



**SENTURUS**

# Tableau Prep: A Visualization's BFF

Overview of self-service data prep for Tableau

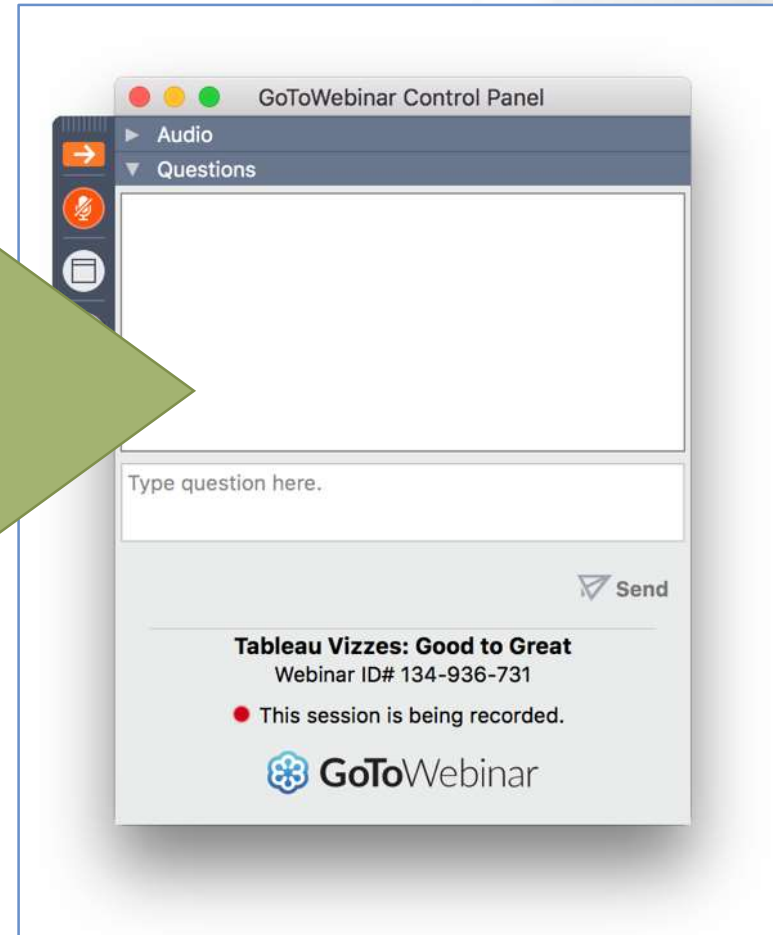


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# Agenda

Introductions

Tableau Prep overview

Senturus overview

Additional resources

Q&A





# Tableau Prep overview

Components

Why you need Tableau Prep?

Current capabilities (demo)

Coming soon

Licensing requirements



# Introductions

## **Patrick Powers**

Data Scientist, Consultant and Trainer  
Senturus, Inc.

## **Michael Weinbauer**

Director of Training and Content  
Senturus, Inc.

# Poll #1

How do you currently prepare your data?

- Tableau Prep
- Tableau Desktop
- Third party ETL tool (example: Alteryx)
- Done at the “back end” (Excel or DB views)

# Poll #2

What are your data challenges? (select all that apply)

- Data is in the wrong format
- Data comes from multiple sources
- Data is at different granularity
- Data is not “analysis friendly”
- Takes too long to make vizzes



# Components

## Tableau Prep Builder

Tableau Prep Builder - Superstore

File Edit Flow Server Help

Navigation icons: Home, Back, Forward, Refresh, Play

Flow steps:

- orders\_south... → Remove Nulls
- Orders\_East → Fix Data Type
- Orders (West) → Rename States
- Orders (Central) → Fix Dates

Final output: All Orders

## Tableau Prep Conductor

New Task

Select a schedule to run the flow "Sales Performance".

Weekday 2:00AM — Weekly at 2:00 AM on Monday, Tuesday, Wednesday, Thursday, and Friday

Automatically include all output steps for this flow.

Select the output steps to include in this task.

<input type="checkbox"/> Output Steps	Output Name	Location
<input checked="" type="checkbox"/>	Create 'Annual Regional Perf...	Tableau Data Engine
<input type="checkbox"/>	Create 'Superstore Sales.tde'	Tableau Data Engine

Cancel Create Task

# Why do you need to prepare data?



# Why do you need to prepare data?



# Good data vs. bad data

- Accurate
- Up-to-date
- Informational

# Data issues - examples

Data is in the wrong format

Data comes from multiple sources

Data is at different granularity

Data is not “analysis friendly”

Outliers and data “mistakes”

# Preparing data for Tableau - options

- Tableau Desktop
- 3<sup>rd</sup> party ETL tools
  - Alteryx
  - Informatica
- Prepare on the “back-end”
  - Database views
  - Data manipulation in Excel
- Tableau Prep



# Advantages of using Tableau Prep

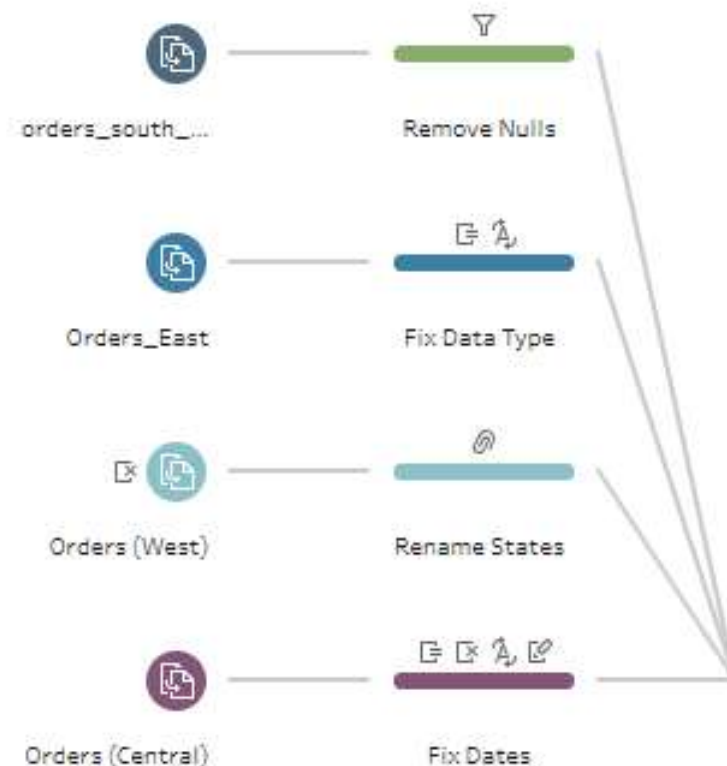
Free with Tableau Creator

Graphical interface (ease of use)

Integrated with Tableau Desktop

Documented and repeatable steps

Data preview



# Tableau Prep - demo



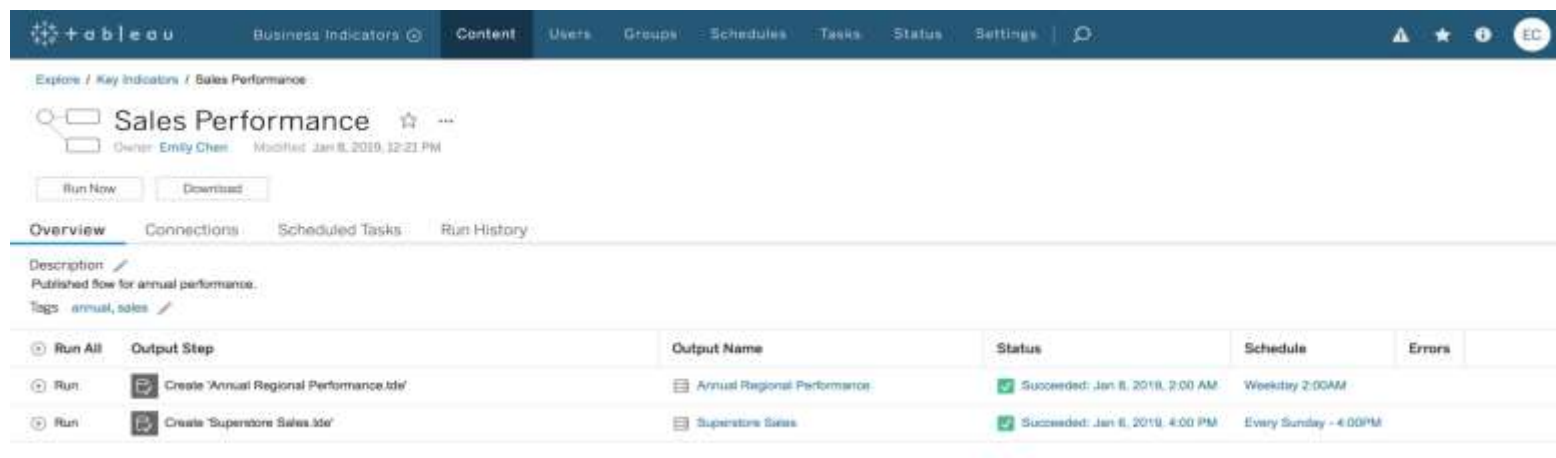
# Coming soon to Tableau Prep

- Features in 2020.2 (current beta)
  - Tableau Builder - incremental data refresh
  - Tableau Builder - Salesforce Data Connector
- Other upcoming features (announced at TC19 dates tbd)
  - Web interface for Tableau Prep Builder
  - Write output to database table

# Licensing requirements

Tableau Prep Builder is part of Tableau Creator license

Tableau Prep Conductor is part of the Data Management “add-on”



The screenshot displays the Tableau Prep Conductor interface. At the top, there is a navigation bar with the Tableau logo and various menu items: Business Indicators, Content, Users, Groups, Schedules, Tasks, Status, and Settings. Below the navigation bar, the main content area shows a workflow titled "Sales Performance" owned by Emily Chen, modified on Jan 8, 2019. There are "Run Now" and "Download" buttons. Below this, there are tabs for Overview, Connections, Scheduled Tasks, and Run History. The Overview tab is active, showing a description "Published flow for annual performance" and tags "annual, sales". A table below lists the run history for the workflow.

Run All	Output Step	Output Name	Status	Schedule	Errors
Run	Create 'Annual Regional Performance.tde'	Annual Regional Performance	✓ Succeeded: Jan 8, 2019, 2:00 AM	Weekday 2:00AM	
Run	Create 'Superstore Sales.tde'	Superstore Sales	✓ Succeeded: Jan 8, 2019, 4:00 PM	Every Sunday - 4:00PM	

More info: <https://senturus.com/blog/tableaus-new-licensing-creator-explorer-and-viewer-explained/>

# New Tableau Prep class

**Instructor-led online**

May 21

Learn how to combine, shape and clean data for analysis. Perform joins, unions, pivots and aggregations.

<https://senturus.com/training/course-schedule/tableau-prep/>



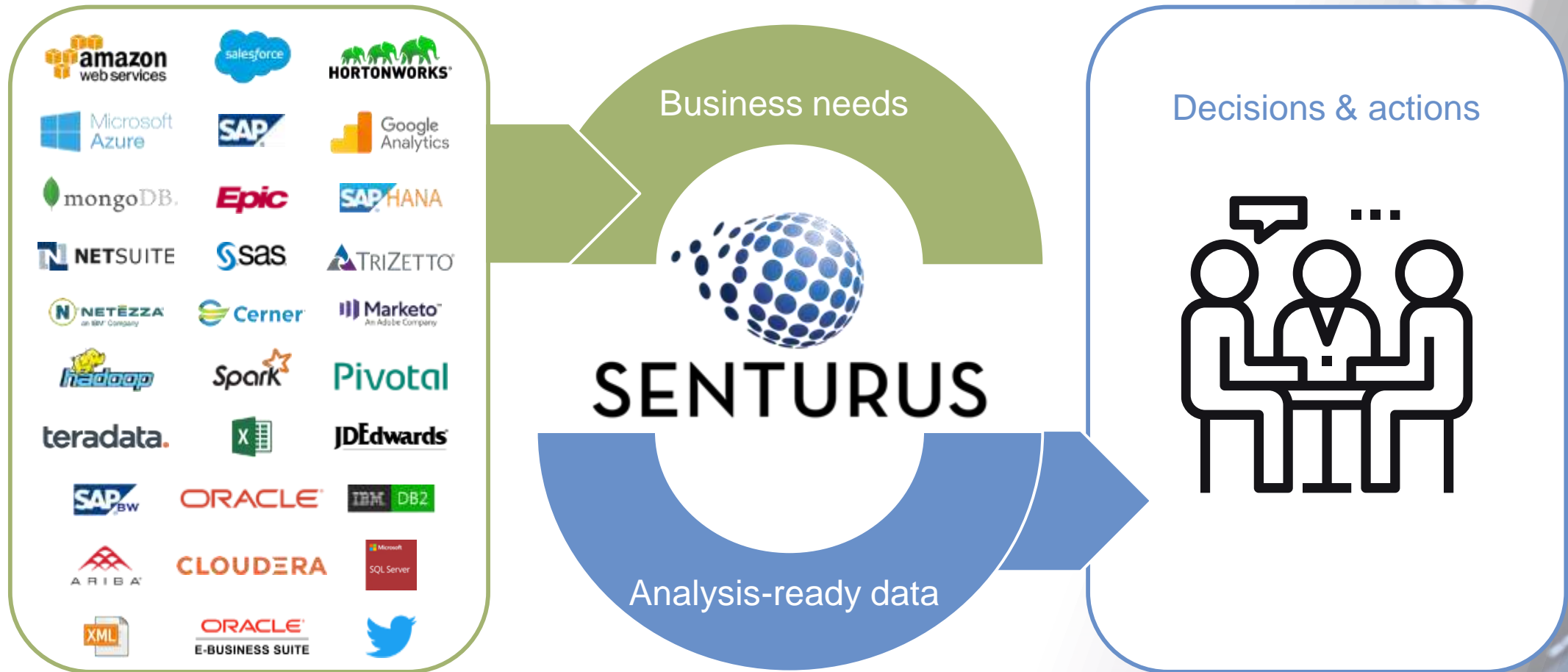
# The authority in Business Intelligence

Exclusively focused on BI,  
Senturus is unrivaled in its  
expertise across the BI stack.





# Bridging the data & decisioning gap



# Full spectrum BI services

- Dashboards, reporting and visualizations
- Data preparation and modern data warehousing
- Hybrid BI environments (migrations, security, etc.)
- Software to enable bimodal BI and platform migrations
- BI support retainer (expertise on demand)
- Training and mentoring

# A long, strong history of success

- 19+ years
- 1300+ clients
- 2500+ projects



# Expand your knowledge

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on the Senturus website:

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# Upcoming events

## **Power BI Row Level Security**

Thursday, May 21, 2020, 11am PT/2pm ET

## **Accelerating BI Migrations**

Cognos, Tableau and Power BI

Thursday, May 28, 2020, 11am PT/2pm ET

## **Cognos Framework Manager vs. Data Modules**

Thursday, Jun 25, 2020, 11am PT/2pm ET

# Complete BI training



**Power BI**



Tailored group sessions



Mentoring



Instructor-led online courses



Self-paced learning





# Additional resources

Unbiased product reviews



Technical tips



Insider viewpoints



More on this subject



Product demos



Upcoming events



# More on this topic

- [Tableau Licensing Explained](#)
- [How to Use Table and LOD Calcs in Tableau](#)
- [Data Modeling Comparison: Tableau, Cognos & Power BI](#)
- [Building Dazzling Tableau Dashboards](#)
- [Tableau Prep Full Day Class](#)



# Q & A

If your question or issue is broader than what we are able to answer today, contact us at:

[info@senturus.com](mailto:info@senturus.com)

and we will set up a free consultation.



# Thank You



## SENTURUS

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