Tableau Prep File Name: Superstore.tflx

Background: _____

Requested by: _____ Requested date: _____

Developed by: _____ Completed date: _____

Audience: _____

Overall Summary Stats

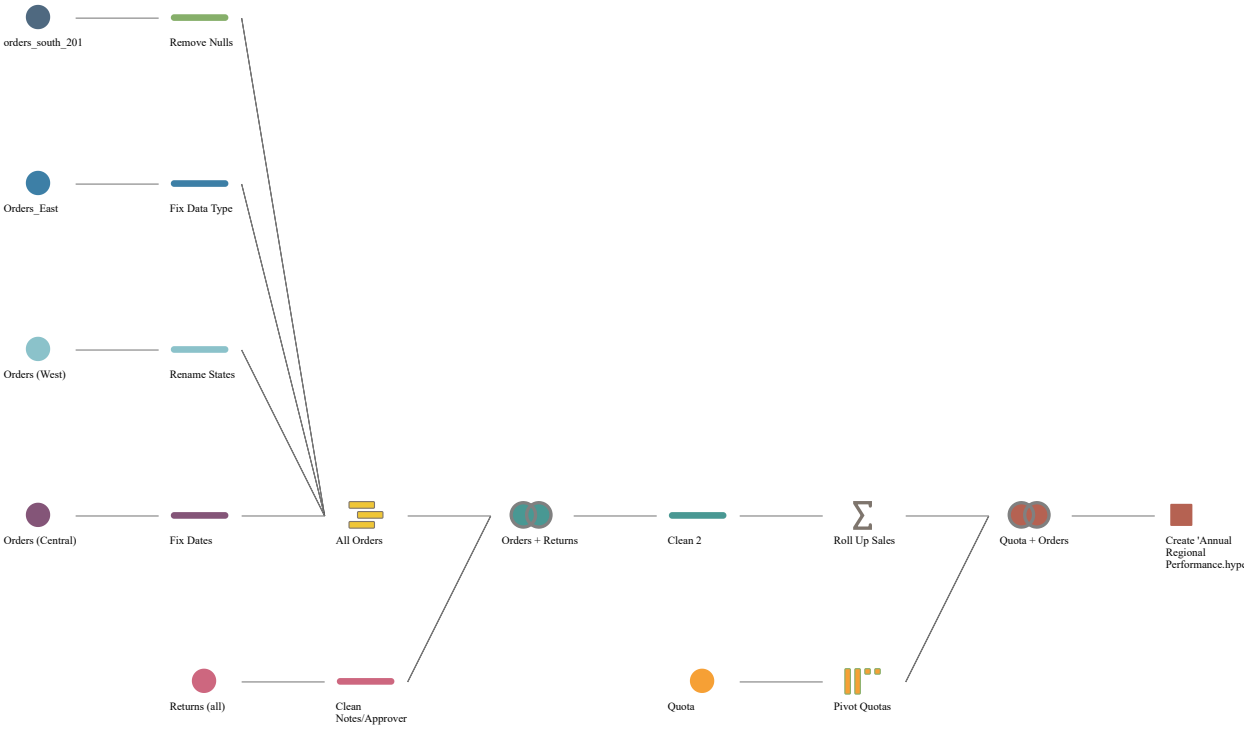
	Counts
Connections #	6
Input Steps #	6
Output Steps #	2
Input Fields #	122
Union Steps #	1
Join Steps #	2
Pivot Steps #	1
Aggregate Steps #	1
Clean Steps #	6
Actions #	38

Connections

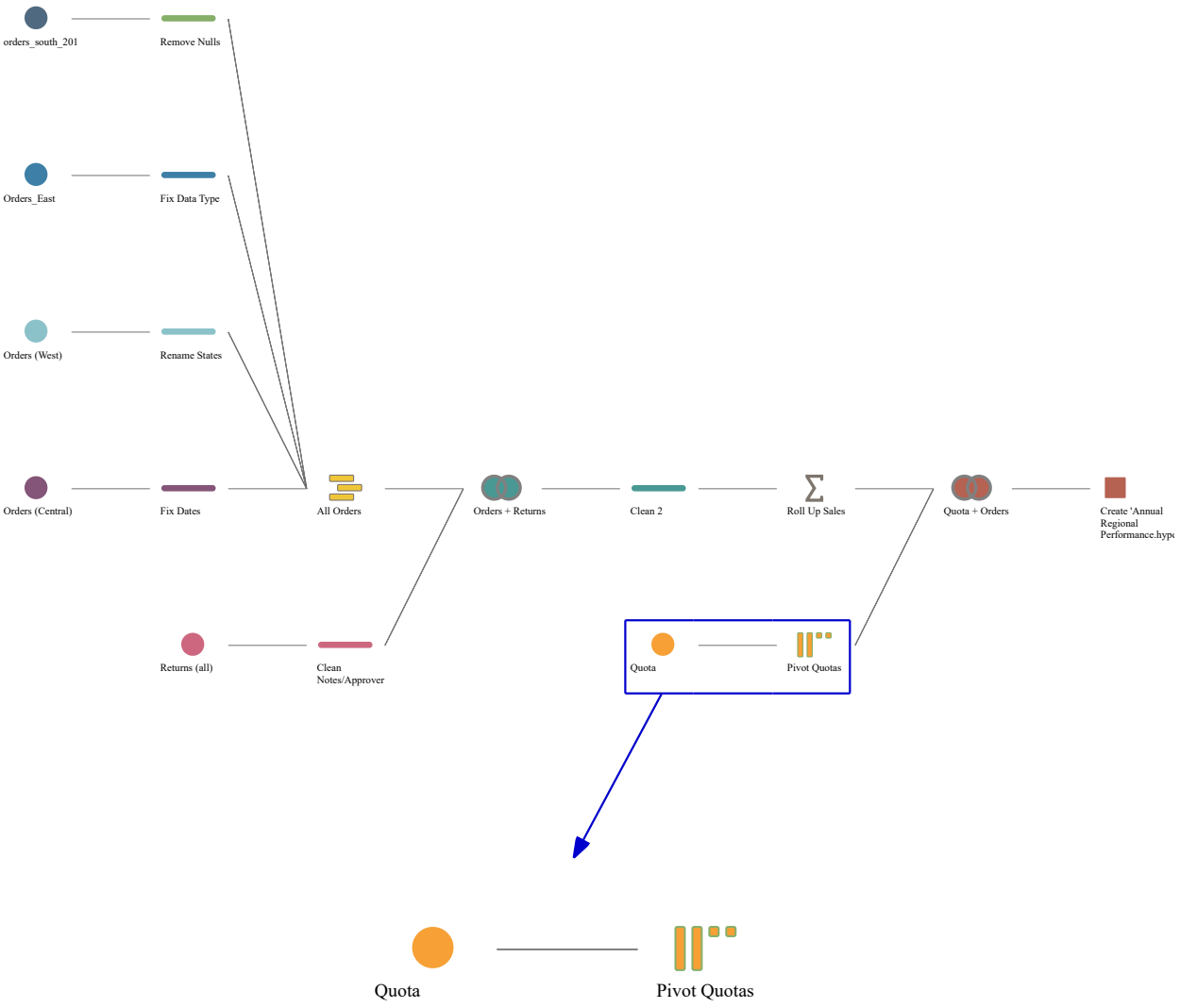
Name	Connection Type	Is Packaged?	File Name
Orders_Central.csv	.v1.SqlConnection	true	
orders_south_2015.csv	.v1.SqlConnection	true	
return reasons_new.xlsx	.v1.SqlConnection	true	
Orders_West.csv	.v1.SqlConnection	true	
Orders_East.xlsx	.v1.SqlConnection	true	
Quota.xlsx	.v1.SqlConnection	true	

Flow to *Create 'Annual Regional Performance.hyper'* Output

Flow Diagram



Section 1


orders_south_201
Remove Nulls
Orders_East
Fix Data Type
Orders (West)
Rename States
Orders (Central)
Fix Dates
All Orders
Orders + Returns
Clean 2
Roll Up Sales
Quota + Orders
Create 'Annual Regional Performance.hyp
Returns (all)
Clean Notes/Approver
Quota
Pivot Quotas
Quota
Pivot Quotas

1.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	5
Pivot Steps #	1
Actions #	1

1.2. Quota - *Input Step*

Step Type	Connection Name
LoadExcel	Quota.xlsx

1.2.1 Input Fields

Field Name	Field Type	Collation
Region	string	LEN_RIN_S2
2015	integer	
2016	integer	
2017	integer	
2018	integer	

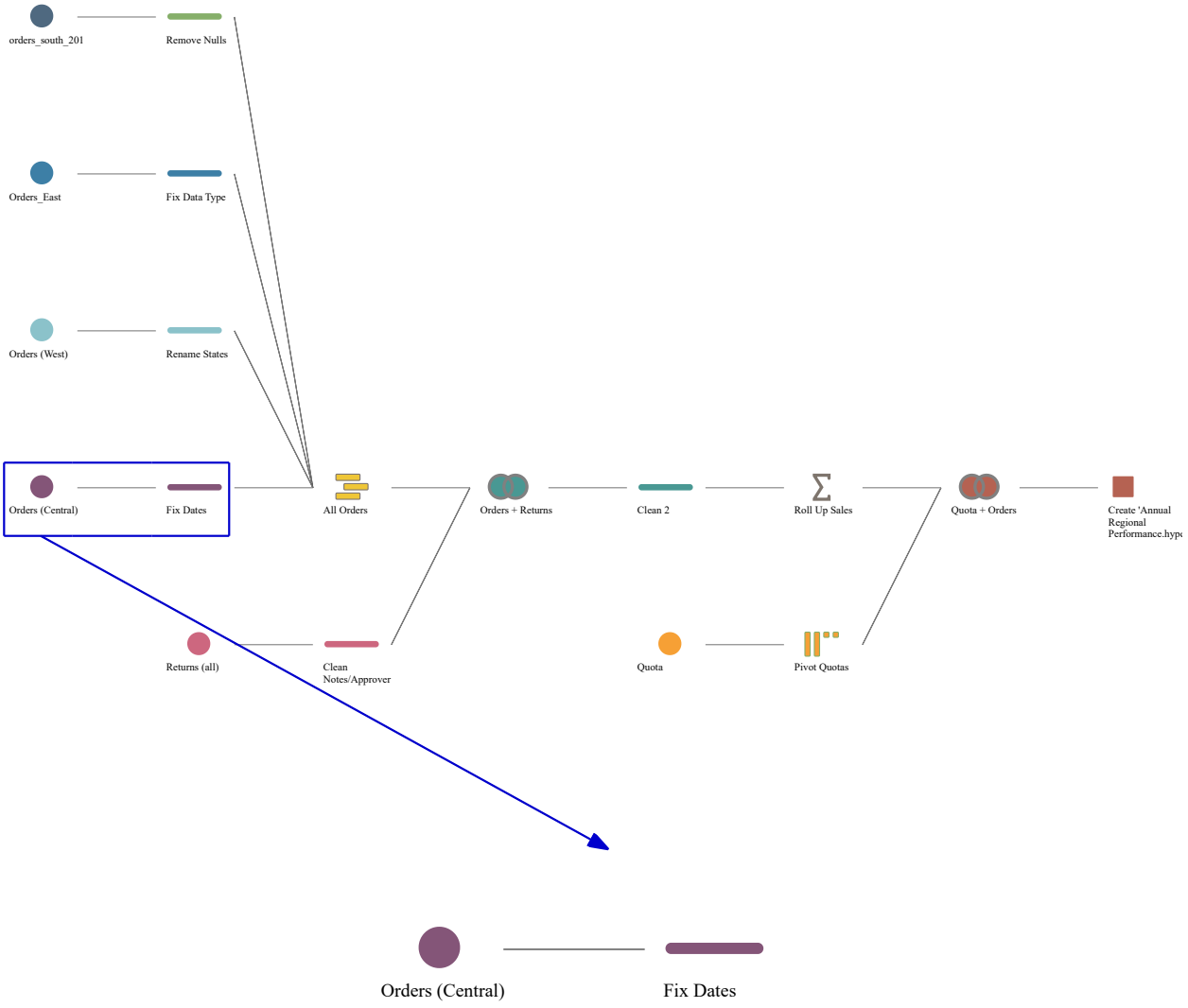
1.3. Pivot Quotas - *Pivot Step*

Step Name	Actions - After Pivot	Groups	Use Smart Defaults
Pivot Quotas	Change Year to Number (whole) 1 (ChangeColumnType) - Default	[{"expressions":[{"bindings":[{"bindingType":"literal","newColumnName":"Year","groupName":"2015"},{"bindingType":"column","newColumnName":"Quota","columnName":"2015"}]},{"bindings":[{"bindingType":"literal","newColumnName":"Year","groupName":"2016"},{"bindingType":"column","newColumnName":"Quota","columnName":"2016"}]},{"bindings":[{"bindingType":"literal","newColumnName":"Year","groupName":"2018"},{"bindingType":"column","newColumnName":"Quota","columnName":"2018"}]},{"bindings":[{"bindingType":"literal","newColumnName":"Year","groupName":"2017"},{"bindingType":"column","newColumnName":"Quota","columnName":"2017"}]}]]	false

1.3.1 Change Column Type Action

Action Name	Column Name	Type	Calculation
Change Year to Number (whole) 1	Year	integer	

Section 2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Returns (all)
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Orders (Central)
Fix Dates

2.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	24
Clean Steps #	1
Actions #	13

2.2. Orders (Central) - *Input Step*

Step Type	Connection Name	Contains Header
LoadCsv	Orders_Central.csv	true

2.2.1 Input Fields

Field Name	Field Type	Collation
Row ID	integer	
Order ID	string	LEN_RUS
Ship Mode	string	LEN_RUS
Customer ID	string	LEN_RUS
Customer Name	string	LEN_RUS
Segment	string	LEN_RUS
Country	string	LEN_RUS
City	string	LEN_RUS
State	string	LEN_RUS
Postal Code	integer	
Product ID	string	LEN_RUS
Category	string	LEN_RUS
Sub-Category	string	LEN_RUS
Product	string	LEN_RUS
Sales	real	
Quantity	integer	
Profit	real	
Order Year	integer	
Order Month	integer	
Order Day	integer	
Ship Year	integer	
Ship Month	integer	
Ship Day	integer	
Discounts	string	LEN_RUS

2.3. Fix Dates - *Clean Step*

Clean Action	Node Type
Remove Order Day	RemoveColumn
renamed Discounts to Discount	RenameColumn
Remove Ship Month	RemoveColumn
Remove Ship Day	RemoveColumn
Add Order Date	AddColumn
change Order Date to date	ChangeColumnType
Remove Order Month	RemoveColumn
change Ship Date to date	ChangeColumnType
Add Region	AddColumn
Remove Order Year	RemoveColumn
Add Ship Date	AddColumn
renamed Product to Product Name	RenameColumn
Remove Ship Year	RemoveColumn

2.3.1 Remove Column Action

Action Name	Column Name
Remove Order Day	Order Day
Remove Ship Month	Ship Month
Remove Ship Day	Ship Day
Remove Order Month	Order Month
Remove Order Year	Order Year
Remove Ship Year	Ship Year

2.3.2 Rename Column Action

Action Name	Column Name	Rename
renamed Discounts to Discount	Discounts	Discount
renamed Product to Product Name	Product	Product Name

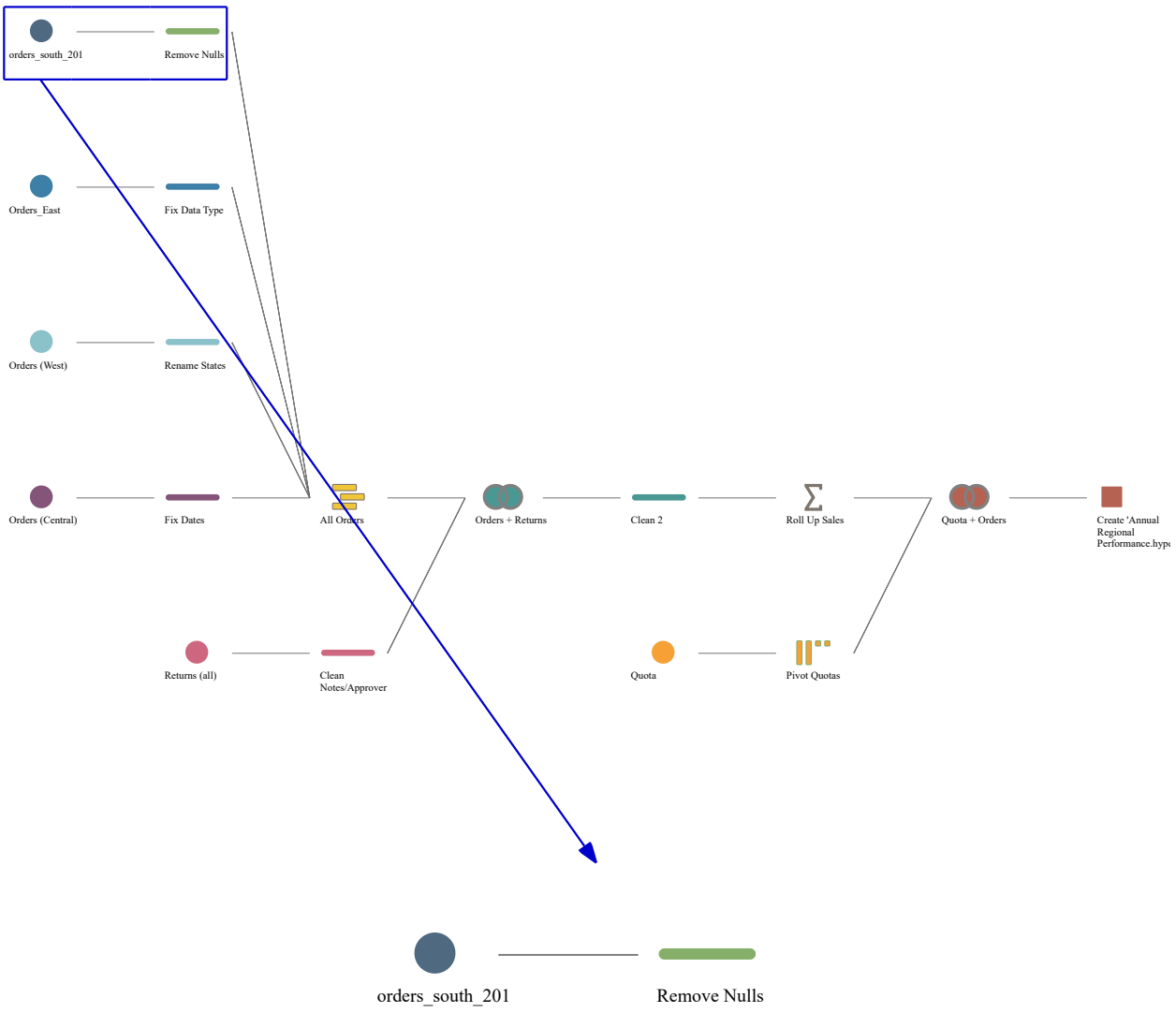
2.3.3 Add Column Action

Action Name	Column Name	Expression
Add Order Date	Order Date	(STR([Order Day])+"/"+STR([Order Month])+"/"+STR([Order Year]))
Add Region	Region	"Central"
Add Ship Date	Ship Date	STR([Ship Day])+"/"+STR([Ship Month])+"/"+STR([Ship Year])

2.3.4 Change Column Type Action

Action Name	Column Name	Type	Calculation
change Order Date to date	Order Date	date	IF NOT ISNULL(DATE(DATEPARSE("dd/MM/yyyy",[Order Date]))) THEN DATE(DATEPARSE("dd/MM/yyyy",[Order Date])) ELSEIF NOT ISNULL(DATE([Order Date])) THEN DATE([Order Date]) ELSE NULL END
change Ship Date to date	Ship Date	date	IF NOT ISNULL(DATE(DATEPARSE("dd/MM/yyyy",[Ship Date]))) THEN DATE(DATEPARSE("dd/MM/yyyy",[Ship Date])) ELSEIF NOT ISNULL(DATE([Ship Date])) THEN DATE([Ship Date]) ELSE NULL END

Section 3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Returns (all)
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Quota
Pivot Quotas
orders_south_201
Remove Nulls

3.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	22
Clean Steps #	1
Actions #	1

3.2. orders_south_2015 - *Input Step*

Step Type	Connection Name	Contains Header
LoadCsvInputUnion	orders_south_2015.csv	true

3.2.1 Input Fields

Field Name	Field Type	Collation
Sales	real	
Quantity	integer	
Profit	real	
Discount	real	
Region	string	LEN_RUS
State	string	LEN_RUS
Row ID	integer	
Order ID	string	LEN_RUS
Order Date	datetime	
Ship Date	datetime	
Ship Mode	string	LEN_RUS
Customer ID	string	LEN_RUS
Customer Name	string	LEN_RUS
Segment	string	LEN_RUS
Country	string	LEN_RUS
City	string	LEN_RUS
Postal Code	integer	
Product ID	string	LEN_RUS
Category	string	LEN_RUS
Sub-Category	string	LEN_RUS
Product Name	string	LEN_RUS
File Paths	string	LEN_RUS

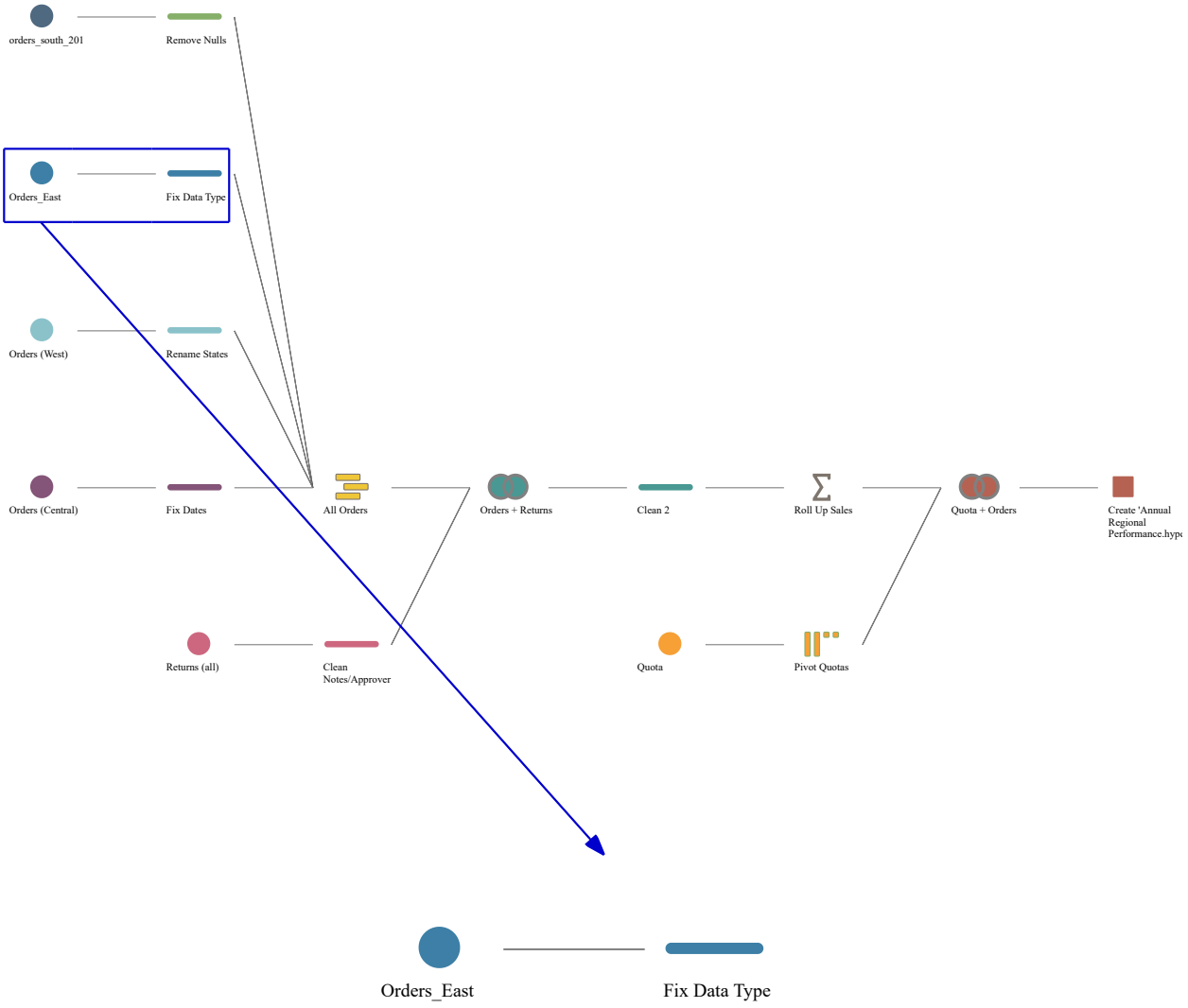
3.3. Remove Nulls - *Clean Step*

Clean Action	Node Type
Exclude Order ID:null	RangeFilter

3.3.1 Range Filter Action

Action Name	Ranges
Exclude Order ID:null	Order ID-->[{"startValue":null,"includeStart":true,"endValue":null,"includeEnd":true}]

Section 4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Orders_East
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Fix Dates
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Orders + Returns
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Roll Up Sales
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Returns (all)
Clean Notes/Approver
Quota
Pivot Quotas
Orders_East
Fix Data Type

4.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	21
Clean Steps #	1
Actions #	3

4.2. Orders_East - *Input Step*

Step Type	Connection Name
LoadExcel	Orders_East.xlsx

4.2.1 Input Fields

Field Name	Field Type	Collation
Category	string	LEN_RIN_S2
City	string	LEN_RIN_S2
Country	string	LEN_RIN_S2
Customer ID	string	LEN_RIN_S2
Customer Name	string	LEN_RIN_S2
Discount	real	
Order Date	date	
Order ID	string	LEN_RIN_S2
Postal Code	integer	
Product ID	string	LEN_RIN_S2
Product Name	string	LEN_RIN_S2
Profit	real	
Quantity	integer	
Region	string	LEN_RIN_S2
Row ID	integer	
Segment	string	LEN_RIN_S2
Ship Date	date	
Ship Mode	string	LEN_RIN_S2
State	string	LEN_RIN_S2
Sub-Category	string	LEN_RIN_S2
Sales	string	LEN_RIN_S2

4.3. Fix Data Type - *Clean Step*

Clean Action	Node Type
change Discount to string 1	ChangeColumnType
Quick Calc 1	QuickCalcColumn
change Sales to real 1	ChangeColumnType

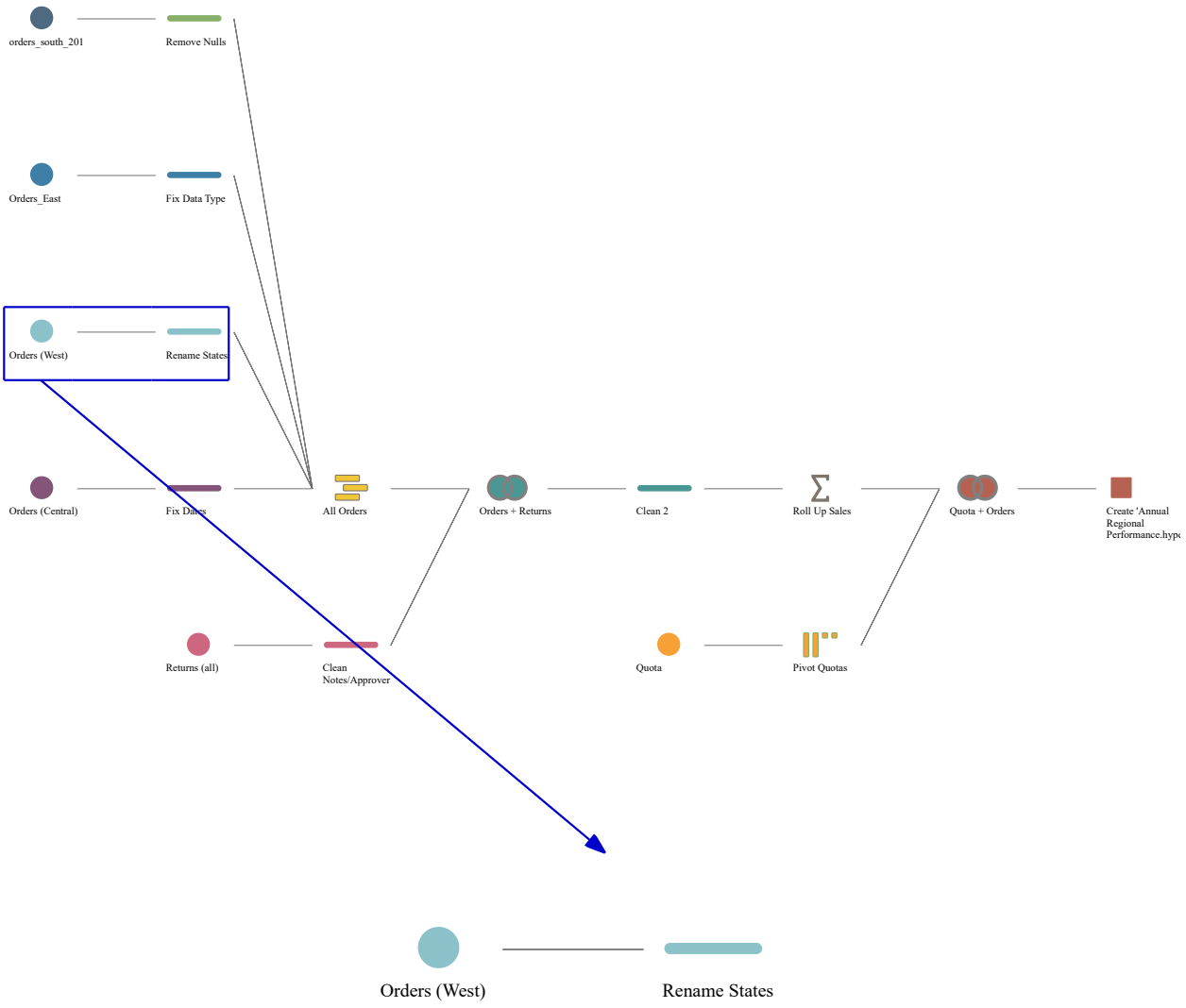
4.3.1 Change Column Type Action

Action Name	Column Name	Type	Calculation
change Discount to string 1	Discount	string	
change Sales to real 1	Sales	real	

4.3.2 Calculated Field Action

Action Name	Column Name	Expression	Calc. Expression Type
Quick Calc 1	Sales	REGEXP_REPLACE([Sales], '[:Letter:]', '')	RemoveLetters

Section 5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Orders + Returns
Clean 2
Roll Up Sales
Quota + Orders
Create 'Annual Regional Performance.hyp
Returns (all)
Clean Notes/Approver
Quota
Pivot Quotas
Orders (West)
Rename States

5.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	41
Clean Steps #	1
Actions #	2

5.2. Orders (West) - *Input Step*

Step Type	Connection Name	Actions	Contains Header
LoadCsv	Orders_West.csv	RemoveColumns	true

5.2.1 Input Fields

Field Name	Field Type	Collation
Row ID	integer	
Order ID	string	LEN_RUS
Order Date	datetime	
Ship Date	datetime	
Ship Mode	string	LEN_RUS
Customer ID	string	LEN_RUS
Customer Name	string	LEN_RUS
Segment	string	LEN_RUS
Country	string	LEN_RUS
City	string	LEN_RUS
Postal Code	integer	
Region	string	LEN_RUS
Product ID	string	LEN_RUS
Category	string	LEN_RUS
Sub-Category	string	LEN_RUS
Product Name	string	LEN_RUS
Sales	real	
Quantity	integer	
Discount	real	
Profit	real	
Right_Row ID	integer	
Right_Order Date	datetime	
Right_Ship Date	datetime	
Right_Ship Mode	string	LEN_RUS
Right_Customer ID	string	LEN_RUS
Right_Customer Name	string	LEN_RUS
Right_Segment	string	LEN_RUS
Right_Country	string	LEN_RUS
Right_City	string	LEN_RUS
Right_State2	string	LEN_RUS
Right_Postal Code	integer	
Right_Region	string	LEN_RUS
Right_Product ID	string	LEN_RUS
Right_Category	string	LEN_RUS
Right_Sub-Category	string	LEN_RUS
Right_Product Name	string	LEN_RUS
Right_Sales	real	
Right_Quantity	integer	
Right_Discount	real	
Right_Profit	real	
State	string	LEN_RUS

5.2.1 Remove Columns Action

Column Names
Right_Row ID
Right_Order Date
Right_Ship Date
Right_Ship Mode
Right_Customer ID
Right_Customer Name
Right_Segment
Right_Country
Right_City
Right_State2
Right_Postal Code
Right_Region
Right_Product ID
Right_Category
Right_Sub-Category
Right_Product Name
Right_Sales
Right_Quantity
Right_Discount
Right_Profit

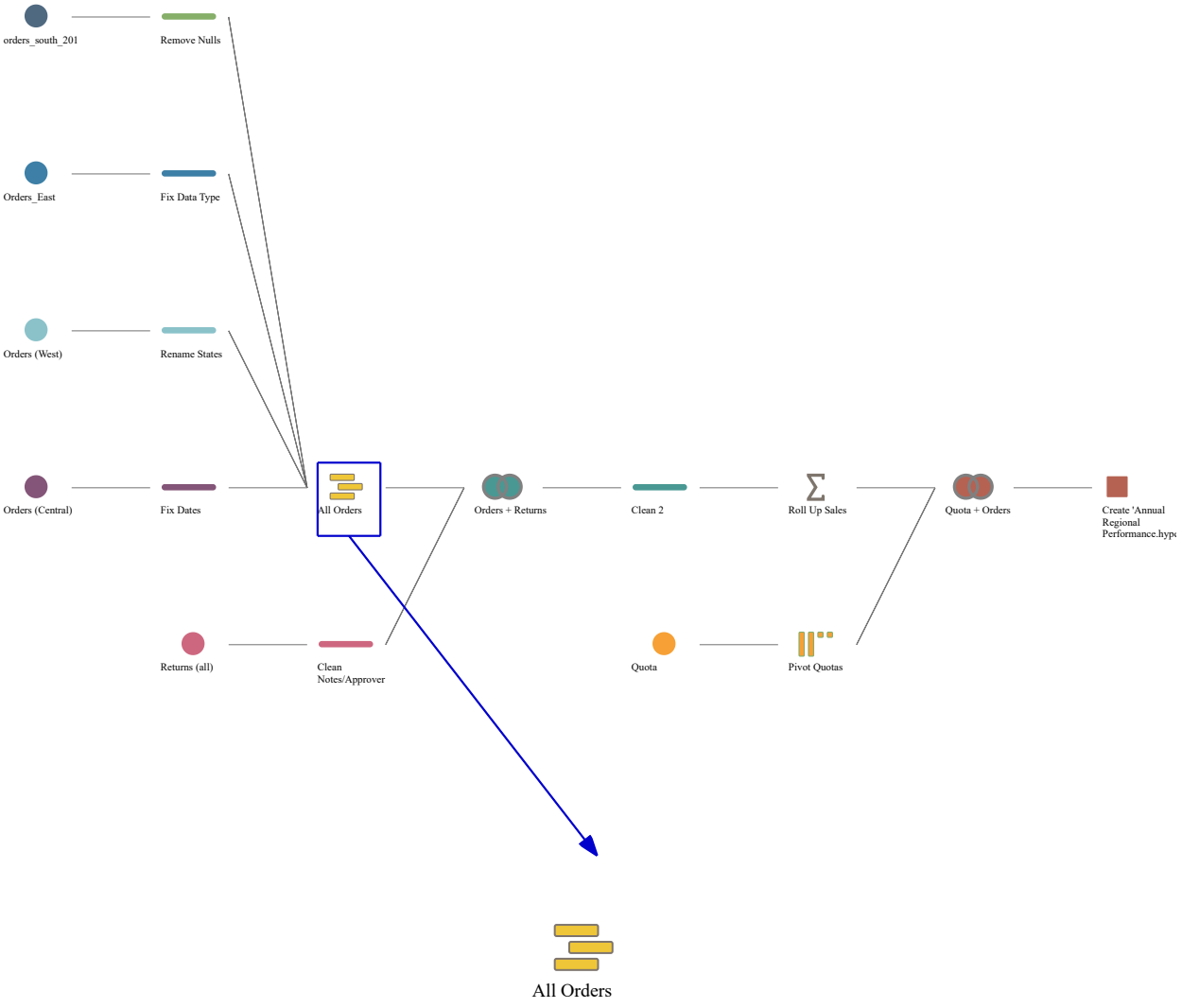
5.3. Rename States - *Clean Step*

Clean Action	Node Type
18 values replaced with 9 values.	Remap

5.3.1 Remap Action

Action Name	Column Name	Values
18 values replaced with 9 values.	State	{"\"Arizona\"":["\"AZ\"","\"Arizona\""],"\"California\"":["\"CA\"","\"California\""],"\"Colorado\"":["\"CO\"","\"Colorado\""],"\"Idaho\"":["\"ID\"","\"Idaho\""],"\"Montana\"":["\"MT\"","\"Montana\""],"\"New Mexico\"":["\"NM\"","\"New Mexico\""],"\"Oregon\"":["\"OR\"","\"Oregon\""],"\"Washington\"":["\"WA\"","\"Washington\""],"\"Utah\"":["\"UT\"","\"Utah\""]}

Section 6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Quota + Orders
Create 'Annual Regional Performance.hyp
Returns (all)
Clean Notes/Approver
Quota
Pivot Quotas
All Orders

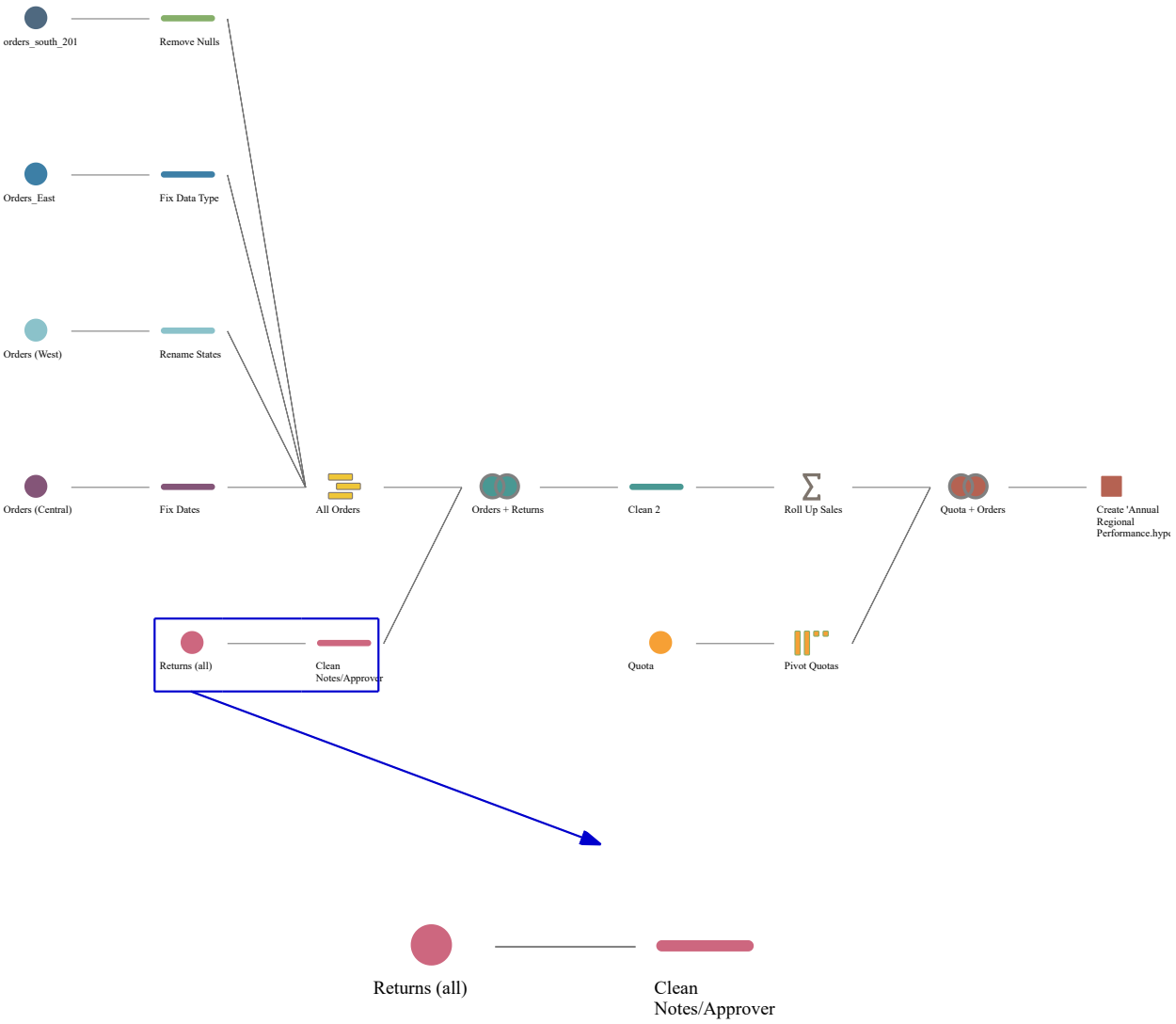
6.1 Summary Stats

	Counts
Union Steps #	1

6.2. All Orders - *Union Step*

Step Name	Sources
All Orders	Fix Dates Remove Nulls Fix Data Type Rename States

Section 7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Returns (all)
Clean Notes/Approver
Quota
Pivot Quotas
Returns (all)
Clean Notes/Approver

7.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	9
Clean Steps #	1
Actions #	7

7.2. Returns (all) - *Input Step*

Step Type	Connection Name	Actions
LoadExcel	return reasons_new.xlsx	RemoveColumns

7.2.1 Input Fields

Field Name	Field Type	Collation
Row ID	integer	
Order Date	string	LEN_RIN_S2
Order ID	string	LEN_RIN_S2
Product ID	string	LEN_RIN_S2
Sub-Category	string	LEN_RIN_S2
Manufacturer	string	LEN_RIN_S2
Product Name	string	LEN_RIN_S2
Return Reason	string	LEN_RIN_S2
Notes	string	LEN_RIN_S2

7.2.1 Remove Columns Action

Column Names
Row ID
Order Date
Sub-Category
Manufacturer
Product Name

7.3. Clean Notes/Approver - *Clean Step*

Clean Action	Node Type
renamed Notes - Split 2 to Approver	RenameColumn
Remove Notes	RemoveColumn
renamed Notes - Split 1 to Return Notes	RenameColumn
Clean 1	Remap
Add Notes - Split 1	AddColumn
Add Notes - Split 2	AddColumn

7.3.1 Remove Column Action

Action Name	Column Name
Remove Notes	Notes

7.3.2 Rename Column Action

Action Name	Column Name	Rename
renamed Notes - Split 2 to Approver	Notes - Split 2	Approver
renamed Notes - Split 1 to Return Notes	Notes - Split 1	Return Notes

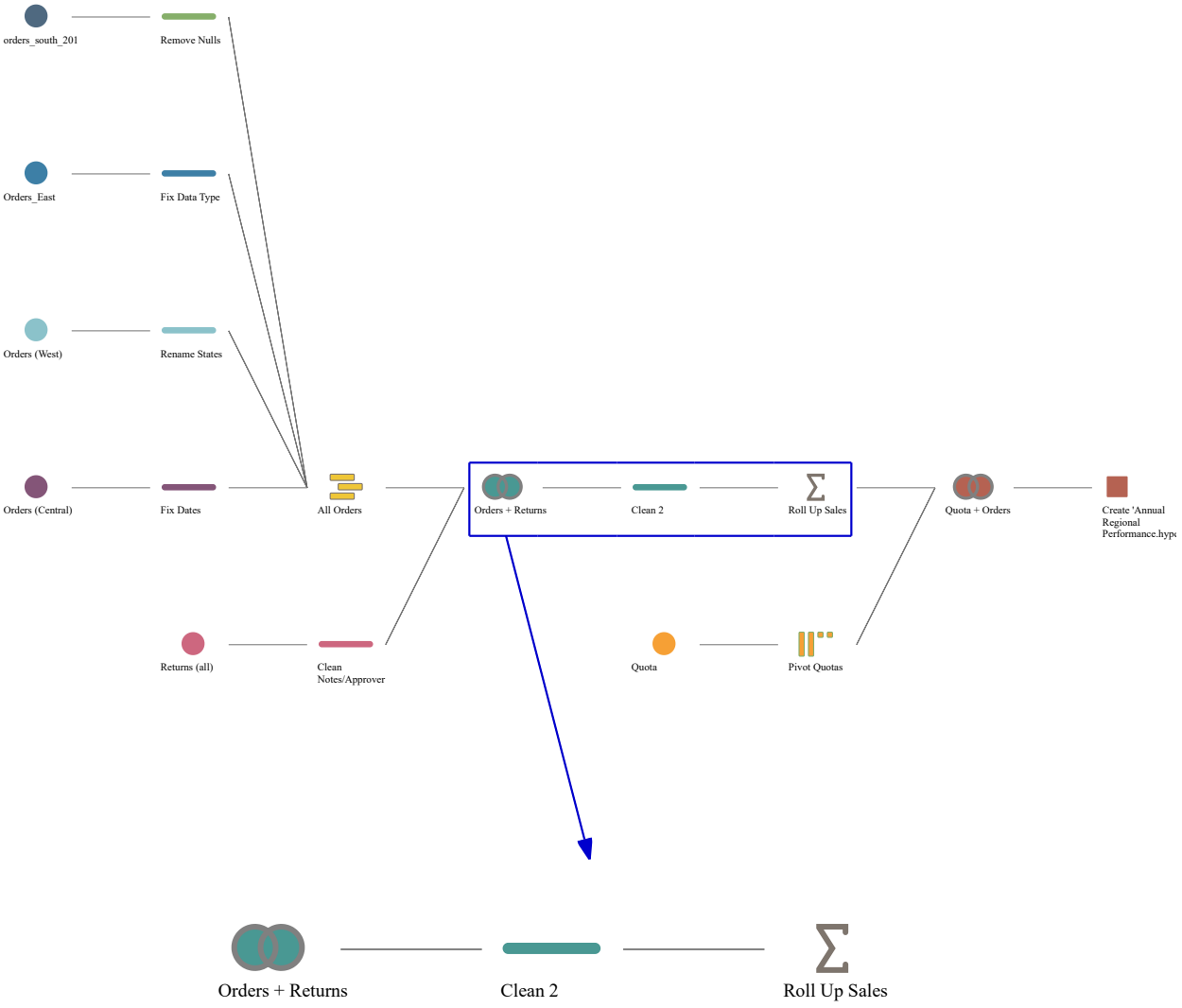
7.3.3 Add Column Action

Action Name	Column Name	Expression
Add Notes - Split 1	Notes - Split 1	TRIM(SPLIT([Notes], "-", 1))
Add Notes - Split 2	Notes - Split 2	TRIM(SPLIT([Notes], "-", 2))

7.3.4 Remap Action

Action Name	Column Name	Values
Clean 1	Approver	{"\"M Gomez\"":["\"M/ Gomez\"","\"M. Gomez\"","\"M Gomez\""],"\"S Kelly\"":["\"S Kelly\"","\"S. Kelly\""],"\"F Azad\"":["\"F. Azad\"","\"F Azad\""],"\"L Smith\"":["\"L. Smith\"","\"L Smith\""],"\"G Lindsay\"":["\"G. Lindsay\"","\"G Lindsay\""],"\"R Chen\"":["\"R Chen\"","\"R. Chen\""],"\"K Lawrence\"":["\"K. Lawrence\"","\"K Lawrence\""],"\"L Jenkins\"":["\"L. Jenkins\"","\"L Jenkins\""],"\"R Duchesne\"":["\"R. Duchesne\"","\"R Duchesne\""]}

Section 8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Orders + Returns
Clean 2
Roll Up Sales

8.1 Summary Stats

	Counts
Join Steps #	1
Aggregate Steps #	1
Clean Steps #	1
Actions #	11

8.2. Orders + Returns - *Join Step*

Step Name	Actions - Before Join	Conditions	Join Type	Sources
Orders + Returns	Change Discount to Number (decimal) 1 (ChangeColumnType) - Right Add Days to Ship (AddColumn) - Right Add Returned? (AddColumn) - Left Remove Table Names 1 (RemoveColumns) - Right Remove File Paths 1 (RemoveColumns) - Right Add Discount (AddColumn) - Right Add Year of Sale (AddColumn) - Right Exclude Discount:(17 - 18) 1 (RangeFilter) - Right	[{"leftExpression":"[Product ID]","rightExpression":"[Product ID]","comparator":"=="},{"leftExpression":"[Order ID]","rightExpression":"[Order ID]","comparator":"=="}]	right	All Orders Clean Notes/Approver

8.2.1 Remove Columns Action

Action Name	Column Names	Is Before	Name Space
Remove Table Names 1	Table Names	true	Right
Remove File Paths 1	File Paths	true	Right

8.2.2 Range Filter Action

Action Name	Ranges	Is Before	Name Space
Exclude Discount:(17 - 18) 1	Discount--> [{"startValue":"17.0","includeStart":true,"endValue":"18.0","includeEnd":false}]	true	Right

8.2.3 Add Column Action

Action Name	Column Name	Expression	Is Before	Name Space
Add Days to Ship	Days to Ship	DATEDIFF('day',[Order Date],[Ship Date])	true	Right
Add Returned?	Returned?	IF ISNULL([Return Reason]) = false THEN "Yes" ELSE "No" END	true	Left
Add Discount	Discount	IFNULL([Discount],0)	true	Right
Add Year of Sale	Year of Sale	YEAR([Order Date])	true	Right

8.2.4 Change Column Type Action

Action Name	Column Name	Type	Calculation	Is Before	Name Space
Change Discount to Number (decimal) 1	Discount	real		true	Right

8.3. Clean 2 - *Clean Step*

Clean Action	Node Type
renamed Product ID-1 to Product ID 1	RenameColumn
Remove Product ID 1	RemoveColumns
Remove Order ID-1 1	RemoveColumns

8.3.1 Remove Columns Action

Action Name	Column Names
Remove Product ID 1	Product ID
Remove Order ID-1 1	Order ID-1

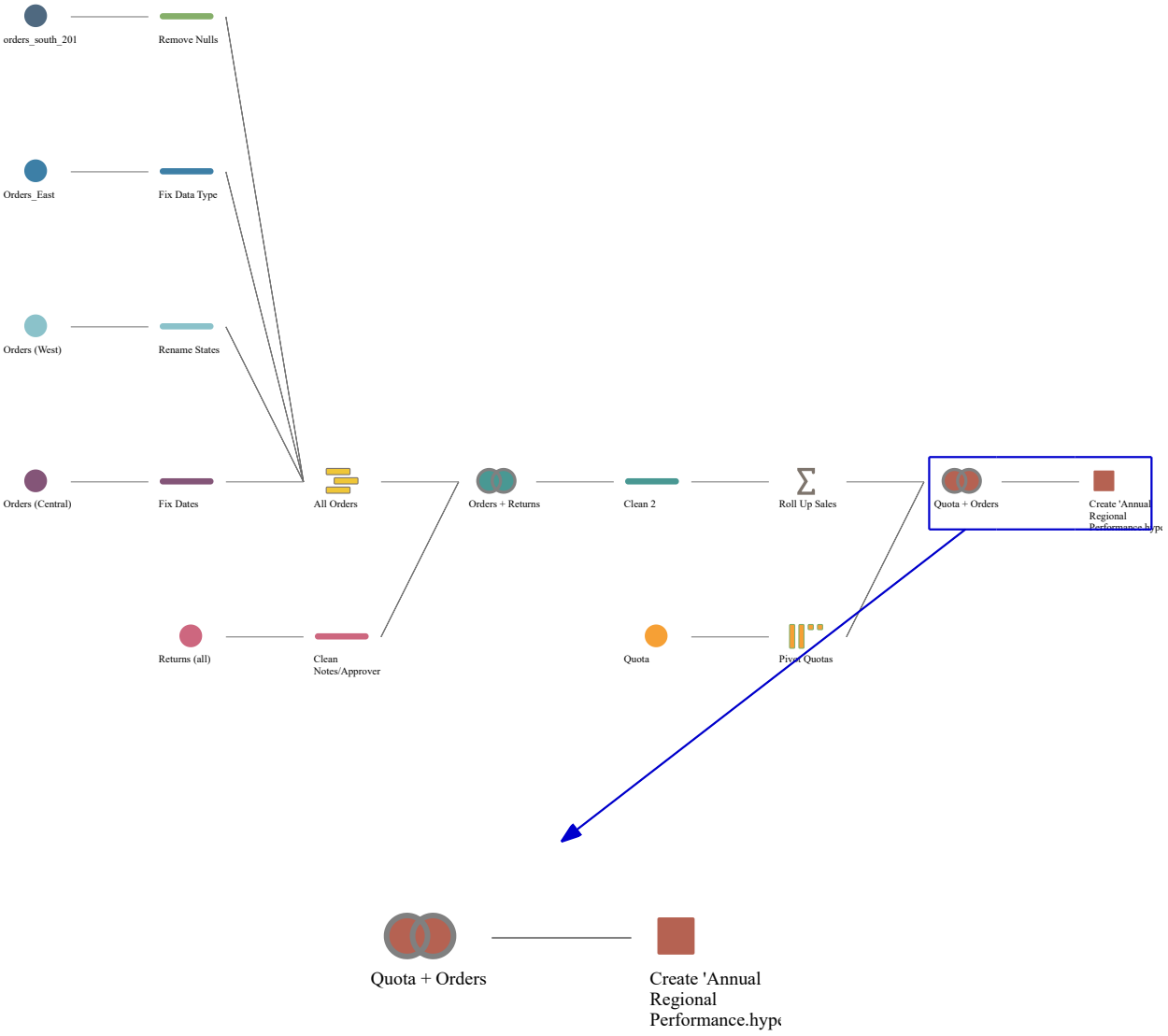
8.3.2 Rename Column Action

Action Name	Column Name	Rename
renamed Product ID-1 to Product ID 1	Product ID-1	Product ID

8.4. Roll Up Sales - *Aggregate Step*

Step Name	Group By Fields	Aggregate Fields
Roll Up Sales	Region, Year of Sale	Profit - SUM, Sales - SUM, Quantity - SUM, Discount - AVG

Section 9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Create 'Annual Regional Performance.hyp

9.1 Summary Stats

	Counts
Output Steps #	1
Join Steps #	1

9.2. Quota + Orders - *Join Step*

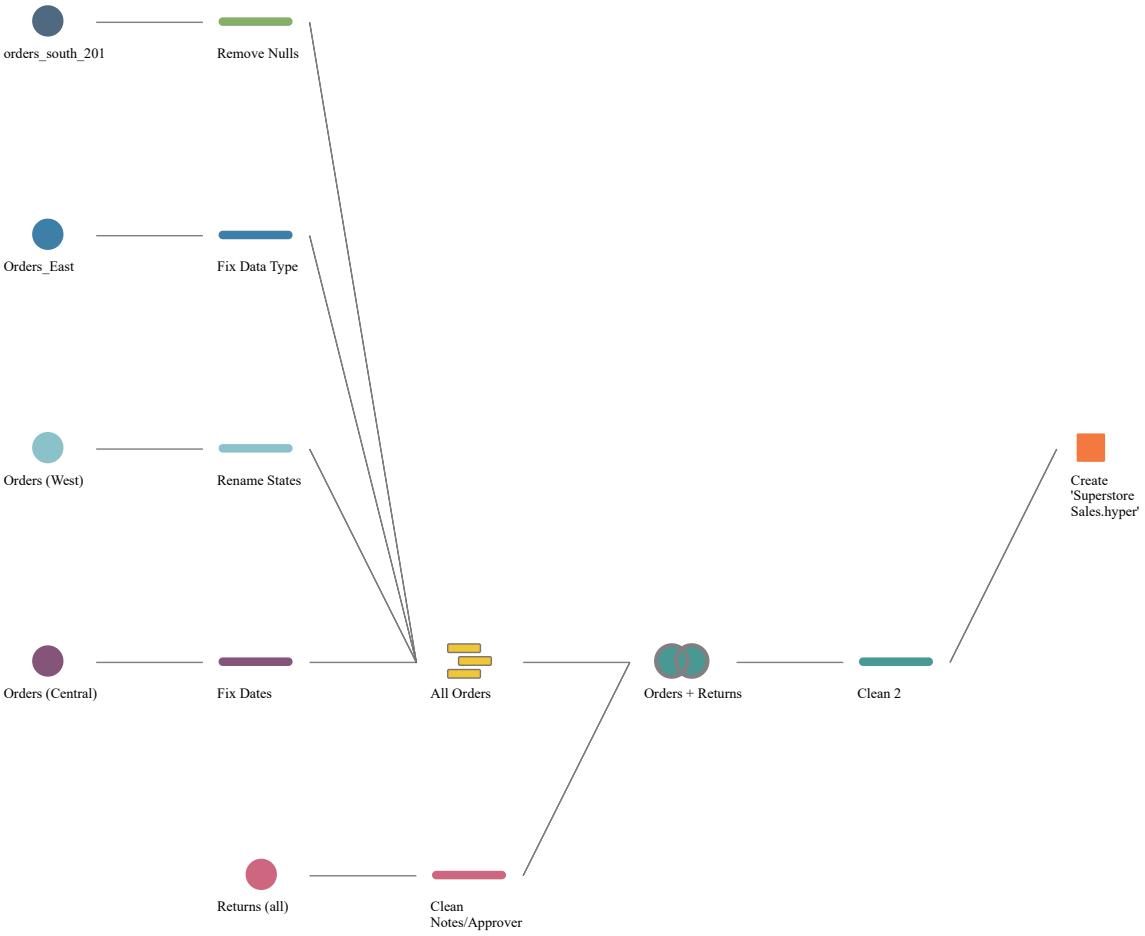
Step Name	Conditions	Join Type	Sources
Quota + Orders	[{"leftExpression":"[Region]","rightExpression":"[Region]","comparator":"=="},{"leftExpression":"[Year]","rightExpression":"[Year of Sale]","comparator":"=="}]	inner	Pivot Quotas Roll Up Sales

9.3. Create 'Annual Regional Performance.hyper' - *Output Step - Write to Hyper*

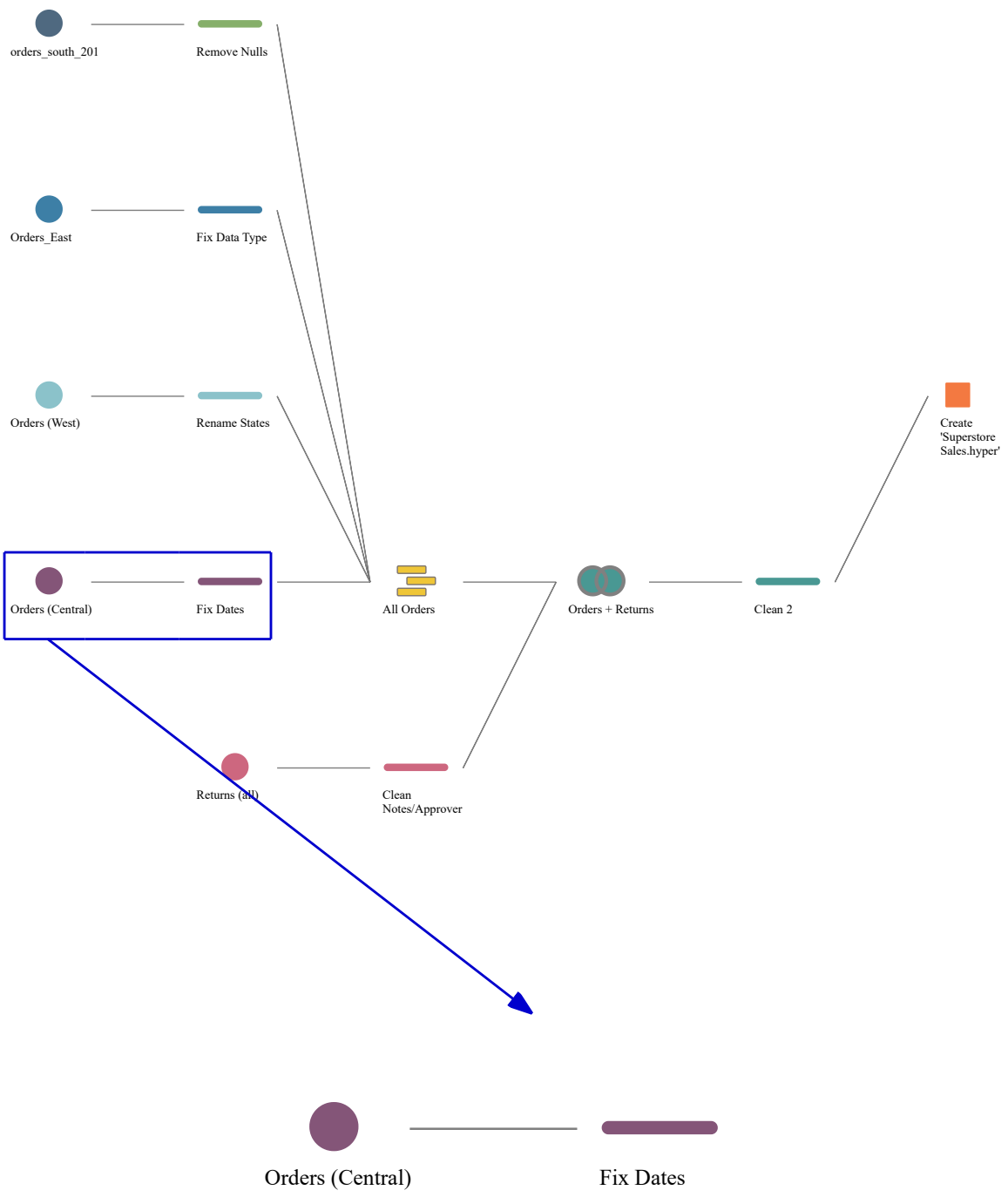
Step Name	Step Type	Hyper Output File	TDS Output
Create 'Annual Regional Performance.hyper'	WriteToHyper	~/My Tableau Prep Repository/Datasources/Annual Regional Performance.hyper	~/My Tableau Prep Repository/Datasources/Annual Regional Performance.tds

Flow to *Create 'Superstore Sales.hyper'* Output

Flow Diagram



Section 10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Fix Dates

10.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	24
Clean Steps #	1
Actions #	13

10.2. Orders (Central) - *Input Step*

Step Type	Connection Name	Contains Header
LoadCsv	Orders_Central.csv	true

10.2.1 Input Fields

Field Name	Field Type	Collation
Row ID	integer	
Order ID	string	LEN_RUS
Ship Mode	string	LEN_RUS
Customer ID	string	LEN_RUS
Customer Name	string	LEN_RUS
Segment	string	LEN_RUS
Country	string	LEN_RUS
City	string	LEN_RUS
State	string	LEN_RUS
Postal Code	integer	
Product ID	string	LEN_RUS
Category	string	LEN_RUS
Sub-Category	string	LEN_RUS
Product	string	LEN_RUS
Sales	real	
Quantity	integer	
Profit	real	
Order Year	integer	
Order Month	integer	
Order Day	integer	
Ship Year	integer	
Ship Month	integer	
Ship Day	integer	
Discounts	string	LEN_RUS

10.3. Fix Dates - *Clean Step*

Clean Action	Node Type
Remove Order Day	RemoveColumn
renamed Discounts to Discount	RenameColumn
Remove Ship Month	RemoveColumn
Remove Ship Day	RemoveColumn
Add Order Date	AddColumn
change Order Date to date	ChangeColumnType
Remove Order Month	RemoveColumn
change Ship Date to date	ChangeColumnType
Add Region	AddColumn
Remove Order Year	RemoveColumn
Add Ship Date	AddColumn
renamed Product to Product Name	RenameColumn
Remove Ship Year	RemoveColumn

10.3.1 Remove Column Action

Action Name	Column Name
Remove Order Day	Order Day
Remove Ship Month	Ship Month
Remove Ship Day	Ship Day
Remove Order Month	Order Month
Remove Order Year	Order Year
Remove Ship Year	Ship Year

10.3.2 Rename Column Action

Action Name	Column Name	Rename
renamed Discounts to Discount	Discounts	Discount
renamed Product to Product Name	Product	Product Name

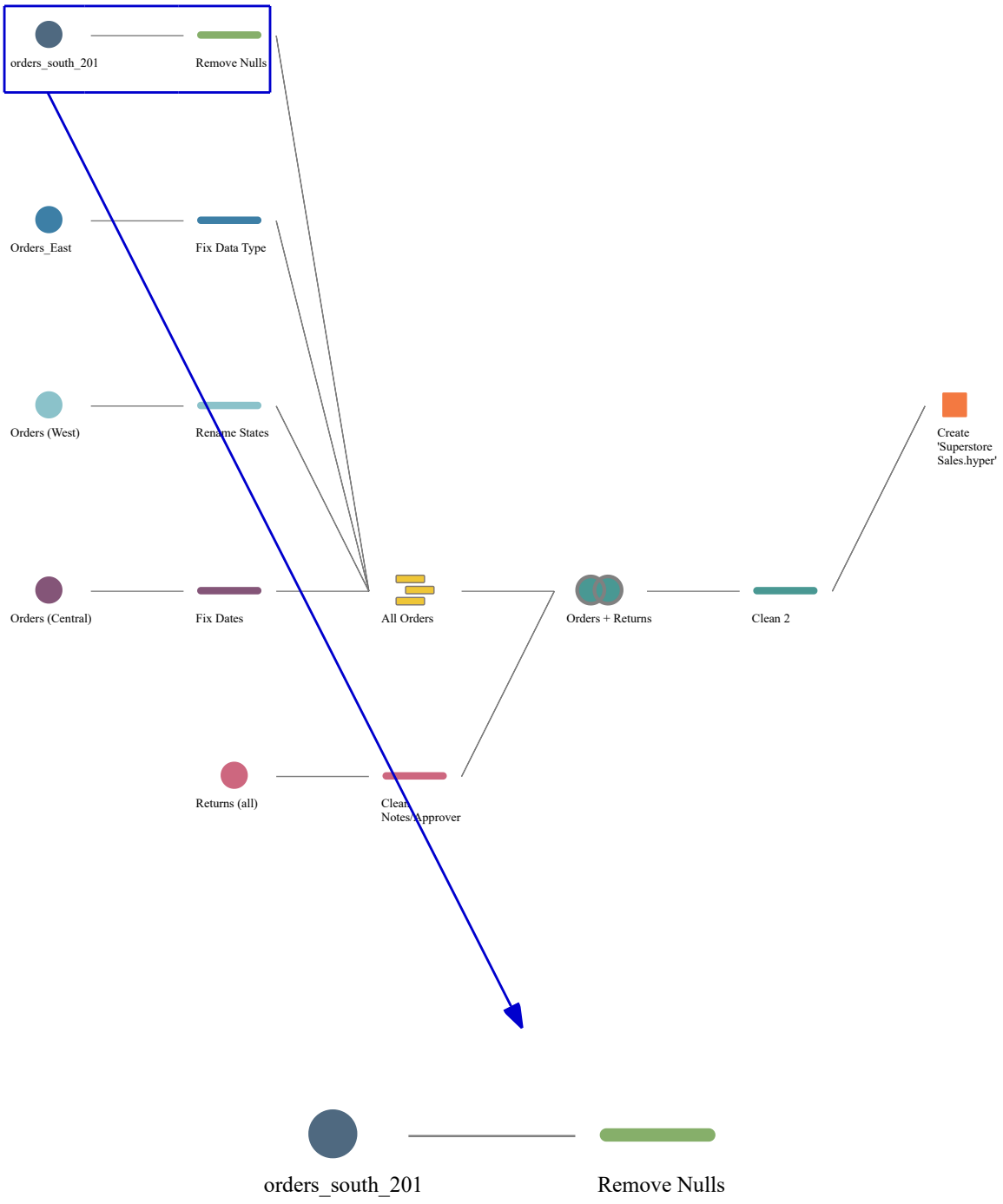
10.3.3 Add Column Action

Action Name	Column Name	Expression
Add Order Date	Order Date	(STR([Order Day])+"/"+STR([Order Month])+"/"+STR([Order Year]))
Add Region	Region	"Central"
Add Ship Date	Ship Date	STR([Ship Day])+"/"+STR([Ship Month])+"/"+STR([Ship Year])

10.3.4 Change Column Type Action

Action Name	Column Name	Type	Calculation
change Order Date to date	Order Date	date	IF NOT ISNULL(DATE(DATEPARSE("dd/MM/yyyy",[Order Date]))) THEN DATE(DATEPARSE("dd/MM/yyyy",[Order Date])) ELSEIF NOT ISNULL(DATE([Order Date])) THEN DATE([Order Date]) ELSE NULL END
change Ship Date to date	Ship Date	date	IF NOT ISNULL(DATE(DATEPARSE("dd/MM/yyyy",[Ship Date]))) THEN DATE(DATEPARSE("dd/MM/yyyy",[Ship Date])) ELSEIF NOT ISNULL(DATE([Ship Date])) THEN DATE([Ship Date]) ELSE NULL END

Section 11


orders_south_201
Remove Nulls
Orders_East
Fix Data Type
Orders (West)
Rename States
Orders (Central)
Fix Dates
All Orders
Orders + Returns
Clean 2
Create
'Superstore
Sales.hyper'
Returns (all)
Clean
Notes/Approver
orders_south_201
Remove Nulls

11.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	22
Clean Steps #	1
Actions #	1

11.2. orders_south_2015 - *Input Step*

Step Type	Connection Name	Contains Header
LoadCsvInputUnion	orders_south_2015.csv	true

11.2.1 Input Fields

Field Name	Field Type	Collation
Sales	real	
Quantity	integer	
Profit	real	
Discount	real	
Region	string	LEN_RUS
State	string	LEN_RUS
Row ID	integer	
Order ID	string	LEN_RUS
Order Date	datetime	
Ship Date	datetime	
Ship Mode	string	LEN_RUS
Customer ID	string	LEN_RUS
Customer Name	string	LEN_RUS
Segment	string	LEN_RUS
Country	string	LEN_RUS
City	string	LEN_RUS
Postal Code	integer	
Product ID	string	LEN_RUS
Category	string	LEN_RUS
Sub-Category	string	LEN_RUS
Product Name	string	LEN_RUS
File Paths	string	LEN_RUS

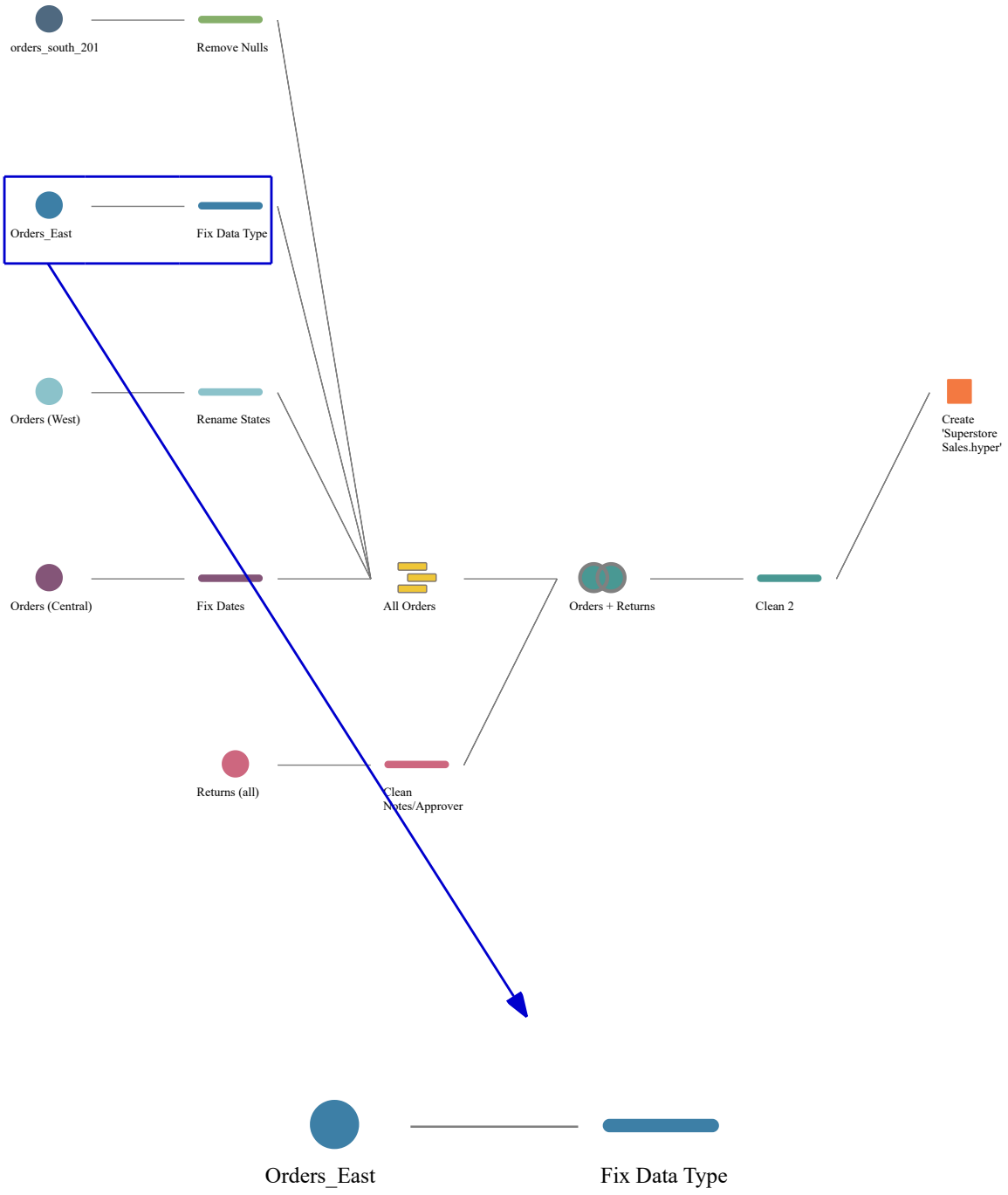
11.3. Remove Nulls - *Clean Step*

Clean Action	Node Type
Exclude Order ID:null	RangeFilter

11.3.1 Range Filter Action

Action Name	Ranges
Exclude Order ID:null	Order ID-->[{"startValue":null,"includeStart":true,"endValue":null,"includeEnd":true}]

Section 12


orders_south_201
Remove Nulls
Orders_East
Fix Data Type
Orders (West)
Rename States
Orders (Central)
Fix Dates
All Orders
Orders + Returns
Clean 2
Create
'Superstore
Sales.hyper'
Returns (all)
Clean
Notes/Approver
Orders_East
Fix Data Type

12.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	21
Clean Steps #	1
Actions #	3

12.2. Orders_East - *Input Step*

Step Type	Connection Name
LoadExcel	Orders_East.xlsx

12.2.1 Input Fields

Field Name	Field Type	Collation
Category	string	LEN_RIN_S2
City	string	LEN_RIN_S2
Country	string	LEN_RIN_S2
Customer ID	string	LEN_RIN_S2
Customer Name	string	LEN_RIN_S2
Discount	real	
Order Date	date	
Order ID	string	LEN_RIN_S2
Postal Code	integer	
Product ID	string	LEN_RIN_S2
Product Name	string	LEN_RIN_S2
Profit	real	
Quantity	integer	
Region	string	LEN_RIN_S2
Row ID	integer	
Segment	string	LEN_RIN_S2
Ship Date	date	
Ship Mode	string	LEN_RIN_S2
State	string	LEN_RIN_S2
Sub-Category	string	LEN_RIN_S2
Sales	string	LEN_RIN_S2

12.3. Fix Data Type - *Clean Step*

Clean Action	Node Type
change Discount to string 1	ChangeColumnType
Quick Calc 1	QuickCalcColumn
change Sales to real 1	ChangeColumnType

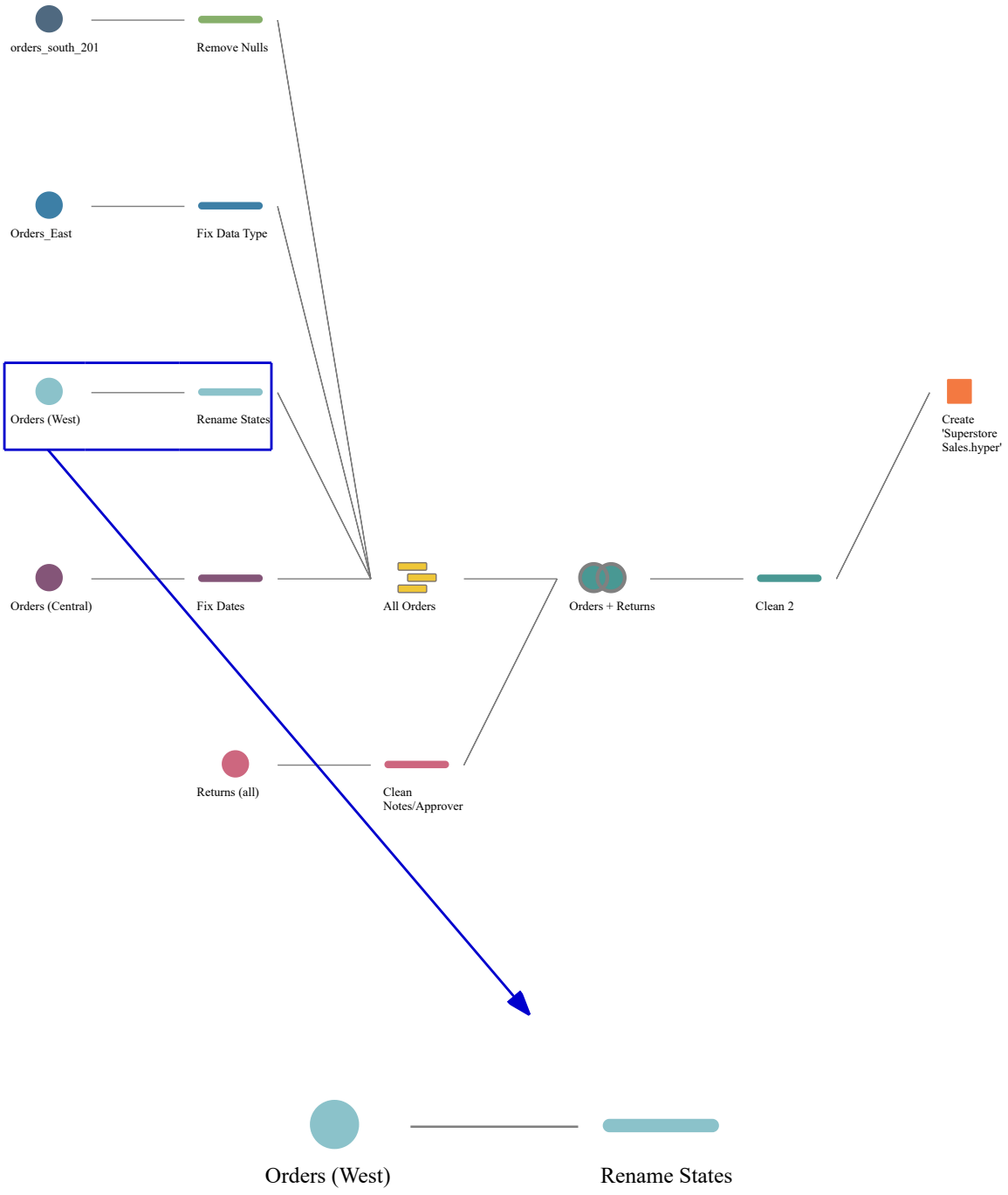
12.3.1 Change Column Type Action

Action Name	Column Name	Type	Calculation
change Discount to string 1	Discount	string	
change Sales to real 1	Sales	real	

12.3.2 Calculated Field Action

Action Name	Column Name	Expression	Calc. Expression Type
Quick Calc 1	Sales	REGEXP_REPLACE([Sales], '[:Letter:]', '')	RemoveLetters

Section 13


orders_south_201
Remove Nulls
Orders_East
Fix Data Type
Orders (West)
Rename States
Orders (Central)
Fix Dates
All Orders
Orders + Returns
Clean 2
Create
'Superstore
Sales.hyper'
Returns (all)
Clean
Notes/Approver
Orders (West)
Rename States

13.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	41
Clean Steps #	1
Actions #	2

13.2. Orders (West) - *Input Step*

Step Type	Connection Name	Actions	Contains Header
LoadCsv	Orders_West.csv	RemoveColumns	true

13.2.1 Input Fields

Field Name	Field Type	Collation
Row ID	integer	
Order ID	string	LEN_RUS
Order Date	datetime	
Ship Date	datetime	
Ship Mode	string	LEN_RUS
Customer ID	string	LEN_RUS
Customer Name	string	LEN_RUS
Segment	string	LEN_RUS
Country	string	LEN_RUS
City	string	LEN_RUS
Postal Code	integer	
Region	string	LEN_RUS
Product ID	string	LEN_RUS
Category	string	LEN_RUS
Sub-Category	string	LEN_RUS
Product Name	string	LEN_RUS
Sales	real	
Quantity	integer	
Discount	real	
Profit	real	
Right_Row ID	integer	
Right_Order Date	datetime	
Right_Ship Date	datetime	
Right_Ship Mode	string	LEN_RUS
Right_Customer ID	string	LEN_RUS
Right_Customer Name	string	LEN_RUS
Right_Segment	string	LEN_RUS
Right_Country	string	LEN_RUS
Right_City	string	LEN_RUS
Right_State2	string	LEN_RUS
Right_Postal Code	integer	
Right_Region	string	LEN_RUS
Right_Product ID	string	LEN_RUS
Right_Category	string	LEN_RUS
Right_Sub-Category	string	LEN_RUS
Right_Product Name	string	LEN_RUS
Right_Sales	real	
Right_Quantity	integer	
Right_Discount	real	
Right_Profit	real	
State	string	LEN_RUS

13.2.1 Remove Columns Action

Column Names
Right_Row ID
Right_Order Date
Right_Ship Date
Right_Ship Mode
Right_Customer ID
Right_Customer Name
Right_Segment
Right_Country
Right_City
Right_State2
Right_Postal Code
Right_Region
Right_Product ID
Right_Category
Right_Sub-Category
Right_Product Name
Right_Sales
Right_Quantity
Right_Discount
Right_Profit

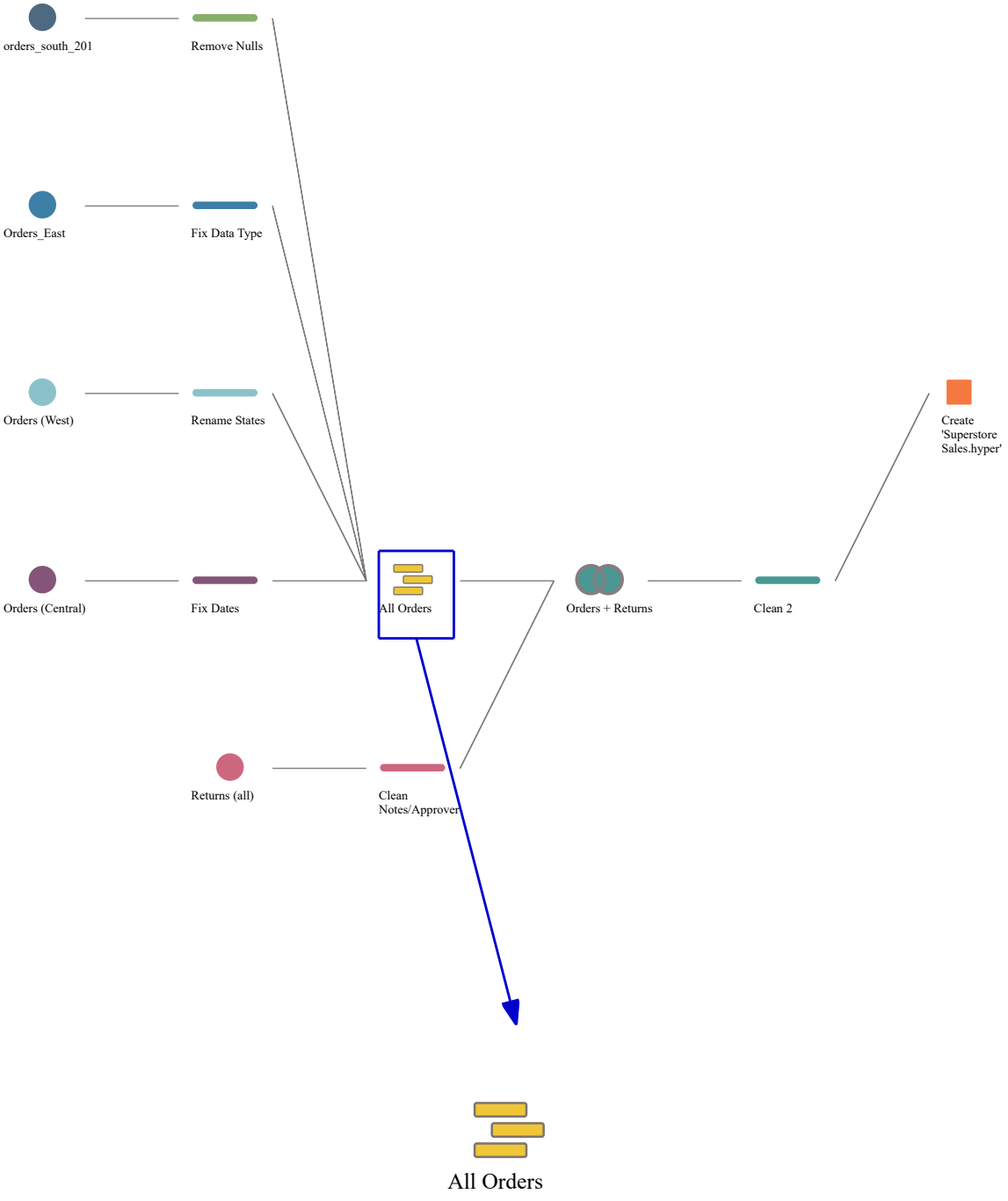
13.3. Rename States - *Clean Step*

Clean Action	Node Type
18 values replaced with 9 values.	Remap

13.3.1 Remap Action

Action Name	Column Name	Values
18 values replaced with 9 values.	State	{"\"Arizona\"":["\"AZ\"","\"Arizona\""],"\"California\"":["\"CA\"","\"California\""],"\"Colorado\"":["\"CO\"","\"Colorado\""],"\"Idaho\"":["\"ID\"","\"Idaho\""],"\"Montana\"":["\"MT\"","\"Montana\""],"\"New Mexico\"":["\"NM\"","\"New Mexico\""],"\"Oregon\"":["\"OR\"","\"Oregon\""],"\"Washington\"":["\"WA\"","\"Washington\""],"\"Utah\"":["\"UT\"","\"Utah\""]}

Section 14


orders_south_201
Remove Nulls
Orders_East
Fix Data Type
Orders (West)
Rename States
Orders (Central)
Fix Dates
All Orders
Orders + Returns
Clean 2
Create 'Superstore Sales.hyper'
Returns (all)
Clean Notes/Approver
All Orders

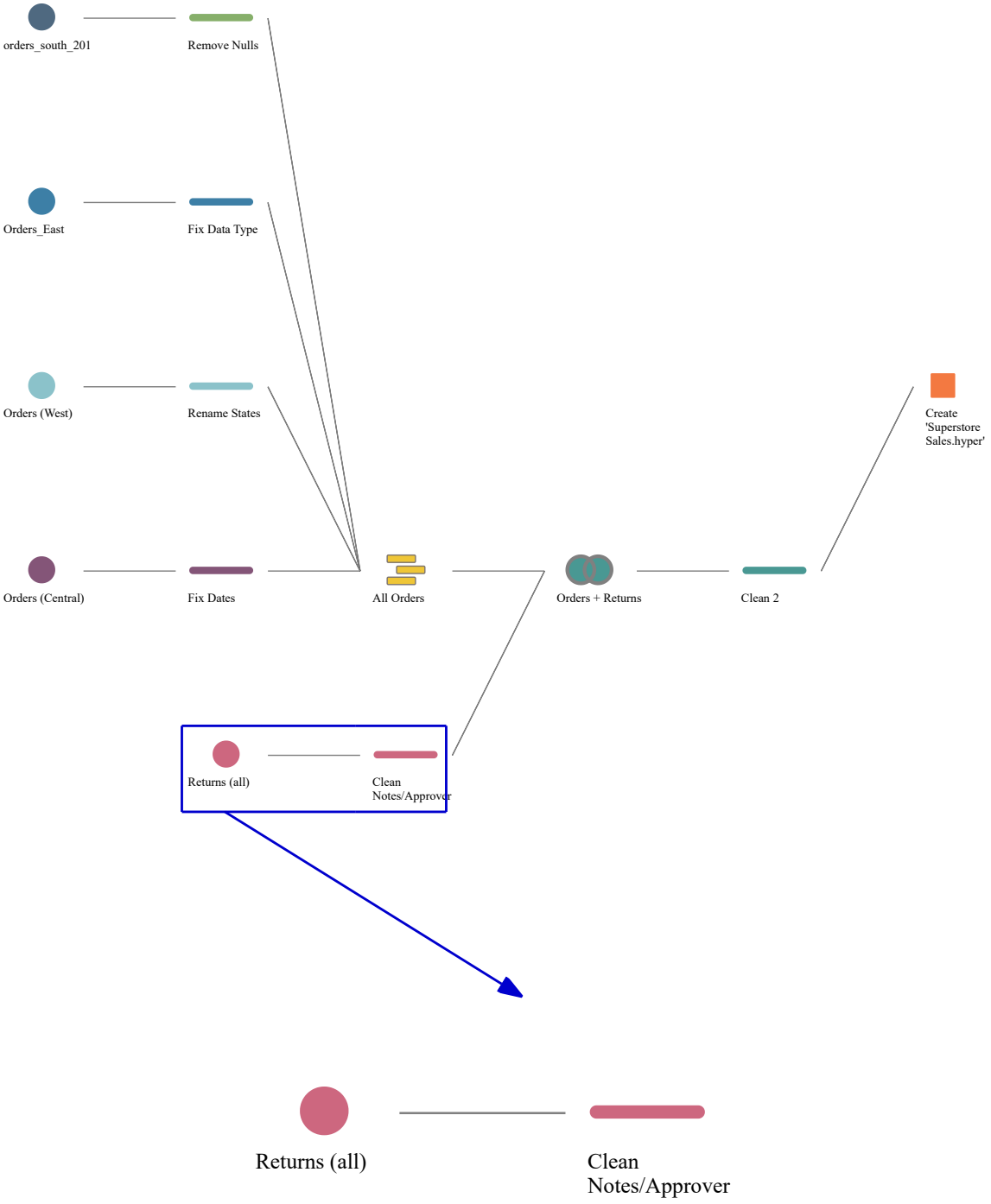
14.1 Summary Stats

	Counts
Union Steps #	1

14.2. All Orders - *Union Step*

Step Name	Sources
All Orders	Fix Dates Remove Nulls Fix Data Type Rename States

Section 15


orders_south_201
Remove Nulls
Orders_East
Fix Data Type
Orders (West)
Rename States
Orders (Central)
Fix Dates
All Orders
Orders + Returns
Clean 2
Create 'Superstore Sales.hyper'
Returns (all)
Clean Notes/Approver
Returns (all)
Clean Notes/Approver

15.1 Summary Stats

	Counts
Input Steps #	1
Input Fields #	9
Clean Steps #	1
Actions #	7

15.2. Returns (all) - *Input Step*

Step Type	Connection Name	Actions
LoadExcel	return reasons_new.xlsx	RemoveColumns

15.2.1 Input Fields

Field Name	Field Type	Collation
Row ID	integer	
Order Date	string	LEN_RIN_S2
Order ID	string	LEN_RIN_S2
Product ID	string	LEN_RIN_S2
Sub-Category	string	LEN_RIN_S2
Manufacturer	string	LEN_RIN_S2
Product Name	string	LEN_RIN_S2
Return Reason	string	LEN_RIN_S2
Notes	string	LEN_RIN_S2

15.2.1 Remove Columns Action

Column Names
Row ID
Order Date
Sub-Category
Manufacturer
Product Name

15.3. Clean Notes/Approver - *Clean Step*

Clean Action	Node Type
renamed Notes - Split 2 to Approver	RenameColumn
Remove Notes	RemoveColumn
renamed Notes - Split 1 to Return Notes	RenameColumn
Clean 1	Remap
Add Notes - Split 1	AddColumn
Add Notes - Split 2	AddColumn

15.3.1 Remove Column Action

Action Name	Column Name
Remove Notes	Notes

15.3.2 Rename Column Action

Action Name	Column Name	Rename
renamed Notes - Split 2 to Approver	Notes - Split 2	Approver
renamed Notes - Split 1 to Return Notes	Notes - Split 1	Return Notes

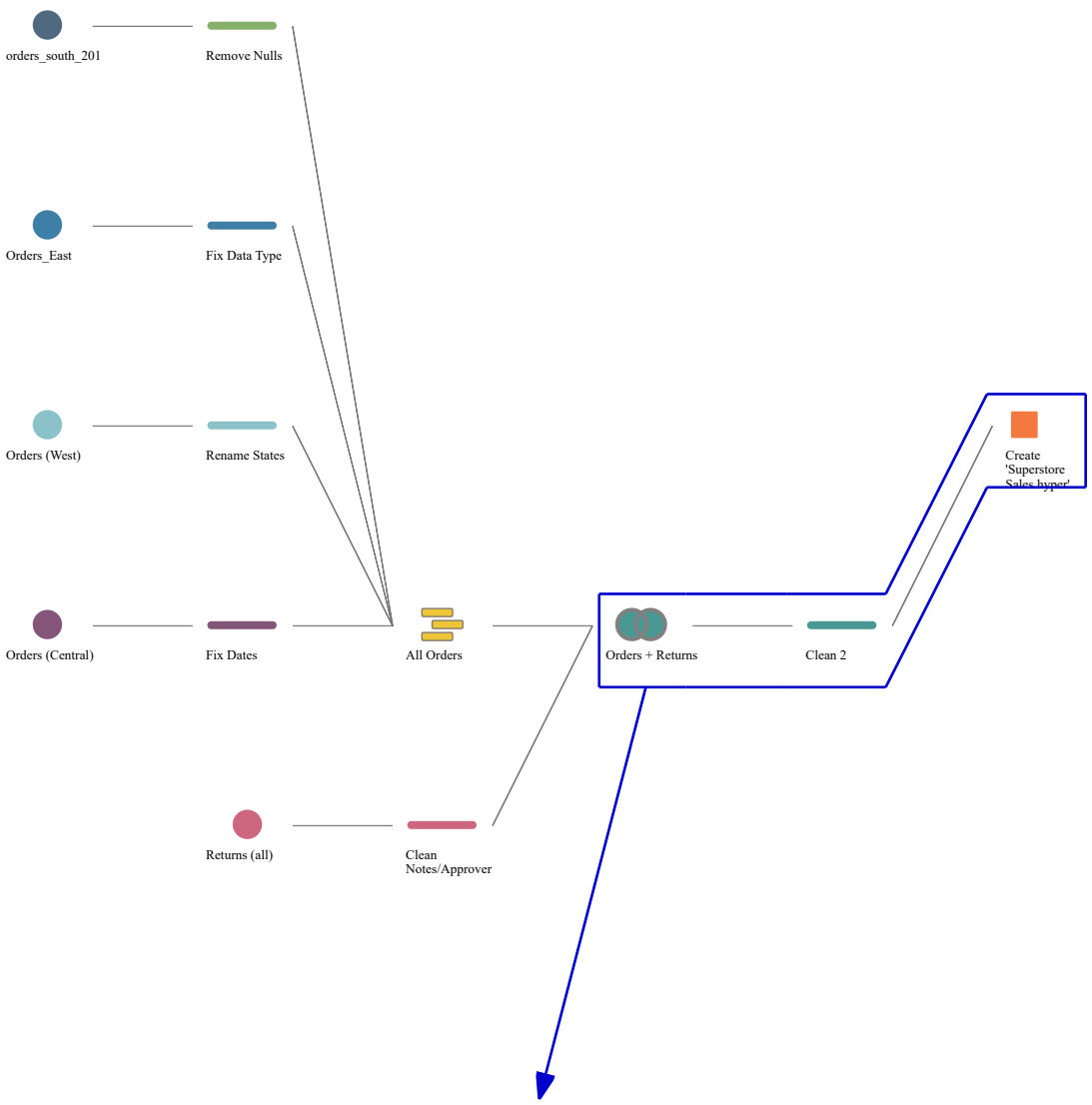
15.3.3 Add Column Action

Action Name	Column Name	Expression
Add Notes - Split 1	Notes - Split 1	TRIM(SPLIT([Notes], "-", 1))
Add Notes - Split 2	Notes - Split 2	TRIM(SPLIT([Notes], "-", 2))

15.3.4 Remap Action

Action Name	Column Name	Values
Clean 1	Approver	{"\"M Gomez\"":["\"M/ Gomez\"","\"M. Gomez\"","\"M Gomez\""],"\"S Kelly\"":["\"S Kelly\"","\"S. Kelly\""],"\"F Azad\"":["\"F. Azad\"","\"F Azad\""],"\"L Smith\"":["\"L. Smith\"","\"L Smith\""],"\"G Lindsay\"":["\"G. Lindsay\"","\"G Lindsay\""],"\"R Chen\"":["\"R Chen\"","\"R. Chen\""],"\"K Lawrence\"":["\"K. Lawrence\"","\"K Lawrence\""],"\"L Jenkins\"":["\"L. Jenkins\"","\"L Jenkins\""],"\"R Duchesne\"":["\"R. Duchesne\"","\"R Duchesne\""]}

Section 16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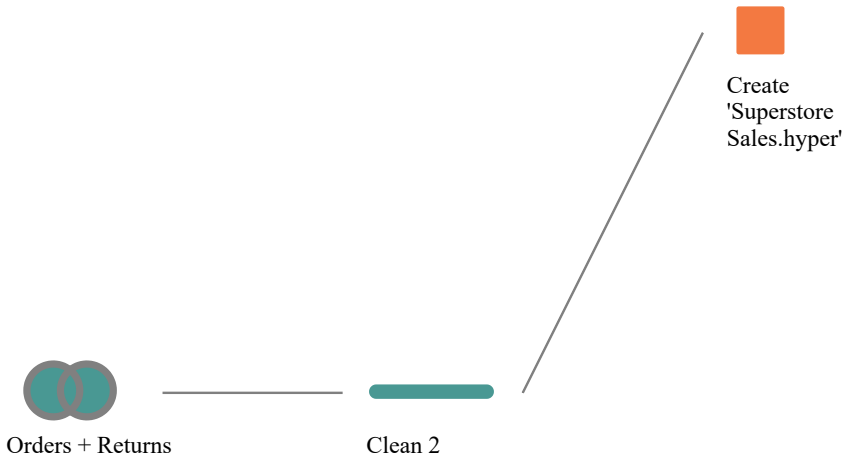
Clean 2
Create 'Superstore Sales.hyper'
Returns (all)
Clean Notes/Approver


Create 'Superstore Sales.hyper'
Orders + Returns
Clean 2

16.1 Summary Stats

	Counts
Output Steps #	1
Join Steps #	1
Clean Steps #	1
Actions #	11

16.2. Orders + Returns - *Join Step*

Step Name	Actions - Before Join	Conditions	Join Type	Sources
Orders + Returns	Change Discount to Number (decimal) 1 (ChangeColumnType) - Right Add Days to Ship (AddColumn) - Right Add Returned? (AddColumn) - Left Remove Table Names 1 (RemoveColumns) - Right Remove File Paths 1 (RemoveColumns) - Right Add Discount (AddColumn) - Right Add Year of Sale (AddColumn) - Right Exclude Discount:(17 - 18) 1 (RangeFilter) - Right	[{"leftExpression":"[Product ID]","rightExpression":"[Product ID]","comparator":"=="},{"leftExpression":"[Order ID]","rightExpression":"[Order ID]","comparator":"=="}]	right	All Orders Clean Notes/Approver

16.2.1 Remove Columns Action

Action Name	Column Names	Is Before	Name Space
Remove Table Names 1	Table Names	true	Right
Remove File Paths 1	File Paths	true	Right

16.2.2 Range Filter Action

Action Name	Ranges	Is Before	Name Space
Exclude Discount:(17 - 18) 1	Discount--> [{"startValue":"17.0","includeStart":true,"endValue":"18.0","includeEnd":false}]	true	Right

16.2.3 Add Column Action

Action Name	Column Name	Expression	Is Before	Name Space
Add Days to Ship	Days to Ship	DATEDIFF('day',[Order Date],[Ship Date])	true	Right
Add Returned?	Returned?	IF ISNULL([Return Reason]) = false THEN "Yes" ELSE "No" END	true	Left
Add Discount	Discount	IFNULL([Discount],0)	true	Right
Add Year of Sale	Year of Sale	YEAR([Order Date])	true	Right

16.2.4 Change Column Type Action

Action Name	Column Name	Type	Calculation	Is Before	Name Space
Change Discount to Number (decimal) 1	Discount	real		true	Right

16.3. Clean 2 - *Clean Step*

Clean Action	Node Type
renamed Product ID-1 to Product ID 1	RenameColumn
Remove Product ID 1	RemoveColumns
Remove Order ID-1 1	RemoveColumns

16.3.1 Remove Columns Action

Action Name	Column Names
Remove Product ID 1	Product ID
Remove Order ID-1 1	Order ID-1

16.3.2 Rename Column Action

Action Name	Column Name	Rename
renamed Product ID-1 to Product ID 1	Product ID-1	Product ID

16.4. Create 'Superstore Sales.hyper' - *Output Step - Write to Hyper*

Step Name	Step Type	Hyper Output File	TDS Output
Create 'Superstore Sales.hyper'	WriteToHyper	~/My Tableau Prep Repository/Datasources/Superstore Sales.hyper	~/My Tableau Prep Repository/Datasources/Superstore Sales.tds