

Workflow Basics

Contents:

- [Overview](#)
 - [Prerequisites](#)
 - [Basic Workflow](#)
 - [Example Flows](#)
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Learn the basics of how to import, wrangle, execute jobs, profile, and export your data from Trifacta® SaaS.

Overview

Trifacta® SaaS enables analysts, data specialists, and other domain experts to quickly cleanse and transform datasets of varying sizes for use throughout the enterprise. Using an innovative set of web-based tools, you can import complex datasets and wrangle them for use in virtually any target system. Key capabilities include:

- **Import** from flat file, databases, or distributed storage systems
- Locate and remove or modify **missing or mismatched** data
- **Unnest complex** data structures
- Identify statistical **outliers** in your data for review and management
- Perform **lookups** from one dataset into another reference dataset
- Aggregate columnar data using a variety of **aggregation functions**
- **Normalize** column values for more consistent usage and statistical modeling
- Merge datasets with **joins**
- Append one dataset to another through **union** operations

Most of these operations can be executed with a few mouse clicks. This section provides a basic overview of common workflows through Trifacta SaaS.

Prerequisites

Before you begin, please verify the following:

- **Trifacta account:** You have a Trifacta account and can login.
- **Example data:** You should use a sample set of data during this workflow.

Basic Workflow

1. **Import data:** Integrate data from a variety of sources of data.

Tip: When you login for the first time, you can immediately upload a dataset to begin transforming it.

See [Import Basics](#).

2. **Profile your data:** Before, during, and after you transform your data, you can use the visual profiling tools to quickly analyze and make decisions about your data. See [Profiling Basics](#).
3. **Build transform recipes:** Use the various views in the Transformer Page to build your transform recipes and preview the results on sampled data. See [Transform Basics](#).

4. **Sample your data:** In Trifacta SaaS, you create your recipes while working with a sample of your overall dataset. As needed, you can take new samples, which can provide new perspectives and enhance performance in complex flows. See *Sampling Basics*.
5. **Run job:** Launch a job to run your recipe on the full dataset. Review results and iterate as needed. See *Running Job Basics*.
6. **Export results:** Export the generated results data for use outside of Trifacta SaaS. See *Export Basics*.

Object overview: You should review the overview of the objects that are created and maintained in Trifacta SaaS. See *Object Overview*.

Example Flows

New users of Trifacta SaaS can learn by example! When a new workspace is created, the first user can access example flows through the product. You can learn more about how to build a flow and perhaps acquire some tips on how to apply to your uses.

Steps:

1. Log in to the Trifacta application.
2. In the left navigation bar, click the Flows icon.
3. Select any of the `Example Flow` flows.
4. Each flow contains detailed notes on the various objects in the flow, as well as recommended practices for building your own flows.

NOTE: These flows are provided only to the first user of a new workspace. This user must invite other users and can then share the flow.

- To invite other users, select **User menu > Admin console > Users**. Click **Invite Users**. For more information, see *Workspace Users Page*.
- After users have been invited, you can share these example flows with them. Open one of the flows. From the flow context menu, select **Share**. Specify the usernames of the users with whom you wish to share the flow. For more information, see *Share Flow Dialog*.