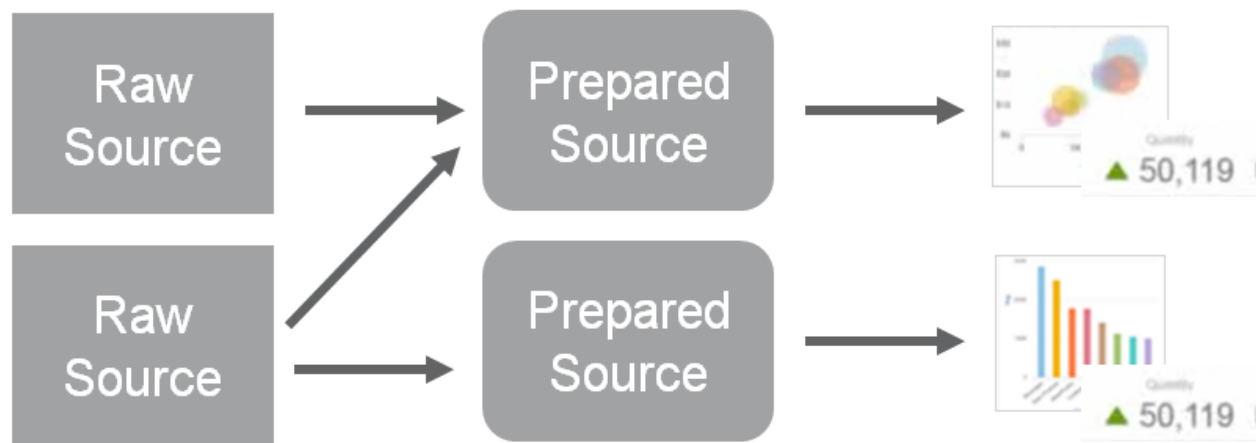


Birst Pronto: Prepare Data in Pronto

Posted by [Dee Elling](#) Jan 28, 2017

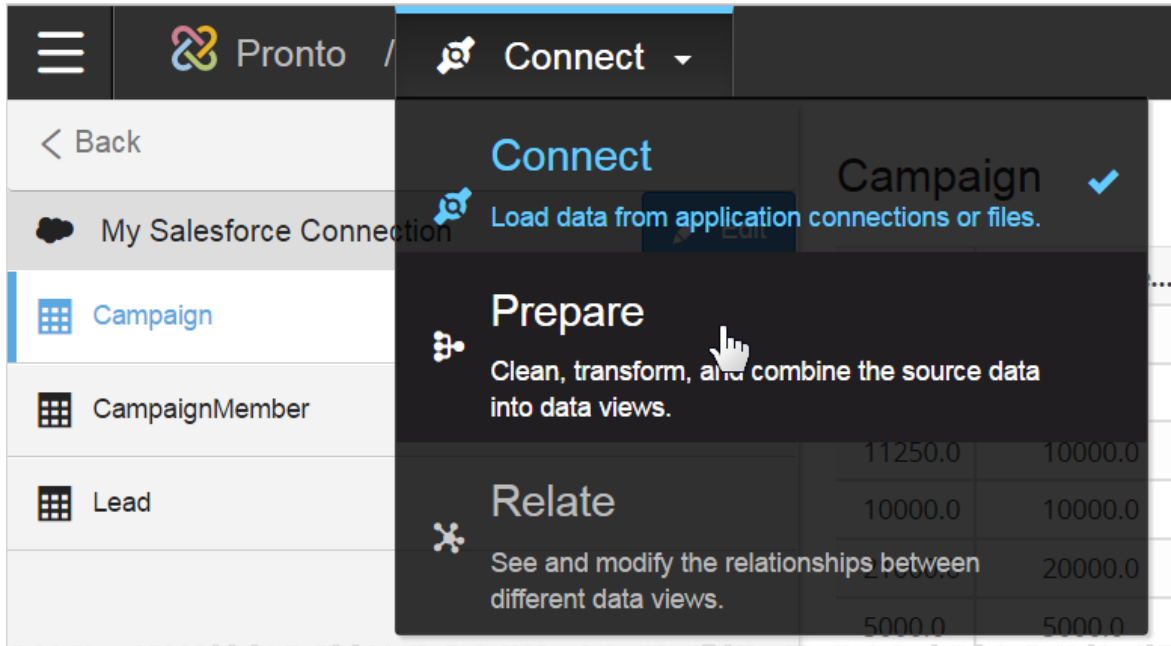
Welcome to the third installment of Birst Pronto introductory blogs. In the previous blog I connected to data sources using the Connect page, and got access to the base data I'll use in my reports. Now all of the important data is in Birst and ready for a few final touches to prepare the source for reporting.

But first, a little orientation. Pronto has the concept of a “prepared source”, that is a view of the data that Birst updates on a regular basis, so that your reports and dashboards are always up-to-date.



You can create multiple prepared sources from the “raw” or base sources that you extracted in the Connect page. If you need to merge tables from multiple raw sources, you can. Prepared sources are an efficient way to manage your report data, especially when you have different uses for the same tables.

To get to the Prepare page, select it from the main Pronto menu.

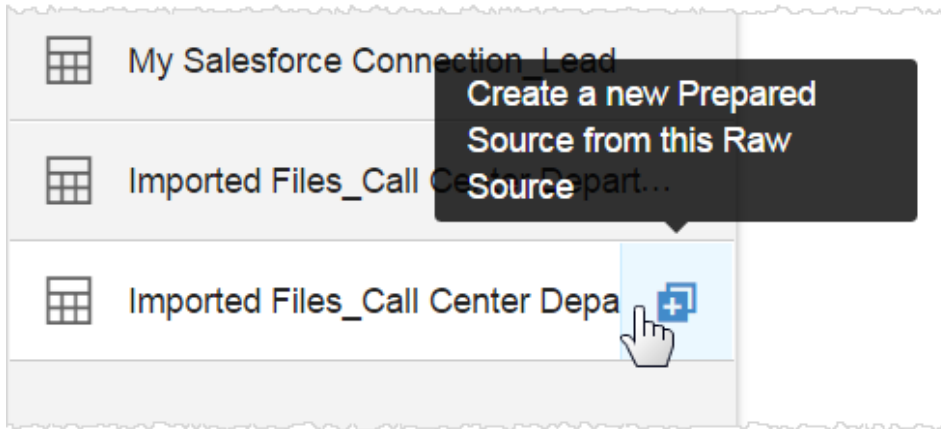


The Prepare page lists all your tables and has a work area for preparing sources.

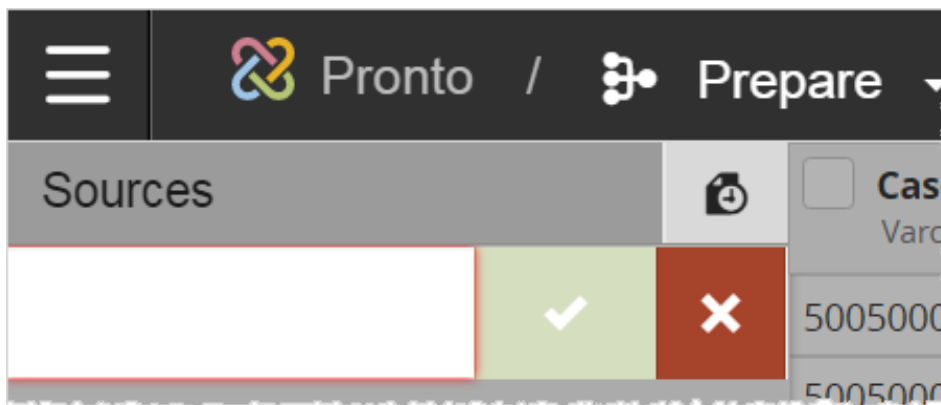


Since every prepared source is based on a raw source, first select the raw source by clicking its Create button.

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Then name the prepared source.



The new source is listed with the raw sources. Note the difference in the icons for raw and prepared sources.



Pronto displays the columns from the base source in the work area. These are the columns you chose in the Connect page.

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<input type="checkbox"/> Case ID Varchar	<input type="checkbox"/> Case Category Varchar	<input type="checkbox"/> Case Status Varchar	<input type="checkbox"/> Case Date DateTime	<input type="checkbox"/> SFDC Account II Varchar
5005000000h5p3M...	Data Acquisition - B...	Closed	08/29/2016 5:39:00...	001E000000YsRisIAF
5005000000h6PzS...	Birst Admin, Data ...	Closed	09/02/2016 6:01:00...	001E000000YsRisIAF
5005000000f6yEOA...	Account Privileges ...	Closed	07/09/2016 4:41:00...	001E000000YsRivIAF
5005000000gETkVA...	Account Privileges ...	Closed	08/04/2016 4:02:00...	001E000000YsRivIAF
5005000000h6PPo...	Space Operations	Closed	09/01/2016 11:56:0...	001E000000YsRivIAF
5005000000eVcqP...	Data Acquisition - B...	Closed	06/24/2016 3:17:00...	001E000000YsRivIAF
5005000000e4v6FA...	Support Portal	Closed	06/02/2016 3:45:00...	001E000000YsRivIAF
5005000000gELqH...	Data Processing	Closed	08/04/2016 11:12:0...	001E000000YsRjAl...

⋮


Imported Files_Call Center Department Data_xlsx SupportCases → add step

Underneath the preview is the transformation pipeline. This is a visual history of how you create the prepared source. The first event in the history is the name of the raw source.


There are many transformations you can perform on the data, to make it better suite your reports. Some transformations apply to the table as a whole, and some to individual columns. In this example I'll show a simple one on a Date column. This column includes the timestamp along with the date, and the timestamp is really not needed for the reports.

I first select the Date column, then select the Date transform. I want to take out the Time element.

Date

 Date Extract ▼

Time ▼

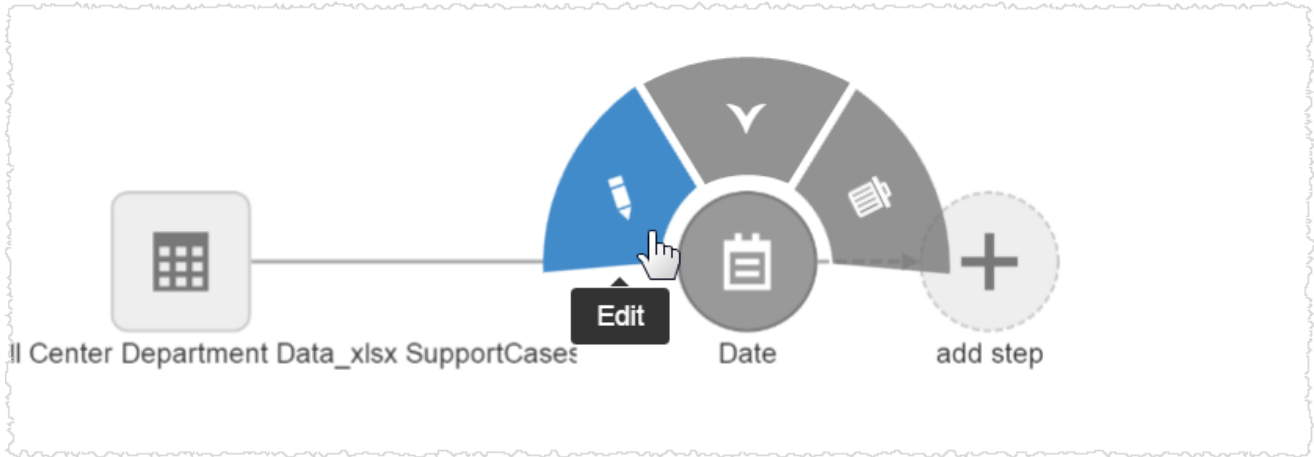
Cancel **Apply** 

Pronto adds a column to the end of the series, and here you see the Date without the Time. Also, notice that the data type changed from DateTime to Date.

<input checked="" type="checkbox"/> Case Date DateTime	<input type="checkbox"/> SFDC Account II Varchar	<input type="checkbox"/> Case Date1 Date
03/25/2016 2:43:00...	001E000000YsRivIAF	03/25/2016
02/19/2016 4:26:00...	001E000000YsRivIAF	02/19/2016
06/02/2016 6:21:00...	001E000000YsRjAl...	06/02/2016
02/19/2016 3:15:00...	001E000000YsRivIAF	02/19/2016
02/13/2016 2:16:00...	001E000000YsRivIAF	02/13/2016
01/26/2016 8:29:00...	001E000000YsRivIAF	01/26/2016
05/01/2016 3:04:00...	001E000000YsRivIAF	05/01/2016
01/22/2016 9:48:00...	001E000000YsRivIAF	01/22/2016
01/22/2016 9:43:00...	001E000000YsRivIAF	01/22/2016
06/24/2016 3:17:00...	001E000000YsRivIAF	06/24/2016

In the transformation pipeline there's a new node for this Data change. If you don't like the results of a transform, you can select its node and edit it again.

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You may wonder why Pronto created a new column and didn't just change the existing one. That's because you may want to do another transformation on the original column. Plus, it's easy to get rid of a column you don't want... just select it, and click the Ignore transform.

Transforms	<input type="checkbox"/> Case ID Varchar	<input type="checkbox"/> Case Category Varchar	<input type="checkbox"/> Case Status Varchar	<input checked="" type="checkbox"/> Case Date DateTime
Null Handling	5005000000h5p3M...	Data Acquisition - B...	Closed	08/29/2016 5:39:00...
Split	5005000000h6mw...	Space Operations	Closed	09/03/2016 4:58:00...
Merge	5005000000h6PzS...	Birst Admin, Data ...	Closed	09/02/2016 6:01:00...
Ignore	5005000000gELqH...	Data Processing	Closed	08/04/2016 11:12:0...
Rename	5005000000f6yEOA...	Account Privileges ...	Closed	07/09/2016 4:41:00...
Replace				

And now the name of the new column needs to change...

Transforms	<input type="checkbox"/> Case ID Varchar	<input type="checkbox"/> Case Category Varchar	<input type="checkbox"/> Case Status Varchar	<input type="checkbox"/> SFDC Account ID Varchar	<input checked="" type="checkbox"/> Case Date1 Date
Null Handling	0000h5p3M...	Data Acquisition - B...	Closed	001E000000YsRiSIAF	08/29/2016
Split	Operations	Closed	001E000000YsRiVIAF	09/03/2016	
Ignore	Privileges ...	Closed	001E000000YsRiVIAF	07/09/2016	
Rename	s & Dashboa...	Resolved - Code Ch...	001E000000YsRiVIAF	04/21/2016	
Add Column	dmin, Data ...	Closed	001E000000YsRiSIAF	09/02/2016	
Data Type	Privileges ...	Closed	001E000000YsRiVIAF	08/04/2016	
Combine	Acquisition - B...	Closed	001E000000YsRiVIAF	06/24/2016	
	0000ba02IA...	Reports & Dashboa...	Resolved - Code Ch...	001E000000YsRiVIAF	03/24/2016

Rename

Column Name

Date Case Filed

Cancel Apply

Great! I'll save this prepared source by clicking Publish.

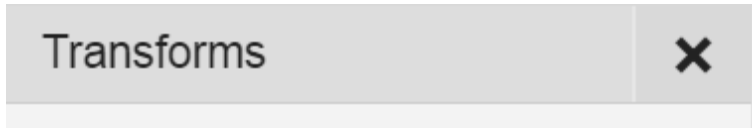


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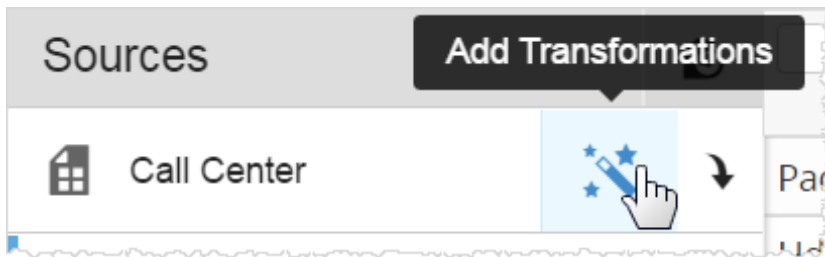
Pronto's indicator shows it's working and lets you know when it is done.



Click the X button in the Transforms menu to go back to the list of tables and make more prepared sources.



If you ever need to go back and change it, you can. Pronto saves the whole history of changes. Just select its transform button from the list.



There's a lot of power and flexibility in the Prepare page and its transforms and pipeline. The specified item was not found. goes into these capabilities.

In the next post of this series, you'll see how to go to Visualizer to create reports from your prepared sources.

In some cases you want to do more sophisticated work with sources, to establish relationships between them.