**Tableau Pulse Series: Hands-On Prep Builder for Healthcare and Life Sciences**



Tableau Prep Builder helps analysts and business users get data ready for analysis

* Prep makes data preparation visual and direct just like building a viz
* Prep has smart defaults, so users don’t have to do repetitive tasks
* Prep is tightly integrated with Tableau so users can quickly analyze data

Tableau Prep Conductor lets users schedule and run Prep flows in a scalable, reliable, and secure environment. Customers can centralize the scheduling, monitoring, and administration of data preparation performed in Tableau Prep.

**Hands-On Instructions**

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| Open Tableau Prep and have your 3 .csv files readily available: | Today we will get hands on with Tableau Prep Builder and Conductor.  We will be covering four main topics:   1. How to connect to data in Prep Builder 2. How to combine and integrate multiple data sets through joins and unions 3. How we can interact with and clean data 4. And finally, share and refresh the data on Tableau Server.   We first need to clean and join 3 Medical Billing files. |
| Screen Clipping | **CONNECTING TO DATA:**   1. Click on the Add Connection https://onlinehelp.tableau.com/v0.0/maestro/en-us/Img/maestro_addconnetion.png button 2. Show flat file connections and server options   Connect to Data   1. Select Text File under To a File 2. Open **Medical Claims 2013-2014.csv** 3. Add a Clean Step |
| A screenshot of a cell phone  Description automatically generated        Screen Clipping | Clean Medical Claims #1:  Under each Profile – or column of data – is a bar chart. These small visualizations are based off the number of rows for each value and help me identify trends.   1. Note the Profile pane *(columns of data)* 2. Bar chart – see many rows a value is made up of.   Clean Admission Source   1. Find 3 ellipses -> Group Values -> Manual Selection 2. Select Physician Referral and also check ‘Doctor Refferral’ and ‘GP Refferal’ 3. Note ‘Refferal’ is spelled wrong but that’s OK the grouping takes care of that. 4. Do the same Grouping for ‘Missing Information’ and ‘Information Not Available’   Clean Rejection Reasons:   1. Find ellipses Clean-> Remove Letters   Double Click on step where it says Clean 1, rename to Medical Claims ’13-14 Clean  Integrate second Medical Claims 2014-2017 csv   1. Find + to add a new file, choose Text File and find this second file 2. These files need to be Unioned as they are the same data, just different years. 3. Hold and drag the second file on top of your cleaned Medical Claims 2013-2014 |
|  | Fix Mismatched Fields:  There are a few columns of data in each dataset that have the same values but are named differently. We can simply selected fields and Tableau will show us the corresponding match.   1. Fix mismatched fields for Copay, Admit Code, Discharge Code & Reject or Accept |
|  | Cleaning the Union  Now that we have our fields merged, let’s clean up our dataset.   1. Add a Clean Step 2. Find Admission Source -> click right into Nulls and replace with “Not Applicable” 3. Remove column: ‘Table Name’ 4. Create a New Calculation: Percent Paid   *([Paid AMT])/ ([Charge AMT])* |
|  | Let’s take a moment and check our work so far. Right click on your latest Clean step and choose Preview in Tableau Desktop  Clean Member Policy File:  Now that we’ve cleaned up the Claims data we need to integrate our Policy Data.   1. Add Connection-> Text File -> Member Info – Policy   Add a Clean Step:   1. Change **Patient ID** to STR 2. Split **Patient Desc** field -> Ellipses -> Automatic Split 3. Rename New Fields to Gender and Relationship 4. Remove Parent field Patient Desc   Rename Step to **Member Info Clean** |
|  | Joining the Datasets:  Now that Member Policy is cleaned we can join it to our claims data to match our members to their policy information.   1. Drag Member Info Clean directly on top of Claims Clean step. Select Join in pop-up orange box. 2. Change to a Left Join |
|  | Final Clean Step   1. For good measure, we’ll add one more Clean step to ensure we caught everything. 2. Select on the Light Bulb- Tableau’s Recommendations 3. Select the last option [State of Residence] to a geographic field 4. Remove duplicate Patient ID-1 field |
|  | ADD AN OUTPUT & SCHEDULE YOUR FLOW:  Now that we’ve finished integrating and cleaning our data, we are ready to run the flow and decide how to output this data.   1. Select Add an Output -> File -> Name Flow ->Select .hyper or .csv 2. Run Flow 3. Connect to your file in Tableau Desktop   Now we need to schedule this Flow to refresh with Prep Conductor & How to access Prep in the Browser (2020.4).  DEMO TIME |