Free Training Transcript:
Tableau Prep Conductor

Introduction

Welcome to this video on Getting Started with Tableau Prep Conductor. Tableau Prep Conductor is an add-on to Tableau Server that enables us to keep our data fresh by scheduling our published flows to run automatically. Tableau Prep Conductor also enables us to monitor, administer and govern our flows.

Accessing Tableau Prep Conductor

To use Tableau Prep Conductor, we create a flow in Tableau Prep Builder, publish the flow to Tableau Server, and then create a task in Tableau Server to schedule our flow.

You can download the packaged flow file underneath this video to follow along. We are using the Sales Performance flow.

Scenario

To learn about Tableau Prep Conductor, let's start by opening an existing flow in Tableau Prep Builder. This flow brings in data for regional orders, returns and quotas. The data in these sources is neither clean nor consistent. Tableau Prep Builder enables us to perform steps to clean, shape, and combine our data to prepare it for analysis. One (or more) output steps define where the results of the flow will be published. Now that we understand our flow, let's examine our need for scheduling.

Each day, new data is added to the Orders, Returns, and Quota data sources. This new data needs to run through the data preparation steps of our flow each day. Rather than manually publishing our flow each day, let's use Tableau Prep Conductor to schedule our flow to run on a daily basis.

Signing In

From within Tableau Prep Builder, let's sign into Tableau Server.

Setting Outputs

Before we publish our flow to Tableau Server, let's set our two output steps to also publish to Tableau Server. We click on our "Create 'Superstore Sales'" output step, expand the output pane, and set the output to publish as a data source. Next, we select the server we just signed into and the desired project, output name, and description. We keep the output pane open and move on to our second output step.

For the "Create 'Annual Regional Performance'" output step, we set the output to publish as a data source. We select the server we are signed into and the desired project, output name, and description. Now that we have defined our output steps, we minimize the output pane.

Publishing the Flow

Let's publish our flow to Tableau Server so that we can schedule it to run. From the Server menu, we select "Publish Flow". Next, we select the desired project and flow name. Let's edit our file connections. We'll select Upload to package our six source files into the published flow. A direct connection enables the files to be refreshed but requires Tableau Server to have access to the locations of our source files. Let's publish our flow.

Scheduling a Flow

Tableau Server now shows us the flow we just published. On this Overview tab, we see our two output steps above the published flow. Let's create a new task to schedule our flow. We can create separate tasks for each output but in our case, we'll schedule both outputs to run at the same time. Let's schedule our outputs to run Daily at 11am. Rather than waiting until that time, let's run our flow now. While our flow is running, let's take a look at the other tabs of our flow workspace.

Flow Workspace

The Connections tab is where we can see and edit the connections for each of our input and output steps. The Scheduled Tasks tab is where we can add new tasks and modify existing tasks. Here we see the task we just scheduled to run Daily at 11am. The Run History tab shows us the status for the flow we just ran. Both our output steps succeeded. The run history will grow as our flow runs each day at 11am. We can also see the revision history of our flow.

Alerting

If a flow fails, an error message will appear next to the failure status, and we will receive an email notifying us of the flow failure.

Exploring our Output

When we explore All Datasources, we see the two outputs of our flow. When our flow runs as scheduled, Daily at 11am, these two data sources will be updated with fresh data. Workbooks based on these data sources will display the fresh data as well.

Flow Permissions

When we explore All Flows, we see the flow we just published and scheduled. As the owner of the flow, we can assign permissions to other users who may want to run or edit our flow. Currently, all users can view and save our flow. We can set custom permissions or choose from the predefined options.

Administrative Views

Tableau Server Administrators can monitor the real-time status of the processes running in Tableau Server. Both Tableau Server Administrators and Tableau Site Administrators can monitor flow activity and performance using administrative views.

Creating Schedules

Tableau Server Administrators can create schedules that others may use to schedules their flows.

Additional Help

For additional help on the use of Tableau Prep Conductor, please visit onlinehelp.tableau.com.

Closing

Thank you for watching this video on Tableau Prep Conductor. We invite you to continue with the free training videos to learn more about using Tableau.