

Enable Onboarding Tour

Contents:

- *Acquire Sample Dataset*
 - *Acquire*
 - *Permissions*
 - *Install*
 - *Configure*
 - *Enable*
 - *Test*
-

Trifacta® Self-Managed Enterprise Edition supports an end-to-end onboarding tour, which steps new users through the entire workflow of importing, transforming, and publishing a provided dataset. This tour is available from the Home page.

As you explore areas of the application, you can choose to review shorter versions of the tour focused on your current area. These areas include:

- Flow View page
- Transformer page
- Run Job page

Click **Don't show me any more helpers** to hide these shorter tours. They can be re-enabled again through the User Profile page.

Acquire Sample Dataset

Acquire

The onboarding tour requires a specific sample dataset that is consistent for all users.

Please download from the following location:

https://trifacta-public-datasets.s3-us-west-2.amazonaws.com/demo-datasets/customers_sample_data.csv

Permissions

This file must be installed in an accessible location on the base storage layer.

Before you begin, please verify that you are uploading the sample dataset to a location that is accessible to all users of the platform.

Requirements:

When the tour is started, an imported dataset is created from this file for each user experiencing the tour. Each Trifacta platform user account must have read access to this location. Write access is not required.

Tip: A special location in the `uploads` area could be a good choice.

NOTE: The account being used to upload the file should have write access to this location. You may need to change the Upload directory in the account's User Profile. See *User Profile Page*.

Install

Steps:

1. Download the file to your local desktop.
2. Upload the example dataset file:
 - a. Through the product, upload from your local desktop to the designated location. See *Import Data Page*.
 - b. From the Dataset Details page, acquire the path to the dataset. See *Dataset Details Page*.
 - c. You can also upload the file through external tools. Please be sure to acquire the URL to the file.
3. Insert the path in platform configuration, as described below.

Configure

Please complete the following steps.

Steps:

1. Login to the application as an administrator.
2. From the menu, select **Settings menu > Settings > Admin Settings**.
3. Settings:

Setting	Description
<pre>"webapp.walkthrough. datasetPath": "<path_to_dataset_on_default_ storage>",</pre>	Specify location of the sample dataset file.
<pre>"webapp.walkthrough. datasetProtocol": "hdfs",</pre>	The protocol identifier to use to connect to the sample dataset file location. This protocol should match the one used to access the base storage layer. For example, HDFS is accessed using the <code>hdfs</code> protocol. Tip: You can gather this protocol identifier from the <i>Dataset Details Page</i> for the sample dataset.

If the `datasetProtocol` is set to `s3`, this value defines the bucket to which to connect for accessing the sample dataset.

```
"webapp.walkthrough.datasetBucket": "<S3_BUCKET_HERE> ",
```

4. Save your changes.

Enable

After the above configuration has been applied, you can enable the feature.

Steps:

1. Login to the application as an administrator.
2. From the menu, select **Settings menu > Settings > Workspace Admin**.
3. Set Product Walkthroughs to `true`.

Test

NOTE: You should have only one window open to the application.

After you have enabled, please log out of the application. Create and login using a non-admin account.

The tour should appear on the Home page. See *Home Page*.