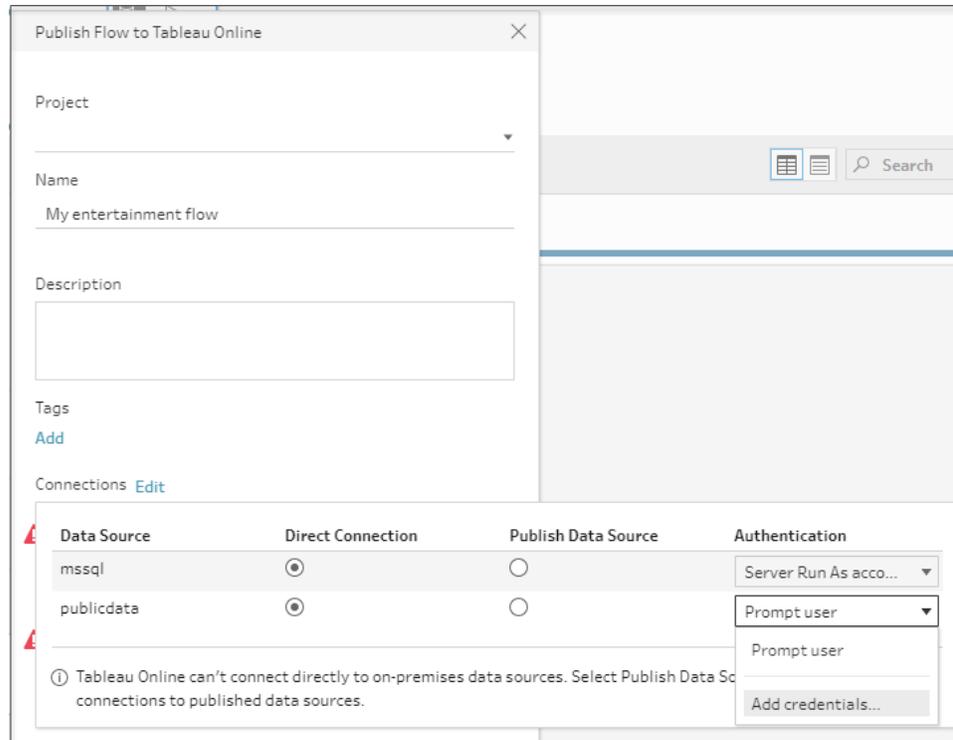
Tags  
Add

Connections Edit  
1 direct database connection ⓘ  
3 published data source connections ⓘ

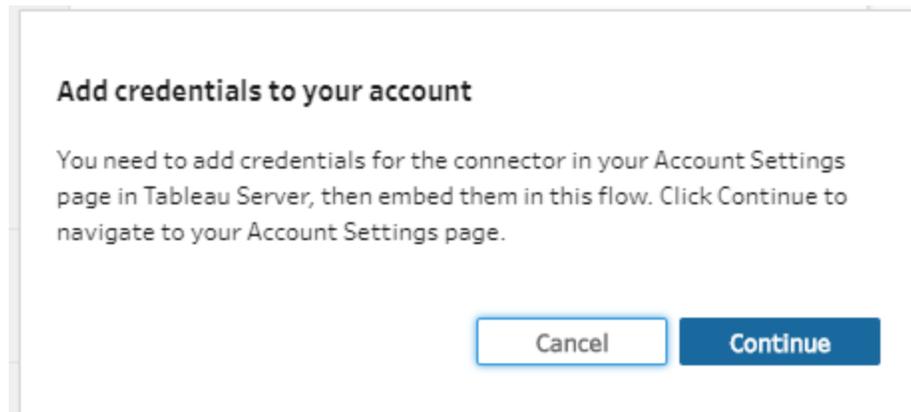
More options  
 Update flow inputs to use published data sources

Cancel Publish

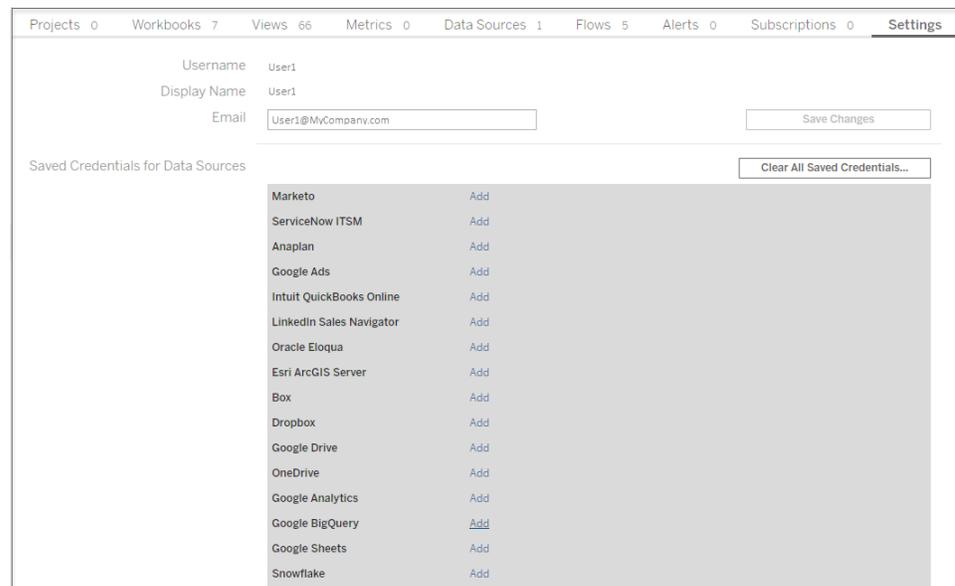
- **Add credentials:** (version 2020.1.1 and later) If you connect to cloud connectors, you can add your credentials directly from the **Publish Flow** dialog to embed them in the flow. To add credentials, do the following:
  - Click **Edit** in the Connections section, or click **Edit credentials** from the warning message. Then click **Add credentials** from the **Authentication** drop-down menu.



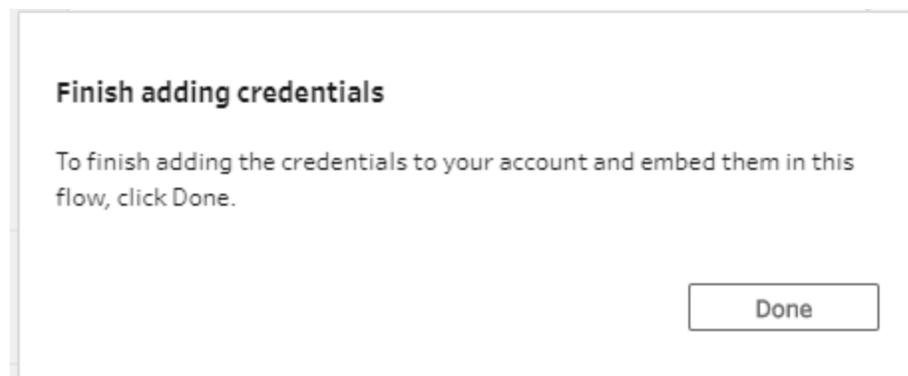
- In the confirmation dialog, click **Continue**. Tableau Prep Builder automatically opens the Account Settings page for the server you are signed into.



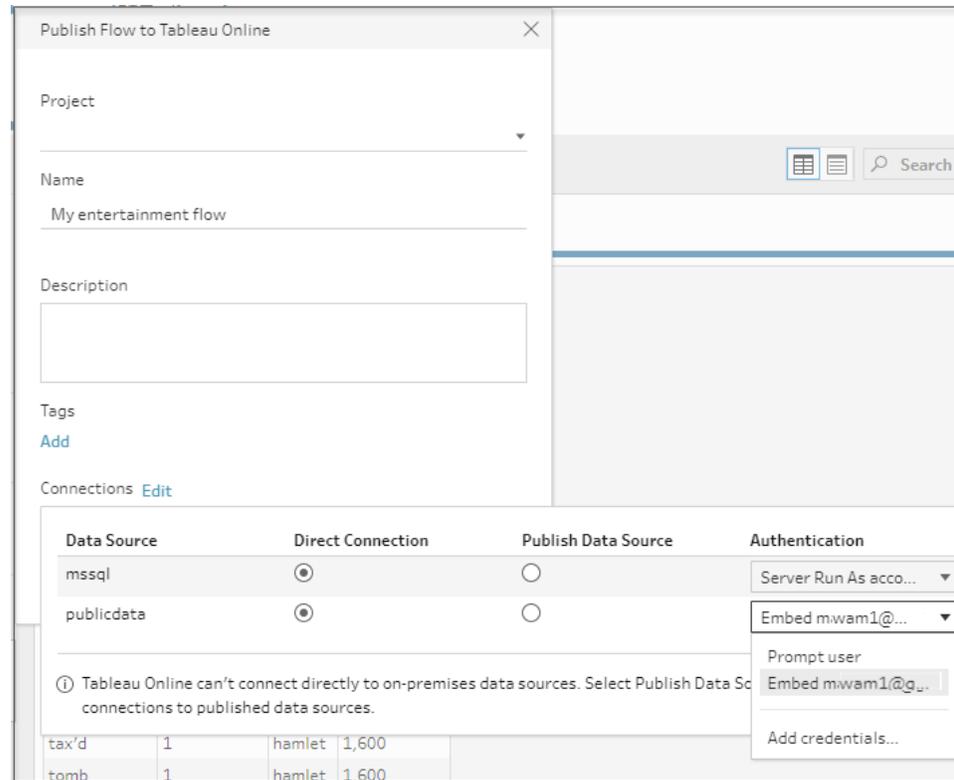
- Add your credentials, then navigate back to Tableau Prep Builder.



- In the **Finish adding credentials** dialog, click **Done**.



- Click **Edit** in the **Connections** section and verify that your credentials were added and embedded in your flow.



## Publish a flow in web authoring

Whether you create a flow from scratch on the web or edit an existing flow, before you can run the flow you'll need to publish it.

- You can only publish draft flows to the same server you are signed into.
- You can publish a draft to a different project using the **File** menu and selecting **Publish As**.
- You can embed credentials for your flow's database connections to enable the flow to run without having to manually enter the credentials when the flow runs.

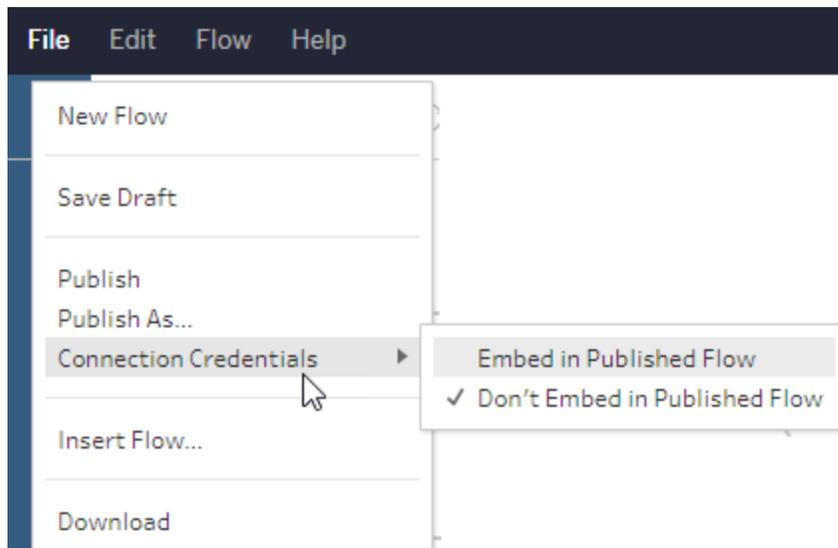
For more information about the differences when working with flows on the web, see [Tableau Prep on the Web](#) on page 166.

### Embed credentials

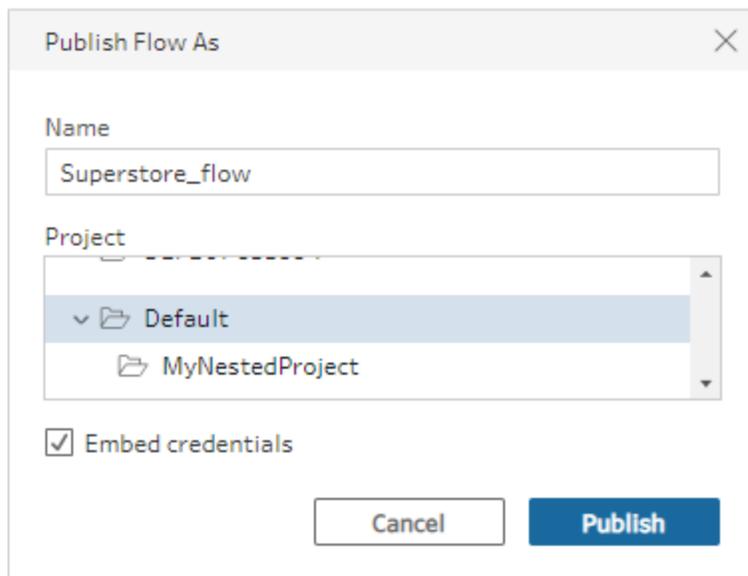
Embedding credentials only applies to running flows. Currently, you will manually need to enter your credentials when editing a flow connected to a database. Embedding credentials can only be set at the flow level and not at the server or site level.

Do one of the following:

- From the top menu, select **File > Connection Credentials > Embed in Published Flow**.



- When publishing a flow, select the **Embed credentials** check box. This option shows when you select **Publish As** to publish the flow to a new project for the first time or when you are editing a flow that was last published by someone else.

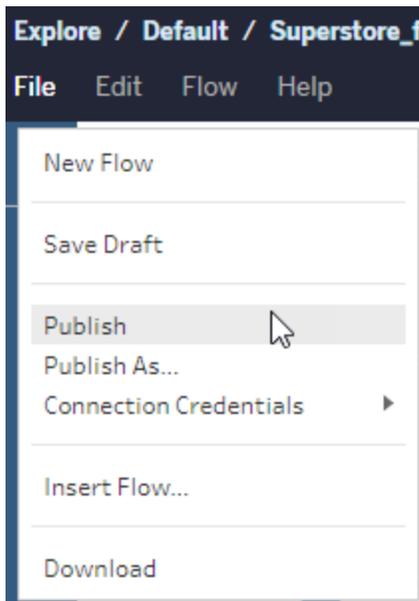


## Publish a flow

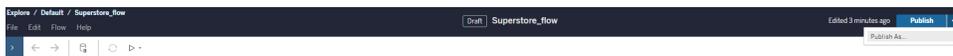
When you publish your flow, it becomes the current version of the flow and can be run and seen by others who have access to your project. Flows that are never published or flow changes that you make to a draft can only be seen by you until you publish the flow. For more information about flow statuses, see [Automatically save your flows on the web \(version 2020.4 and later\)](#) on page 384.

To publish your flow, do one of the following:

- From the top menu, select **File > Publish** or **File > Publish As**



- From the top bar, click the **Publish** button or click the drop arrow to select **Publish As**.



## Who can do this

Server Administrator, Site Administrator Creator, and Creator allow full connecting and publishing access.

Creator can perform web authoring tasks.

Explorer (can publish) and Site Administrator Explorer have limited publishing capabilities, as described in the following topics:

**Tableau Server:**

- Windows: [General capabilities allowed with each site role](#).
- Linux: [General capabilities allowed with each site role](#).

**Tableau Online:** [General capabilities allowed with each site role](#).

## Schedule a Flow Task

**Note:** Starting in version 2020.4.1, you no longer need the Data Management Add-on to publish flows to the web. As a Creator, you can also create and edit flows directly on your server. If you want to schedule flows to run on your server, the Data Management Add-on is required. For more information authoring flows on the web, see [Tableau Prep on the Web](#) on page 166.

To schedule flows to run at a specific time or on a recurring basis you can create scheduled tasks. Scheduled tasks rely on pre-configured schedules. In Tableau Server, schedules are created by the System Administrator. For information about how to create schedules on Tableau Server, see [Step 3: Create Schedules for Flow Tasks](#) on page 473.

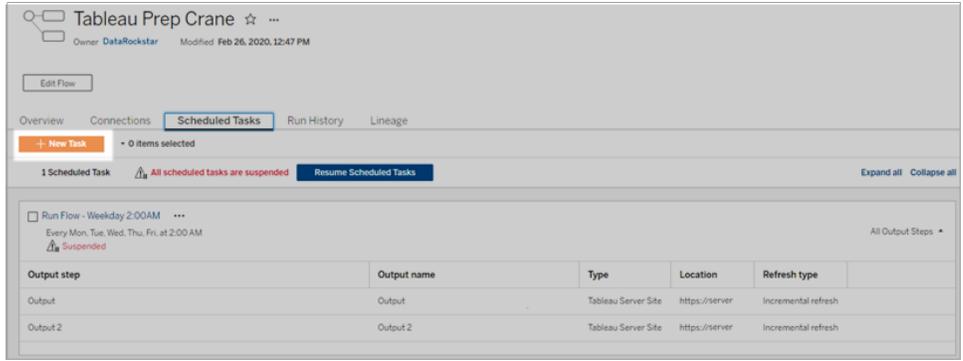
In Tableau Online, to assign a flow to a schedule, select one of the pre-defined schedules provided with Tableau Prep Conductor. New schedules cannot be created in Tableau Online.

### Schedule a flow task

1. From the **Scheduled Tasks** tab, click **New Task**.

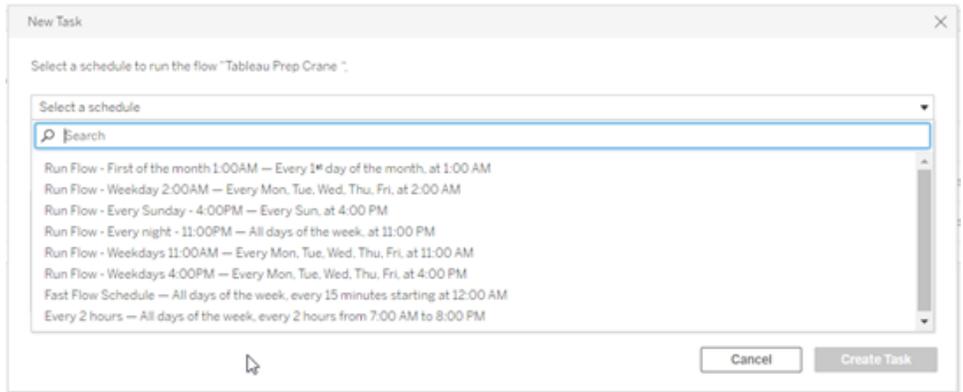
If the output step isn't assigned to a task, you can also create a new task from the **Overview** page. On that page, in the **Schedules** field, click **Create new task**.

## Tableau Prep Help

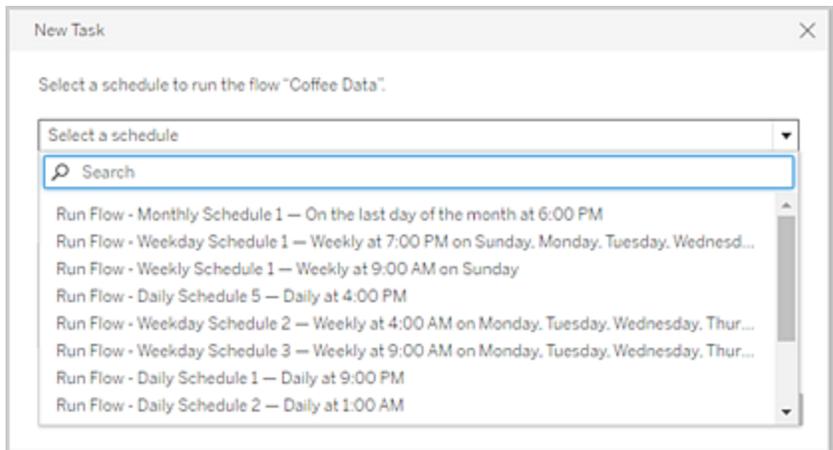


2. In the **New Task** dialog, select a schedule from the drop-down list.

## Tableau Server



## Tableau Online



3. Select one of the following options:

**Note:** Starting in version 2020.2.1 and later, if one input is configured to use incremental refresh and it is associated with multiple outputs, those outputs must be run together and must use the same refresh type. Otherwise the flow will fail.

- **Automatically include all output steps for this flow:** (default) Select this option to include all current and future output steps for this flow in the scheduled task. As new output steps are added to the flow over time, they are automatically included in the schedule when it runs.
- **Select the output steps to include in this task:** Select this option to manually select the output steps to include in this scheduled task. Then select the output steps to include in the flow task.

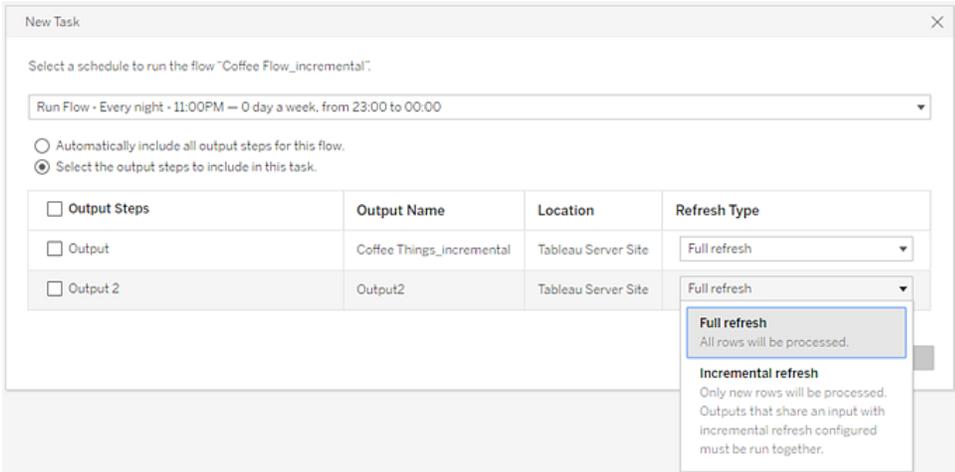
To include all output steps in the flow task, select the check box next to **Output Steps**. This area can't be edited if the **Automatically include all output steps for this flow** radio button is selected. Select the other radio button to enable this section.

<input type="checkbox"/> Output Steps	Output Name	Location	Refresh Type
<input checked="" type="checkbox"/> Create 'Annual Regional Performance.tde'	Annual Regional Performance	Tableau Server Site	Full refresh
<input type="checkbox"/> Create 'Superstore Sales.tde'	Superstore Sales	Tableau Server Site	Full refresh

4. (version 2020.2.1 and later) Select a **Refresh Type**. For more information about these settings, see [Refresh Flow Data Using Incremental Refresh](#) on page 400.

- **Full refresh** (default): Refresh all data and create or append data to your table based on the output setting in Tableau Prep Builder.
- **Incremental refresh:** Refresh only the new rows and create or append data to your table based on the output setting in Tableau Prep Builder. The incremental refresh option is only available when the flow is configured in Tableau Prep Builder to use this refresh type.

**Note:** Tableau Prep Conductor runs a full refresh for all outputs regardless of the run option you select if no existing output is found. Subsequent flow runs will use the incremental refresh process and retrieve and process only your new rows unless incremental refresh configuration data is missing or the existing output is removed.



5. Click **Create Task** to create the scheduled task.

### Who can do this

- The Server administrator can do this on all sites on the server. The Site administrator can do this on sites they have access to if the site settings to allow users to publish and schedule tasks is enabled.
- Flow owners and project leaders can create flow tasks for flows or projects that they own respectively.

For more information, review the following articles:

- Windows: [Set Users' Site Roles](#) and [Content Permissions and Ownership](#)
- Linux: [Set Users' Site Roles](#) and [Content Permissions and Ownership](#)

Site administrators, flow owners, project leaders, can create flow tasks for the flows and projects that they own respectively.

For more information, see [Set Users' Site Roles](#) and [Content Ownership and Permissions](#)

# Manage a Flow

Once you publish a flow to Tableau Server or Tableau Online, you can manage your flows and make changes to them as necessary. This topic describes the various actions you can take to manage your flows.

**Note:** The content in this topic applies to both Tableau Server and Tableau Online, exceptions are called out specifically.

## Managing your flows

Following is a list of actions you can take to manage your flows:

- **Create flows:** Starting in version 2020.4, as a Creator you can create flows directly on the web. From the **Home** page, click **Create > Flow** or from the **Explore** page, click **New > Flow**. For more information, see [Tableau Prep on the Web on page 166](#).
- **Edit flows:** Starting in version 2020.4, as a Creator you can edit flows directly on the web. Navigate to the list of flows, select **Actions** and click **Edit Flow**, or open a flow and click the **Edit** button.

When you edit a flow, your changes are moved to a draft state. When you're finished, publish your flow to commit your changes and create a new version of the flow. For more information, see [Autosave and working with drafts on page 169](#).

- **Run flows:** You can manually run a flow in addition to creating scheduled flows tasks that run at a specific time.

**Note:** The Data Management Add-on is not required to manually run flows, but is required to schedule flows to run.

- Navigate to the list of flows, select one or more flows you want to run, select **Actions** and click **Run Now**.
- **Tag:** Tags are keywords you can create for flows to help you find, filter, and categorize content. Authors can add tags to flows when they publish it. But you can also add tags to any workbook, view, or data source that you are allowed to access and you can delete any tags you have added. You can add a tag to a list of flows.

Navigate to the list of flows, select one or more items you want to tag, select **Actions** and click **Tag**. To add a tag to a specific flow you can do it from the list of flows as described above. Open the Flow, from the Overview tab, select **Actions**, and click **Tag**.

- **Change Owner:** Administrators, flow owners, and project leaders can change owners.
- **Permissions:** You can set permissions for users and specify if they can perform edit actions like save, download, move to a different project and delete. In addition, you can specify who can view and run the flow.
- **Download:** You can download a flow to view or modify it using Tableau Prep Builder. To download a flow, you need download permissions. You'll have that by default if you are the owner, but you might need to add it for other users.
- **Revision History:** When you make a change to the flow, and republish it to the same project with the same name, a new version of the flow is created. You can view the revision history by selecting revision history from the actions menu. Flow owners have permissions to restore a previous version of a flow.
- **Move:** You can move flows between projects. To move a flow, users need Move permission. You'll have that by default for flows you own, but you might need to add it for other users.
- **Rename:** You can rename a flow. To rename a flow, users need the Save permission. You'll have that by default for flows you own, but you might need to add it for other users.
- **Delete:** You can delete a flow. To delete a flow, users need the Delete permission. You'll have that by default for flows you own, but you might need to add it for other users.

### Who can do this

## Tableau Server Administrator

**Can do the following tasks across all the sites:**

- Create flows
- Edit published flows
- View a list of all draft flows
- Run flows
- Delete flows

- Download flows
- Change Owner
- Change Permissions
- Change Project
- Add/Remove Tags
- Change Description
- Change Name
- Update Flow Task
- Delete Flow Task
- Create a Flow Task\*
- Version Management\*

\*Some additional conditions apply to these actions:

- To create a flow task:
  - A flow schedule must be available. Only Server Administrators can create a schedule.
  - The flow must have at least one output step.
  - The flow version must be compatible with the Tableau Server version.
- Version management:
  - Revision history must be enabled on the site.
  - User role is allowed to publish to the project.

## Tableau Site Administrator

**Can do the following tasks on flows published to the sites that they are site administrator for:**

- Create flows
- Edit published flows
- View a list of all draft flows
- Run flows

## Tableau Prep Help

- Delete flows
- Download flows
- Change Owner
- Change Permissions
- Change Project
- Add/Remove Tags
- Change Description
- Change Name
- Update Flow Task
- Delete Flow Task
- Create a Flow Task\*
- Version Management\*

Some additional conditions apply to these actions:

- To create a flow task:
  - A flow schedule must be available. Only Server Administrators can create a schedule.
  - The flow must have at least one output step.
  - The flow version must be compatible with the Tableau Server version.
- Version management:
  - Revision history must be enabled on the site.
  - User role is allowed to publish to the project.

## Project Leader

**Can do the following tasks on flows published to the projects where they have project leader permissions:**

- Create flows
- Edit published flows

- Run Flows
- Delete
- Download
- Change Owner
- Change Permissions
- Change Project
- Add/Remove Tags
- Change Description
- Change Name
- Update Flow Task
- Delete Flow Task
- Create a Flow Task\*
- Version Management\*

\*Some additional conditions apply to these actions:

- To create a flow task:
  - A flow schedule must be available. Only Server Administrators can create a schedule.
  - The flow must have at least one output step.
  - The flow version must be compatible with the Tableau Server version.
- Version management:
  - Revision history must be enabled on the site.
  - User role is allowed to publish to the project.

## Project Owner

**Can do the following tasks on flows published to the projects that they own:**

- Create Flows
- Edit published flows

## Tableau Prep Help

- Run Flows
- Delete
- Download
- Change Owner
- Change Permissions
- Change Project
- Add/Remove Tags
- Change Description
- Change Name
- Update Flow Task
- Delete Flow Task
- Create a Flow Task\*
- Version Management\*

\* Some additional conditions apply to these actions:

- To create a flow task:
  - A flow schedule must be available. Only Server Administrators can create a schedule.
  - The flow must have at least one output step.
  - The flow version must be compatible with the Tableau Server version.
- Version management:
  - Revision history must be enabled on the site.
  - User role is allowed to publish to the project.

## Flow Owner

**Can do the following tasks on flows that they own:**

- Create Flows
- Edit Draft (flows they own) and Published Flows

- Run flows
- Delete flows
- Download flows
- Change Owner
- Change Permissions
- Change Project
- Add/Remove Tags
- Change Description
- Change Name
- Update Flow Task
- Delete Flow Task
- Create a Flow Task\*
- Version Management\*

\*Some additional conditions apply to these actions:

- To create a flow task:
  - A flow schedule must be available. Only Server Administrators can create a schedule.
  - The flow must have at least one output step.
  - The flow version must be compatible with the Tableau Server version.
- Version management:
  - Revision history must be enabled on the site.
  - User role is allowed to publish to the project.

## User with Creator License

### Can do the following tasks:

- Create Flows
- Edit Draft (flows they own) and Published Flows

## Tableau Prep Help

- Run Flows (with Run flow permissions)
- Delete (with delete permissions)
- Download (with download or Save as, and read permissions)
- Change Permissions (with Change Permissions)
- Change Project (with move permissions, and write permissions on the destination project)
- Add/Remove Tags (with read permissions)
- Change Description (with Save permissions)
- Change Name (with Save permissions)
- Update Flow task (with Execute permissions)
- Delete Flow Task (with Execute permissions)
- Create a Flow Task\* (with Execute permissions)
- Version Management\* (with view, read, save as, download permissions)

\* Some additional conditions apply to these actions:

- To create a flow task:
  - A flow schedule must be available. Only Server Administrators can create a schedule.
  - The flow must have at least one output step.
  - The flow version must be compatible with the Tableau Server version.
- Version management:
  - Revision history must be enabled on the site.
  - User role is allowed to publish to the project.

## User with Explorer License

### Can do the following tasks:

**Note:** Starting in version 2020.4, Explorer users can no longer run flows on the server.

- Delete (with delete permissions)
- Download (with download or Save as, and read permissions)
- Change Permissions (with Change Permissions)
- Change Project (with move permissions and write permissions on the destination project)
- Add/Remove Tags (with read permissions)
- Change Description (with Save permissions)
- Change Name (with Save permissions)
- Update Flow task (with Execute permissions)
- Delete Flow Task (with Execute permissions)
- Create a Flow Task\* (with Execute permissions)
- Version Management\* (with view, read, save as, download permissions)

\*Some additional conditions apply to these actions:

- To create a flow task:
  - A flow schedule must be available. Only Server Administrators can create a schedule.
  - The flow must have at least one output step.
  - The flow version must be compatible with the Tableau Server version.
- Version management:
  - Revision history must be enabled on the site.
  - User role is allowed to publish to the project.

## User with Viewer License

Viewers cannot manage flows, they can however view the flow and the different versions of the flow.

For more information about the full capabilities you can set on flows, see [Permission capabilities](#).

# Monitor Flow Health and Performance

After you publish flows and schedule them to run periodically, you want to know that they are running as expected and resolve any issues as they occur. You will also want to monitor and understand the performance of your flows.

This topic describes the various methods that Tableau Server and Tableau Online provide to help you monitor your flows.

## Detect issues as they occur and resolve them

You can set up Tableau Server to send email notifications when flows fail, or find and review errors on Tableau Server using the Alerts menu or by reviewing the flow pages for the flows that you are interested in. This type of monitoring allows you to detect problems as they occur.

### Get email notifications when a flow fails:

You can configure Tableau Server to send email notifications to flow owners when a flow fails.

To set up email notifications for your Tableau Server and sites, follow the instructions in [Step 2: Configure Flow Settings for your Tableau Server](#) on page 469.

Email notifications is turned on by default for your site in Tableau Online. You can verify this by going to **Settings > General** page.

## View and resolve errors

**Note:** Starting in version 2020.4.1, you can now create and edit flows directly in Tableau Server and Tableau Online. The content in this section applies to all platforms, unless specifically noted. For more information about authoring flows on the web, see [Tableau Prep on the Web](#) on page 166.

The following errors can happen when running a flow:

- **Connection errors:** Connection errors generally happen when Tableau Server or Tableau Online is unable to connect to one or more data inputs or is unable to make a connection in one or more output steps.
  - For Input connection errors, use the **Edit connections** option on the **Connections** tab to make changes to connection details, then run the flow again.

- For output connection errors, check the output location for the flow output steps. If the flow output is going to a network share, make sure the output steps are pointing to a safe listed location. After you make any changes republish the flow and try running it again.

**Note:** To fix output connection errors for flows that output to a file or network share, download the flow to Tableau Prep Builder, then republish the flow to your server. Flows that output to a published data source or database can be edited directly on the web.

- **Errors in the flow:** If there are errors in one or more steps in the flow, you will see an error message. You can edit the flow directly on the web and republish it. You can also download the flow to Tableau Prep Builder, resolve the errors, republish the flow to the server and then run the flow again.
- **Suspended flow tasks:** When a scheduled flow task fails to run after a configured number of attempts, the flow task is suspended. A flow can have multiple scheduled tasks assigned to it, but only the failed tasks are suspended. All other flow tasks will continue to run unless they have errors. To resolve a suspended task, review and resolve the errors then run the flow on-demand or let the flow run automatically based on the assigned schedule.

**Note:** By default, a flow task is suspended after 5 consecutive flow tasks failures. Server administrators can change this default by using the tsm configuration set option. For more details, see [Step 5: Optional Server Configurations on page 477](#).

You can view errors on the following pages:

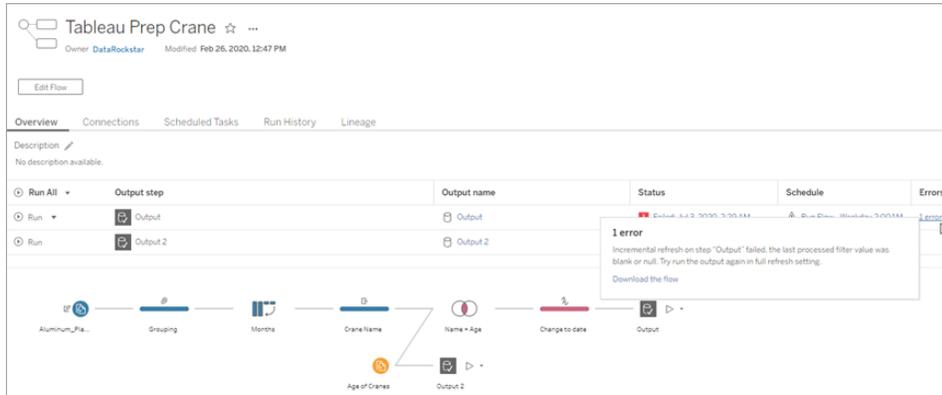
### Flow Overview page

On this page you can see the status of the most recent flow run and any errors. Hover on the error text to review the error details. If a scheduled task is suspended, a warning icon shows next to the schedule. Hover on the icon to view the status.

After you resolve the error that caused the flow to fail or the task to be suspended, you can run the flow manually or let the flow run based on the assigned schedule. For suspended flow tasks, click the **Go to Scheduled Task** link on the tooltip for the suspended task to navigate to

## Tableau Prep Help

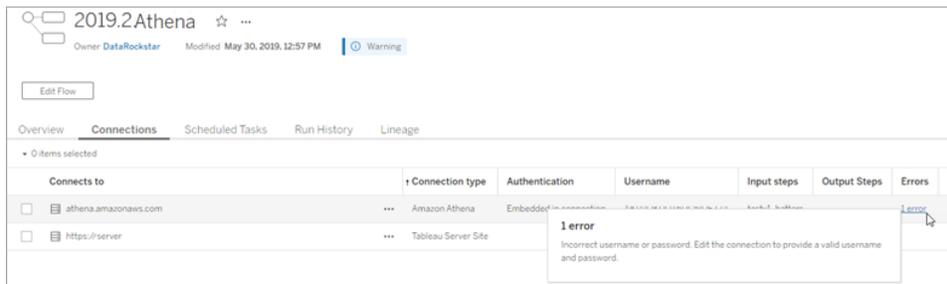
the **Scheduled Tasks** page and click the **Resume Scheduled Tasks** button to resume the suspended tasks.



## Connections page

The **Connections** page shows the most recent status and any related connectivity errors. To correct input errors, click the **More actions** ... menu for an input connection to edit the connection and change the server name, port, user name and password.

To fix output connection errors, edit the flow directly or download the flow in Tableau Prep Builder, correct the file path, then republish the flow to continue running it.



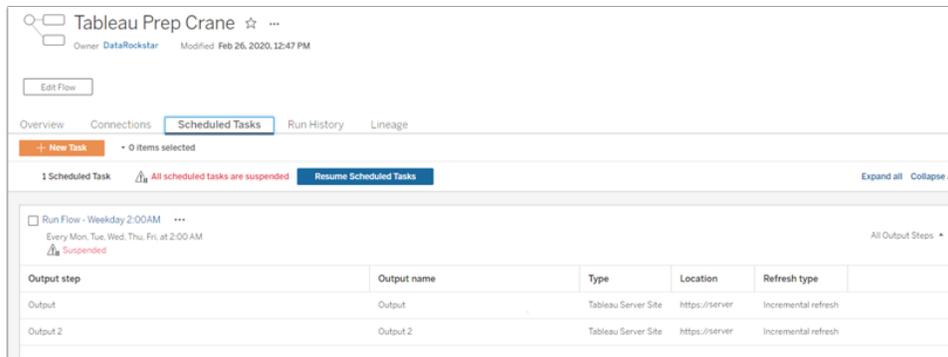
## Scheduled Tasks page

**Note:** The Data Management Add-on is required to see this tab.

View the scheduled tasks assigned to a flow. If a scheduled task is suspended, you can see the status of that tasks here and you can manually resume the flow tasks from this page. Before resuming a suspended task, resolve any errors in the flow. Errors are not shown on this page, but you can review them on the **Overview** or **Run History** pages.

A suspended scheduled task will automatically resume when the flow is republished, if you edit a connection for the flow or manually run the flow tasks. To manually resume a suspended tasks, on the **Scheduled Tasks** page, click **Resume Scheduled Tasks**. This resumes all suspended tasks for the flow.

To resume individual tasks, click the **More actions** ... menu for a scheduled task and select **Resume**. You can also click **Run Now** to run all tasks for the flow immediately.



## Run History page

**Note:** The Data Management Add-on is required to see this tab.

The **Run History** page shows the details of all the flow runs that have either completed or are in progress for each output. View any error details by hovering over the errors in the **Errors** column. The duration column shows you the run time of the flow.

**Note:** Starting in version 2020.2.1, the **Run Type** field shows the refresh type for the output. In prior releases this field showed whether the output was run on a schedule or on-demand. For more information about setting up output refresh types, see [Refresh Flow Data Using Incremental Refresh](#) on page 400.

# Tableau Prep Help

The screenshot shows the Tableau Prep interface for a flow named 'Tableau Prep Crane'. The 'Run History' tab is active, displaying a table of execution records. A tooltip is visible over the 'Error' column of a failed run, providing details about the failure.

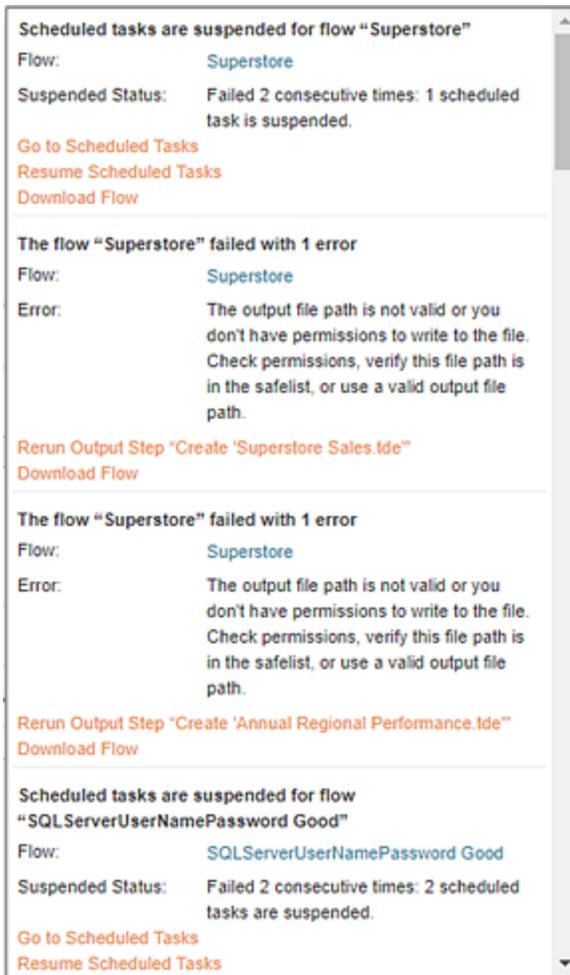
Output step	Run type	Run start	Run end	Duration	Status	Rows generated	Errors
Output 2	Full refresh	Jul 3, 2020, 2:29 AM	Jul 3, 2020, 2:29 AM	00:00:06	Succeeded	7	
Output	Incremental refresh	Jul 3, 2020, 2:29 AM	Jul 3, 2020, 2:29 AM	00:00:04	Failed	0	<a href="#">Error</a>
Output	Incremental refresh	Jul 2, 2020, 2:28 AM	Jul 2, 2020, 2:28 AM	00:00:04	Failed	0	<a href="#">Error</a>
Output 2	Full refresh	Jul 2, 2020, 2:28 AM	Jul 2, 2020, 2:28 AM	00:00:06	Succeeded	7	
Output 2	Full refresh	Jul 1, 2020, 2:29 AM	Jul 1, 2020, 2:29 AM	00:00:06	Succeeded	7	
Output	Incremental refresh	Jul 1, 2020, 2:29 AM	Jul 1, 2020, 2:29 AM	00:00:04	Failed	0	<a href="#">Error</a>
Output 2	Full refresh	Jun 30, 2020, 2:30 AM	Jun 30, 2020, 2:30 AM	00:00:06	Succeeded	7	
Output	Incremental refresh	Jun 30, 2020, 2:30 AM	Jun 30, 2020, 2:30 AM	00:00:04	Failed	0	<a href="#">Error</a>
Output	Incremental refresh	Jun 29, 2020, 2:29 AM	Jun 29, 2020, 2:29 AM	00:00:04	Failed	0	<a href="#">Error</a>
Output 2	Full refresh	Jun 29, 2020, 2:29 AM	Jun 29, 2020, 2:29 AM	00:00:06	Succeeded	7	

**1 error**  
Incremental refresh on step "Output" failed: the last processed filter value was blank or null. Try run the output again in full refresh setting.  
[Download the flow](#)

## Alerts

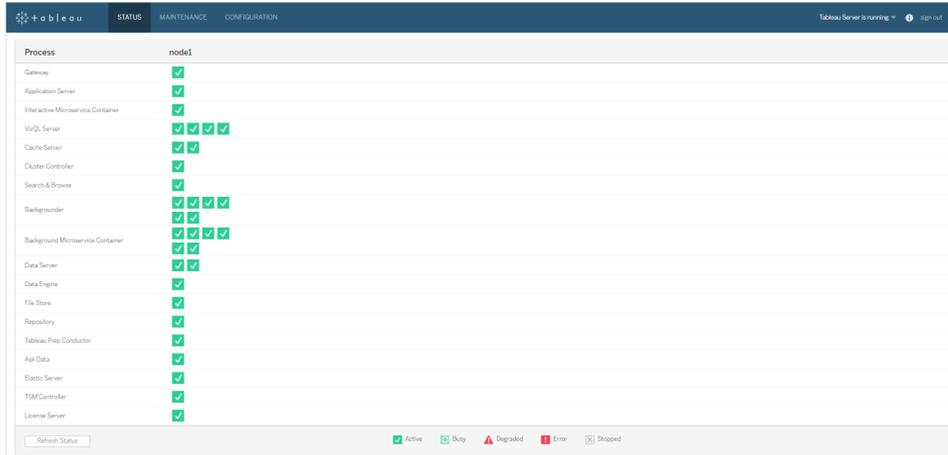
When a flow fails, the alerts menu is populated with the error details with the option to re-run the flow, or download the flow to troubleshoot.

**Note:** In Tableau Server, Flow owners, Server or Site Administrators can see this menu. In Tableau Online, Flow owners and Site Administrators can see this menu.



## Tableau Prep Conductor process status

- The Tableau Services Manager (TSM) status page is accessible in TSM and can be viewed by TSM administrators. You must be able to log into TSM to see this page.
- The Tableau Server status page appears in the Tableau Server web UI and is accessible by Tableau Server administrators. If you hover your mouse pointer over the status indicator for a process, a tooltip shows the node name and the port the process is running on. The Tableau Server status page does not show TSM processes.



When Tableau Server is functioning properly, Tableau Prep Conductor will show as Active or Busy:

- **Active**—The process is functioning as intended.
- **Busy**—The process is completing some task.
- **Down**—The process is down. The implications of this differ depending on the process.
- **Status unavailable**—Tableau Server is unable to determine the status of the process.

## Monitor flow activity and performance with Administrative Views

Administrative views can be used to monitor the activities related to flows, performance history, and the disk space used. The **Status** page contains an embedded Tableau workbook with various administrative views that can be used to monitor different types of server or site activity.

For **Tableau Server** installations, you must install PostgreSQL drivers before you can see Administrative views. For more information, see [Database Drivers \(Linux\)](#), [Database Drivers \(Windows\)](#). Server administrators can use these views to see activity both at the server level (aggregated for all sites) or for a specific site. Only server administrators can filter by site.

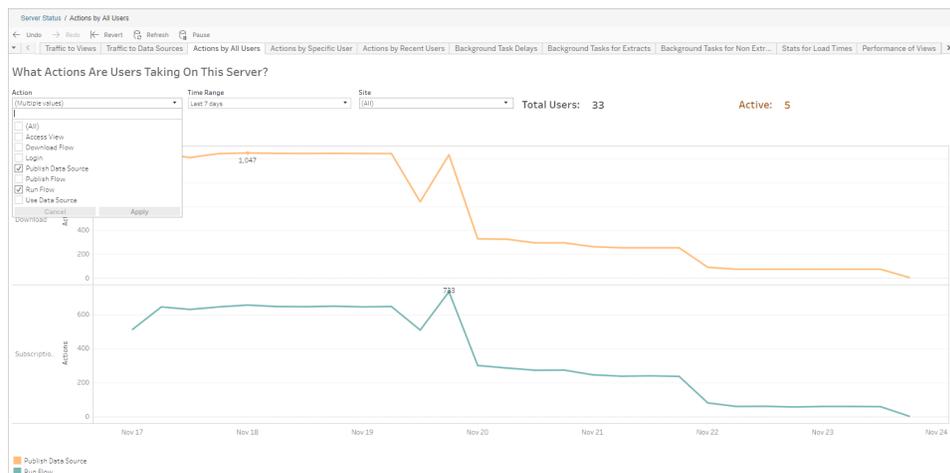
### Who can do this?

- **Tableau Server:** Tableau Server administrators and Tableau Site administrators can both view and work with Administrative Views. Only Server administrators can filter by site.

- **Tableau Online:** Tableau Site administrators can view and work with Administrative Views.

## Action by all users

Use this view to gather insight into how flows are being used. This includes actions like publish, download, and flow runs. You can filter the view by actions, by site, and by time range. The Total Users count shows the number of users who have performed an action. This value is not affected by any filtering. The Active user count shows the number of users who have been active during the selected time period and performed one of the selected actions.



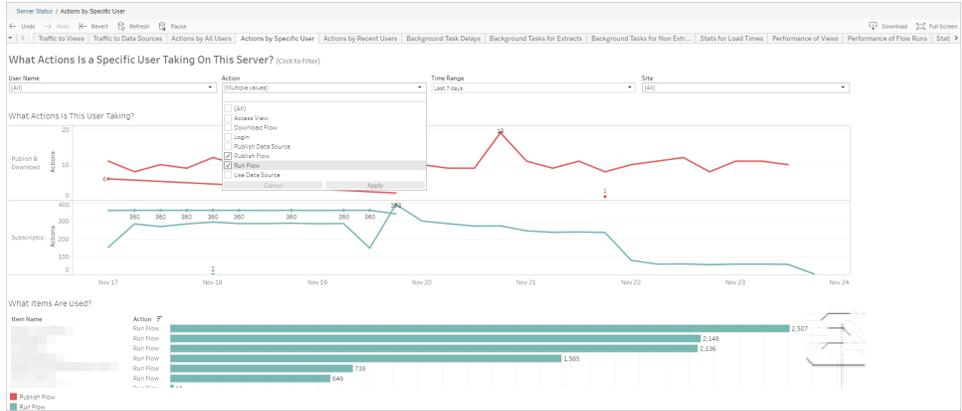
## Action by Specific User

Use this view to gather insights about how an individual user is working with flows.

In Tableau Server, you can filter the view by user name, the type of action, time range, and by site.

In Tableau Online, you can filter the view by user name, the type of action, and by time range.

# Tableau Prep Help



## Action by Recent Users

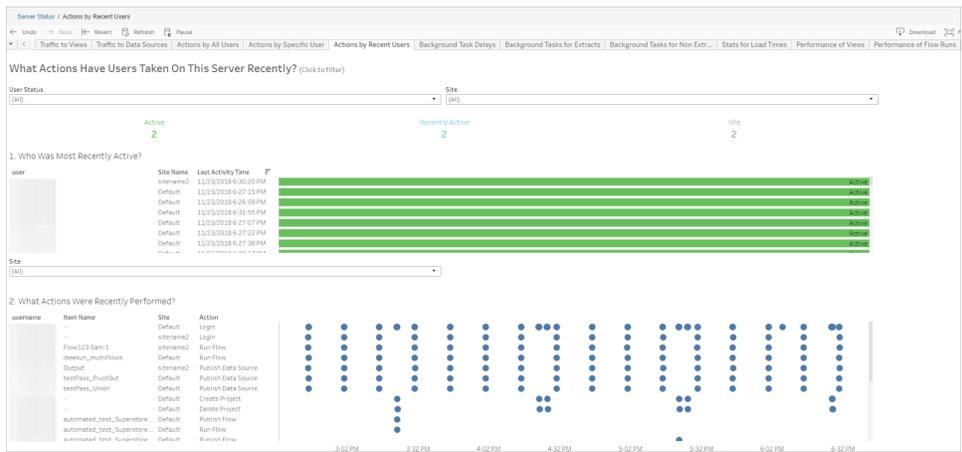
This view shows you which users have been active on Tableau Server or Tableau Online over the past 24 hours.

This can be useful if you need to do some maintenance activity on the server and want to know how many and which users this will affect, and what they are doing.

The view **Active**, **Recently Active**, and **Idle** users that are currently signed in to Tableau Server or Tableau Online.

For this view, an active user is one who took an action in the last 5 minutes, a recently active user is one who last took an action within 30 minutes, and an idle user is one who last took an action more than 30 minutes ago.

Select a user to see only the actions that user performed recently. Hover over an action to see details of the action.



## Backgrounder Task Delays

The Background Task Delay view displays the delay for extract refresh tasks, subscription, and flow tasks—that is, the amount of time between when they are scheduled to run and when they actually run. You can use the view to help you identify places you can improve server performance by distributing your task schedules and by optimizing tasks.



Possible reasons for the delays and ways that you might reduce the delays include the following:

- Many tasks are scheduled for the same time. In the example view, tasks that show long delays are clustered at the same time every day, which creates spikes in the wait time. Note that you can set the Timeline filter to a single day to view task delays by hour and identify the hours of the day which have many tasks scheduled at the same time. A solution to this issue can be to distribute the tasks to off-peak hours to reduce load on the server.
- In Tableau Server, other server processes are running at the same time and are consuming server resources and slowing down performance. Monitor the CPU and memory usage of server processes to see which processes are consuming the most resources and then adjust the configuration of processes on your server. For more information on monitoring processes, see [Collect Data with Windows Performance Monitor](#).

## Background Tasks for Non Extracts

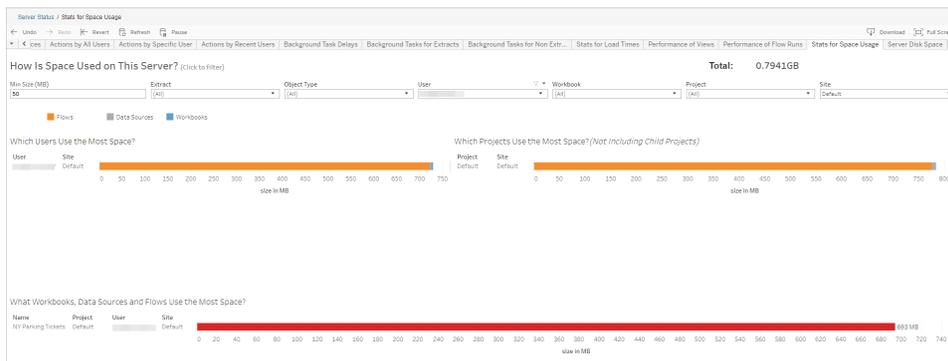
Background Tasks are created to run flows (scheduled and ad hoc). You can use this view to see how many flow tasks succeeded or failed on this site. For details on a task, hover over its icon.



- The flows that are running most frequently will have the most marks.
- To see how many flows are running at the same time currently, hover over a mark that shows **“In Progress”** or **“Pending and select “Keep Only”** to filter all flow runs that are currently running.
- To see how many flows are running at the same time during a specific time range, select a range for the **Start Time** filter. For example, you can choose **“Next three hours”** to see which flows will be running in the next three hours.

## Stats for Space Usage

The Stats for Space Usage view can help you identify which flow outputs are taking up the most disk space on the server. Disk space usage is displayed by user, project, and by the size of flow output and is rounded down to the nearest number.



Use the Min Size filter to control which flow outputs are displayed, based on the amount of space they take up. Use the object type filter for flows.

- **What Users Use the Most Space** – This section shows the users who own flows (when filtered for flows) that are taking up the most space. Click a user name to filter the next two graphs for that user.
- **What Projects Use the Most Space** – This section shows the projects with flows (when filtered for flows) that are using the most space.
- **What Workbooks, Data Source and Flows Use the Most Space** – This section shows the flows (when filtered for flows) that take up the most space.

## Who can do this

- **Tableau Server Administrators:**
  - Set up email notifications at the server level
  - Set up email notifications for a site
  - View errors
  - Resume suspended tasks
  - View alerts
  - view process status
- **Tableau Site Administrators:**
  - Set up email notifications at the site level
  - View errors
  - Resume suspended tasks
  - View alerts
- **Flow owners, project leaders and any user who is granted permissions to view the flow:**
  - View errors
  - Resume suspended tasks
  - View alerts (Flow owners)

## Developer Resources - REST APIs

Use Tableau Server REST APIs to automate and seamlessly integrate Tableau into your existing workflows. Tableau Server REST API gives you programmatic access to work with your content, users, sites, and now flows. Manage provisioning, permissions, and publishing on Tableau Server or Tableau Online via HTTP. The REST API gives you access to the functionality behind the data sources, projects, workbooks, site users, sites, and flows. You can use this access to create custom applications or to script interactions with server resources.

Tableau REST API supports the following flow functionality:

New flow endpoints have been added to support publishing flows, scheduling flows, running flows on demand, managing permissions, downloading flows and such. For a full list of all the new REST API endpoints for flows, see [Flow Methods](#).

In addition, [existing endpoints](#) have been updated to support flow functionality such as Creating New Schedules for Flows, Creating new sites, updating existing sites, and managing default permissions.



# Day in the Life Scenarios

What does it mean to shape data? How does that impact what visualizations can be built and what analysis can be performed? In the tutorials below, we explore scenarios for analysis and visualization, identify the data limitations holding us back, then see how Tableau Prep can help us shape the data to reach our intended outcome.

Download the data sets and follow along with these day in the life scenarios using Tableau Prep and Tableau Desktop. Learn how to apply the features and functions in Tableau Prep to get your data ready for analysis in Tableau Desktop.

**Give us your feedback.** We are just starting to build this section of the online help. If there are specific scenarios you'd love to see here, please let us know. Use the feedback bar at the top of the page to tell us more.

To complete the tasks in these tutorials, you need Tableau Prep and Tableau Desktop installed, and you'll need to download and save the data to your computer.

For information about how to install Tableau Prep and Tableau Desktop, see [Install Tableau Desktop or Tableau Prep Builder from the User Interface](#) in the Tableau Desktop and Tableau Prep Deployment guide. Otherwise you can download the [Tableau Prep](#) and [Tableau Desktop](#) free trials.

## Hospital Bed Use with Tableau Prep

Reaching capacity in a hospital is problematic but so is an overabundance of resources. It's important to understand hospital beds from the perspective of the bed as a resource. However, the data is often stored from the perspective of a patient. How can we take data that captures when patients are in beds and determine the bed usage?

**Note:** To complete the tasks in these tutorials, you need Tableau Prep and optionally Tableau Desktop installed:

To install Tableau Prep and Tableau Desktop see the [Tableau Desktop and Tableau Prep Deployment guide](#). Otherwise you can download the [Tableau Prep](#) and [Tableau Desktop](#) free trials.

You will also need to download three data files. It is recommended to save them in your My Tableau Prep Repository > Datasources folder.

- [Beds.xlsx](#)
- [Hours.xlsx](#)
- [Patient Beds.xlsx](#)

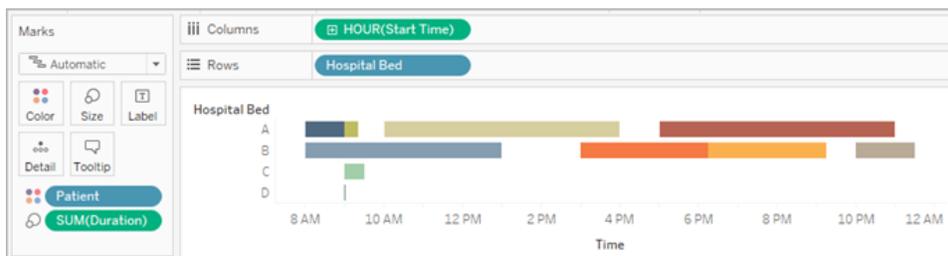
## The Data

For our four beds, A, B, C, and D, we track which patient was in the bed and their start and end time there. The data looks like this:

	A	B	C	D
1	<b>Hospital Bed</b>	<b>Patient</b>	<b>Start Time</b>	<b>End Time</b>
2	A	Person 1	1/1/2018 8:34	1/1/2018 9:34
3	A	Person 5	1/1/2018 9:55	1/1/2018 10:15
4	A	Person 9	1/1/2018 10:34	1/1/2018 16:34
5	A	Person 8	1/1/2018 17:00	1/1/2018 23:00
6	B	Person 2	1/1/2018 8:45	1/1/2018 13:45
7	B	Person 6	1/1/2018 15:13	1/1/2018 18:27
8	B	Person 7	1/1/2018 18:41	1/1/2018 21:56
9	B	Person 10	1/1/2018 22:13	1/1/2018 23:43
10	C	Person 3	1/1/2018 9:05	1/1/2018 9:35
11	D	Person 4	1/1/2018 9:30	

## Preliminary Analysis

If we bring this data into Tableau Desktop, we can create a Gantt chart to show when patients are in beds.



This is a useful visual. We can see that there are only small gaps in use for beds A and B, but bed C is very under-used. Bed D's patient has no end time, but we could address that with some calculations. This gives us a visual overview of how the beds are used.

However, what if we wanted to count the hours when a bed was empty? Or compare open bed time before and after a new policy is put in place? There's no easy way to do that with the data as it's currently structured.

## Desired Data Structure

By creating some very basic data sets and combining them in Tableau Prep, we can modify this data set into a form that will allow us to perform deeper analysis and create even more useful visualizations.

Before we jump into Tableau Prep, let's step back and think about what we need to create to answer the question, "How many hours was each bed empty?"

We need to be able to look at each bed for each hour, and know whether or not there was a patient in the bed. Right now, the data is solely when a patient was in the bed; we haven't given Tableau information about the *empty* hours.

To create that full matrix of all beds and all hours, we'll create two new data sets. One is simply a list of beds (A, B, C, D) and the other is a list of hours (1, 2, 3, ..., 23, 24). By performing a cross join (joining every row in one data set with every row in the other data set) we'll wind up with every possible combination of beds and hours.

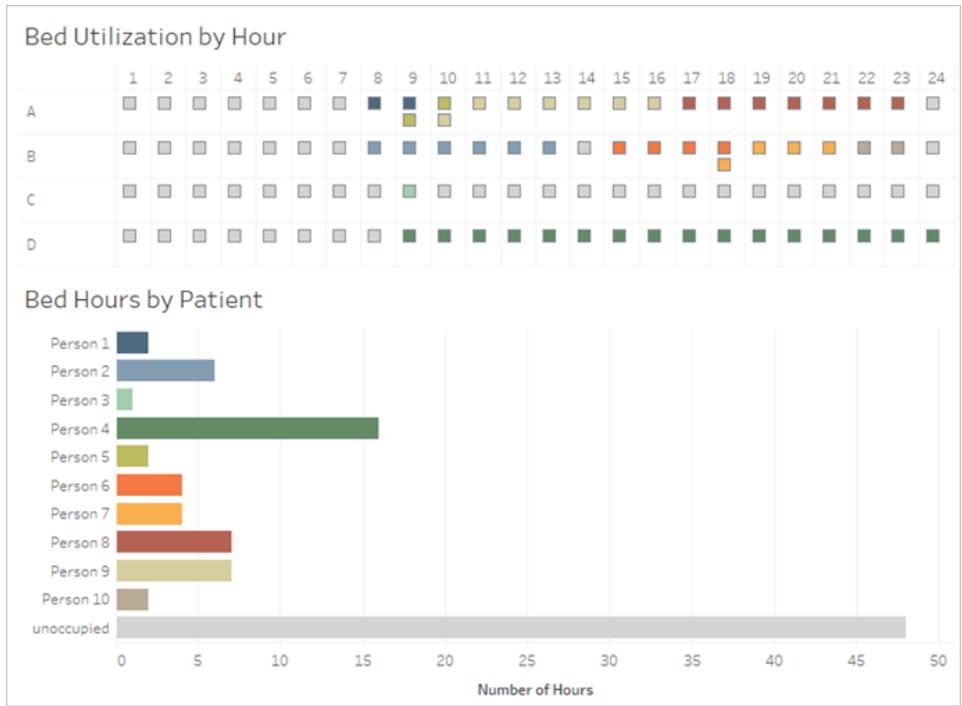
The <b>Beds.xlsx</b> data set looks like this:	The <b>Hours.xlsx</b> data set looks like this:	And the cross joined results look like this:																																																							
<table border="1"> <thead> <tr><th></th><th>A</th></tr> </thead> <tbody> <tr><td>1</td><td>Bed</td></tr> <tr><td>2</td><td>A</td></tr> <tr><td>3</td><td>B</td></tr> <tr><td>4</td><td>C</td></tr> <tr><td>5</td><td>D</td></tr> </tbody> </table>		A	1	Bed	2	A	3	B	4	C	5	D	<table border="1"> <thead> <tr><th></th><th>A</th></tr> </thead> <tbody> <tr><td>1</td><td>Hour</td></tr> <tr><td>2</td><td>1</td></tr> <tr><td>3</td><td>2</td></tr> <tr><td>4</td><td>3</td></tr> <tr><td>5</td><td>4</td></tr> <tr><td>6</td><td>5</td></tr> <tr><td>7</td><td>6</td></tr> </tbody> </table>		A	1	Hour	2	1	3	2	4	3	5	4	6	5	7	6	<table border="1"> <thead> <tr><th></th><th>A</th><th>B</th></tr> </thead> <tbody> <tr><td>1</td><td>Bed</td><td>Hour</td></tr> <tr><td>2</td><td>A</td><td>1</td></tr> <tr><td>3</td><td>B</td><td>1</td></tr> <tr><td>4</td><td>C</td><td>1</td></tr> <tr><td>5</td><td>D</td><td>1</td></tr> <tr><td>6</td><td>A</td><td>2</td></tr> <tr><td>7</td><td>B</td><td>2</td></tr> <tr><td>8</td><td>C</td><td>2</td></tr> </tbody> </table>		A	B	1	Bed	Hour	2	A	1	3	B	1	4	C	1	5	D	1	6	A	2	7	B	2	8	C	2
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5	D	1																																																							
6	A	2																																																							
7	B	2																																																							
8	C	2																																																							

Next, we'll bring in the **Patient Beds** information, labeling each bed-hour combination as having a specific patient or not. We wind up with a data set that has a row for each bed-hour,

and if a patient was in the bed, their number and start and end times. Null values indicate the bed was unoccupied.

	A	B	C	D	E
1	Bed	Hour	Patient	Start Time	End Time
29	D	7			
30	A	8	Person 1	1/1/2018 8:34	1/1/2018 9:34
31	B	8	Person 2	1/1/2018 8:45	1/1/2018 13:45
32	C	8			
33	D	8			
34	A	9	Person 5	1/1/2018 9:55	1/1/2018 10:15
35	A	9	Person 1	1/1/2018 8:34	1/1/2018 9:34
36	B	9	Person 2	1/1/2018 8:45	1/1/2018 13:45
37	C	9	Person 3	1/1/2018 9:05	1/1/2018 9:35
38	D	9	Person 4	1/1/2018 9:30	
39	A	10	Person 9	1/1/2018 10:34	1/1/2018 16:34
40	A	10	Person 5	1/1/2018 9:55	1/1/2018 10:15
41	B	10	Person 2	1/1/2018 8:45	1/1/2018 13:45
42	C	10			
43	D	10	Person 4	1/1/2018 9:30	
44	A	11	Person 9	1/1/2018 10:34	1/1/2018 16:34

With the data in this structure, we can perform analyses like this, which enables us to investigate unoccupied beds as easily as patient beds.



## Restructuring the Data

So how do we get there with Tableau Prep? We'll build out the flow in two parts, first building the Bed Hours matrix, then combining it with the Patient Beds data. Make sure you've downloaded all three Excel files (**Beds.xlsx**, **Hours.xlsx**, and **Patient Beds.xlsx**) to follow along.

### Bed Hour Matrix

First, we'll connect to the **Beds.xlsx** file.

1. Open Tableau Prep.
2. From the start screen, click **Connect to Data**.
3. On the **Connections** pane, click **Microsoft Excel**. Navigate to where you saved **Beds.xlsx** and click **Open**.
4. The **Beds** sheet should automatically be brought out to the **Flow** pane.

**Tip:** For more information about connecting to data, see [Connect to Data on page 177](#).

Next, we need to create a field we can use to do the cross join with the **Hours** data set. We'll add a calculation that is simply the value **1**.

5. In the **Flow** pane, select **Beds** and click the suggested **Clean Step**.
6. With the **Clean** step we just added, the **Profile** pane will come up. Click **Create Calculated Field** in the toolbar.
7. Name the field **Cross Join** and enter the value **1**.
8. The **Data** grid should update show the current state of the data.

Cross Join	Bed
1	A
1	B
1	C
1	D

Now we'll repeat the process with the Hours data set.

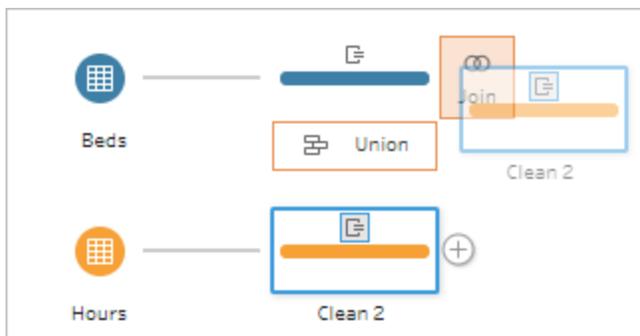
## Click for directions

9. On the **Connections** pane, click the Add connection  button to add another data connection.
10. Choose **Microsoft Excel** and then select the **Hours.xlsx** file and click **Open**.
11. In the **Flow** pane, select **Hours** and click the suggested **Clean Step**.
12. From the toolbar in the **Profile** pane, create a calculated field named **Cross Join** and enter the value **1**.

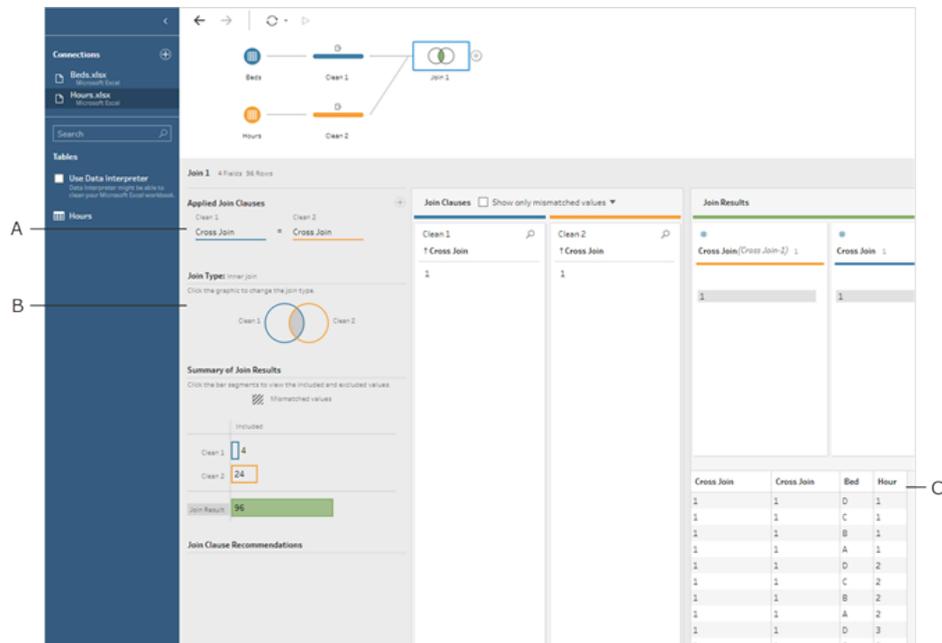
Cross Join	Hour
1	1
1	2
1	3
1	4
1	5

Both data sets now have a shared field, **Cross Join**, and can be joined.

- Join the two cleaning steps by dragging **Clean 2** onto **Clean 1** and dropping it on the **Join** option.



- In the **Join Profile** below, the join configurations should populate automatically.
  - Because we named both fields **Cross Join**, Tableau Prep automatically identifies them as the shared field and creates the appropriate **Applied Join Clauses**.
  - The default **Join Type** is inner, which is what we want.
  - This join will match all rows from **Beds** with all rows from **Hours**, as seen in the **Data** grid.



A. Join clause, B. Join type, C. Data grid results

**Tip:** For more information about joins, see [Join your data on page 361](#).

We no longer need the **Cross Join** fields, so we can remove them.

15. In the **Flow** pane, select **Join 1**, click the plus  $\oplus$  icon, and select **Add Clean Step**.
16. Select the fields **Cross Join-1** and **Cross Join**, and click **Remove Fields**.
17. Double click on the **Clean 3** label and rename that step **Bed Hour Matrix**.

We now have the Bed Hour Matrix data set that contains all beds and all hours and have finished the first part of building our data set.

## Patient Bed Use

Part two is bringing in the patient bed usage. To start, we'll connect to the data.

1. On the **Connections** pane, click the Add connection  $\oplus$  button to add another data connection.
2. Choose **Microsoft Excel** and then select the **Patient Beds.xlsx** file, and click **Open**.

3. In the **Flow** pane, select **Patient Beds**, click the plus  icon and select **Add Clean Step**.

Because the Bed Hour Matrix file is based on *hour* but Patient Beds is based on *actual time*, we need to pull the hour out of the Patient Beds start and end times. Additionally, for the end time, we want to ensure that if a patient is still in the bed at the end of the day (midnight, hour 24) we indicate that the bed is occupied even though there's no end time in the data set. We'll add a calculated field in this new step.

4. In the toolbar, click **Create Calculated Field**.
5. Name the field **Start Hour**. For the calculation, enter `DATEPART('hour', [Start Time])`.

This takes the hour of the start time and pulls it out. Therefore, "1/1/18 9:35 AM" becomes simply "9".

6. Create another calculated field named **End Hour**. For the calculation, enter `IFNULL(DATEPART('hour', [End Time]), 24)`.

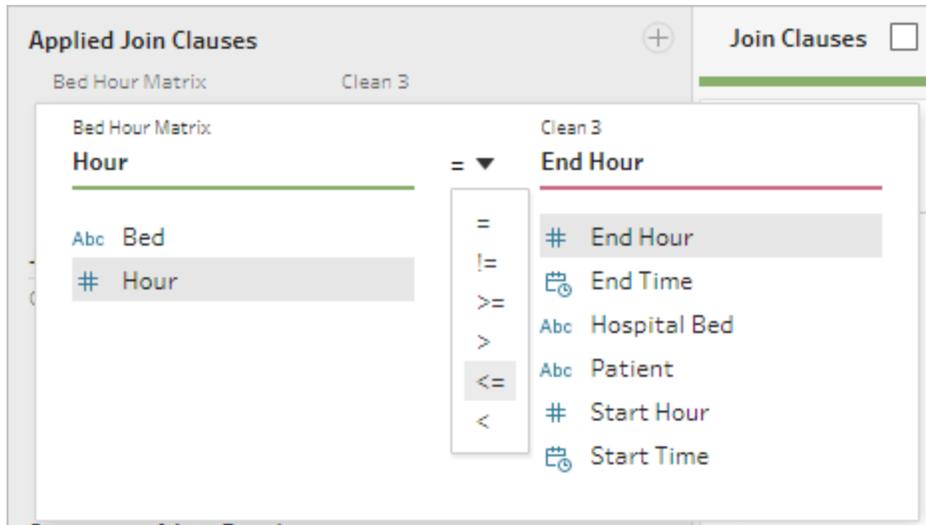
The `DATEPART` portion takes the hour of the end time. The `IFNULL` portion will assign an end time of 24 (midnight) to any missing end time.

Now we're ready to join patient bed usage to the **Bed Hour Matrix**. This is a bit more complex join than we did previously. An inner join would only return values present in both data sets. Because we want to make sure we keep all the bed-hour slots, regardless of whether or not a patient was in the bed, we'll need to do a left join. This will result in a lot of nulls, but that's appropriate.

We also need to match when a bed-hour slot is taken by a patient (or patients). So in addition to matching the bed the patient is in we also need to consider the time. The Bed Hour Matrix data set just has an **Hour** field, and the **Patient Beds** data set has **Start Hour** and **End Hour**. We'll use some basic logic to determine if a patient should be assigned to a given bed-hour slot: *A patient is considered in a bed if their start hour is less than or equal to ( $\leq$ ) the bed-hour slot AND their end hour is greater than or equal to ( $\geq$ ) the bed-hour slot.*

Therefore, three join clauses are needed to appropriately match these two data sets together.

9. Join the **Clean 3** step with the **Bed Hour Matrix** step.
10. In the **Applied Join Clauses** area, the default should be **Hour = End Hour**. Click the join clause to change the operator from "=" to " $\leq$ ".



11. Click the plus  button in the upper right corner of the **Applied Join Clauses** area to add another join clause. Set it to be **Hour >= Start Hour**
12. Add a third join clause for **Bed = Hospital Bed**.
13. In the **Join Type** section, click the unshaded area of the graphic next to **Bed Hour Matrix** to change the join type to a **Left** join.

**Applied Join Clauses**

Bed Hour Matrix <= End Hour  
 Hour >= Start Hour  
 Bed = Hospital Bed

**Join Type:** Left join

Click the graphic to change the join type.

Bed Hour Matrix & Clean 3

**Summary of Join Results**

Click the bar segments to view the included and excluded values.

Mismatched values

Included

Bed Hour ... 96

Clean 3 10

Join Result: 99

**Join Clauses**  Show only mismatched values

Bed Hour Matrix		Clean 3		
↑ Hour	↑ Bed	↑ End Hour	↑ Start Hour	↑ Hospital Bed
1	A	9	8	A
1	B	9	9	C
1	C	10	9	A
1	D	13	8	B
2	A	16	10	A
2	B	18	15	B
2	C	21	18	B
2	D	23	17	A
3	A	23	22	B
3	B	24	9	D
3	C			
3	D			
4	A			
4	B			
4	C			
4	D			
5	A			
5	B			
5	C			

**Note:** If you drag the **Bed Hour Matrix** to **Clean 3** instead of the other way around, the desired results can be obtained by using a right join instead of a left join. The order of dragging the steps matters for the orientation of the join. The join clauses will also be in reverse order—be sure to preserve the correct logic of comparing the hours.

Our data is now joined, but we should clean up some artifacts from the join and make sure the fields are tidy. We no longer need **Start Hour** and **End Hour**. **Hospital Bed** and **Bed** are also redundant. Finally, a value of null in the **Patient** field really means the bed is unoccupied.

14. In the **Flow** pane, add a cleaning step so we can tidy up the joined data.
15. Ctrl+click (Command+click on Mac) to multi select the fields **End Hour**, **Start Hour**, and **Hospital Bed**, then click **Remove Fields** in the toolbar.
16. On the **Patient** field profile card, double click the **null** value and type **Unoccupied**.

We now have a data structure with a row for every bed-hour; if there was a patient in bed during that hour, we have the patient information as well. All that remains to do is add an output step and generate the data set itself.

17. In the **Flow** pane, select **Clean 4**, click the plus  icon, and select **Add Output**.
18. In the **Output** pane, change the **Output type** to .csv then click **Browse**.
19. Enter **Bed Hour Patient Matrix** for the name and choose the desired location before clicking **Accept** to save.
20. Click the **Run Flow** button at the bottom of the pane to generate your output. Click **Done** in the status dialog to close the dialog.

**Tip:** For more information about outputs and running a flow, see [Save and Share Your Work](#) on page 383.

The final flow should look like this:

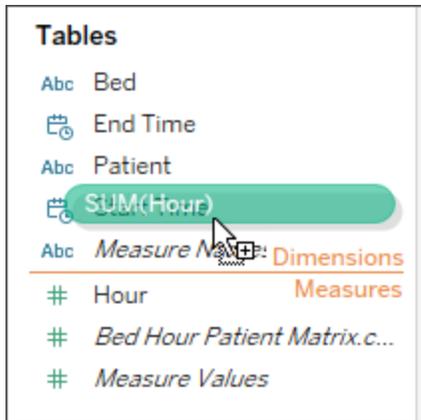


## Analysis in Tableau Desktop

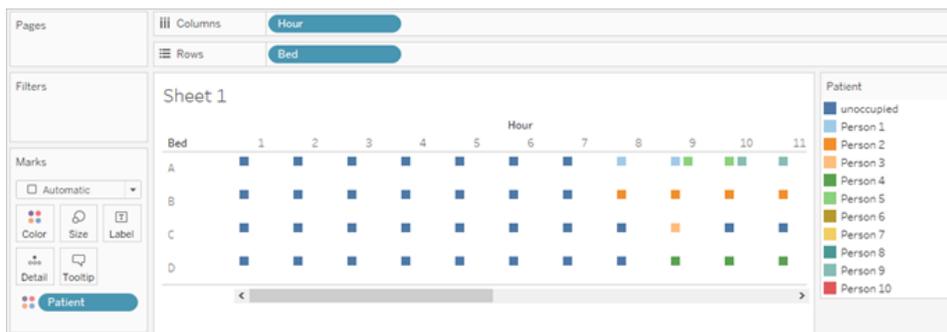
To install Tableau Desktop before continuing with this tutorial, you can download the [free trial](#).

Now that we have the data set in the desired structure, we can perform deeper analysis than with the original data.

1. Open Tableau Desktop. In the **Connect** pane, select **Text file**, navigate to the **Bed Hour Patient Matrix.csv** file, and click **Open**.
2. On the **Data source** tab, the data should appear in the canvas by default. Click to **Sheet 1**.
3. In the **Data** pane, drag **Hour** above the line separating Measures and Dimensions to make it a discrete dimension.

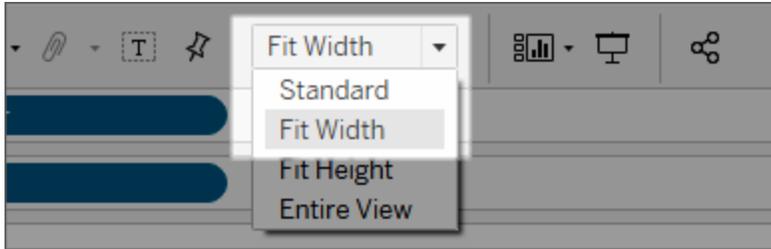


4. Drag **Bed** to the **Rows** shelf and **Hour** to the **Columns** shelf.
5. Drag **Patient** to the **Color** shelf.

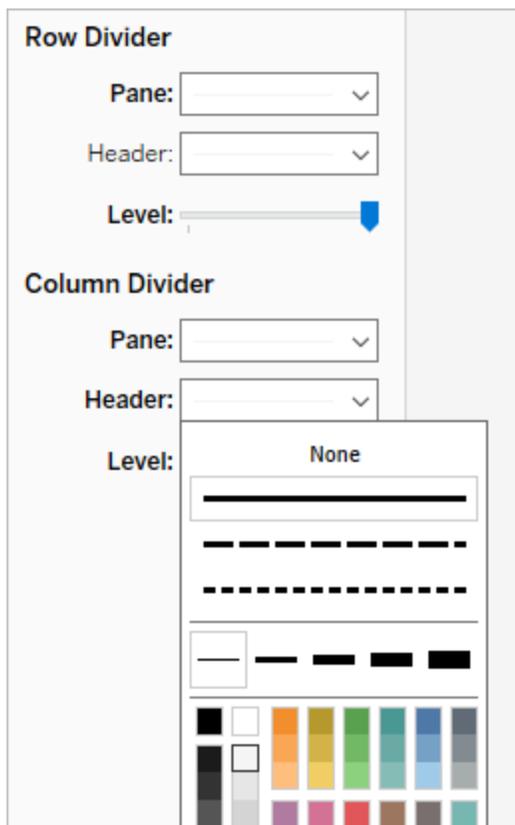


Formatting is optional, but may help make the visual more readable.

6. Click on the **Color** shelf and select **Edit Colors**.
7. In the area to the left, select **Unoccupied**. From the drop down on the right, choose the **Seattle Grays** color palette.
8. Select the fourth, lightest gray, and click **OK**.
9. Click the **Color** shelf again, then click the **Border** dropdown. Choose the second gray option at the far right.
10. In the toolbar, from the Size dropdown, change from **Standard** to **Fit Width**.



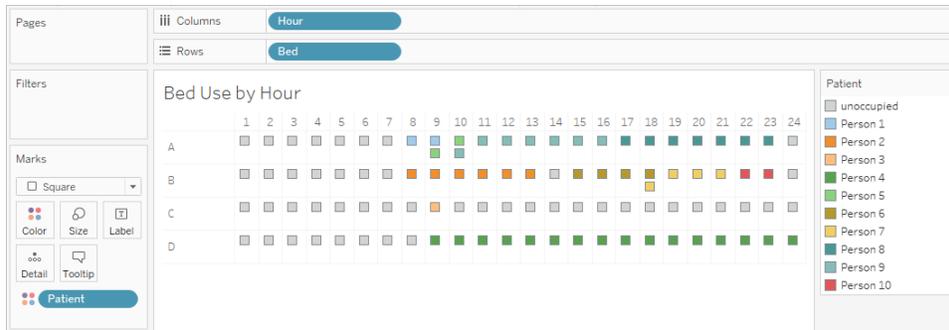
11. Click the **Format** menu and then **Borders**.
12. For **Row Divider**, click the Pane dropdown and choose a very light gray.
13. Adjust the **Level** slider to the second tick mark.
14. Repeat with the **Column Divider**. Set the **Pane** color to be light gray and the **Level** to the second tick mark.



15. Double click the sheet tab at the bottom and rename it **Bed Use by Hour**.

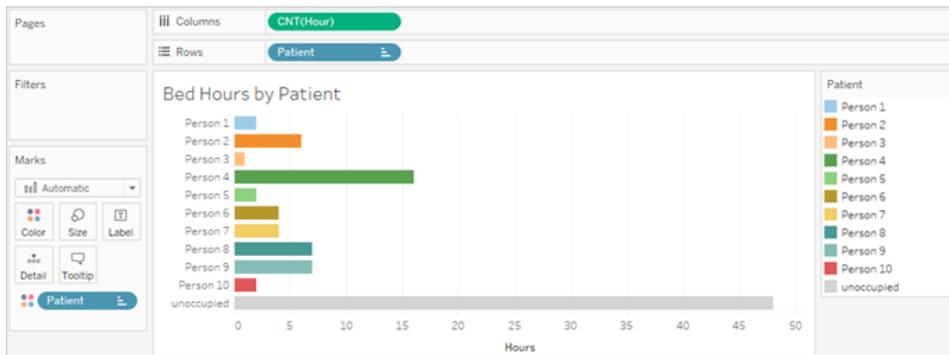
This view lets us quickly see when a given bed was occupied or open.

## Tableau Prep Help



But we can go further and count the number of hours each bed was unoccupied.

16. Click the new sheet tab  icon at the bottom to open a clean sheet.
17. Drag **Patient** to **Rows**.
18. Drag **Hour** to **Columns**. Right click the Hour pill to open the menu. Choose **Measure** > **Count**.
19. Drag another copy of the **Patient** field from the **Data** pane to the **Color** shelf.
20. Right click on the axis and select **Edit Axis**. Change the title to **Hours** and close the dialog.
21. Rename the sheet tab **Bed Hours by Patient**.



This view lets us identify how many unoccupied bed hours we had, something we couldn't do with the original data set. What other charts or dashboards can you create? Give it a try now that your data is in the right structure.

## Recap and Resources

To build this data structure using Tableau Prep, we needed to perform the following actions:

1. Build a data set for each aspect we want to analyze, in this case, **Beds** and **Hours**.
2. Cross join those data sets to create a **Bed Hour Matrix** data set with every possible combination of beds and hours.
3. Join the **Bed Hour Matrix** with the **Patient Bed** data, making sure the join keeps all bed-slot hours and the join clauses appropriately match patient bed data with the bed-hour slots.

We used the following calculations to create fields we could join on. The second and third pull out the hour information from the original datetime fields.

- **Cross Join = 1**
  - This simply assigns the value 1 to every row
- **Start Hour = DATEPART('hour', [Start Time])**
  - This takes the hour of the start time and pulls it out. Therefore, "1/1/18 9:35 AM" becomes simply "9".
- **End Hour = IFNULL(DATEPART('hour', [End Time]), 24)**
  - We could use `DATEPART('hour', [End Time])`, as we did for **Start Time**. This takes the hour of the end time and pulls it out. Therefore, "1/1/18 4:34 PM" becomes simply "4".
  - But we want to indicate that the patient bed that is still occupied (no end time) is in use, not empty. To do so, we'll assign an end time of 24 (midnight) to any missing end time using the `IFNULL` function. If the first argument `DATEPART('hour', [End Time])` is null, the calculation will return "24" instead.

**Note:** Want to check your work? Download the Tableau Prep packaged flow file ([Hospital Beds.tflx](#)) and the Tableau Desktop packaged workbook file ([Hospital Beds.twbx](#)).

**Resources:** Need more training? Check out the new [training videos](#) for Tableau Prep or take an [in-person training](#) course. Curious about the features we covered? Check out

the other topics in the Tableau Prep online help. Looking for additional resources? The [Master Tableau Prep with this list of learning resources](#) blog post is for you.

## Finding the Second Date with Tableau Prep

A common need in analytics is to determine the date a *second* event happens, such as when a customer made a second purchase—thereby becoming a repeat customer—or when a driver gets a second traffic violation. Finding the date of a first event is easy, it's simply the minimum date. Finding the second date is trickier.

In this two-part tutorial, we'll shape traffic infraction data and answer the following questions:

1. What was the length of time in days between the first and second infraction for each driver?
2. Compare the fine amounts for the first and second infractions. Are they correlated?
3. Which driver paid the most overall? Who paid the least?
4. How many drivers had multiple infraction types?
5. What was the average fine amount for drivers who never attended traffic school?

In the first stage, we'll use Tableau Prep Builder to restructure the data for our analysis. In the second stage, [Analysis with the Second Date in Tableau Desktop on page 559](#), we'll move on to analysis in Tableau Desktop.

The goal of this tutorial is to present various concepts in the context of a real-life scenario and work through options—not prescriptively establishing which is best. At the end, you should have a better sense of how data structure impacts calculations and analysis, as well as greater familiarity with various aspects of Tableau Prep and calculations in Tableau Desktop.

**Note:** To complete the tasks in this tutorial, you need Tableau Prep Builder (installed or via the browser) and the data downloaded. For the second portion, you'll also need Tableau Desktop installed.

The data set is [Traffic Violations.xlsx](#). It is recommended to save it in your My Tableau Prep Repository > Datasources folder.

To install Tableau Prep Builder and Tableau Desktop before continuing with this tutorial, see the [Tableau Desktop and Tableau Prep Deployment guide](#). Otherwise you can download the [Tableau Prep](#) and [Tableau Desktop](#) free trials.

## The Data

For this example, we're looking at traffic infraction data. Each infraction is a row. The driver, date, type of infraction, if the driver was required to attend traffic school, and fine amount are recorded.

	A	B	C	D	E
1	Driver ID	Infraction Date	Infraction Type	Traffic School	Fine Amount
2	JO-151451402	1/8/2017	Speeding	Yes	115
3	CM-127151402	3/1/2017	Running a red light	No	55
4	AP-109151404	3/2/2017	Non-moving violation	No	95
5	SH-199751404	3/4/2017	Speeding	Yes	130
6	BT-114401404	3/20/2017	Non-moving violation	No	130
7	MO-175001406	5/30/2017	Speeding	Yes	118
8	RA-1988558	6/2/2017	Speeding	Yes	144
9	BT-1168027	6/5/2017	Speeding	Yes	128
10	MO-175001406	6/18/2017	Speeding	Yes	115
11	MP-174701406	6/19/2017	Speeding	No	125
12	AA-106451404	7/5/2017	Running a red light	No	60
13	RA-199151402	7/20/2017	Speeding	Yes	146
14	SC-202601404	8/31/2017	Running a red light	No	150
15	MO-175001406	9/7/2017	Non-moving violation	No	320
16	AC-100451404	9/26/2017	Running a red light	No	50

## Desired Data Structure

The data is currently structured such that each *infraction* is a row. A driver with multiple infractions appears on multiple rows, and there's no easy way to tell which was their first or second infraction.

To investigate our repeat offenders, we want a data set that separates out the first and second infraction dates, and the information associated with each of those infractions, and each row is a *driver*.

	A	B	C	D	E	F	G	H	I
1	Driver ID	1st Infraction Date	1st Infraction Type	1st Traffic School	1st Fine Amount	2nd Infraction Date	2nd Infraction Type	2nd Traffic School	2nd Fine Amount
2	BD-117701406	12/25/2017	Speeding	Yes	140	2/7/2018	Speeding	Yes	125
3	JO-151451402	1/8/2017	Speeding	Yes	115	11/21/2018	Reckless driving	Yes	550
4	SN-207101402	12/27/2017	Speeding	Yes	280	4/26/2018	Speeding	Yes	130
5	CJ-120101402	11/26/2017	Speeding	Yes	122	3/28/2018	Speeding	Yes	116
6	JR-156701404	12/24/2017	Speeding	No	148	7/28/2018	Speeding	Yes	310
7	AP-109151404	3/2/2017	Non-moving violation	No	95	9/24/2018	Speeding	No	105
8	PC-187451406	11/11/2017	Speeding	Yes	220	12/30/2018	Non-moving violation	No	600
9	TS-214301406	9/13/2018	Speeding	Yes	115	11/10/2018	Non-moving violation	No	95
10	NP-187001404	12/11/2018	Non-moving violation	No	80	12/20/2018	Speeding	No	120
11	DB-129701402	5/13/2018	Running a red light	No	110	11/11/2018	Speeding	Yes	80
12	AJ-107951404	10/15/2017	Speeding	Yes	130	12/31/2017	Running a red light	No	85
13	BT-114401404	3/20/2017	Non-moving violation	No	130	11/13/2018	Speeding	Yes	96
14	AF-108851406	5/9/2018	Non-moving violation	No	200	9/2/2018	Speeding	No	130
15	SC-202601404	8/31/2017	Running a red light	No	150	11/10/2018	Speeding	Yes	50
16	KL-166451406	10/4/2017	Speeding	No	115	11/13/2017	Speeding	Yes	104
17	MO-175001406	5/30/2017	Speeding	Yes	118	6/18/2017	Speeding	Yes	115
18	CM-127151402	3/1/2017	Running a red light	No	55	8/1/2018	Running a red light	No	160
19	KT-164801402	5/31/2018	Non-moving violation	No	190	11/10/2018	Speeding	No	74
20	JB-160001402	11/18/2018	Speeding	Yes	220	12/5/2018	Non-moving violation	No	195
21	LH-170201404	5/6/2018	Running a red light	No	110	9/17/2018	Speeding	Yes	230
22	BG-1103555	12/25/2017	Speeding	Yes	195	12/8/2018	Speeding	Yes	315
23	MP-174701406	6/19/2017	Speeding	No	125	10/12/2017	Running a red light	No	175
24	EV-178061406	10/13/2017	Reckless driving	Yes	800	9/9/2018	Speeding	Yes	134

## Restructuring the Data

So how do we get there with Tableau Prep? We'll build out the flow in stages, beginning with pulling out the first infraction date, then the second, then shaping the final data set as desired. Make sure you've downloaded the Excel file ([Traffic Violations.xlsx](#)) to follow along.

### Initial Aggregation for 1st Infraction Date

First, we'll connect to the **Traffic Violations.xlsx** file.

1. Open Tableau Prep Builder.
2. From the start screen, click **Connect to Data**.
3. In the **Connections** pane, click **Microsoft Excel**. Navigate to where you saved **Traffic Violations.xlsx** and click **Open**.
4. The **Infractions** sheet should automatically be brought out to the **Flow** Pane.

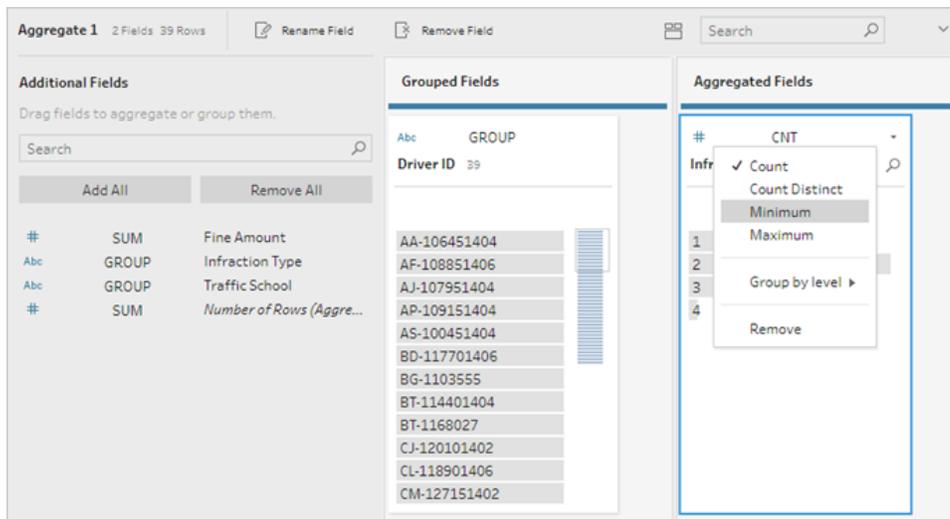
For more information about connecting to data, see [Connect to Data on page 177](#).

Next, we need to identify the first infraction date per driver. We'll use an **Aggregate** step to do this, creating a mini data set of **Driver ID** and **Minimum Infraction Date**.

When using an Aggregate step in Tableau Prep, any field that should define what makes a row is a **Grouped Field**. (For us, that's Driver ID.) Any field that will be aggregated and presented at the level of the grouped fields is an **Aggregated Field**. (For us, that's Infraction Date).

5. In the **Flow** pane, select **Infractions**, click the plus  icon, and select **Aggregate**.
6. Drag **Driver ID** to the **Grouped Fields** drop area.

7. Drag **Infraction Date** to the **Aggregated Fields** area. The default aggregation is **CNT** (count). Click **CNT** and change the aggregation to **Minimum**.

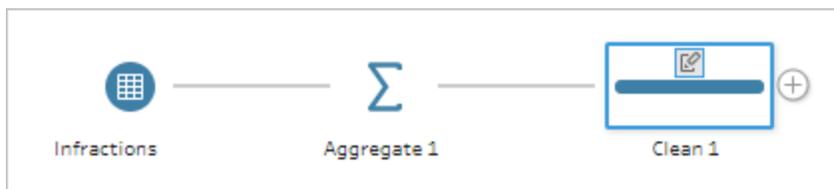


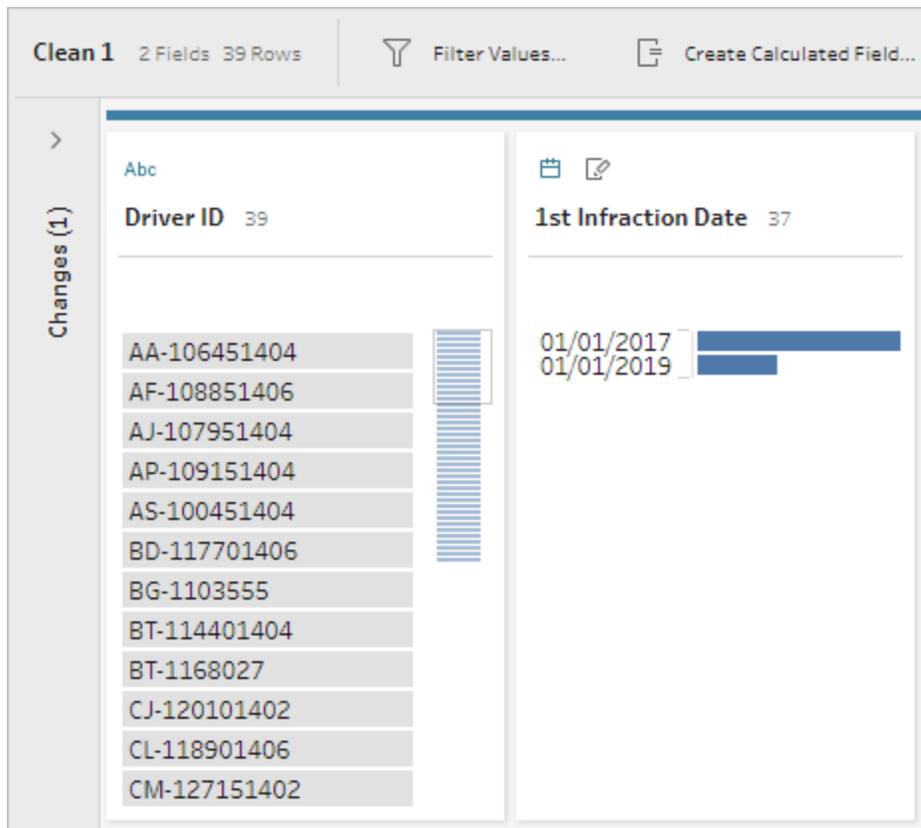
This identifies the smallest (earliest) date, which is the first infraction date per driver.

For more information about aggregations, see [Clean and Shape Data](#) on page 277.

8. In the Flow pane, select **Aggregate 1**, click the plus (+) icon, and select **Clean Step** so we can clean up the output of the aggregation.
9. In the **Profile** pane, double-click on the field name **Infraction Date** and change it to **1st Infraction Date**.

*At this stage, the flow and profile should look like this:*





From the Profile pane in this Clean step, we can see that our data now consists of 39 rows and only 2 fields. Any field not used for grouping or aggregation is lost. But we want to be able to keep some of the original information. We could either add those fields to the grouping or aggregation (but doing so would change the level of detail or require the fields to be aggregated), or join this mini data set back to the original (essentially adding a new column to the original data for **1st Infraction Date**). Let's do the join.

10. In the Flow pane, select **Infractions**, click the plus  $\oplus$  icon, and select **Clean Step**.

Make sure you hover over the Infractions step directly, not the line between it and the Aggregation step. If the new Clean step is inserted between the two rather than branching, use the Undo arrow in the tool bar and try again. The menu should say *Add*

not *Insert*.



This branches your flow with all the original data. We'll join the results of the aggregation to this copy of the full data. By joining on **Driver ID**, we're adding the minimum date from our aggregation into the original data.

11. Select step **Clean 2** and drag it on top of step **Clean 1**, and drop it on **Join**.
12. The default join configuration should be correct: an inner join on **Driver ID = Driver ID**.

The screenshot shows the 'Join 1' configuration in Tableau Prep. The 'Applied Join Clauses' section shows 'Clean 1 Driver ID = Clean 2 Driver ID'. The 'Join Type' is set to 'Inner join'. The 'Summary of Join Results' shows 39 rows for Clean 1, 81 rows for Clean 2, and 81 rows for the Join Result. The 'Join Clauses' section shows a list of Driver IDs for both Clean 1 and Clean 2.

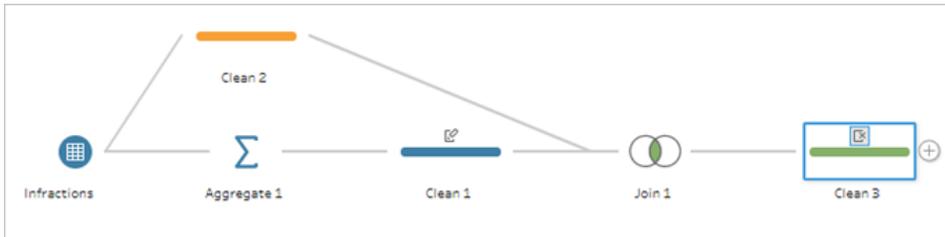
Clean 1	Clean 2
AA-106451404	AA-106451404
AF-108851406	AF-108851406
AJ-107951404	AJ-107951404
AP-109151404	AP-109151404
AS-100451404	AS-100451404
BD-117701406	BD-117701406
BG-1103555	BG-1103555
BT-114401404	BT-114401404
BT-1168027	BT-1168027
CJ-120101402	CJ-120101402
CL-118901406	CL-118901406
CM-127151402	CM-127151402
DB-129701402	DB-129701402
DJ-1342082	DJ-1342082
GZ-1454582	GZ-1454582
JB-160001402	JB-160001402

For more information about joins, see [Join your data on page 361](#).

Because some fields may be duplicated during a join—such as the fields in the join clause—it's often a good idea to clean up extraneous fields after performing a join.

13. In the Flow pane, select **Join 1**, click the plus  $\oplus$  icon, and select **Clean Step**.
14. In the Profile pane, right-click or Ctrl -click (MacOS) the card for **Driver ID-1**, and select **Remove**.
15. To change the field order, drag the **1st Infraction Date** card between **Driver ID** and **Infraction Date** where you see the black line appear.

*At this stage, the flow should look like this:*



Looking at the data grid below, we can see our new, combined data set. We have the minimum—that is, first—infraction date for each driver added to each row in the data set.

Driver ID	1st Infraction Date	Infraction Date	Infraction Type	Traffic School	Fine Amount
JO-151451402	01/08/2017	01/08/2017	Speeding	Yes	115
CM-127151402	03/01/2017	03/01/2017	Running a red light	No	55
AP-109151404	03/02/2017	03/02/2017	Non-moving violation	No	95
SH-199751404	03/04/2017	03/04/2017	Speeding	Yes	130
BT-114401404	03/20/2017	03/20/2017	Non-moving violation	No	130
MO-175001406	05/30/2017	05/30/2017	Speeding	Yes	118
RA-1988558	06/02/2017	06/02/2017	Speeding	Yes	144
BT-1168027	06/05/2017	06/05/2017	Speeding	Yes	128
MO-175001406	05/30/2017	06/18/2017	Speeding	Yes	115
MP-174701406	06/19/2017	06/19/2017	Speeding	No	125
AA-106451404	07/05/2017	07/05/2017	Running a red light	No	60
RA-199151402	07/20/2017	07/20/2017	Speeding	Yes	146
SC-202601404	08/31/2017	08/31/2017	Running a red light	No	150
MO-175001406	05/30/2017	09/07/2017	Non-moving violation	No	320
AS-100451404	09/26/2017	09/26/2017	Running a red light	No	50
SH-199751404	03/04/2017	09/27/2017	Speeding	Yes	225
AA-106451404	07/05/2017	09/28/2017	Running a red light	No	195

## Second Aggregation for 2nd Infraction Date

We need to also determine the second infraction date. To do this, we want to filter out any row where the infraction date is equal to the minimum—thus removing the first date. We can then take the minimum of the remaining dates using another aggregate step, leaving us with the second infraction date, which we'll rename for clarity.

**Note:** Because we'll want to use the data as it currently is in **Clean 3** later on in the flow, we'll add another **Clean** step to get the second infraction date. This will leave the current state of the data in Clean 3 available later on.

16. In the Flow pane, select **Clean 3**, click the plus  $\oplus$  icon, and select **Clean Step**.
17. On the toolbar in the Profile pane, choose **Filter Values**. Create a filter `[Infraction Date] != [1st Infraction Date]`.
18. Remove the field **1st Infraction Date**.
19. In the Flow pane, select **Clean 4**, click the plus  $\oplus$  icon, and select **Aggregate**.
20. Drag **Driver ID** to the **Grouped Fields** drop area. Drag **Infraction Date** to the **Aggregated Fields** area and change the aggregation to **Minimum**.
21. In the Flow pane, select **Aggregate 2**, click the plus  $\oplus$  icon, and select **Clean Step**. Rename **Infraction Date** to **2nd Infraction Date**.

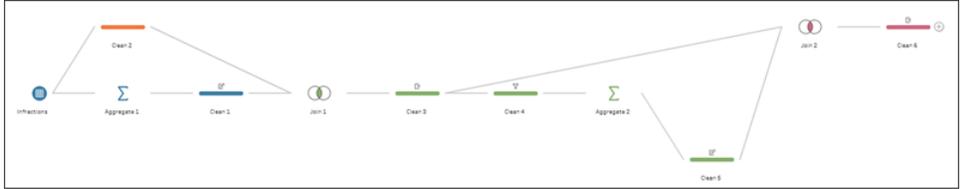
*At this stage, the flow should look like this:*



We now have our second infraction date identified for each driver. To get all the other information associated with each infraction (type, fine, traffic school) we again need to join this back to the entire data set.

22. Select **Clean 5** and drag it on top of **Clean 3**, dropping it on **Join**.
23. Again, the default join configuration should be correct: an inner join on **Driver ID = Driver ID**.
24. In the **Flow** pane, select **Join 2**, click the plus  $\oplus$  icon, and select **Clean Step**. Delete the fields **Driver ID-1** and **1st Infraction Date** as they are no longer needed.

*At this stage, the flow should look like this:*



## Create full data sets for the 1st and 2nd infractions

Before we go any further, let's step back and think about everything we have and how we want to bring it all together. Our desired end state is a data set that looks like this, with a column for **Driver ID**, then columns for date, type, traffic school, and fine amount for the 1st and 2nd infractions.

	A	B	C	D	E	F	G	H	I
1	Driver ID	1st Infraction Date	1st Infraction Type	1st Traffic School	1st Fine Amount	2nd Infraction Date	2nd Infraction Type	2nd Traffic School	2nd Fine Amount
2	BD-117701406	12/25/2017	Speeding	Yes	140	2/7/2018	Speeding	Yes	125
3	JO-151451402	1/8/2017	Speeding	Yes	115	11/21/2018	Reckless driving	Yes	550
4	SN-207101402	12/27/2017	Speeding	Yes	280	4/26/2018	Speeding	Yes	130
5	CI-126101402	11/26/2017	Speeding	Yes	122	3/28/2018	Speeding	Yes	116
6	JR-156701404	12/24/2017	Speeding	No	148	7/28/2018	Speeding	Yes	310
7	AP-109151404	3/2/2017	Non-moving violation	No	95	9/24/2018	Speeding	No	105
8	PC-187451406	11/11/2017	Speeding	Yes	220	12/30/2018	Non-moving violation	No	600
9	TS-214301406	9/13/2018	Speeding	Yes	115	11/10/2018	Non-moving violation	No	95
10	NP-187001404	12/11/2018	Non-moving violation	No	80	12/20/2018	Speeding	No	120
11	DB-129701402	5/13/2018	Running a red light	No	110	11/11/2018	Speeding	Yes	80
12	AJ-107951404	10/15/2017	Speeding	Yes	130	12/31/2017	Running a red light	No	85
13	BT-114401404	3/20/2017	Non-moving violation	No	130	11/13/2018	Speeding	Yes	96
14	AF-108851406	5/9/2018	Non-moving violation	No	200	9/2/2018	Speeding	No	130
15	SC-202601404	8/31/2017	Running a red light	No	150	11/10/2018	Speeding	Yes	50
16	KL-166451406	10/4/2017	Speeding	No	115	11/13/2017	Speeding	Yes	104
17	MO-175001406	5/30/2017	Speeding	Yes	118	6/18/2017	Speeding	Yes	115
18	CM-127151402	3/1/2017	Running a red light	No	55	8/1/2018	Running a red light	No	160
19	KT-164801402	5/31/2018	Non-moving violation	No	190	11/10/2018	Speeding	No	74
20	JB-160001402	11/18/2018	Speeding	Yes	220	12/5/2018	Non-moving violation	No	195
21	LH-170201404	5/6/2018	Running a red light	No	110	9/17/2018	Speeding	Yes	230
22	BG-1103555	12/25/2017	Speeding	Yes	195	12/8/2018	Speeding	Yes	315
23	MP-174701406	6/19/2017	Speeding	No	125	10/12/2017	Running a red light	No	175
24	...	...	...	...	...	...	...	...	...

How do we get there from here?

In the step **Clean 3**, we have our complete data set with a column that repeats the first infraction date for each driver.

Driver ID	1st Infraction Date	Infraction Date	Infraction Type	Traffic School	Fine Amount
JO-151451402	01/08/2017	01/08/2017	Speeding	Yes	115
CM-127151402	03/01/2017	03/01/2017	Running a red light	No	55
AP-109151404	03/02/2017	03/02/2017	Non-moving violation	No	95
SH-199751404	03/04/2017	03/04/2017	Speeding	Yes	130
BT-114401404	03/20/2017	03/20/2017	Non-moving violation	No	130
MO-175001406	05/30/2017	05/30/2017	Speeding	Yes	118
RA-1988558	06/02/2017	06/02/2017	Speeding	Yes	144
BT-1168027	06/05/2017	06/05/2017	Speeding	Yes	128
MO-175001406	05/30/2017	06/18/2017	Speeding	Yes	115
MP-174701406	06/19/2017	06/19/2017	Speeding	No	125

We want to eliminate all the rows for a driver that aren't the first infraction, building a data set of only first infractions. That is, we only want to keep the information for a given driver when **1st**

**Infraction Date = Infraction Date.** Once we've filtered to keep only the row of the first infraction, we can remove the **Infraction Date** field and tidy up field names.

Similarly, after the second aggregation and join, we have our complete data set with a column for the second infraction date.

Driver ID	2nd Infraction Date	Infraction Date	Infraction Type	Traffic School	Fine Amount
JO-151451402	11/21/2018	01/08/2017	Speeding	Yes	115
CM-127151402	08/01/2018	03/01/2017	Running a red light	No	55
AP-109151404	09/24/2018	03/02/2017	Non-moving violation	No	95
SH-199751404	09/27/2017	03/04/2017	Speeding	Yes	130
BT-114401404	11/13/2018	03/20/2017	Non-moving violation	No	130
MO-175001406	06/18/2017	05/30/2017	Speeding	Yes	118
MO-175001406	06/18/2017	06/18/2017	Speeding	Yes	115
MP-174701406	10/12/2017	06/19/2017	Speeding	No	125
AA-106451404	09/28/2017	07/05/2017	Running a red light	No	60
RA-199151402	12/31/2017	07/20/2017	Speeding	Yes	146
SC-202501404	11/10/2018	08/21/2017	Running a red light	No	150

We can perform a similar filter of **2nd Infraction Date = Infraction Date** to keep only the row of information for each driver's 2nd infraction. Again, we can also remove the now-redundant **Infraction Date** and tidy up field names.

We'll start with the first infraction data set.

25. In the Flow pane, select **Clean 3**, click the plus  icon, and select **Clean Step**.

Like in step 10 above, we want to add a branch for the new clean step, not insert it between Clean 3 and Clean 4.

26. With this new **Clean** step selected, in the **Profile** pane, click **Filter Values** in the toolbar. Create a filter `[1st Infraction Date] = [Infraction Date]`.

27. Remove the field **Infraction Date**.

28. Rename the **Infraction Type**, **Traffic School**, and **Fine Amount** fields to start with "1st".

29. Double-click on the name **Clean 7** under the step in the **Flow** pane and rename it **Robust 1st**.

Now for the second infraction data set.

30. In the Flow pane, select **Clean 6**, after the last join.

31. Click **Filter Values** in the toolbar. Create a filter `[2nd Infraction Date] = [Infraction Date]`.

32. Remove the field **Infraction Date**.
33. Rename the **Infraction Type**, **Traffic School**, and **Fine Amount** fields to start with "2nd".
34. Double-click on the name **Clean 6** under the step in the Flow pane and rename it **Robust 2nd**.

*At this stage, the flow should look like this:*



## Create the complete data set

Now that we have these two tidy data sets with complete information for the first and second infractions per driver, we can join them back together on **Driver ID** and wind up with our desired data structure.

35. Select **Robust 2nd** and drag it on top of **Robust 1st**, dropping it on **Join**.
36. The default join clause should be correct as **Driver ID = Driver ID**.
37. Because we don't want to drop drivers who didn't have a second infraction, we need to make this a left join. In the **Join Type** area, click the unshaded area of the diagram next to **Robust 1st**, turning it into a **Left** join.
38. In the Flow pane, select **Join 3**, click the plus  $\oplus$  icon, and select **Clean Step**. Remove the field duplicate **Driver ID-1**.

The data is in the desired state, so we can create an output and proceed to analysis.

39. In the Flow pane, select the newly added **Clean 6**, click the plus  $\oplus$  icon, and select **Add Output**.
40. In the **Output** pane, change the **Output type** to .csv then click **Browse**. Enter **Driver Infractions** for the name and choose the desired location before clicking **Accept** to save.

41. Click the **Run Flow** ▾ button at the bottom of the pane to generate your output. Click **Done** in the status dialog to close the dialog.

**Tip:** For more information about outputs and running a flow, see [Save and Share Your Work](#) on page 383.

The final flow should look like this:



**Note:** You can download the completed flow file to check your work: [Driver Infractions.tflx](#)

## Recap

For the first stage of this tutorial, our goal was to take our original data set and prepare it for analysis involving the first and second infraction dates. The process consists of three phases:

Identify the first and second infraction dates:

1. Create an aggregation that keeps **Driver ID** and **MIN Infraction Date**. Join this with the original data set to create an "intermediate data set" that has the first (minimum) infraction date repeated for every row.
2. On a new step, filter out all rows where the **1st Infraction Date** is the same as the **Infraction Date**. From that filtered data set, create an aggregation that keeps **Driver ID** and **MIN Infraction date**. Join this with the intermediate data set from the first step. This identifies the second infraction date.

Build out clean data sets for the first and second infractions:

3. Go back and create a branch from the intermediate data set and filter to keep only rows where the **1st Infraction Date** is the same as the **Infraction Date**. This builds a data set for just the first infraction. Tidy it up by removing any unnecessary fields and rename all the desired fields (except **Driver ID**) to indicate they're for the first infraction. This is

the **Robust 1st** data set.

4. Tidy the data set for the second infraction date. Clean the join results from step 2 by filtering to keep only rows where the **2nd Infraction Date** is the same as the **Infraction Date**. Remove any unnecessary fields and rename all the desired fields (except **Driver ID**) to indicate they're for the second infraction. This is the **Robust 2nd** data set.

Combine the first and second infraction data into one data set:

5. Join the **Robust 1st** and **Robust 2nd** data sets, making sure to keep all records from **Robust 1st** to prevent losing any drivers without a second infraction.

Next, we want to explore how this data can be analyzed in Tableau Desktop.

Continue to [Analysis with the Second Date in Tableau Desktop](#) below.

**Note:** Special Thanks to Ann Jackson's Workout Wednesday topic [Do Customers Spend More on Their First or Second Purchase?](#) and Andy Kriebel's Tableau Prep Tip [Returning the First and Second Purchase Dates](#) that provided the initial inspiration for this tutorial. Clicking these links will take you away from the Tableau website. Tableau cannot take responsibility for the accuracy or freshness of pages maintained by external providers. Contact the owners if you have questions regarding their content.

## Analysis with the Second Date in Tableau Desktop

This is the second stage of the tutorial and assumes the first stage, [Finding the Second Date with Tableau Prep on page 547](#), has been completed.

In the first stage, we took our original data set and shaped it to answer the following questions:

1. What was the length of time in days between the first and second infraction for each driver?
2. Compare the fine amounts for the first and second infractions. Are they correlated?
3. Which driver paid the most overall? Who paid the least?

4. How many drivers had multiple infraction types?
5. What was the average fine amount for drivers who never attended traffic school?

As we now explore these questions, it becomes clear that there are some pros and cons to the first data structure we created. We'll go back into Tableau Prep Builder and do some additional reshaping, then see how that impacts the same analysis in Tableau Desktop. Finally, we'll look at a Tableau Desktop-only approach to the analysis using Level of Detail (LOD) expressions with the original data.

The goal of this tutorial is to present various concepts in the context of a real-life scenario and work through options—not prescriptively establishing which is best. At the end, you should have a better sense of how data structure impacts calculations and analysis, as well as greater familiarity with various aspects of Tableau Prep and calculations in Tableau Desktop.

**Note:** To complete the tasks in this tutorial, you need Tableau Prep Builder and optionally Tableau Desktop installed and the data downloaded.

To install Tableau Prep and Tableau Desktop before continuing with this tutorial, see the [Tableau Desktop and Tableau Prep Deployment guide](#). Otherwise you can download the [Tableau Prep](#) and [Tableau Desktop](#) free trials.

The data set is the output from [Driver Infractions.tflx](#), as built in the first stage.

## Analysis in Tableau Desktop

Now that we have our data configured, we'll bring it into Tableau Desktop. We can easily answer some questions, but others involve a few (or a lot of) calculations. Try your hand at the questions below; you can expand each one for basic information about how to proceed if you get stuck.

**Note:** You can download the workbook [Driver Infractions.twbx](#) to look at the solutions in context. Remember that there may be alternative ways to interpret the analysis or pursue answers.

### 1. What was the length of time in days between the first and

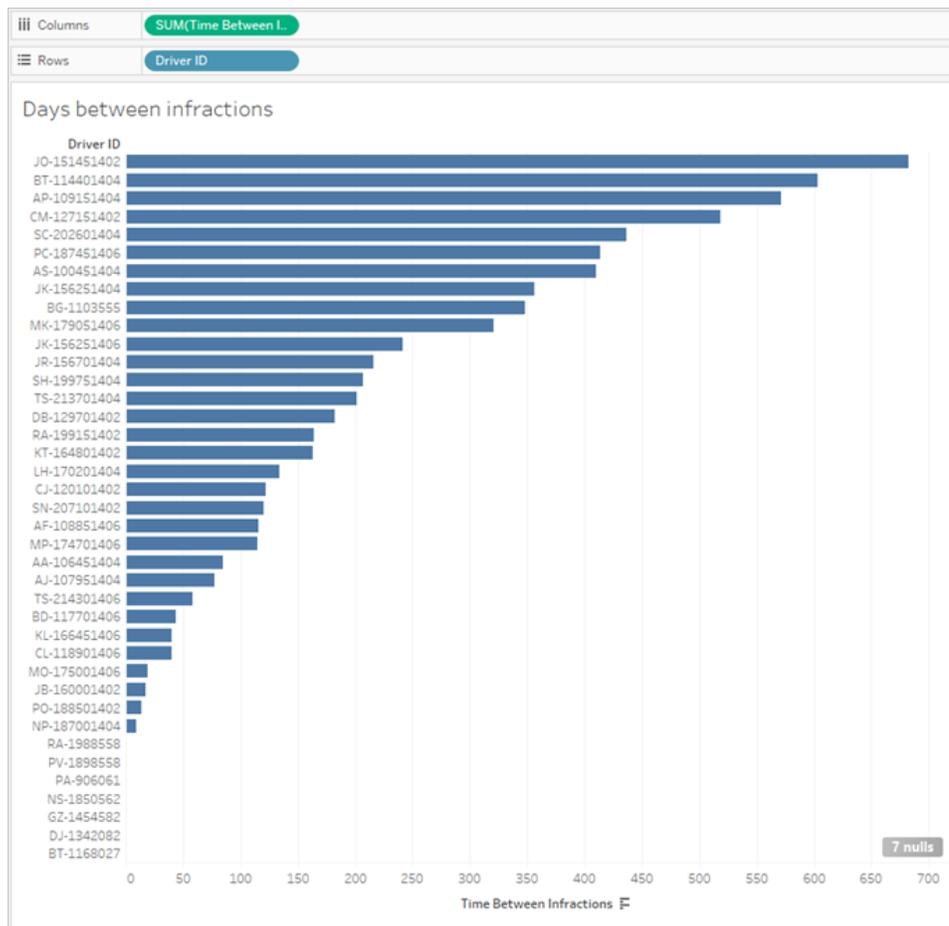
## second infraction for each driver?

A. To answer this question in Tableau Desktop, we'll use the DATEDIFF function. This function takes three arguments—the date part, the start date, and the end date. Since we want to know the days between these events, we'll use the date part 'day'. Our start and end dates are in the data set as **1st Infraction Date** and **2nd Infraction Date**.

B. The calculation is:

```
Time Between Infractions = DATEDIFF('day', [1st Infraction Date], [2nd Infraction Date])
```

C. We can plot that against **Driver ID** as a bar chart. Note that seven drivers had no second infraction, so there are seven nulls.

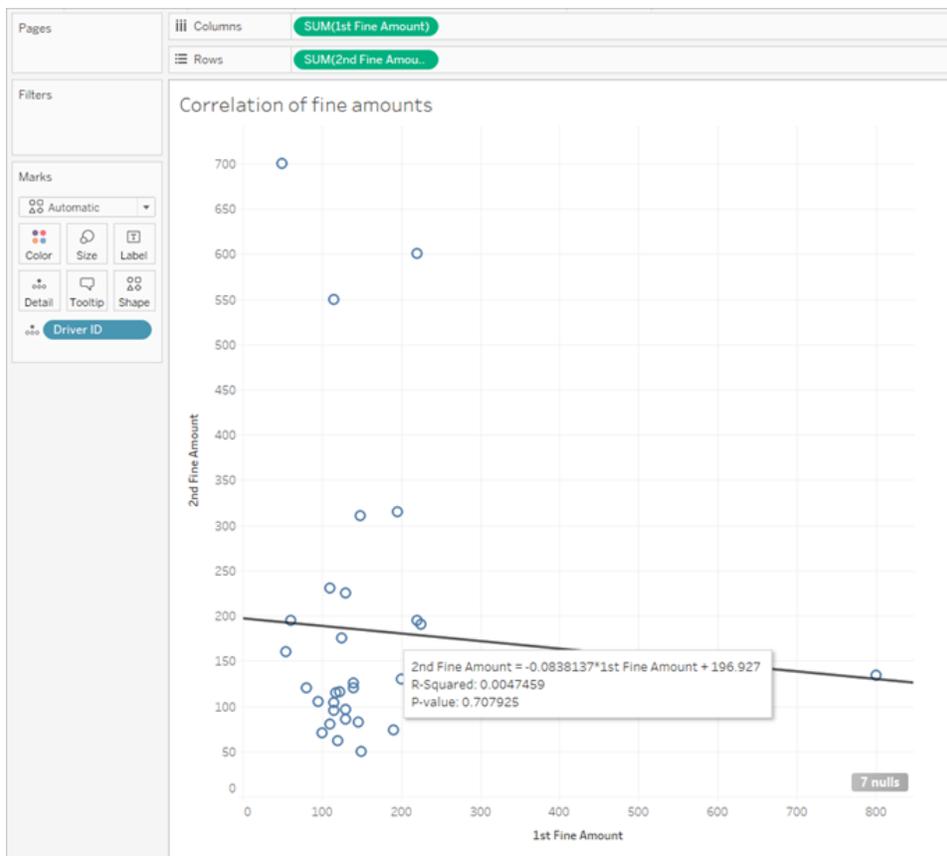


## 2. Compare the fine amounts for the first and second

## infractions. Are they correlated?

- To answer this question in Tableau Desktop, we'll create a scatter plot of **1st Fine Amount** and **2nd Fine Amount**. By bringing **Driver ID** to the **Detail** shelf on the **Marks** card, we can create a mark for each driver.
- To add a trend line, use the **Analytics** tab in the left-hand pane and bring out a linear trend line. Hovering over the trend line, we can see the R-squared value is practically zero, and the p-value is far above any cutoff for significance. We can determine that there is no correlation between first and second fine amount.

If we were to use this scatter plot in a dashboard, the trend line should be removed.

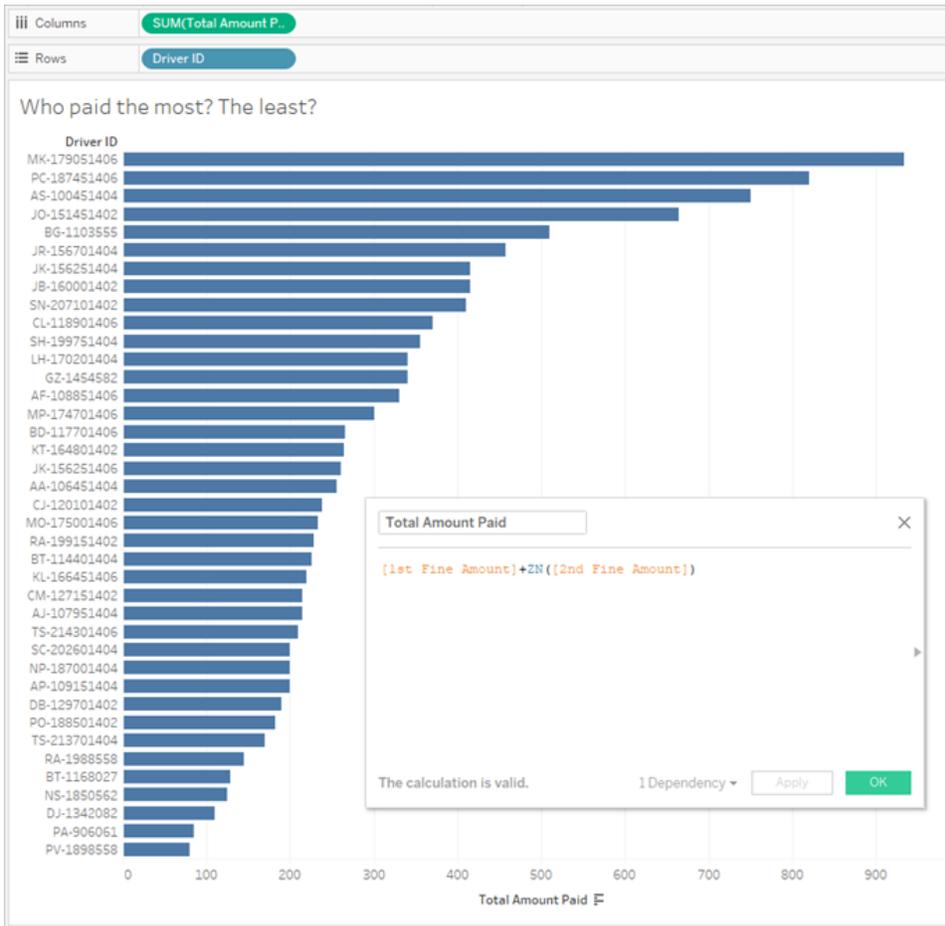


## 3. Which driver paid the most overall? Who paid the least?

When we want to go deeper in our analysis, we may need to create some calculations.

- A. To answer this in Tableau Desktop, we need to add the fines for both infractions into a single field. Because some drivers may not have had a second infraction, we need to use the zero null `ZN` function to turn any nulls for **2nd Fine Amount** into zeros. Failing to do this will result in nulls if there isn't a second fine.
- B. The calculation is:
   

$$\text{Total Amount Paid} = [\text{1st Fine Amount}] + \text{ZN}([\text{2nd Fine Amount}])$$
- C. We can plot **Total Amount Paid** against **Driver ID** and sort the bar chart.



#### 4. How many drivers had multiple infraction types?

- A. To answer this in Tableau Desktop, we need to do a fancier `IF` calculation, comparing if

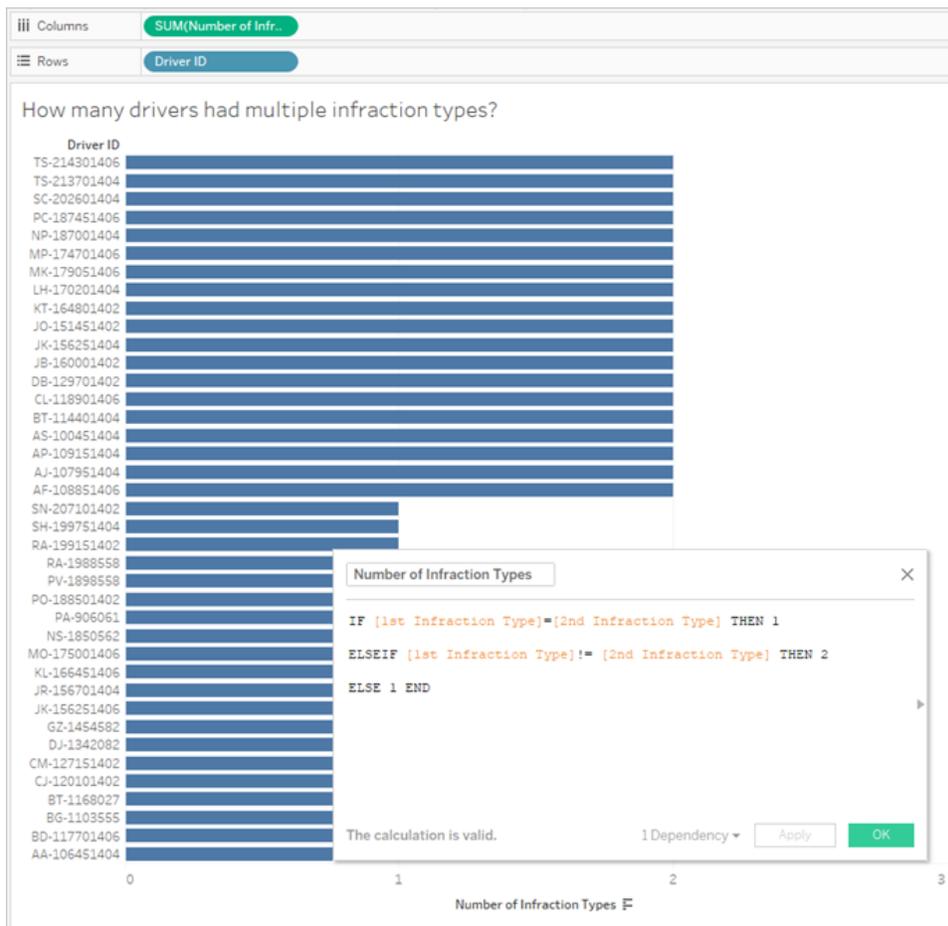
the first and second infraction types are the same. If they are, we want to assign the value "1". If they are not the same, we'll assign "2". Since we only care about multiple infraction types, any other result, such as a null second infraction type, will be assigned "1".

B. The calculation is:

### Number of Infraction Types =

```
IF [1st Infraction Type]=[2nd Infraction Type] THEN 1
ELSEIF [1st Infraction Type]!=[2nd Infraction Type] THEN 2
ELSE 1 END
```

C. We can then plot **Number of Infraction Types** against **Driver ID** and sort the bar chart.



5. What was the average fine amount for drivers who never

## attended traffic school?

- A. To answer this in Tableau Desktop, we cannot simply divide the total fine amount by two, since some drivers only had one infraction. We also can't calculate the average fine per driver and take the average of those values, because averaging averages can lead to inconsistencies. Instead, we need to calculate the total amount paid by drivers who never attended traffic school, then divide by the total number of infractions associated with those fines.

1. First, we need to determine if each driver had a second infraction. We can leverage the fact the information in all the "2nd" fields will be null if there was no second infraction and start building the calculation:

```
IFNULL([2nd Infraction Type], 'no')
```

This will return an infraction type if it exists, or "no" if there was no second infraction.

2. Next, we need to turn this information into the number of infractions, 1 or 2. If the result of our `IFNULL` calculation is "no", then the driver should be marked as having one fine. Any other result should be marked as having two fines. The calculation is:

**Number of Infractions =**

```
IF IFNULL([2nd Infraction Type], 'no') = 'no' THEN 1
ELSE 2
END
```

3. Now we need to consider the total fine amount. Similarly to question 3 above, we'll add the first and second fine amounts, with a `ZN` function around the second. However, because we want this to be computed at the level of the entire data set, it's a best practice to specify the aggregations, **SUM**, in the calculation itself. The calculation is:

```
SUM([1st Fine Amount]) + SUM( ZN([2nd Fine Amount]) )
```

4. To bring it all together, we'll take this total fine amount and divide it by our new **Number of Infractions** calculated field to determine the average fine amount:

```
Average Fine = ( SUM([1st Fine Amount]) + SUM( ZN([2nd Fine Amount]) ) ) / SUM([Number of Infractions])
```

B. We also need to filter out drivers who ever attended traffic school—but that information is also stored across two fields.

1. Tableau is very efficient at numerical calculations. We'll phrase this with numbers to help performance as much as we can. To combine these two fields, we'll create a calculation for each one that says "Yes = 1" and "No = 0" (null should also = 0, for drivers with no second infraction). By summing the outcome of these calculations, any driver with an overall value of 0 never went to traffic school (and a value of 1 or 2 represents how many times they went). We can then filter to keep only drivers with a value of 0.
2. This time, we'll use a `CASE` statement instead of `IF`. They function very similarly but have different syntax. The start of the calculation should look like this:

```
CASE [1st Traffic School]
WHEN 'Yes' THEN 1
WHEN 'No' THEN
ELSE 0
END
```

3. And then we'll do the same thing for 2nd Traffic School. We can add both pieces in the same calculation by wrapping each case statement in parentheses and adding a plus between them. Removing some of the line breaks, it looks like this:

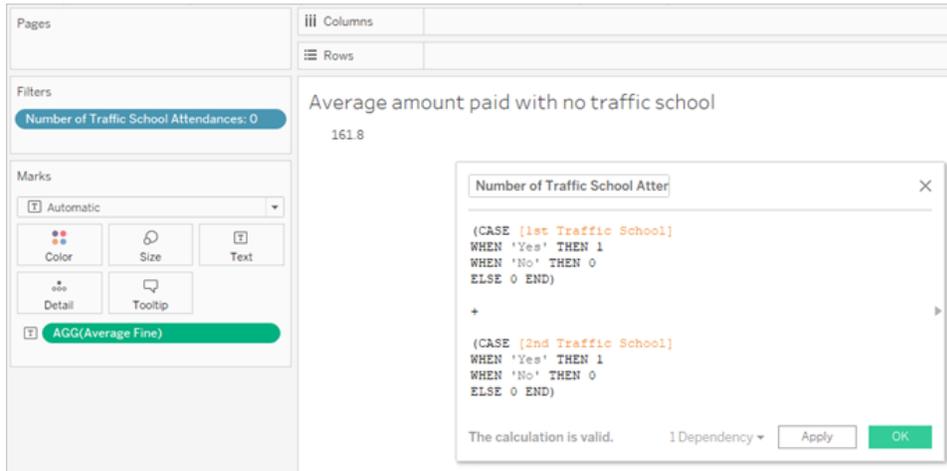
**Number of Traffic School Attendances =**

```
(CASE [1st Traffic School] WHEN 'Yes' THEN 1 WHEN 'No'
THEN 0 ELSE 0 END)
+
(CASE [2nd Traffic School] WHEN 'Yes' THEN 1 WHEN 'No'
THEN 0 ELSE 0 END)
```

4. If we drag **Number of Traffic School Attendances** to the Dimensions area of the **Data** pane (above the line), the values 0–2 will become discrete.
5. Now if we filter on **Number of Traffic School Attendances**, we can select just the 0 and know we're getting drivers who have never attended traffic school.

- C. To answer the original question, we'll simply bring **Average Fine** to the **Textshelf** on the **Marks** card.

Because we built the aggregations into the calculation, the aggregation on the pill will be **AGG** and we cannot change it. This is as expected.



## Go Further—Pivoted Data

While the data we've been working with is well structured to address questions specifically around first and second infractions, it isn't the standard structure recommended for use with Tableau Desktop. The more our analysis diverges from basic questions around the infraction dates, the more complicated our calculations become to combine the relevant information into useable form.

Usually, when data is stored with multiple columns for the same type of data (such as two columns for date, two columns for fine amount, etc.) and unique information is stored in the field name (such as whether it's the first or second infraction), this is an indication the data should be pivoted.

Performing a multiple pivot in Tableau Prep Builder can handle this nicely. We can work from the end of the **Driver Infraction** Tableau Prep flow created in the previous tutorial [Finding the Second Date with Tableau Prep on page 547](#).

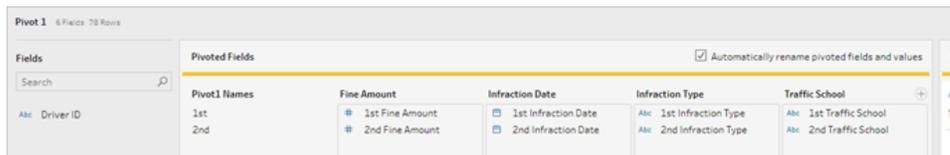
**Tip:** Make sure you're back in Tableau Prep for these next steps.

1. From the final clean step, add a **Pivot** step that pivots by every duplicated field. Use the plus  $\oplus$  icon in the upper right corner of the **Pivoted Fields** area to add more **Pivot**

**Values.** Each set of fields (such as 1st and 2nd Fine Amounts) should be pivoted together.

For more information about pivoting, see [Clean and Shape Data on page 277](#).

- In the Pivoted Fields area, under the **Pivot1 Names** column, double click each value and rename them to 1st and 2nd.



The results can be tidied by removing null dates as well as renaming and reordering fields.

- Add a cleaning step after the pivot. In the **Infraction Date** column, right-click on the null bar and choose **Exclude**.
- Double-click the field name **Pivot1 Names** and rename it **Infraction Number**.
- Drag fields as appropriate to reorder them as below:

Driver ID	Infraction Number	Infraction Date	Infraction Type	Traffic School	Fine Amount
MO-175001406	1st	05/30/2017	Speeding	Yes	118
SH-199751404	1st	03/04/2017	Speeding	Yes	130
AA-106451404	1st	07/05/2017	Running a red light	No	60
MP-174701406	1st	06/19/2017	Speeding	No	125
PO-188501402	1st	10/30/2017	Speeding	Yes	120
KL-166451406	1st	10/04/2017	Speeding	No	115
RA-199151402	1st	07/20/2017	Speeding	Yes	146
AJ-107951404	1st	10/15/2017	Speeding	Yes	130
BD-117701406	1st	12/25/2017	Speeding	Yes	140
CJ-120101402	1st	11/26/2017	Speeding	Yes	122
SN-207101402	1st	12/27/2017	Speeding	Yes	280
TS-213701404	1st	10/23/2017	Speeding	Yes	100
JR-156701404	1st	12/24/2017	Speeding	No	148
CM-127151402	1st	03/01/2017	Running a red light	No	55
JK-156251406	1st	12/25/2017	Speeding	Yes	140
AS-108851406	1st	05/09/2018	Max. weight violation	No	200

- From the new, pivoted data, create an output named **Pivoted Driver Infractions** and bring it into Tableau Desktop. (Don't forget to run the flow after adding the **Output** step.)

Now we can look at our five questions again with this pivoted data structure; you can expand each one for basic information about how to proceed if you get stuck.

**Note:** You can download the completed flow file [Pivoted Driver Infractions.tflx](#) to check your work, or download the workbook [Pivoted Driver Infractions.twbx](#) to look at the solutions in context. Remember that there may be alternative ways to interpret the analysis or pursue answers.

## 1. What was the length of time in days between the first and second infraction for each driver?

A. To answer this in Tableau Desktop, as we did with the first data set, we'll use the `DATEDIFF` function. This function requires a start date and an end date. This information is present in our data, but all in one field. We need to pull it out into two fields.

1. Create two preliminary calculated fields:

**1st Infraction Date** = IF [Infraction Number] = "1st" THEN [Infraction Date] END

**2nd Infraction Date** = IF [Infraction Number] = "2nd" THEN [Infraction Date] END

2. Because we want to make sure both of these values are available to be compared for each driver, we need to fix them to the level of **Driver ID**.

**Note:** Don't believe me? Try to do a `DATEDIFF` calculation with these two fields as they are: **Time Between Infractions** = `DATEDIFF('day', [1st Infraction Date], [2nd Infraction Date])`  
 You'll get null results everywhere, because Tableau is trying to compare across a data structure that looks like this:

Driver ID	1st Infraction Date	2nd Infraction Date	Time between infractions
AA-106451404	Null	9/28/2017	Null
	7/5/2017	Null	Null
AF-108851406	Null	9/2/2018	Null
	5/9/2018	Null	Null
AJ-107951404	Null	12/31/2017	Null
	10/15/2017	Null	Null

Here, the row that knows what the first date is doesn't know what the second

date is, and vice versa. To get around this, we'll use a FIXED Level of Detail expression to force these first and second dates to be related by **Driver ID**.

Edit each calculation as follows:

```
1st Infraction Date = { FIXED [Driver ID] : MIN ( IF
[Infraction Number] = "1st" THEN [Infraction Date] END )
}
```

```
2nd Infraction Date = { FIXED [Driver ID] : MIN ( IF
[Infraction Number] = "2nd" THEN [Infraction Date] END )
}
```

**Note:** The original IF calculation must be aggregated when embedded in an LOD expression. We can use any basic aggregation that will preserve the date value (so aggregations like SUM, AVG, or MIN work, but not CNT or CNTD).

**Note:** These calculations can also be created in Tableau Prep Builder. For more information on LOD expressions in Prep, see [Create level of detail and rank calculations](#) on page 319.

3. Now we can create the DATEDIFF calculation as follows:

```
Time Between Infractions = DATEDIFF('day', [1st Infraction
Date], [2nd Infraction Date])
```

- If we want to look at weeks or months, simply modify the date part (currently 'day').
- It would also be possible to create a single calculation for the entire thing by placing the FIXED calcs inside the DATEDIFF directly:

```
DATEDIFF ( 'day',
{ FIXED [Driver ID] : MIN ( IF [Infraction Number]
= "1st" THEN [Infraction Date] END ) },
```

```
{ FIXED [Driver ID] : MIN ( IF [Infraction Number] =
"2nd" THEN [Infraction Date] END ) }
)
```

4. Plot **Time Between Infractions** on Columns and **Driver ID** on Rows.

The results will be identical to the outcome with the unpivoted data structure.

## 2. Compare the fine amounts for the first and second infractions. Are they correlated?

- A. To answer this in Tableau Desktop, we'll use very similar logic to the previous question. We'll use **Infraction Number** to identify if a given row is the first or second infraction, then pull out the fine amount accordingly.

1. If all we want to do is make a scatter plot, we can skip the LOD portion and just use the `IF` calculation:

```
1st Fine Amount = IF [Infraction Number] = "1st" THEN [Fine Amount] END
```

```
2nd Fine Amount = IF [Infraction Number] = "2nd" THEN [Fine Amount] END
```

2. However, if we wanted to compare and see the difference in amount between the first and second fines for a single driver, we'd run into the same null issue as with the dates. It can't hurt to wrap these calculations in a `FIXED LOD`, so it might be good just to do so from the start:

```
1st Fine Amount = { FIXED [Driver ID] : MIN ( IF [Infraction Number] = "1st" THEN [Fine Amount] END ) }
```

```
2nd Fine Amount = { FIXED [Driver ID] : MIN ( IF [Infraction Number] = "2nd" THEN [Fine Amount] END ) }
```

These calculations can also be created in Tableau Prep Builder. For more information on LOD expressions in Prep, see [Create level of detail and rank calculations](#) on page 319.

3. Create a scatterplot with **1st Fine Amount** on Columns and **2nd Fine Amount** on Rows and bring out a linear trend line as before.

The results will be identical to the outcome with the unpivoted data structure.

### 3. Which driver paid the most overall? Who paid the least?

- A. To answer this question in Tableau Desktop, the pivoted data structure is ideal. All we need to do is bring out **Driver ID** and **Fine Amount** into a bar chart. The default aggregation is already **SUM**, so the total amount paid by the driver will automatically be plotted.

The results will be identical to the outcome with the unpivoted data structure.

### 4. How many drivers had multiple infraction types?

- A. To answer this question in Tableau Desktop, the pivoted data structure is ideal. All we need to do is bring out **Driver ID** and a **Count Distinct of Infraction Type** as a bar chart, and we'll have our answer.

The results will be identical to the outcome with the unpivoted data structure.

### 5. What was the average fine amount for drivers who never attended traffic school?

- A. To answer this in Tableau Desktop, we cannot simply divide the total fine amount by two, since some drivers only had one infraction. We also can't calculate the average fine per driver and take the average of those values, because averaging averages can lead to inconsistencies. Instead, we need to calculate the total amount paid by drivers who never attended traffic school, then divide by the total number of infractions associated with those fines.

1. First, we need to determine if each driver had a second infraction. We can leverage the fact **2nd Infraction Date** will be null if there was no second infraction and start building the calculation:

```
IFNULL(STR([2nd Infraction Date]), 'no')
```

This will return the date of the second infraction if it exists, or "no" if there was no second infraction.

**Note:** The `STR` portion of this calculation is necessary because `IFNULL` needs consistency of data type in its arguments. Because we want to return the string "no" for null values, we need to convert the date to a string as well.

- Next, we need to turn this information into the number of infractions, 1 or 2. If the result of our `IFNULL` calculation is "no", then the driver should be marked as having one fine. Any other result should be marked as having two fines. The calculation is:

**Number of Infractions =**

```
IF IFNULL(STR([2nd Infraction Date]), 'no')= 'no' THEN 1
ELSE 2
END
```

- Now we need to consider the average fine amount. We already have a single field for **Fine Amount**. All we need to do is divide that by our new **Number of Infractions** field, wrapping both in **SUM**:

```
Average Fine = (SUM([Fine Amount]) / SUM([Number of
Infractions]))
```

- B. We also need to filter out drivers who attended traffic school. It looks like we could use the **Traffic School** field and filter on **Traffic School = no**. However, this would filter on *infractions* not associated with traffic school, not *drivers* who never went to traffic school. If a driver went to traffic school for one infraction but not the other, we don't want either infraction to be considered here—that driver has been to traffic school and therefore doesn't fit the parameters of the question.

What we want to do is filter out any driver who attended traffic school. In terms of the data, we want to filter out any driver who has a "Yes" for **Traffic School** on any row, regardless of which infraction it's associated with. Let's build our calculation in stages, using a simple view to help keep track of what's happening:

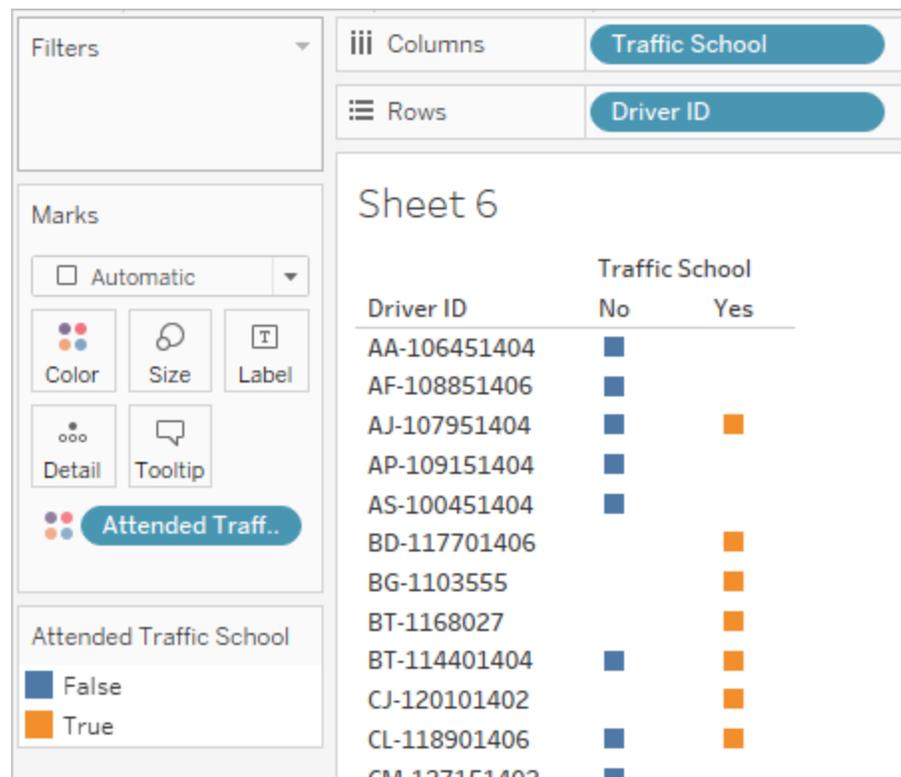
- First, we want to know if a driver has a "Yes" for Traffic School. Drag **Driver ID** to **Rows** and **Traffic School** to **Columns**. We'll get a text table with placeholder

"Abc" text indicating the relevant values for each driver.

- Next, we want to build a calculation that will identify if the value of **Traffic School** is "Yes". The first stage of the calculation is:

**Attended Traffic School** = CONTAINS([Traffic School], 'Yes')

If we bring **Attended Traffic School** to the **Color** shelf on the **Marks** card, we see it accurately labels "False" for every mark in the "No" column, and "True" for every mark in the "Yes" column.



- However, what we really want is this information at the level of the *driver*, not the *infraction*. An LOD expression is a natural fit when trying to compute a result at a different level of detail than the basic structure of the data. We'll make this a `FIXED` LOD expression. But, as we know, the aggregate expression portion of an LOD must be aggregated. Previously, we've used **MIN**. Will that work here? We'll modify the calculation to be:

**Attended Traffic School** = { `FIXED` [Driver ID] : `MIN`( `CONTAINS` ([Traffic School], 'Yes')) }

The screenshot shows the Tableau Prep interface with the following configuration:

- Columns:** Traffic School
- Rows:** Driver ID
- Marks:** Automatic
- Legend:** Attended Traffic School
  - False (Blue square)
  - True (Orange square)

The resulting pivot table is as follows:

Driver ID	Traffic School	
	No	Yes
AA-106451404	■	
AF-108851406	■	
AJ-107951404	■	■
AP-109151404	■	
AS-100451404	■	
BD-117701406		■
BG-1103555		■
BT-1168027		■
BT-114401404	■	■
CJ-120101402		■
CL-118901406	■	■

With that change applied in the view, we see the opposite of what we want. Any driver that has a "No" is marked as "False" across the board. Instead, we want to carry the "Yes" as a "True" for every record for that driver. What is MIN doing here? It's picking the first response alphabetically, that is, "No".

4. What if we changed it to **MAX**? Would that take the last response alphabetically? We'll modify the calculation to be:

```
Attended Traffic School = { FIXED [Driver ID] : MAX ( CONTAINS
( [Traffic School], 'Yes') ) }
```

Sheet 6

Driver ID	Traffic School	
	No	Yes
AA-106451404	■	
AF-108851406	■	
AJ-107951404	■	■
AP-109151404	■	
AS-100451404	■	
BD-117701406		■
BG-1103555		■
BT-1168027		■
BT-114401404	■	■
CJ-120101402		■
CL-118901406	■	■
CM-123151402	■	

And here we have it: if a driver has "Yes" anywhere in the data, they are marked as "True" for having attended traffic school, even on the infraction that didn't involve traffic school.

5. If we bring **Attended Traffic School** to the **Filter** shelf and select only "False", we'll be left with only drivers who never attended traffic school.
- C. To answer the original question, with our filter in place we'll simply bring **Average Fine** to the **Text** shelf on the **Marks** card. Because we built the aggregations into the calculation, the aggregation on the field will be **AGG** and we cannot change it. This is as expected.

The results will be identical to the outcome with the unpivoted data structure.

## The benefits of pivoted data

We could stick with the original data structure from the tutorial if we know we'd only need to answer questions that are easy to answer with that structure. However, the pivoted data format is more flexible. Even though it requires some calculations, once they're in place the resulting data set is well suited to answer broader questions.

## Go Further Still—Calculations Only

What if you don't have access to Tableau Prep Builder? Are you out of luck entirely if you're stuck with the original data? Not at all!

Tableau Desktop and LOD expressions can answer all of our analytical questions. If we connect to the original **Traffic Violations.xlsx**, it looks very similar to the pivoted data set—just without the crucial **Infraction Number** field. We'll need to mimic the outcome of the aggregation steps via LOD expressions.

**Note:** You can download the workbook **LOD Driver Infractions.twbx** to look at the solutions in context. Remember that there may be alternative ways to interpret the analysis or pursue answers.

### 1. What was the length of time in days between the first and second infraction for each driver?

- A. To answer this in Tableau Desktop, we'll again use the `DATEDIFF` function. This function requires a start date and an end date. This information is present in our data, but all in one field. We need to pull it out into two fields. Because we want to make sure both of these values are available to be compared for each driver, we need to fix them to the level of **Driver ID**.

1. To find the first infraction date, we use the calculation:

```
1st Infraction = { FIXED [Driver ID] : MIN ( [Infraction Date] ) }
```

2. We'll do the second infraction date in stages.

- a. To start, we need to look at just the dates that are larger than the first date:

```
IF [Infraction Date] > [1st Infraction] THEN
  [Infraction Date] END
```

- b. But this will give us *every* infraction after the first, and we only want the second. So we want the smallest of these dates. Wrap the whole thing in **MIN**:

```
MIN( IF [Infraction] : [1st Infraction] THEN
[Infraction Date] END )
```

- c. We also want to recalculate the second infraction date for each driver. That's where LOD expressions come in. We'll fix this to the level of **Driver ID**:

```
2nd Infraction = { FIXED [Driver ID] : MIN ( IF
[Infraction Date] > [1st Infraction] THEN
[Infraction Date] END ) }
```

3. And we can now create the `DATEDIFF` calculation:

```
Time Between Infractions = DATEDIFF('day', [1st Infraction],
[2nd Infraction])
```

The results will be identical to the outcomes with the other two data structures.

## 2. Compare the fine amounts for the first and second infractions. Are they correlated?

- A. To answer this in Tableau Desktop, we'll use similar logic to the pivoted data version of this question. We'll use the **1st Infraction** and **2nd Infraction** fields we created for question 1 to identify if a given row is the first or second infraction, then pull out the fine amount accordingly.

1. If all we want to do is make a scatter plot, we can skip the LOD portion and just use an `IF` calculation:

```
1st Fine Amount = IF [1st Infraction] = [Infraction Date]
THEN [Fine Amount] END
```

```
2nd Fine Amount = IF [2nd Infraction] = [Infraction Date]
THEN [Fine Amount] END
```

2. However, if we want to compare and see the difference in amount between the first and second fines for a single driver, we'd run into issues with nulls, as in the first data structure. It can't hurt to wrap these calculations in a `FIXED` LOD, so it might be good just to do so from the start:

```
1st Fine Amount = { FIXED [Driver ID] : MIN ( IF [1st  
Infraction] = [Infraction Date] THEN [Fine Amount] END )  
}
```

```
2nd Fine Amount = {FIXED [Driver ID] : MIN( IF  
[2ndInfraction] = [Infraction Date] THEN [Fine Amount]  
END ) }
```

The results will be identical to the outcomes with the other two data structures.

### 3. Which driver paid the most overall? Who paid the least?

- A. To answer this in Tableau Desktop, we need to first realize something about the LOD-only method. Both methods using Tableau Prep filter out records that are not the first or second infraction for a driver. The LOD method in Tableau Desktop keeps all records. This means that if we were to create a viz of **SUM(Amount Paid)** by **Driver ID**, the Tableau Desktop-only version will show higher amounts for drivers with more than two infractions. To get a **Total Amount Paid** value from the complete data that matches the other methods, instead of using the original **Fine Amount** field, we instead need to sum the first and second fines like we did with the first data structure.
- B. Using the fields we created for question 2, we'll add the two fine amounts. **ZN** is necessary to prevent a null result for any drivers who only had one infraction. The calculation is:

```
Total Amount Paid = [1st Fine Amount] + ZN([2nd Fine Amount])
```

The results will be identical to the outcomes with the other two data structures.

### 4. How many drivers had multiple infraction types?

- A. To answer this question in Tableau Desktop, we can't simply bring out **Driver ID** and a **Count Distinct of Infraction Type**. Because this data set has infractions beyond the second, some drivers may have more than two infraction types. To match the results with the other methods, we need to limit the scope to just the first two infractions.

B. We can to pull out the 1st and 2nd infraction types, wrap them in LOD expressions to make them `FIXED` to the driver, then use an `IF` calculation to count the types:

1. **1st Infraction Type** = { `FIXED [Driver ID] : MIN ( IF [1st Infraction] = [Infraction Date] THEN [Infraction Type] END )` }

2. **2nd Infraction Type** = { `FIXED [Driver ID] : MIN ( IF [2nd Infraction] = [Infraction Date] THEN [Infraction Type] END )` }

3. **Number of Infraction Types** =

```
IF [1st Infraction Type] = [2nd Infraction Type] THEN 1
ELSEIF [1st Infraction Type] != [2nd Infraction Type]
THEN 2
ELSE 1 END
```

**Note:** It's also possible to create many of these calculations as a single field by nesting the initial calculations directly in the larger calculation. Here, the combined calculation would look like this:

```
IF
  {FIXED [Driver ID] : MIN(IF [1st Infraction]=
[Infraction Date] THEN [Infraction Type] END)}
=
  {FIXED [Driver ID] : MIN(IF [2nd Infraction]=
[Infraction Date] THEN [Infraction Type] END)}
THEN 1

ELSEIF
  {FIXED [Driver ID] : MIN(IF [1st Infraction]=
[Infraction Date] THEN [Infraction Type] END)}
!=
  {FIXED [Driver ID] : MIN(IF [2nd Infraction]=
[Infraction Date] THEN [Infraction Type] END)}
THEN 2
```

```
ELSE 1
END
```

Which is a bit harder to make sense of, but works if preferred. (Note that line breaks and some spaces do not impact how a calculation is interpreted by Tableau.)

- C. We can then plot **Number of Infraction Types** against **Driver ID** and sort the bar chart.

The results will be identical to the outcomes with the other two data structures.

## 5. What was the average fine amount for drivers who never attended traffic school?

- A. To answer this in Tableau Desktop, we cannot simply divide the total fine amount by two, since some drivers only had one infraction. We also can't calculate the average fine per driver and take the average of those values, because averaging averages can lead to inconsistencies. Instead, we need to calculate the total amount paid by drivers who never attended traffic school, then divide by the total number of infractions associated with those fines.

1. First, we need to determine if each driver had a second infraction. We can leverage the fact the information in all the "2nd" fields will be null if there was no second infraction and start building the calculation:

```
IFNULL([2nd Infraction Type], 'no')
```

This will return an infraction type if it exists, or "no" if there was no second infraction.

2. Next, we need to turn this information into the number of infractions, 1 or 2. If the result of our `IFNULL` calculation is "no", then the driver should be marked as having one fine. Any other result should be marked as having two fines. The calculation is:

**Number of Infractions =**

```
IF IFNULL([2nd Infraction Type], 'no') = 'no' THEN 1
ELSE 2
END
```

- For the Total Amount Paid, we can use the calculation from question 3. To bring it all together, we'll take this total fine amount and divide it by our new **Number of Infractions** calculated field to determine the average fine amount:

```
Average Fine = SUM([Total Amount Paid]) / SUM([Number of
Infractions])
```

- B. We also need to filter out drivers who attended traffic school. Because this data set contains some drivers with a third or fourth infraction, we can't use the same method as the pivoted data structure. Instead, we'll follow the same method as the unpivoted data, summarized here:

- First, we need to built two calculations identifying if the first and second infractions involved traffic school or not:

```
1st Traffic School = { FIXED [Driver ID] : MIN (IF [1st
Infraction] = [Infraction Date] THEN [Traffic School]
END ) }
```

```
2nd Traffic School = { FIXED [Driver ID] : MIN (IF [2nd
Infraction] = [Infraction Date] THEN [Traffic School]
END ) }
```

- Then we'll add those values to get the overall number of traffic school attendances:

**Number of Traffic School Attendances =**

```
(CASE [1st Traffic School] WHEN 'Yes' THEN 1 WHEN 'No'
THEN 0 ELSE 0 END)
+
(CASE [2nd Traffic School] WHEN 'Yes' THEN 1 WHEN 'No'
THEN 0 ELSE 0 END)
```

- If we drag **Number of Traffic School Attendances** to the **Dimensions** area of the **Data** pane, the values 0–2 become discrete.

4. Now if we filter on **Number of Traffic School Attendances**, we can select just the 0 and know we're getting drivers who have never attended traffic school.
- C. To answer the original question, we'll simply bring **Average Fine** to the **Textshelf** on the **Marks** card. Because we built the aggregations into the calculation, the aggregation on the field will be **AGG** and we cannot change it. This is as expected.

The results will be identical to the outcomes with the other two data structures.

It's important to remember that this solution has a lot of nested calculations and LOD expressions. Depending on the size of the data set and the complexity of the data, performance could be an issue.

## Reflection on Methods

So which route should you go? That's entirely up to you and the tools at your disposal.

- If you want to steer clear of LODs, there's a data-shaping solution, though calculations might be necessary for some analysis ([Analysis in Tableau Desktop on page 560](#)).
- If you can shape the data and are comfortable with calculations—including LODs—the middle-of-the-road option provides the best flexibility ([Go Further—Pivoted Data on page 567](#)).
- If you're comfortable with LODs, there's minimal impact on performance, and/or you don't have access to Tableau Prep, solving this with LODs alone is a viable option ([Go Further Still—Calculations Only on page 577](#)).

At the very least, it's valuable to understand how aggregation in Tableau Prep and Level of Detail expressions in Tableau Desktop are interrelated and impact data analysis. As with most things in Tableau, there's more than one way to do anything. Exploring all the various options can help bring concepts together and let you pick the best solution for you.

## Calculations used:

### Driver Infractions

- **Time Between Infractions** = `DATEDIFF('day', [1st Infraction Date], [2nd Infraction Date])`

- **Total Amount Paid** = [1st Fine Amount] + ZN([2nd Fine Amount])
- **Number of Infraction Types** = IF [1st Infraction Type]=[2nd Infraction Type] THEN 1 ELSEIF [1st Infraction Type]!=[2nd Infraction Type] THEN 2 ELSE 1 END
- **Number of Infractions** = IF IFNULL([2nd Infraction Type], 'no') = 'no' THEN 1 ELSE 2 END
- **Average Fine** = ( SUM([1st Fine Amount]) + SUM( ZN([2nd Fine Amount]) ) ) / SUM([Number of Infractions])
- **Number of Traffic School Attendances** = (CASE [1st Traffic School] WHEN 'Yes' THEN 1 WHEN 'No' THEN 0 ELSE 0 END) + (CASE [2nd Traffic School] WHEN 'Yes' THEN 1 WHEN 'No' THEN 0 ELSE 0 END)

## Pivoted Driver Infractions

- **1st Infraction** = {FIXED [Driver ID] : MIN(IF [Infraction Number] = "1st" THEN [Infraction Date] END)}
- **2nd Infraction** = {FIXED [Driver ID] : MIN(IF [Infraction Number] = "2nd" THEN [Infraction Date] END)}
- **Time Between Infractions** = DATEDIFF('day', [1st Infraction], [2nd Infraction])
- **1st Fine Amount** = {FIXED [Driver ID] : MIN( IF [Infraction Number] = "1st" THEN [Fine Amount] END ) }
- **Number of Infractions** = IF IFNULL(STR([2nd Infraction]), 'no')= 'no' THEN 1 ELSE 2 END
- **Average Fine** = SUM([Fine Amount])/SUM([Number of Infractions])
- **Attended Traffic School** = { FIXED [Driver ID] : MAX( CONTAINS ([Traffic School], 'Yes')) }

## LOD Driver Infractions

- **1st Infraction** = {FIXED [Driver ID] : MIN([Infraction Date])}
- **2nd Infraction** = { FIXED [Driver ID] : MIN( IF [Infraction Date]

```
> [1st Infraction] THEN [Infraction Date] END ) }
```

- **Time Between Infractions** = DATEDIFF('day', [1st Infraction], [2nd Infraction])
- **1st Fine Amount** = {FIXED [Driver ID] : MIN( IF [1st Infraction] = [Infraction Date] THEN [Fine Amount] END ) }
- **2nd Fine Amount** = {FIXED [Driver ID] : MIN( IF [2nd Infraction] = [Infraction Date] THEN [Fine Amount] END ) }
- **Total Amount Paid** = [1st Fine Amount] + ZN([2nd Fine Amount])
- **1st Infraction Type** = {FIXED [Driver ID] : MIN( IF [1st Infraction] = [Infraction Date] THEN [Infraction Type] END ) }
- **2nd Infraction Type** = {FIXED [Driver ID] : MIN( IF [2nd Infraction] = [Infraction Date] THEN [Infraction Type] END ) }
- **Number of Infraction Types** = IF [1st Infraction Type]=[2nd Infraction Type] THEN 1 ELSEIF [1st Infraction Type]!=[2nd Infraction Type] THEN 2 ELSE 1 END
- **Number of Infractions** = IF IFNULL([2nd Infraction Type], 'no') = 'no' THEN 1 ELSE 2 END
- **Average Fine** = SUM ([Total Amount Paid]) / SUM([Number of Infractions])
- **1st Traffic School** = {FIXED [Driver ID] : MIN (IF [1st Infraction] = [Infraction Date] THEN [Traffic School] END ) }
- **2nd Traffic School** = {FIXED [Driver ID] : MIN (IF [2nd Infraction] = [Infraction Date] THEN [Traffic School] END ) }
- **Number of Traffic School Attendances** = (CASE [1st Traffic School] WHEN 'Yes' THEN 1 WHEN 'No' THEN 0 ELSE 0 END) + (CASE [2nd Traffic School] WHEN 'Yes' THEN 1 WHEN 'No' THEN 0 ELSE 0 END)

**Note:** Special Thanks to Ann Jackson's Workout Wednesday topic [Do Customers Spend More on Their First or Second Purchase?](#) and Andy Kriebel's Tableau Prep Tip

[Returning the First and Second Purchase Dates](#) that provided the initial inspiration for this tutorial. Clicking these links will take you away from the Tableau website. Tableau cannot take responsibility for the accuracy or freshness of pages maintained by external providers. Contact the owners if you have questions regarding their content.

# Troubleshoot Tableau Prep Builder

This article lists problems you might encounter when using Tableau Prep Builder and suggestions for how to resolve them.

## Common errors when using the command line to run flows

You can run flows from the command line to refresh your output files programmatically instead of opening Tableau Prep Builder to run each flow manually. While this process helps build efficiency in your flow process, if your syntax is incorrect, or you are missing credentials for your connections or output locations, you will receive errors when running this process.

The following table describes common errors and how to resolve them. For information about how to run flows from the command line, see [Refresh flow output files from the command line on page 409](#).

Error	Cause	How to fix it
"Missing arguments"	One of the required command line arguments is missing.	Use "tableau-prep-cli -help" to see a list of the arguments for the command line.
"Unable to read the connections file."	There are errors in the syntax or format in the credentials.json file for the input connections.	Check the syntax for the input connections in the .json file. For more information and examples, see <a href="#">Refresh flow output files from the command line on page 409</a> .

<p>"There are errors in the flow. Unable to run the flow.</p> <p>Check that the credentials .json file includes all required credentials. Open the flow in Tableau Prep Builder to view error details."</p>	<p>There are missing credentials in the credentials.json file for the input connections or the flow has errors.</p>	<p>Check that the .json file has the credentials for all connections, and open the flow file in Tableau Prep Builder to see if there are any errors in the flow.</p> <p>If the flow has errors, you must fix them and republish the flow to Tableau Server, then try running the process again.</p>
<p>"Could not find match for &lt;hostname of inputConnections &gt;"</p>	<p>The credentials.json file is missing an entry for the hostname (server name).</p>	<p>Make sure the credentials.json file includes the correct credentials for the hostname (server name).</p> <p>For more information and examples, see <a href="#">Refresh flow output files from the command line on page 409</a></p>
<p>"We don't have credentials of all connections in tfl/t-flx file. The following connection(s) were not found: &lt;hostname of inputConnections&gt;"</p>	<p>The credentials.json file is missing or has incorrect</p>	<p>Make sure credentials.json file includes the correct credentials for the hostname (server</p>

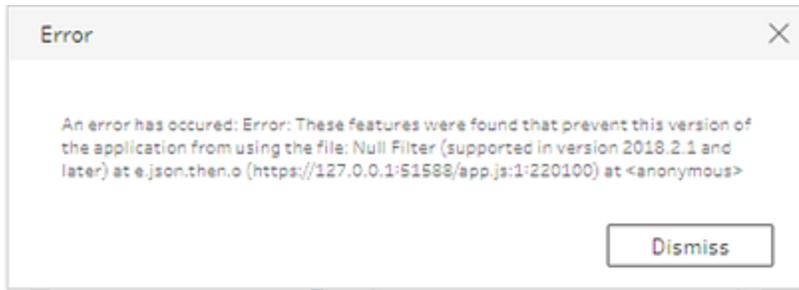
	<p>credentials for the hostname (server name) shown in the error message.</p>	<p>name) listed in the error message.</p> <p>For more information and examples, see <a href="#">Refresh flow output files from the command line on page 409</a>.</p>
<p>"Error signing in server &lt;serverUrl&gt; as a user &lt;userName&gt;. Please check the credentials."</p>	<p>The credentials.json file has the incorrect credentials for Tableau Server.</p>	<p>Make sure the credentials.json file includes all the correct credentials and elements for the output connection.</p> <p>For more information and examples, see <a href="#">Refresh flow output files from the command line on page 409</a></p>
<p>"Could not sign in successfully as &lt;userName&gt; to server &lt;serverUrl&gt;(&lt;contentUrl&gt;)"</p>	<p>The credentials.json file has the incorrect credentials for Tableau Server.</p>	<p>Make sure the credentials.json file includes all the correct credentials and elements for the output connection.</p> <p>For more information and examples, see</p>

		<a href="#">Refresh flow output files from the command line on page 409</a>
"We don't have credentials for Tableau Server to publish extract for one or more output nodes in tfl/t-flx file."	The credentials.json file was not passed in as a command line argument or it is missing the credentials for the output connection.	<p>Make sure the the path to the credentials.json file is included in the command line and verify that the credentials.json file includes all the correct credentials and elements for the output connection.</p> <p>For more information and examples, see <a href="#">Refresh flow output files from the command line on page 409</a></p>
"Loom rest api server not started"	The installation or environment setup is incorrect.	<p>Make sure that Tableau Prep Builder is installed correctly and that you are running the command as an Administrator.</p> <p>For information about how to install Tableau Prep</p>

		Builder, see <a href="#">Install Tableau Desktop or Tableau Prep Builder from the User Interface.</a>
"Error. Flow file does not exist."	The path to the flow file is incorrect.	Make sure that the correct path to the flow file is included in the command line.
"Error. Connections file does not exist."	The path to the credentials.json file is incorrect.	Make sure that the correct path to the credentials.json file is included in the command line.
"Could not find match for <mapr01:5181>,<mapr02:5181>,<mapr03:5181>"	You must specify a specific Port ID when connecting to Apache Drill using ZooKeeper .	Include a credentials.json file in the command line that specifies "port": 31010 for the input credentials.

## Error: "These features were found that prevent this version of the application from using this file"

If you open a flow that was created in version 2018.2.1 or later in an earlier version of Tableau Prep Builder, you may see the following error:



Flows that include features that are not supported in earlier releases will result in this incompatibility error. To resolve the error, open the flow in the later version, and save a copy of the flow without the indicated features. In the above example, remove the null filter from the field where it is applied.

Then open the copy that has the feature removed in the earlier version of Tableau Prep Builder.

## Error: "Failed to parse response from Tableau Server" when publishing Tableau Prep output

To successfully publish output from Tableau Prep Builder to Tableau Server, the REST API must be enabled on Tableau Server. If the REST API is not enabled, you will see the following error:

```
Failed to parse response from Tableau server due
to:javax.xml.bind.UnmarshalException - with linked
exception: [org.xml.sax.SAXParseException; lineNumber: 1;
columnNumber: 10; DOCTYPE is disallowed when the feature
"http://apache.org/xml/features/disallow-doctype-decl" set
to true.]
```

For information about enabling the REST API on Tableau Server, see [REST API Requirements](#) in the REST API Help.

For information about publishing output from Tableau Prep Builder, see [Create data extract files and published data sources](#) on page 387.

# Error: "You are using Server version: null..." when signing in to an SSL-enabled Tableau Server using Tableau Prep

When you sign in to an SSL-enabled Tableau Server from Tableau Prep Builder, you must have a root certificate installed on the computer where Tableau Prep Builder is installed. If the certificate is not installed, you might see the following error:

**You are using Server version: null but the minimum compatible version is: 10.0. Please upgrade to a compatible version**

If you see this error, work with your IT department or system administrator to install the required root certificate on the computer where Tableau Prep Builder is installed. For more information, see [System requirements](#) in the Tableau Desktop and Tableau Prep Builder Deployment Guide.

## Maintain Licenses for Tableau Desktop and Tableau Prep

Tableau Desktop and Tableau Prep can be licensed under a term license model. Term licenses, also known as subscription licenses, allow you to use and update Tableau Desktop and Tableau Prep for a specified period of time.

Term licenses must be renewed and the product key refreshed to continue providing uninterrupted service. You can continuously renew the term license as each specified period expires. If you don't renew your term license and the term expires, Tableau will stop working and you will no longer have access to the software. For more information about renewing your license, see [How to Renew your Tableau Licenses](#).

**Note:** Trial licenses for Tableau Desktop or Tableau Prep expire after a set period of time, usually 14 days. After the trial period expires, you'll need to [purchase a license](#) to continue using the product.

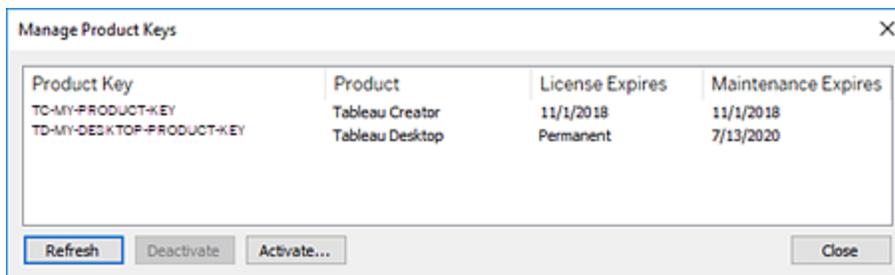
## View data about your license

After you install Tableau Desktop or Tableau Prep open the application and then navigate to **Help > Manage Product Keys** from the top menu to see information about the type of license you have and when it expires.

You can also activate or deactivate a product key or refresh a maintenance product key from this dialog.

**Note:** Tableau offers term licenses that provide a range of capabilities. The type of license that you have is displayed in the **Product** field. For more information about the different type of user-based licenses that are available, see [User-based licenses](#) in the Tableau Server help.

Existing Tableau Desktop users may have a perpetual (permanent) license. Perpetual licenses don't expire. However, to get access to product updates and technical support you must purchase Support and Maintenance services. These services must be renewed to continue receiving the service. Perpetual (permanent) licenses are no longer available for Tableau Desktop.



Use the following buttons to take action on your product key:

- **Refresh** (Tableau Desktop only): Click the **Refresh** button to refresh a maintenance license that is expiring, then close and restart Tableau Desktop. If the **Maintenance Expires** date doesn't update, check with your license administrator as the key or maintenance agreement may have changed.

A product key whose License Expires value is listed as "Permanent," as shown in the Manage Product Keys dialog box above, is a legacy product key. You can refresh a Permanent product key at any time as long as the maintenance end date listed in the

Tableau Customer Portal is higher than the date reflected in the Desktop Manage Product Keys dialog box.

If the product key has reached its expiration date, you cannot refresh the product key. Visit the Tableau Customer Portal to obtain an updated subscription product key and perform a new activation. If the product key has not reached its expiration date, you can refresh the product key. When you refresh a product key that has not yet expired, only the "License Expires" value will change and not the product key. The product key will change when it reaches its expiration date.

To refresh a maintenance key from the command line see [Refresh the product key](#) in the Tableau Desktop and Tableau Prep Deployment guide.

**Note:** You cannot refresh the product key if Tableau Desktop is offline. If you are activating Tableau Desktop in offline mode, you must obtain and activate a new key from the Tableau Customer Portal.

- **Deactivate:** Select a product key in the list then click **Deactivate** to deactivate the product key. Deactivate a product key if you need to move the product key to another computer or when you no longer need the product key on this computer.

For more information about deactivating a product key, see [Move or Deactivate Product Keys](#) in the Tableau Desktop and Tableau Prep Deployment guide.

- **Activate:** After Tableau Desktop or Tableau Prep is installed, click **Activate** to open the activation dialog and enter your product key. If you get an error and can't activate Tableau Desktop or Tableau Prep using your product key, contact [Tableau Support](#).

For more information about activating a product key, see [Activate and Register your Product](#) in the Tableau Desktop and Tableau Prep Deployment guide.

## Automatically refresh product keys using zero downtime licensing

Beginning in Tableau version 2021.1, internet-connected Tableau Desktop and Tableau Prep Builder users no longer have to manually refresh product keys. Licenses are automatically refreshed without requiring any action as their subscription approaches expiration.

Tableau Desktop and Tableau Prep Builder will attempt to silently refresh an active product key and will warn users 14 days before their license is set to expire if the silent refresh was

unsuccessful. Tableau will attempt to refresh a product key twice (at 14 days and 1 day before license expiration) to reflect license end date extensions as a result of your subscription renewal.

If the license end date for Tableau Desktop or Tableau Prep Builder has been extended prior to a silent refresh attempt, the updated license term is updated automatically and downloaded into the trusted storage of the computer where Tableau Desktop or Tableau Prep Builder is running. This allows users to continue using Tableau Desktop or Tableau Prep Builder without interruption. However, if no updated license end dates are found before the active license expires, Tableau Desktop or Tableau Prep Builder will become unlicensed and stop working. Users will need to activate a new or updated product key to start working with Tableau Desktop or Tableau Prep Builder again.

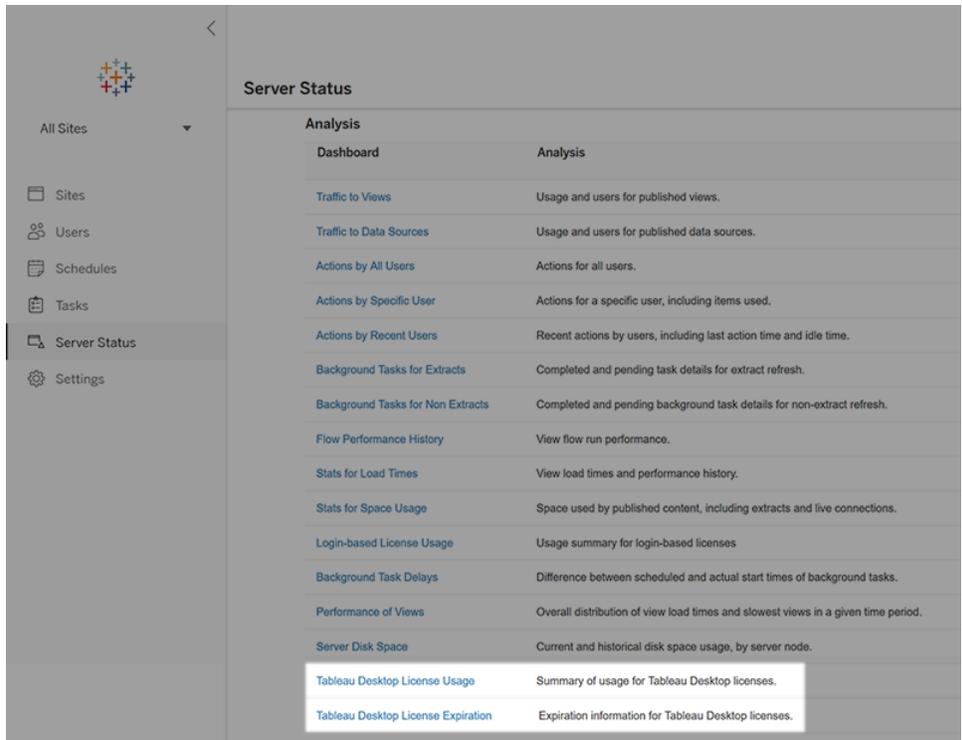
## Track Tableau Desktop license usage and expiration data

If you want to track and view license usage and expiration data for Tableau Desktop in Tableau Server you must configure Tableau Desktop to send license data to Tableau Server on a set interval, and then enable reporting on Tableau Server.

This enables server administrators to access two reports:

- **Desktop License Usage:** This report lets server administrators see usage data for Tableau Desktop licenses in your organization.
- **Desktop License Expiration:** This report gives server administrators information about which Tableau Desktop licenses in your organization have expired or need maintenance renewal.

If Tableau Desktop and Tableau Server are configured for license reporting, when signed in to Tableau Server as an Administrator, you will see these two reports listed on the **Server Status** page in the **Analysis** section.



If you don't see these reports listed, then Tableau Desktop and Tableau Server may not be configured for Tableau Desktop usage reporting.

For information about how to configure Tableau Desktop and Tableau Server for usage reporting, see [Manage Tableau Desktop License Usage](#) in the Tableau Desktop and Tableau Prep Deployment guide.

## Additional resources

For more information about managing your license refer to the following topics:

- To find your product key and activate Tableau Desktop or Tableau Prep Builder, see [Where's my product key.](#)
- To deactivate a product key or move it to another computer, see [Move or Deactivate Tableau Desktop.](#)
- To learn more about product keys for non-persistent virtual desktops or for computers that are regularly re-imaged, see [Configure Virtual Desktop Support.](#)
- To learn more about product key management for Tableau Server or Tableau Online, see [Licensing Overview \(Linux | Windows\)](#)

- To learn more about the license renewal process or to renew a license, see [How to Renew your Tableau Licenses](#).