PLEASE JOIN US ON VIDEO

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NORTHAMPTON / COVENTRY USER GROUP

Alteryx Community Updates

Samantha Hughes (ACE)

Analytics Innovation Manager, Avon

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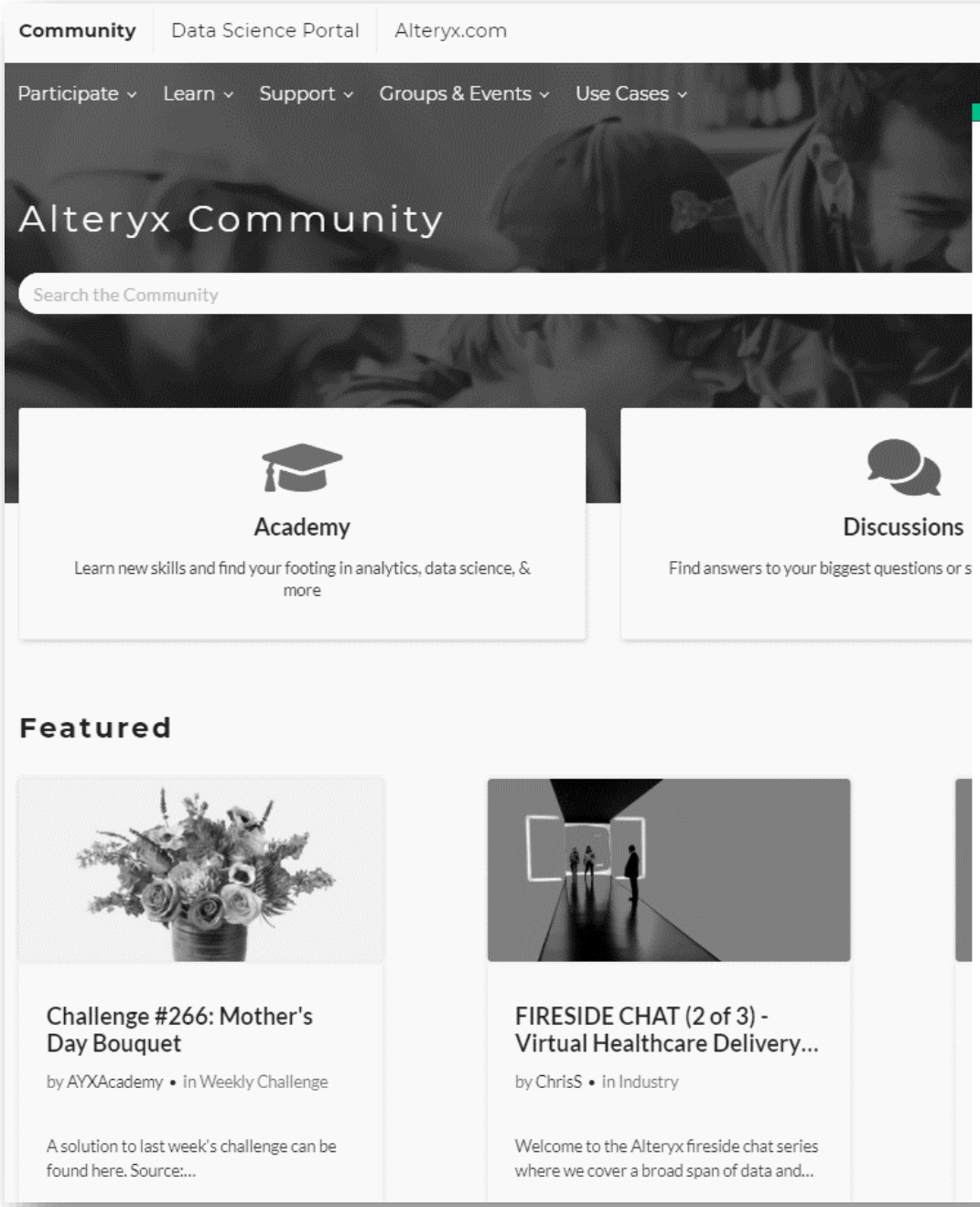
AGENDA

- Community Updates
- Joseph Serpis – Best Practice Tips for setting up your Alteryx Server for success
- Joe Lipski – Pros and Cons of using Macros and data Connections on your server
- Samantha Hughes – Understanding Performance using the Usage Report and Mitigating Risk with your Server



Alteryx Community

community.alteryx.com

Also available in | Français | Português | Español | 日本語 | Deutsch

- Find answers quickly
- Share your knowledge
- Connect with peers
- Discover new Alteryx use cases
- Submit your bright ideas
- Read insightful blogs
- Develop tools, macros, and apps

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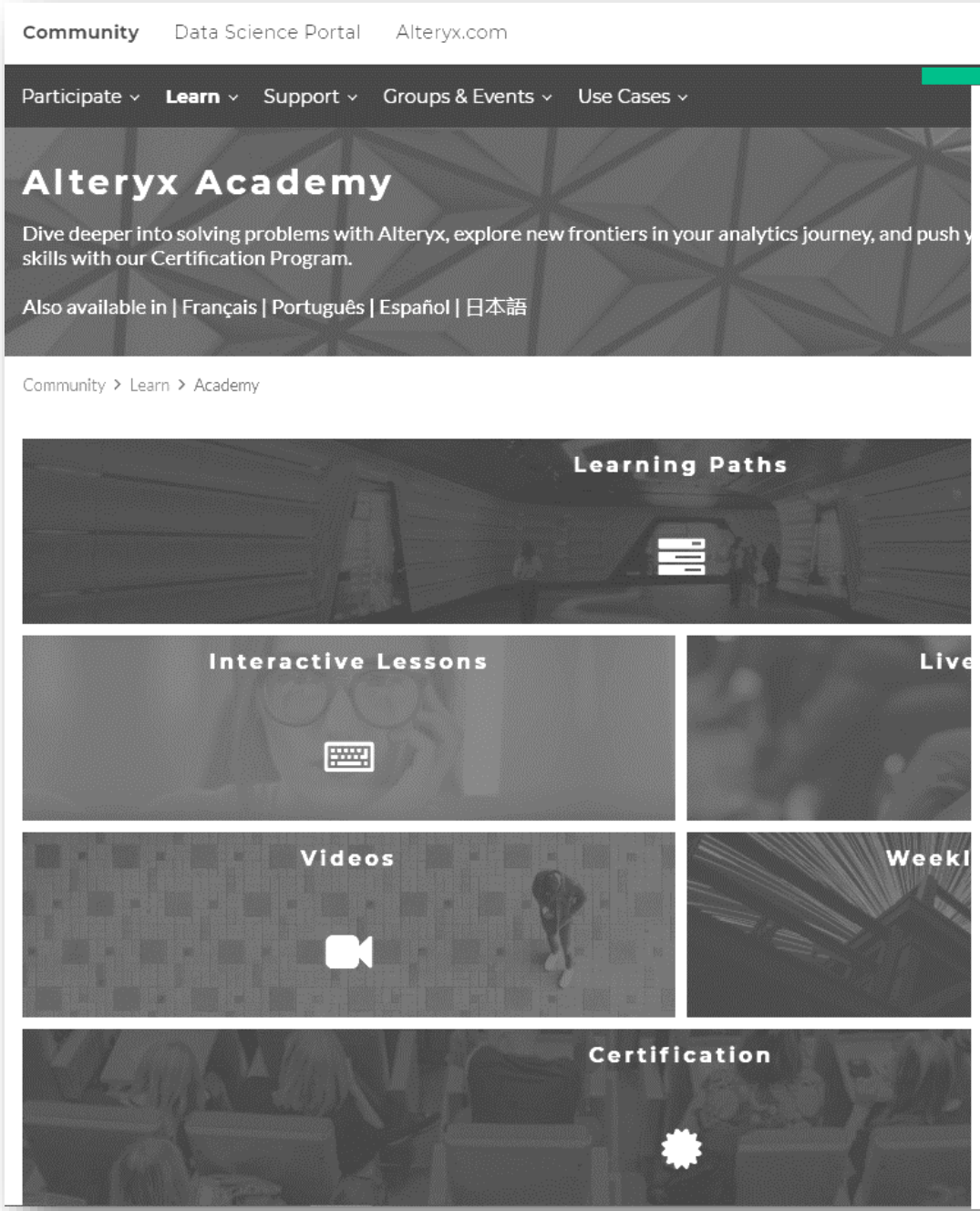

Alteryx Academy

Also available in | Français | Português | Español | 日本語

Learn

- **Learning Paths** – Keep up the pace of your learning with guided curriculum
- **Interactive Lessons** – Lessons that incorporate videos, hands-on activities, and quizzes to access your knowledge
- **Videos** – Hours and hours of videos on topics ranging from beginner to advanced
- **Weekly Challenge** – Solve the challenge, share your solutions, and summit the ranks of Community!
- **Certification** – Prove your skills and become Alteryx Certified

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Release 2021.3

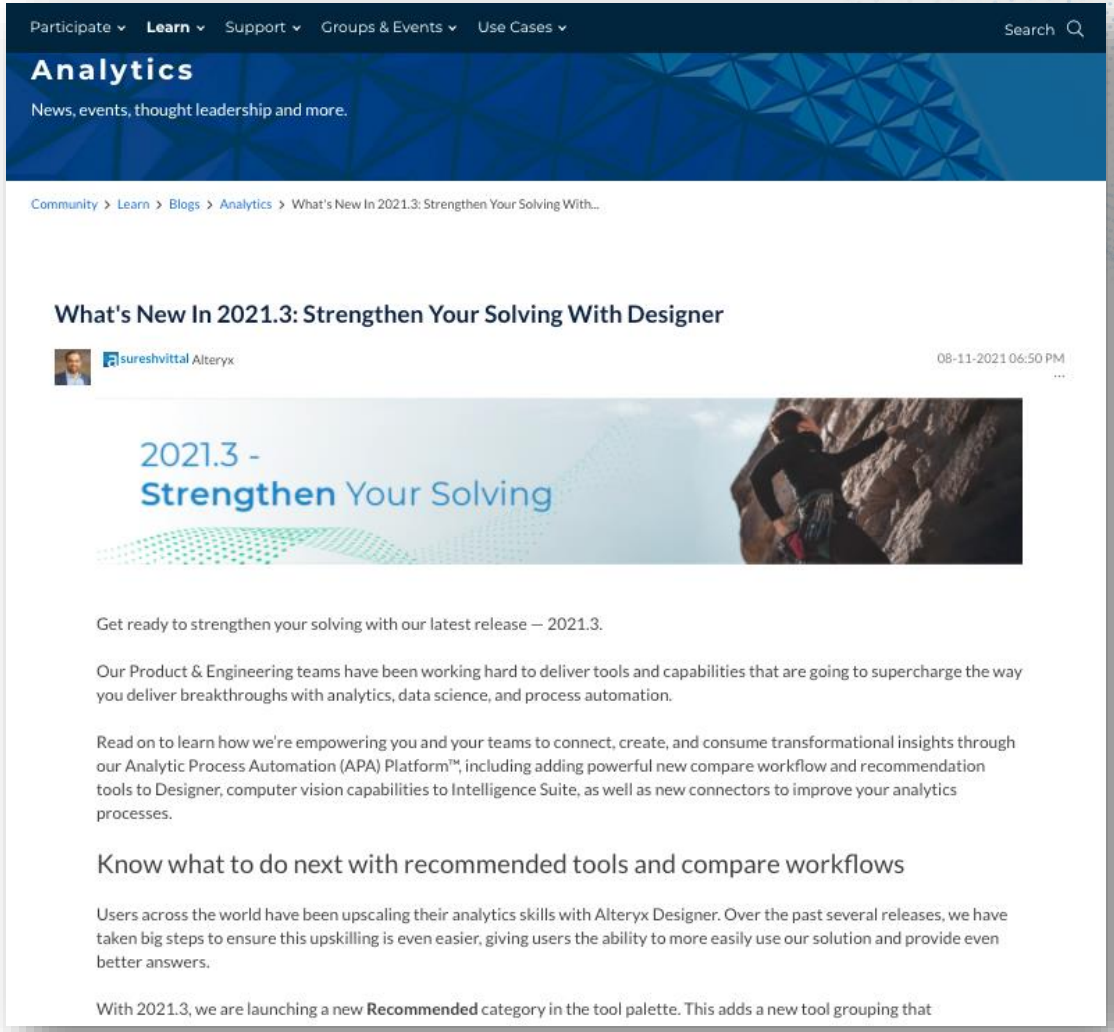
What's New In 2021.3: Strengthen Your Solving With Designer

Check out all about the new release 2021.3

- Know what to do next with recommended tools and compare workflows
- Bring image recognition and analytics into your workflow
- Strengthen your Connections

⇒ Upgrade to 2021.3 today

German, French, Spanish and Portuguese versions are also available.



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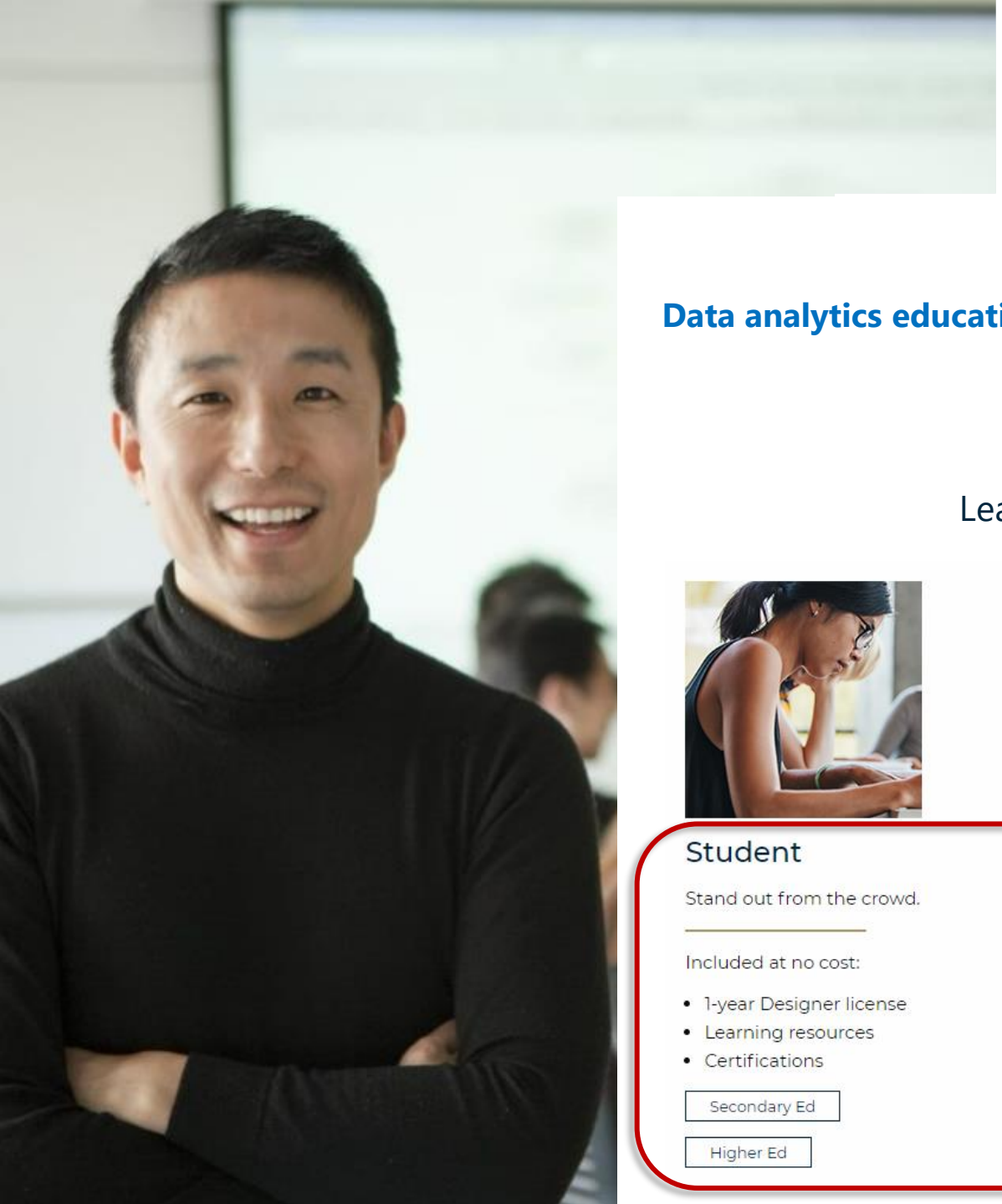

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alteryx.com/sparked

sparked@alteryx.com

Data analytics education program for schools, colleges, universities, and individual learners.

Expanded from Alteryx For Good into its own program under Libby Adams.

Designer education licenses → Faculty training → Teaching tools → Learning content → Community of support → Certifications → Job Board

Student

Stand out from the crowd.

Included at no cost:

- 1-year Designer license
- Learning resources
- Certifications

Secondary Ed

Higher Ed

Educator

Empower students with data skills.

Included at no cost:

- 1-year Designer license
- Teaching curriculum
- Teacher collaboration community

Teaching Resources

Career Changer

Gain a competitive edge.

Included at no cost:

- For reskillers
- 3-month Designer license
- Certifications

Get Started

Supporter

Join our efforts.

Spread the word:

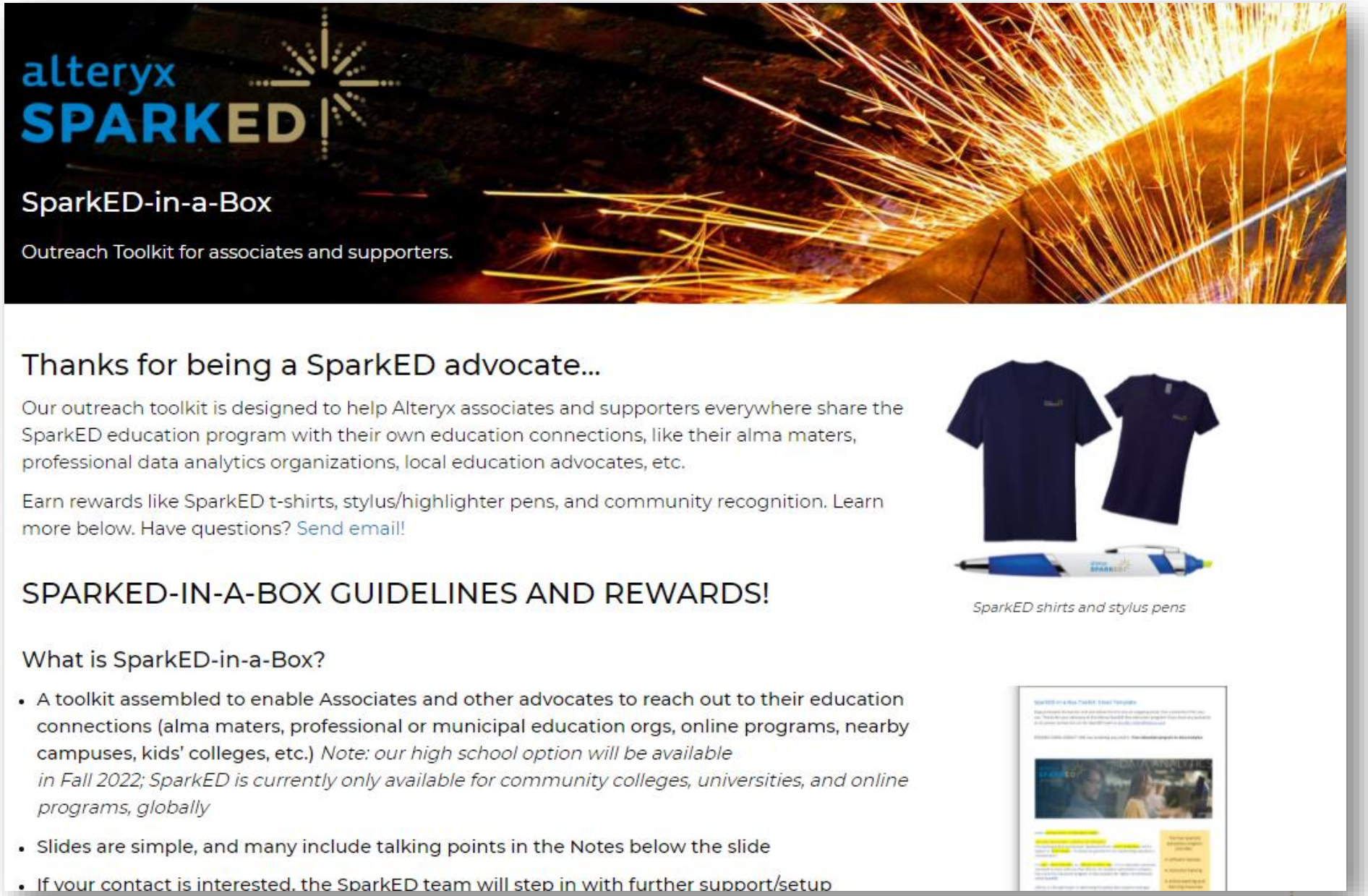
- Share the program
- Make connections
- Submit ideas

Let's Connect

What You Can Do

HELP US GROW!

- Visit our **SparkED-in-a-Box page**
- Download a customizable email
- Send it to your alma mater or other education contact
- Set up a quick call to share slides about SparkED (also in the toolkit)
- If they are interested, pass them along to the SparkED team for further nurturing



SparkED shirts and stylus pens

www.alteryx.com/sparked/in-a-box

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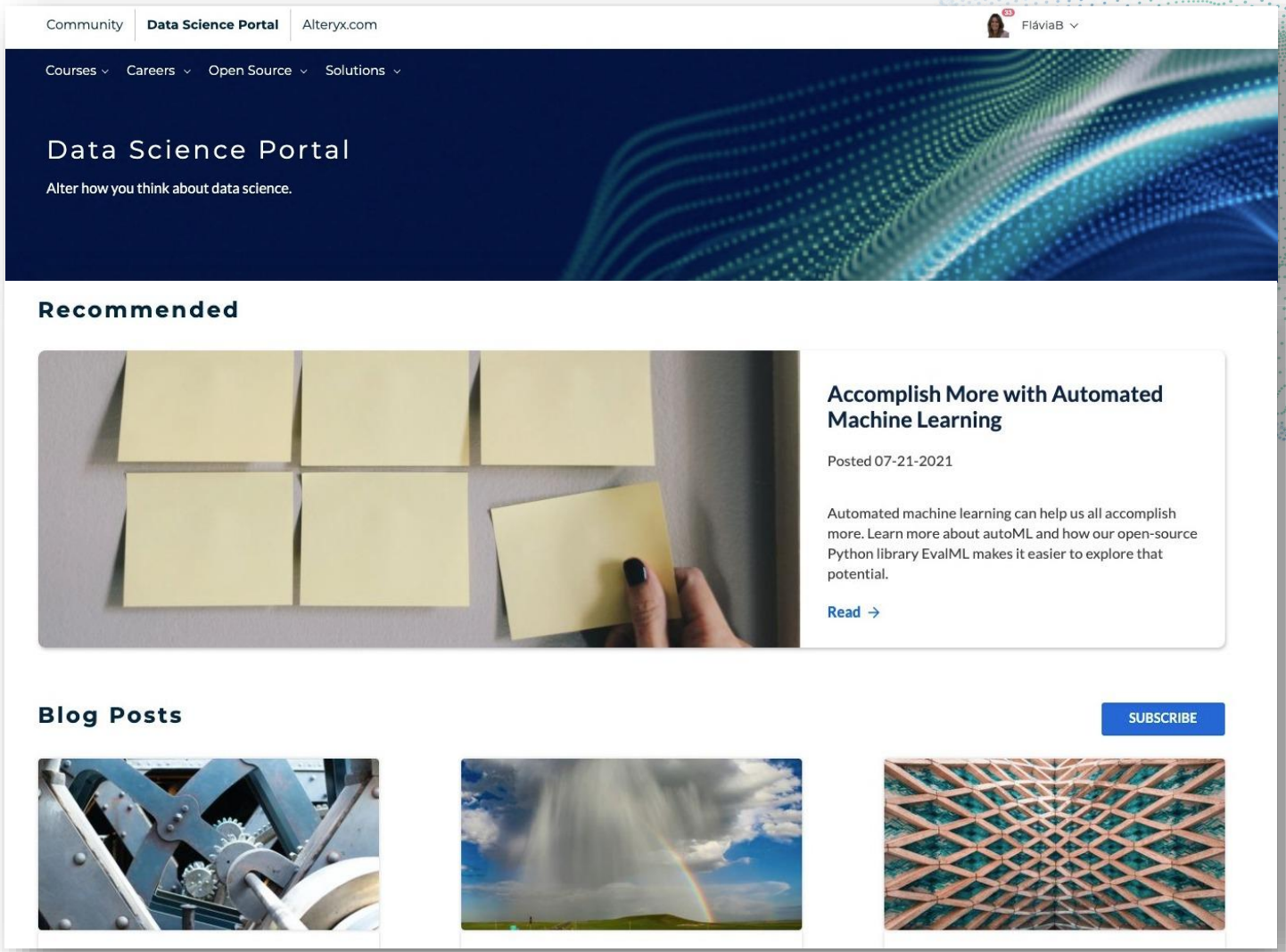
Alteryx Data Science Portal

- For the data scientist, both current and aspiring!
- Curated Community content that is data science focused

alteryx.com/data-science



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EXPERT EXAM

Read the blog on Community for information

The Expert exam is a performance-based assessment that allows you to get certified by doing what you do best: building awesome solutions in designer!

Expert Exam Snapshot (High-level):

Exam Delivery: Delivered in a proctored virtual environment

Exam Format: Performance-based assessment

Questions: 7 practical application scenarios

Price: USD $150

Exam Time: 3 hours

Questions? academy@alteryx.com

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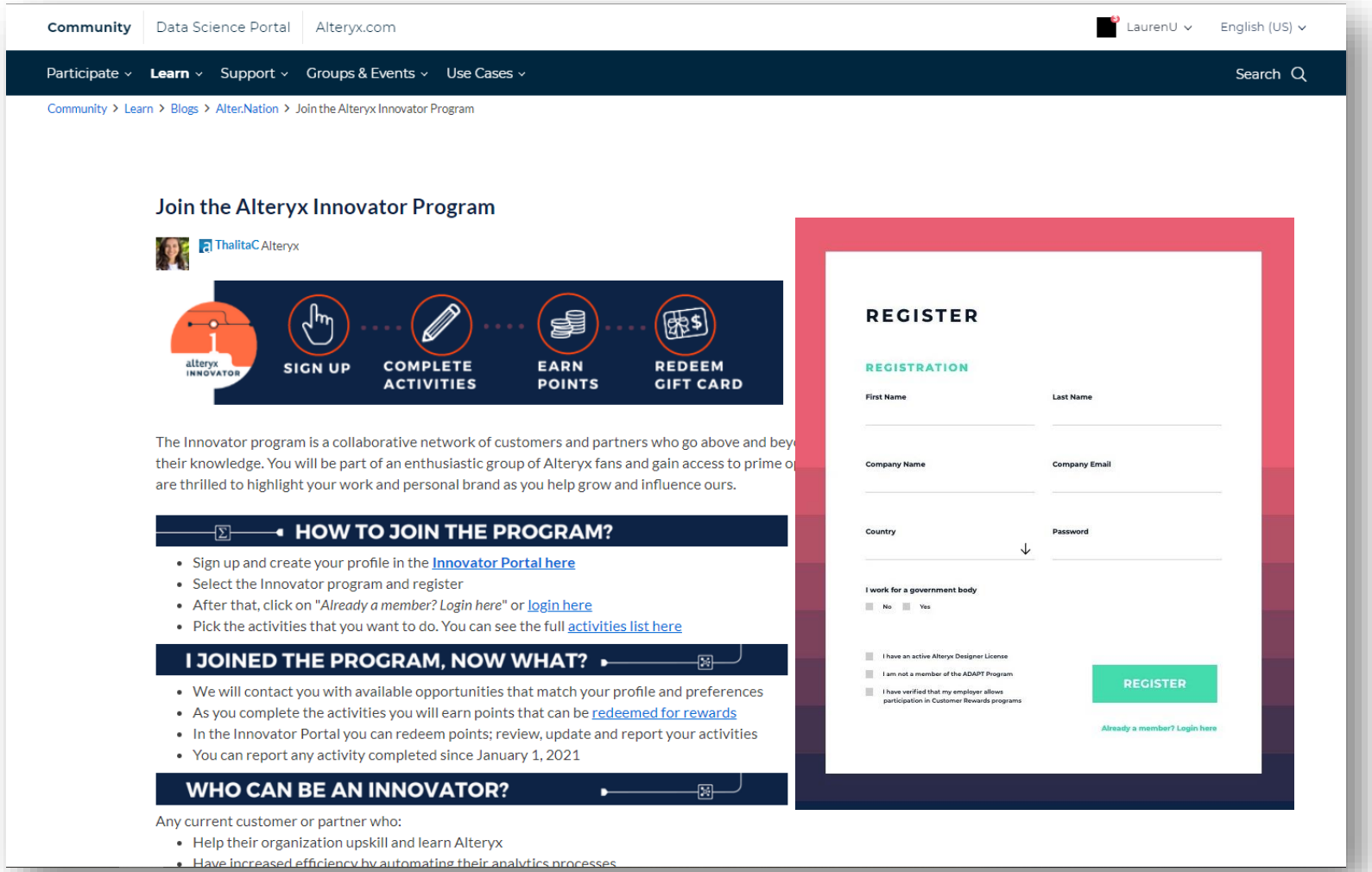
INNOVATOR PROGRAM : Alteryx Customer Rewards Portal



- Discover the brand-new **Alteryx Customer Rewards Portal** that gives passionate customers another positive way to engage with Alteryx. The portal, with its modern user experience, presents customers the opportunity to sign up for the **Innovator** program.
- Wondering what's in it for you? Networking! Upskilling! Career Opportunities! *Rewards! Public Recognition! Giving Back!
- Register today in the Customer Portal to become an Innovator

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ALTER
EVERYTHING
A podcast about data science and analytics culture
community.alteryx.com/podcast
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Purchasing New Licenses?

Don’t forget to mention datacurious.ai before checkout! To gain access to amazing leap start resources within Alteryx

Introducing datacurious.ai

datacurious.ai

ALTER:U

alteryx

ASSOCIATE PARTNER

datacurious.ai

analytics automation experts

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CHAT BOX

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JOSEPH SERPIS

BEST PRACTICE TIPS FOR SETTING UP YOUR ALTERYX SERVER FOR SUCCESS

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Best Practice tips for setting up your Alteryx Server for success

Joe Serpis

Principal Consultant & Alteryx ACE - Keyrus

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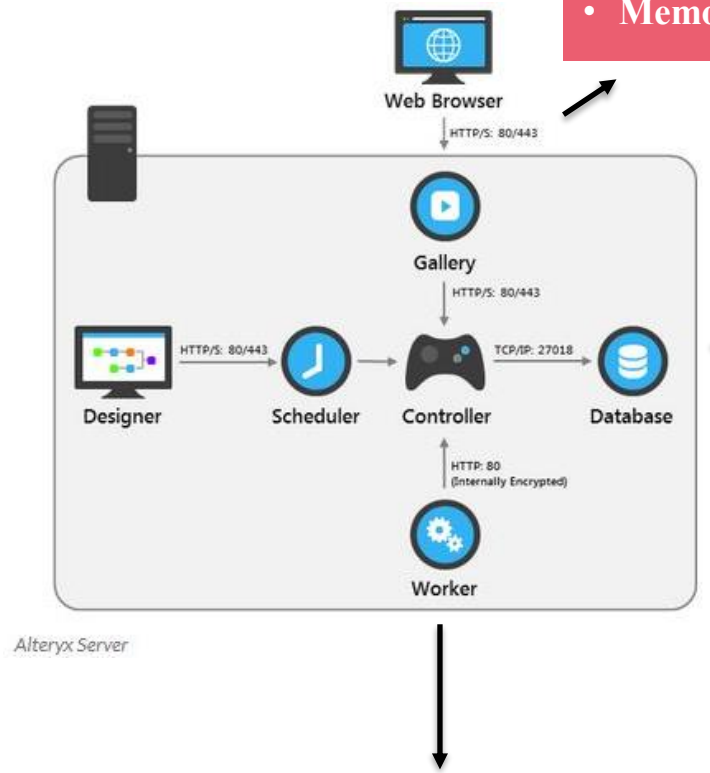
What is the Right Size?

- Redundancy needed
- High availability needed
- Number of simultaneous users increases
- Memory or CPU consumption is high on webnodes



- Redundancy Needed
- High availability needed

- Workflows/Apps sit in queues
- Number of simultaneous users increase
- Workflow execution time increases
- High availability needed
- Redundancy needed

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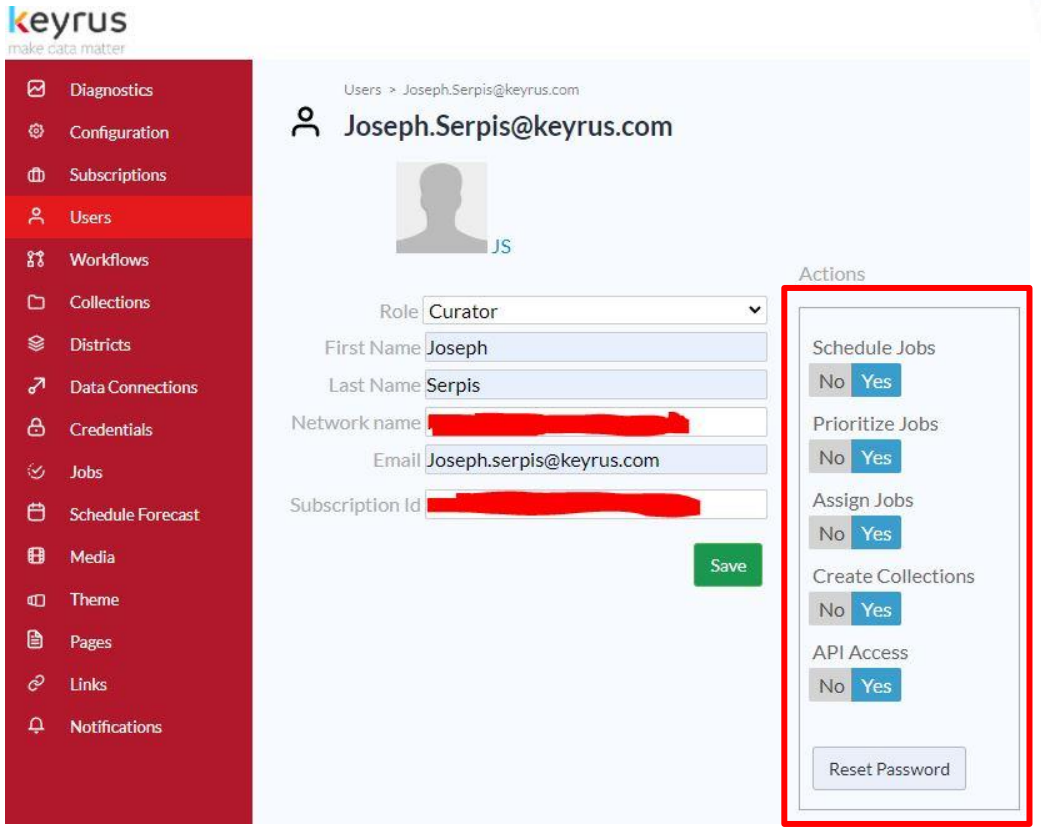
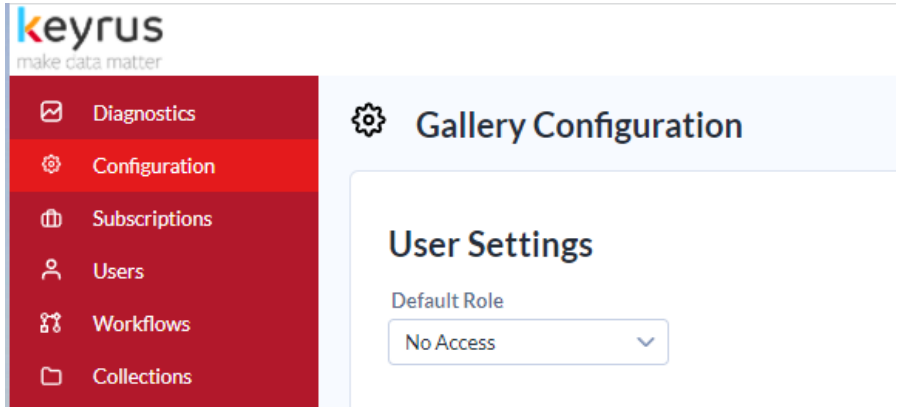
User Permissions

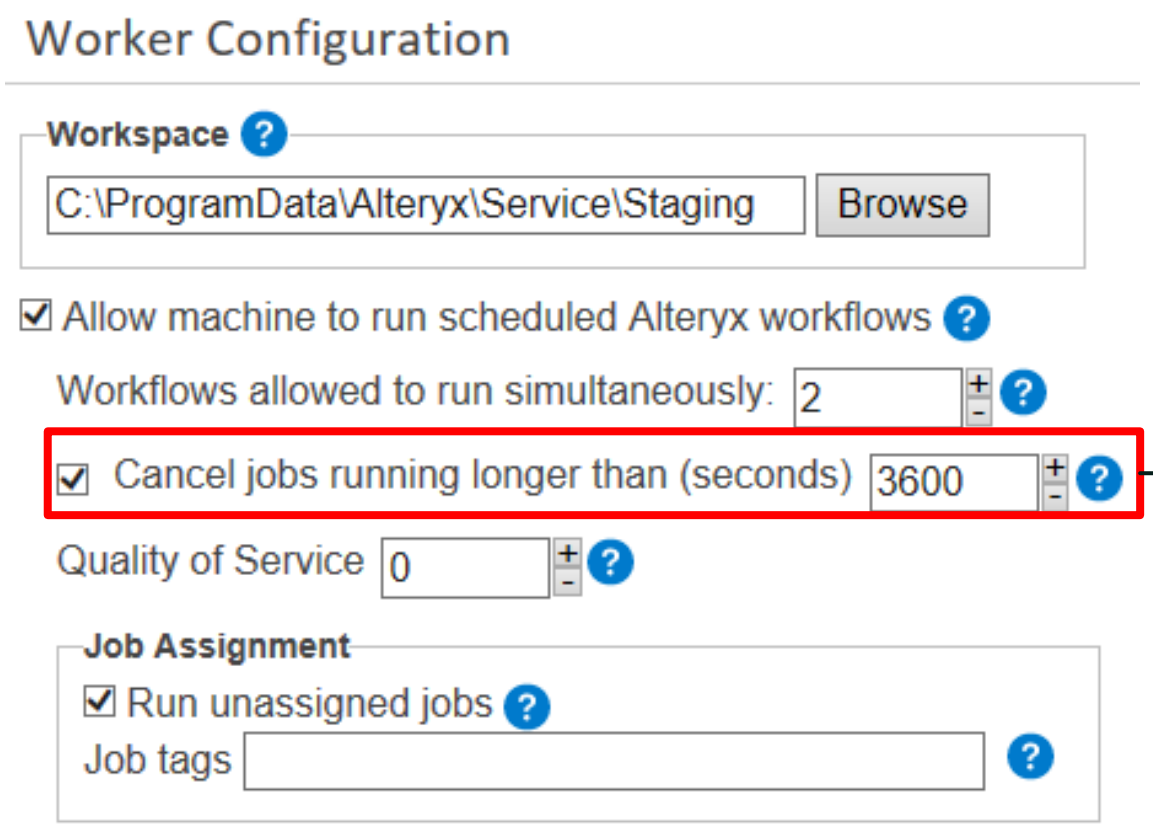
User Roles
Gallery users can have one of the following roles.

- **Curator**: (Gallery Admins) can access the Admin interface.
- **Artisan**: Can publish, run, and share workflows in their private studio and shared Collections.
- **Member**: Can run workflows that are shared with them via collections.
- **Viewer**: Viewers can run public workflows on the homepage and in districts.
- **No Access**: Blocks access to all Gallery assets.





Worker Configuration



This setting will auto cancel any scheduled jobs that exceed the time limit specified

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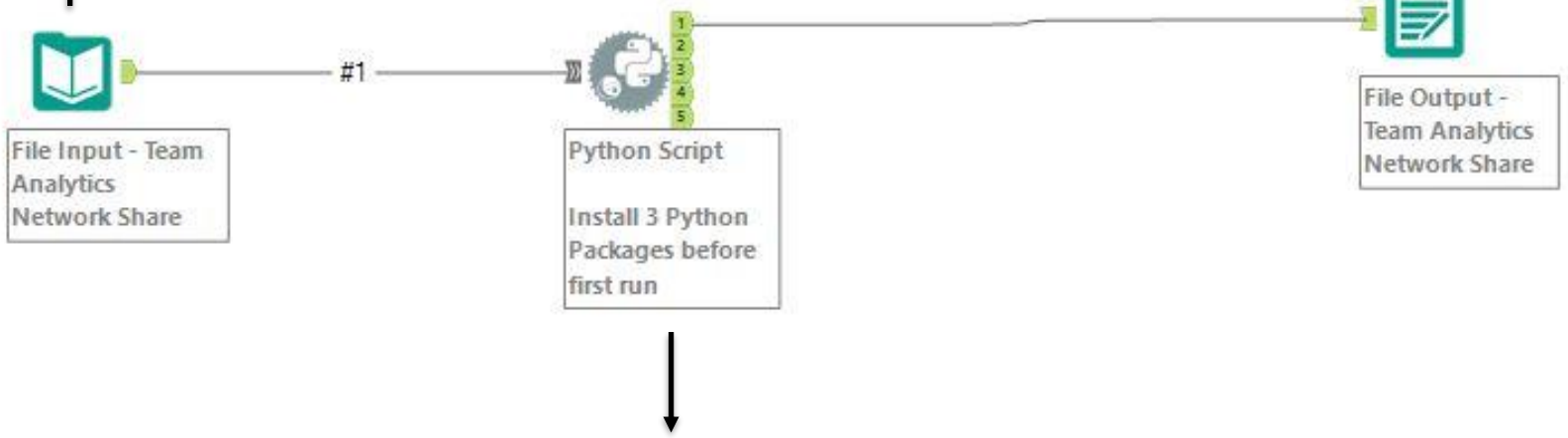
Correct Credentials?

Break Point: Need to ensure Alteryx Server can read data from this Location

Break Point: Need to ensure Alteryx Server can write data from this Location



Break Point: Additional code packages needs to be installed on the Alteryx Server

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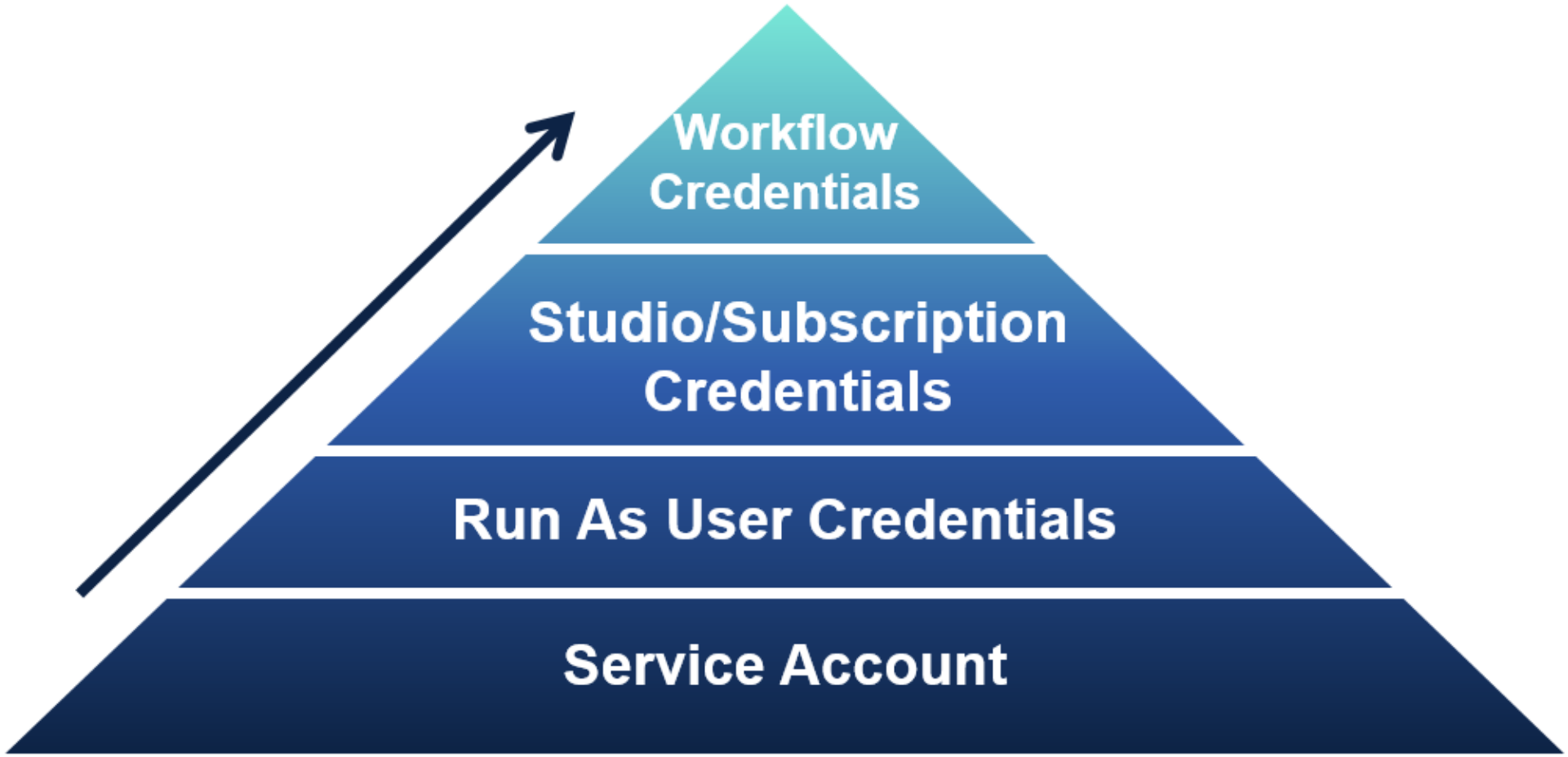
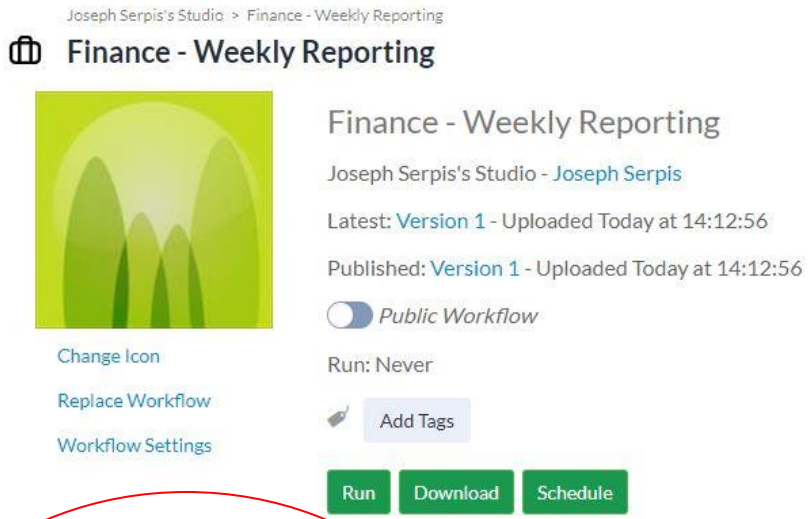
How Credentials work on Alteryx Server



Meta Info



Purpose

Weekly reporting on the previous week of sales

Sponsors

Finance Team

Maintenance/Troubleshooting

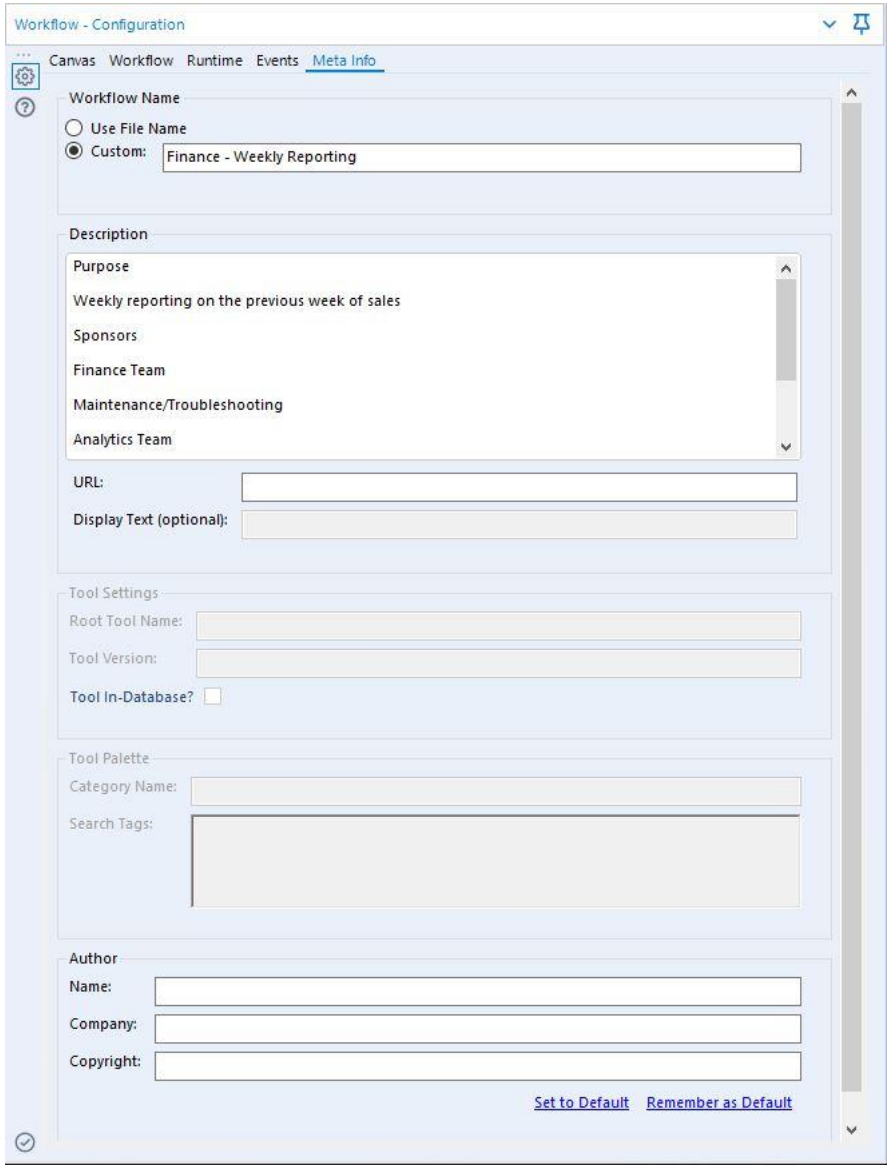
Analytics Team

Input/Outputs

Inputs: Excel File

Output: Excel File and Snowflake

Alteryx Designer – Meta Info



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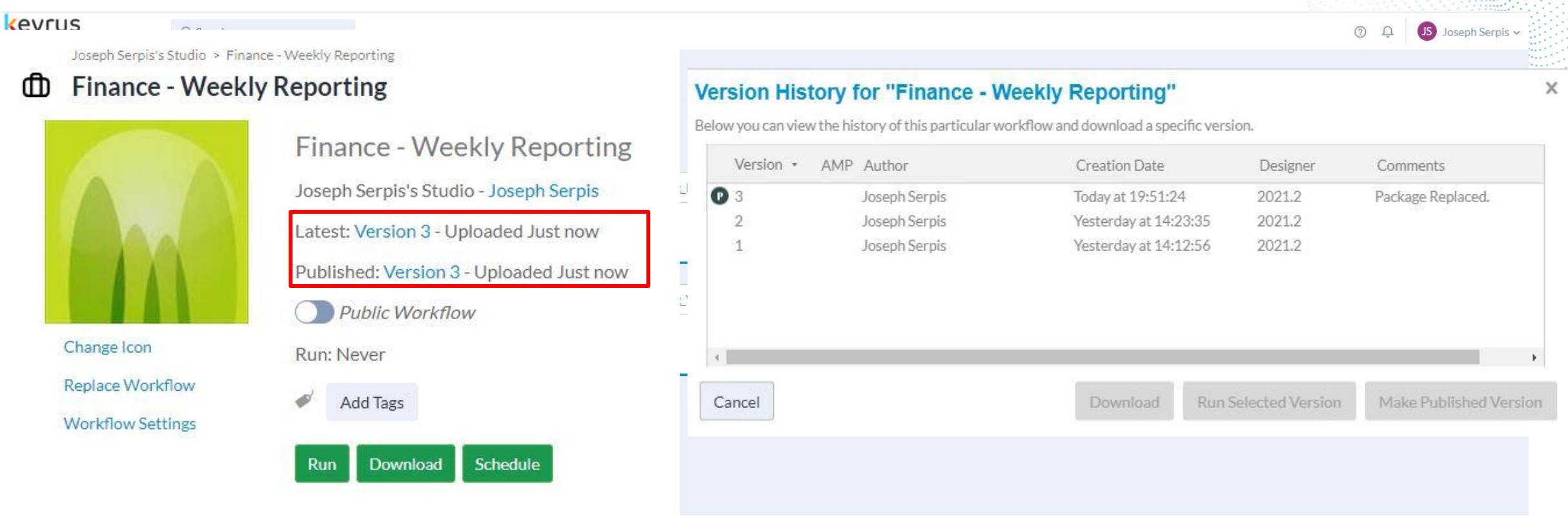
Version Control



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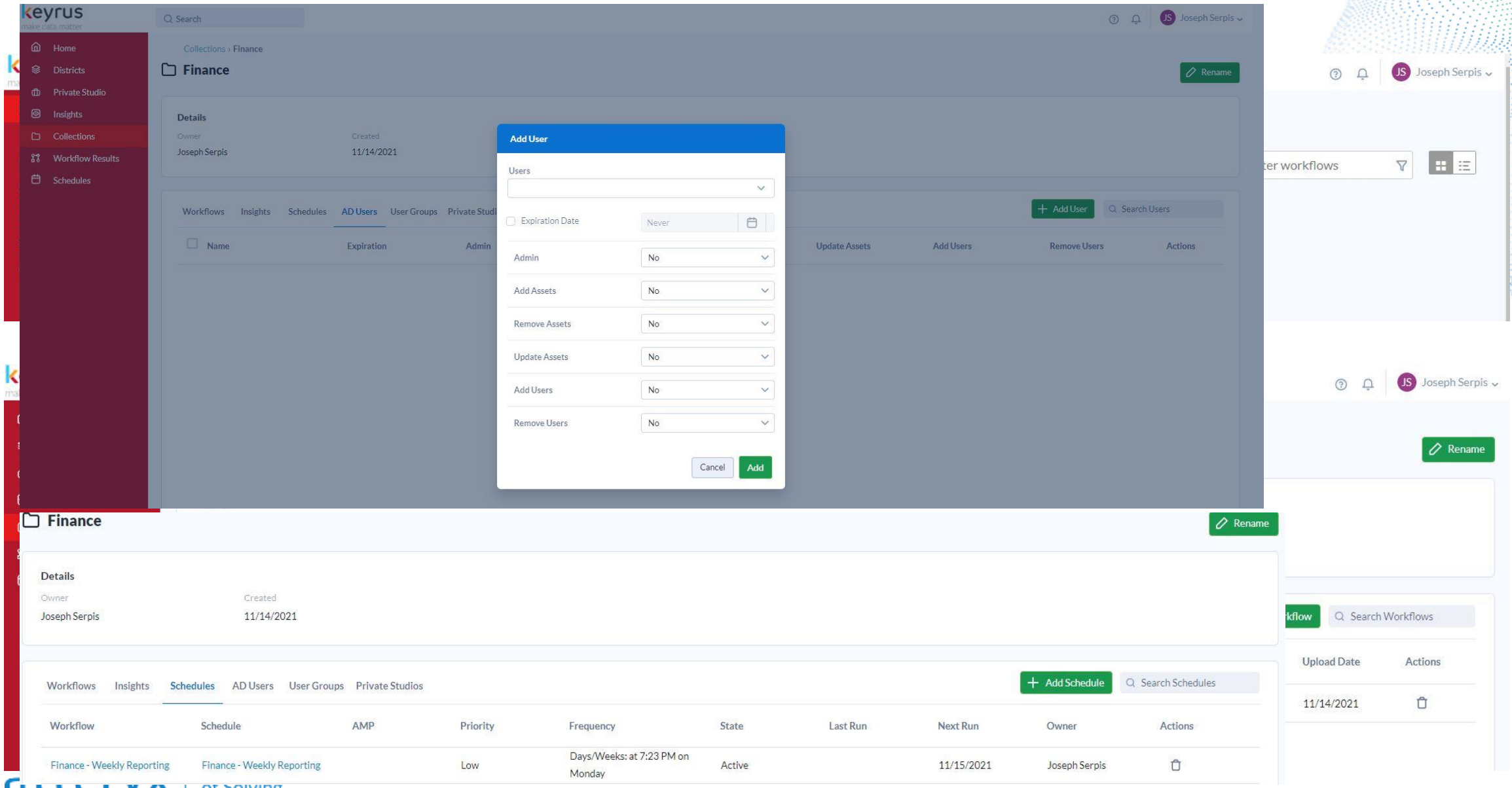
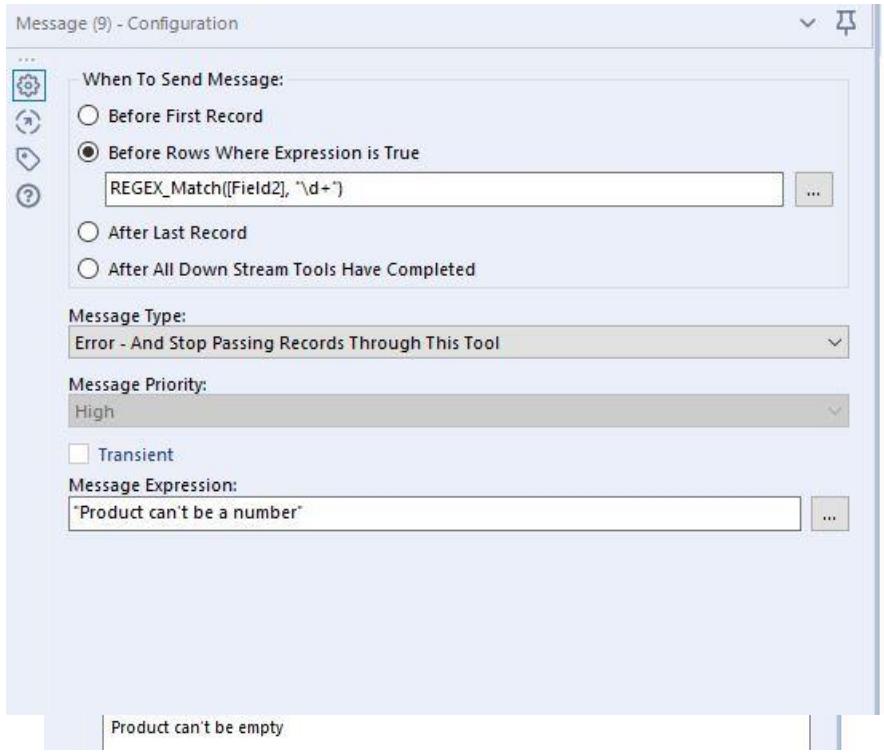
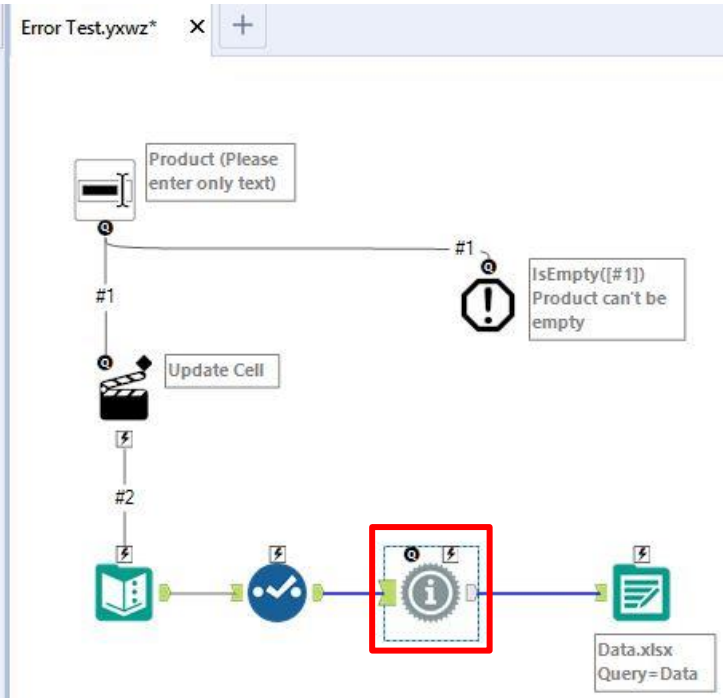
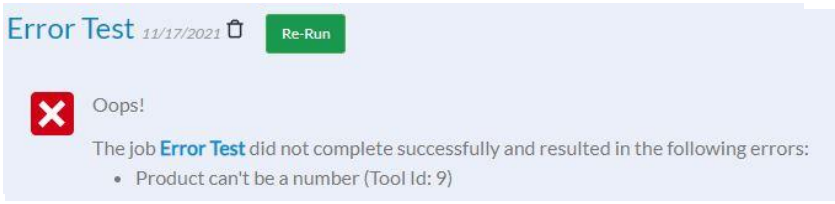
Collections



Error Messages







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Peer Review Workflows/ Apps

Check List

Documentation

Best practises

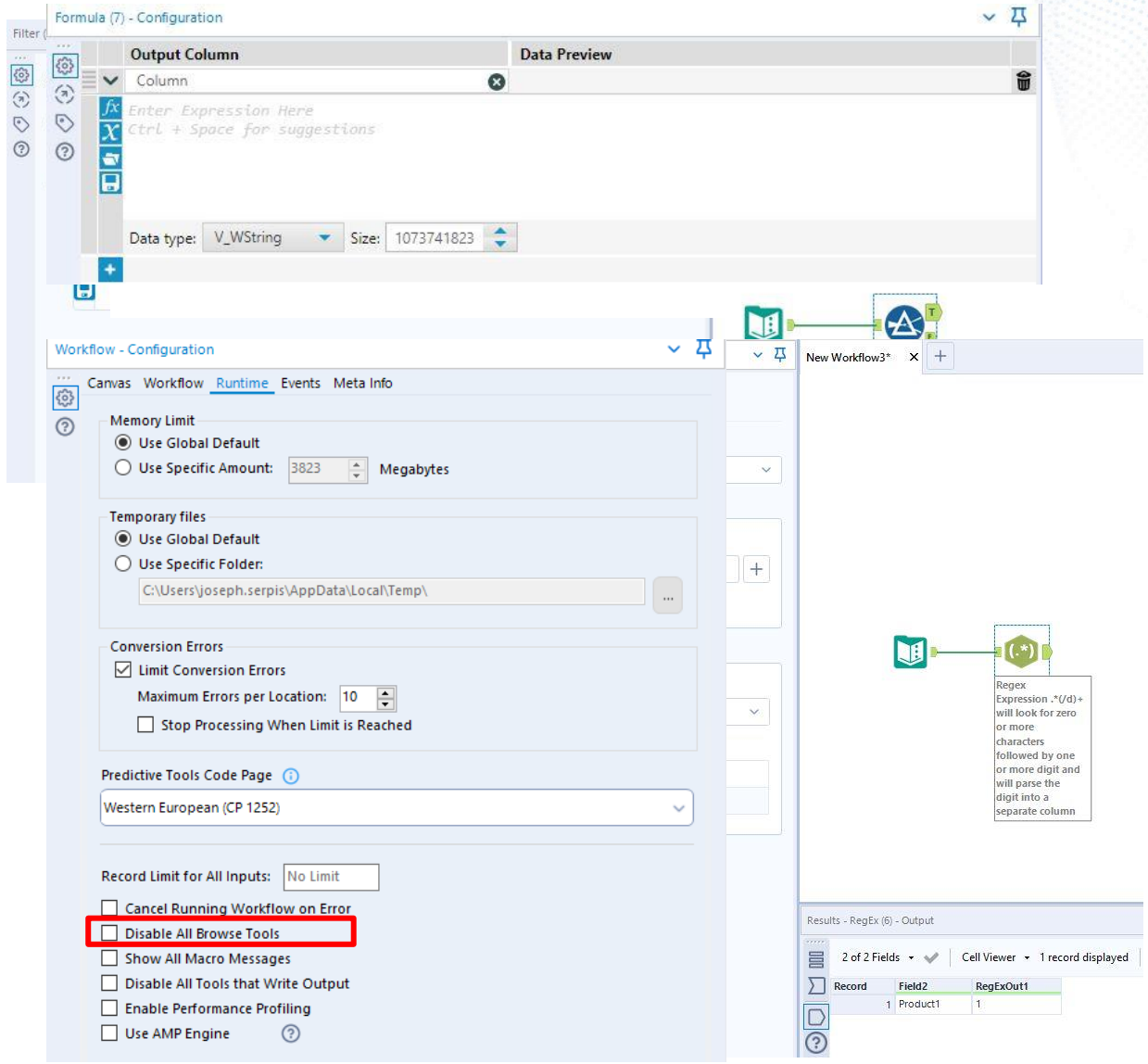
Database connection/Optimisation

Data field sizes

Slow Tools

Dropping Spatial Data

Disable Browse Tools



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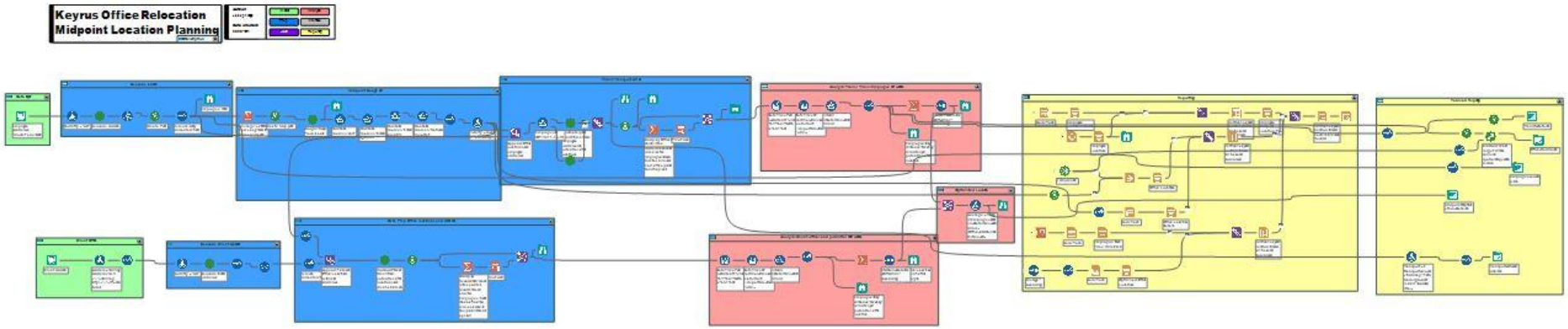
Documenting Workflows



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JOSEPH LIPSKI

PROS AND CONS OF USING MACROS AND DATA CONNECTIONS ON YOUR SERVER

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Asset Management Pros & Cons

- Flat Files
- Database Connections
- Macros

Joe Lipski

Aimpoint Digital
UK Practice Lead

Joe.Lipski@AimpointDigital.com

Alteryx ACE: 10 years in data, BI and advanced analytics

Previously: Javelin Group (Part of Accenture)

Passionate about helping others automate the mundane so they can focus on the fun

Interests: Sports & Sourdough

Flat File Assets

1 Save in Shared Location

In a location where Alteryx Server and users have access to, typically UNC pathed

✚ Centralized data source which is accessible and editable by the business.	▬ Network performance, editable by the business, potentially space issues depending on drive limits.

2 Load into Data Lake/Data Warehouse

Converting flat file into database table

✚ Centralized data source and allowing further use of data source by other tools by housing it within DWH.	▬ Have to setup some sort of ingestion using Alteryx or otherwise which may not be sensible for some sources.

Flat File Assets

3 Save as Text Input in Workflow

Copy and Paste data as Text Input tool directly in Alteryx Designer

+ If table is very small, not updated and used only in that workflow it may make sense to embed data into flow as text input.

- If table more than a few rows the workflow development performance suffers. The data is now stored directly in the XML making the workflow less lightweight.

4 Save on Alteryx Server Local Storage

Save flat files on some storage directly in the Alteryx Server environment

+ Fast performance of workflows as no network performance issues, typically good for staging tables (tables created and used by Alteryx).

- Could impact Alteryx Server performance and cause memory issues. Users needing access to Alteryx Server is some added risk. Not easily updated by non-Alteryx users. Risk of data loss.

Database Connections

1 Local Aliased Connections

True alias that translates alias per environment

+ Each environment uses their own configured credentials for DB impact traceability even with local credentials.

- Evaluating database performance hog is hard for server workflows as it runs with server credentials only. All environments have to be configured with matching aliases.

2 Gallery Aliased Connections

By default translates per Gallery configuration

+ Relatively easy to implement.

- No visibility into database performance hogs by user, local runs or server, unless using AD for access. Difficult to manage access using studios. Cannot promote across Dev/Prod servers with default setup.

Database Connections

3 File Connections (In-DB)

Typically housed on a shared location

+ Easy to implement. In-DB connection file (.indbc) can be packaged with a workflow for sharing.

- If hosted in a shared location, harder to permission, must be done on the folder level.

4 Embedded Credentials

User embedded credentials, DSN and DSN-less

+ Able to quantify the impact of the users queries regardless of individual runs or schedules.

- Schedules will fail if user's account is no longer valid. Potentially users appearing as other users if copying DB tools from other workflows.

Locations to Set as Mapped Macro Folders

Shared Location

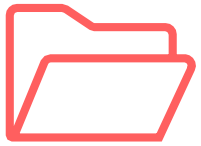
\+ Simplest to setup.

\- Network performance issues. Harder to version control and restrict changes to production macros.

Git Repository

\+ Best version control and can implement the most controlled promotion production process.

\- Requires Git on all Alteryx users' machines.



Local Folder

\+ Simple to implement.

\- Similar to a local git repository but with no sync of company macros. Either sync software or some other method or process has to be added to make this less manual/ad-hoc.

Macro Dependencies

Overall why?: Mapped macros run the version on their environment making seamless transition between user machines, Dev and Prod environment. Mapped macros also will appear within the Alteryx toolbar. Can also leverage Git in this environment.

1 Ini Files

Files which tell Alteryx the folders to map for macros

+ Maps multiple macro folders for users. Able to distribute these files to relevant users' machines to ensure proper access is provided.

- Requires distribution of ini files to employee machines or otherwise there remains some manual process.

2 Manual Macro Mapping

Process driven

+ Simplest of the mapped macro methods to implement for a single user.

- Very manual and time consuming. Hard to maintain with every new user, easy for existing users to fall behind of macro folders additions.

3 Install Macros / Default Locations

Default macro locations are local, pre-mapped folders, installing macros places them in these folders

+ Can be managed through Alteryx Gallery.

- Requires user to install every tool they want to use as a macro. Risk of local macros being outdated.

Macro Dependencies

4 Network Drive Location with UNC Path

Alternative

Configured with UNC Path to run without error but not a mapped macro

+ Centralize logic and data sources. Easy to implement, good for single use macros/personal macros.

- Not as easy to implement Dev/Prod as references are not relative to environment. Not shown in Alteryx toolbar. Requires user to convert from absolute path to UNC per workflow.

5 Embedded Macros

Not Recommended

Regardless of how the macro was referenced in desktop, it is embedded on Gallery upload

+ Guarantees workflow will run on Gallery without macro dependency errors. If a macro update breaks dependencies, the workflow with an embedded macro will not be impacted.

- Future macro updates will not flow through to gallery workflows with embedded copies of the macro. Skips the macro validation process.

SAMANTHA HUGHES

BE RISK ADVERSE WITH ALTERYX SERVER

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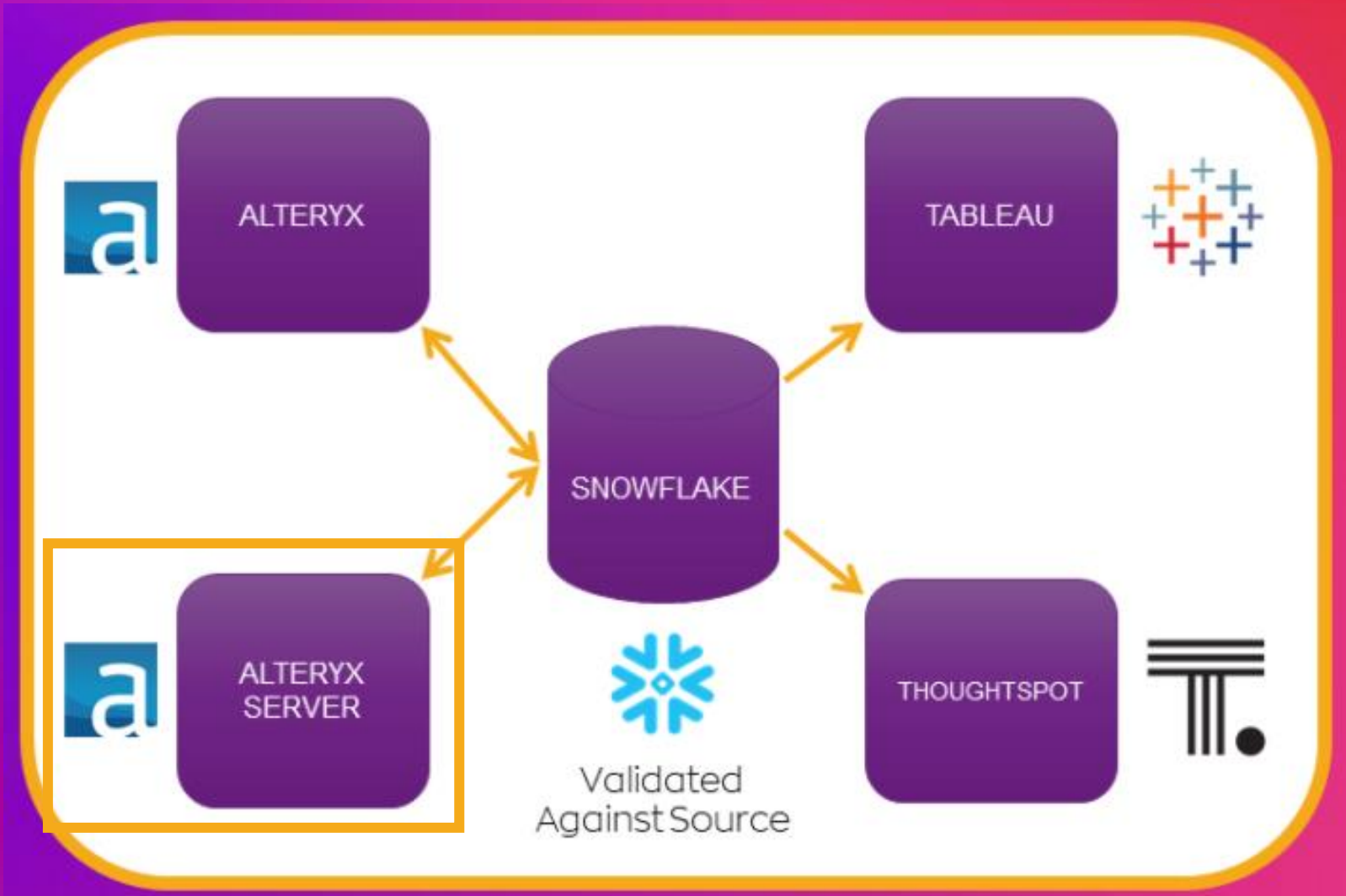
TEAM INNVOVATION
BE RISK ADVERSE WITH ALTERYX SERVER
AVON

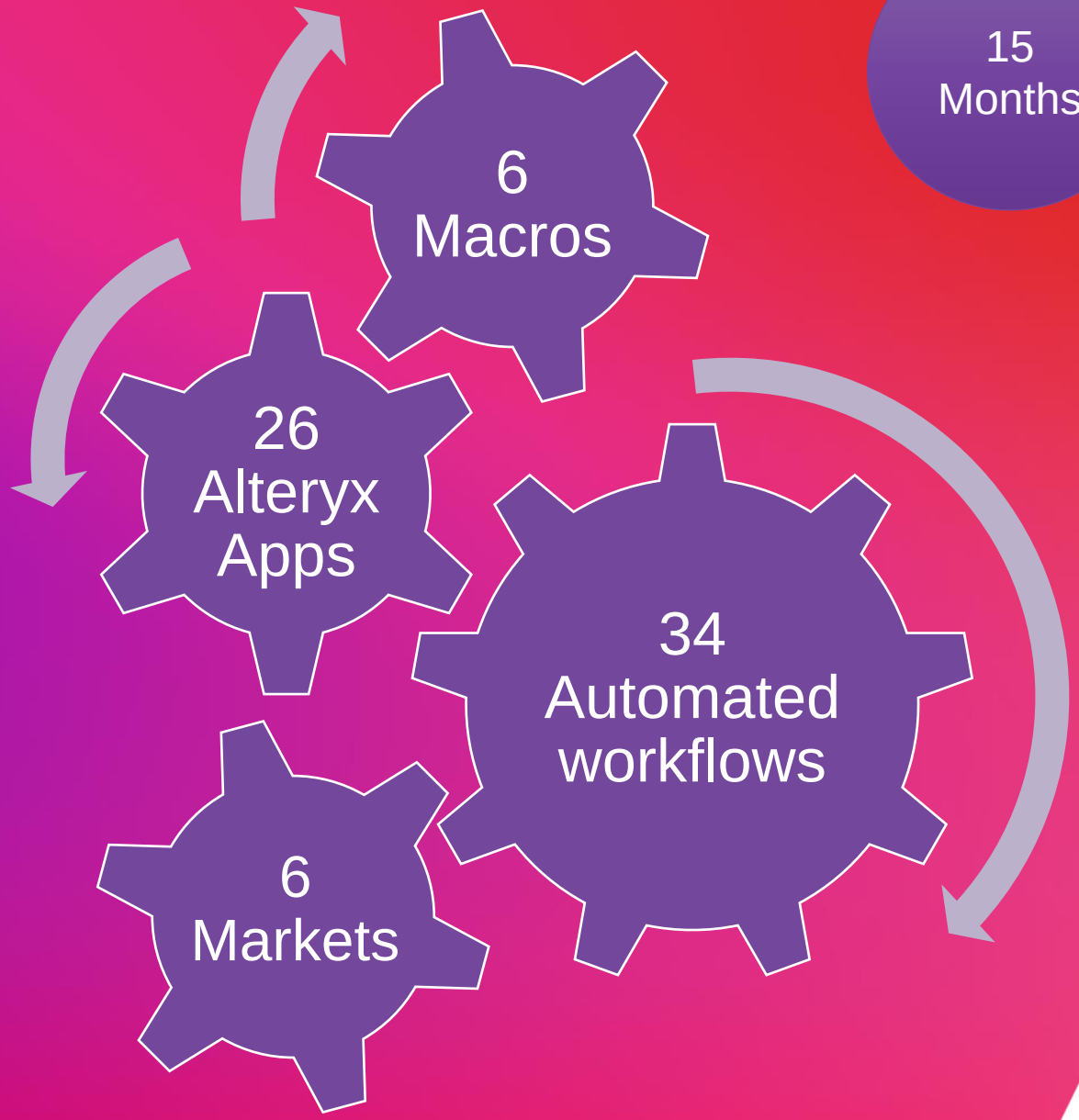
OUR TECHNOLOGY



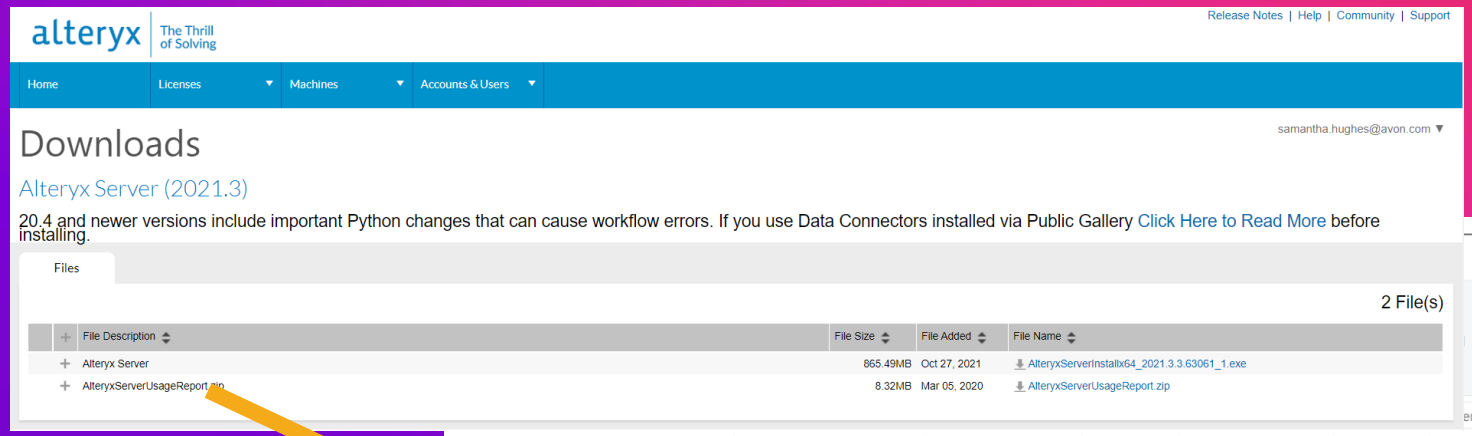
15
Months

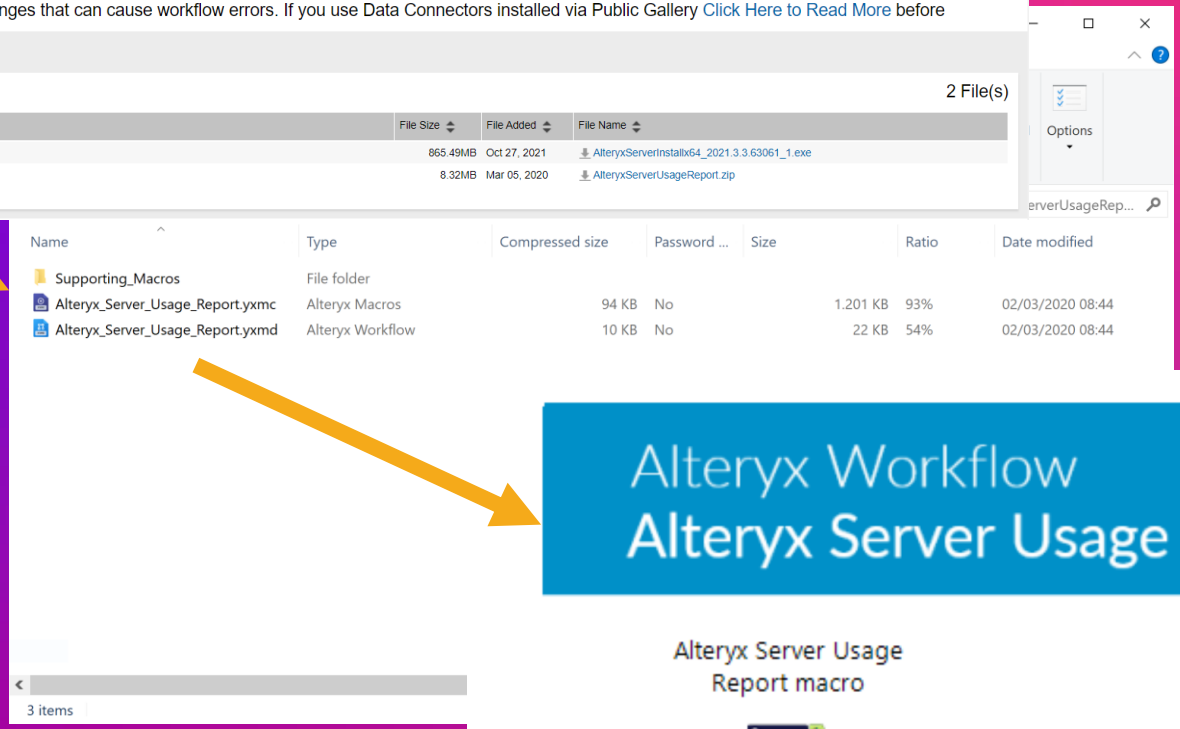
1
ALTERYX
SERVER

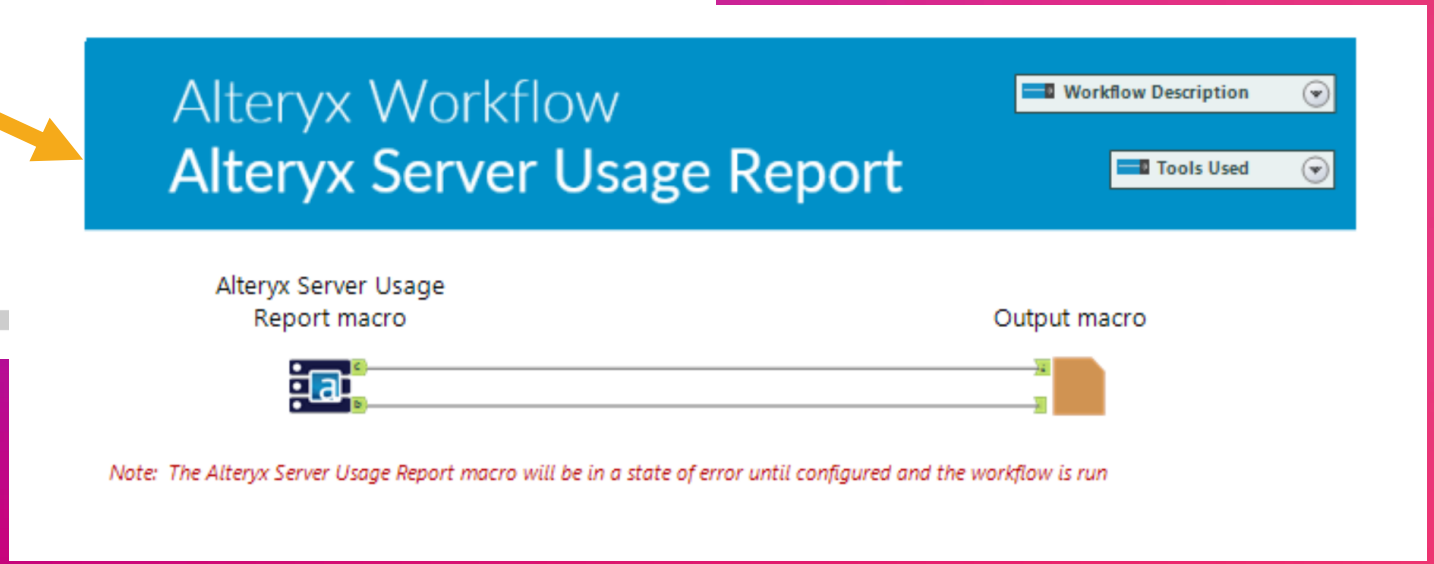
7
ALTERYX
DESIGNERS



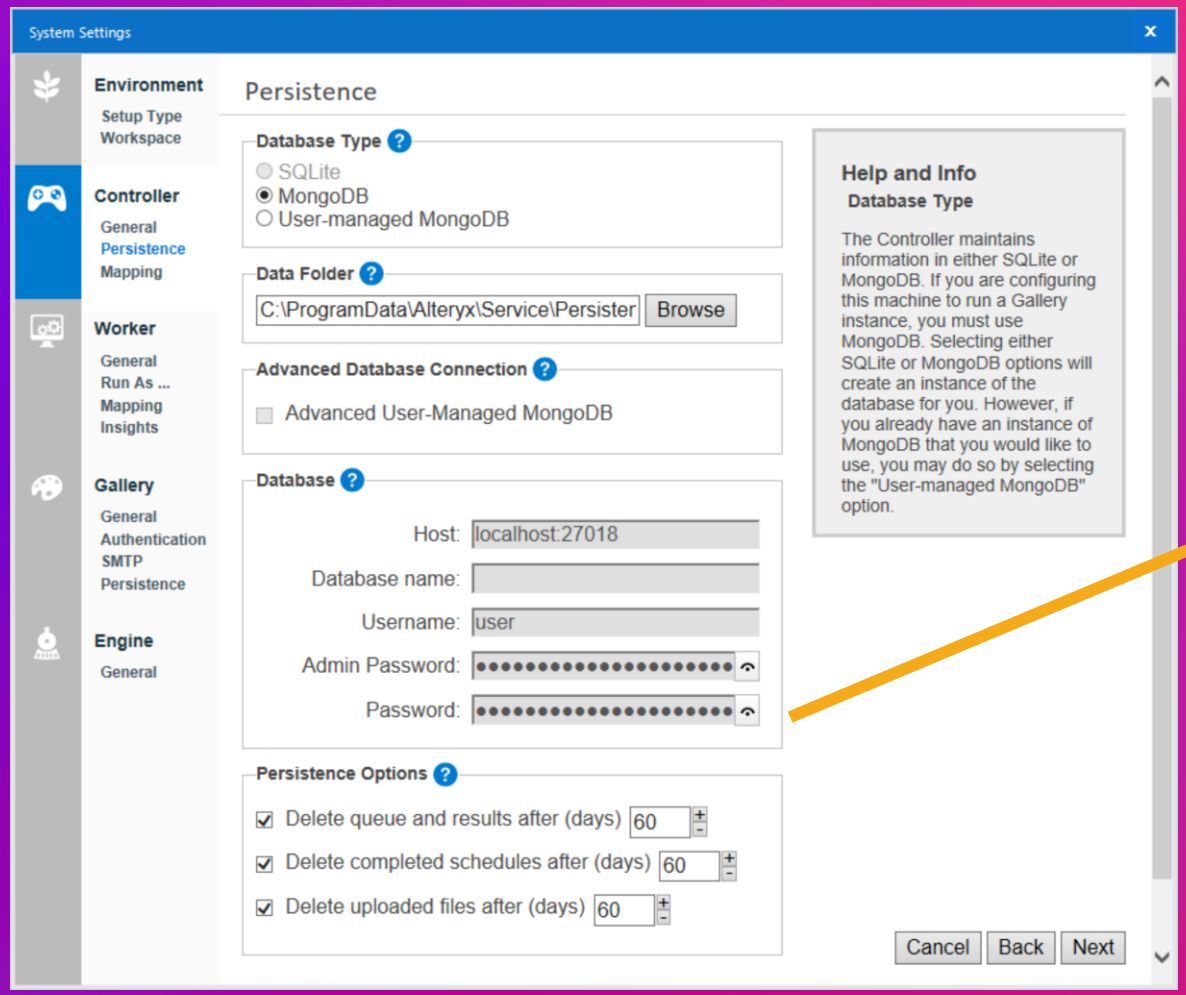
USAGE REPORT

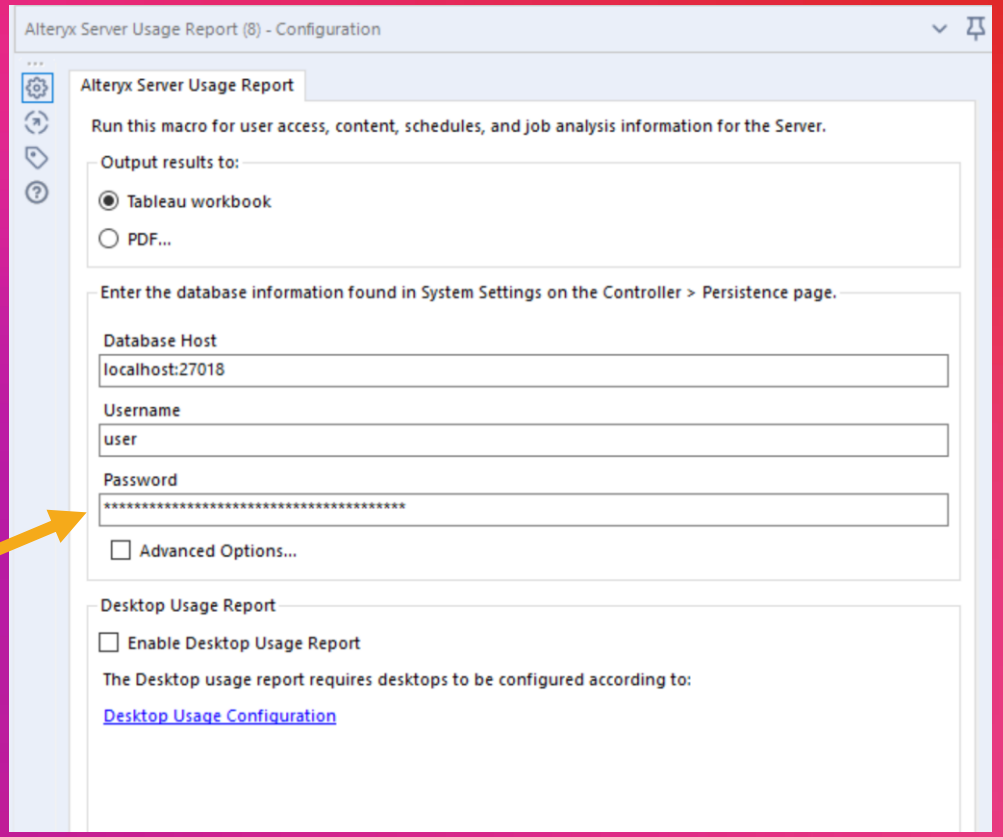






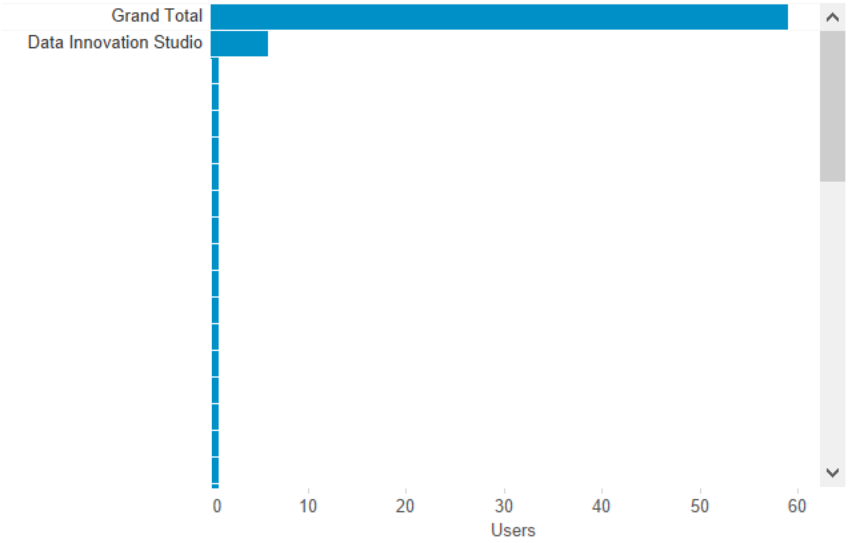
WHERE IS MY PASSWORD?





Alteryx Server Report | Access

Studio Users



User List

Search:

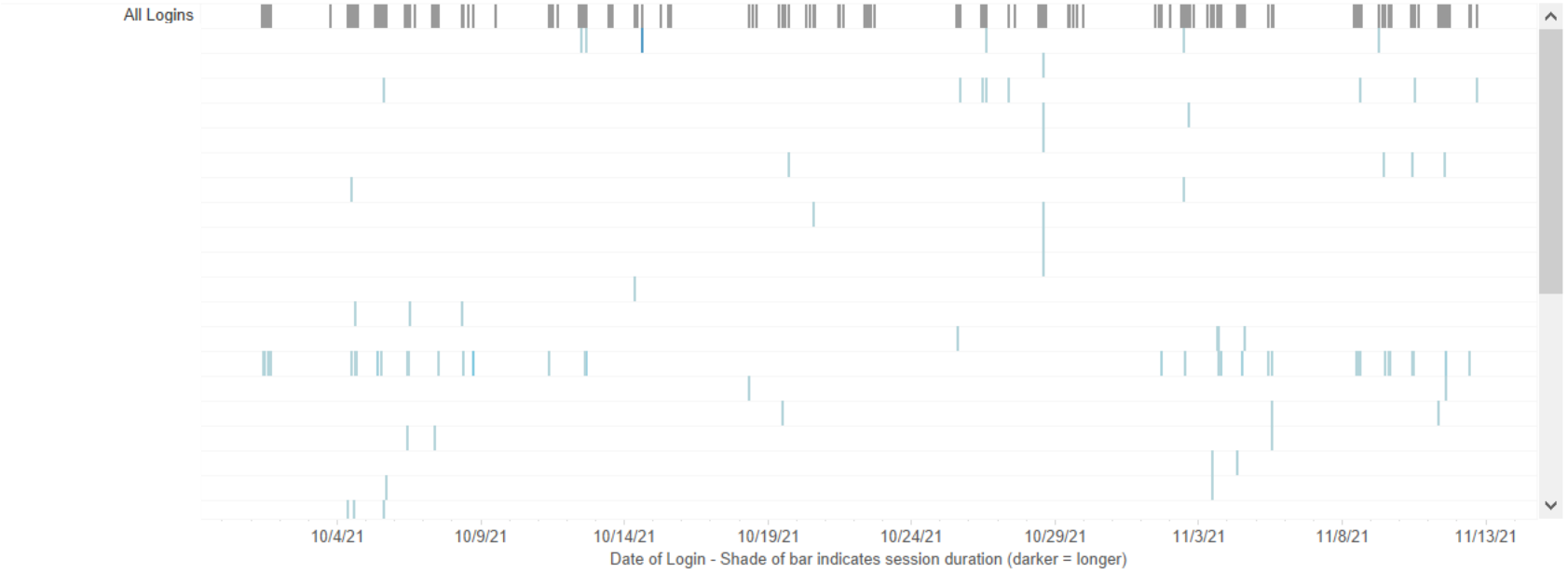
Name	Role
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated
	Evaluated

Low Activity Users

Haven't logged in within the last days 180

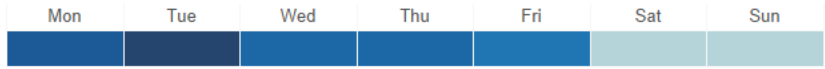
April 27, 2021 at 9:50 AM
April 29, 2021 at 12:31 PM
April 29, 2021 at 12:33 PM
April 29, 2021 at 12:36 PM
April 29, 2021 at 12:55 PM
April 29, 2021 at 1:05 PM
April 29, 2021 at 1:15 PM
April 30, 2021 at 8:08 AM
April 30, 2021 at 8:51 AM
May 3, 2021 at 12:22 PM
May 14, 2021 at 8:49 AM
May 17, 2021 at 7:08 AM

Login History



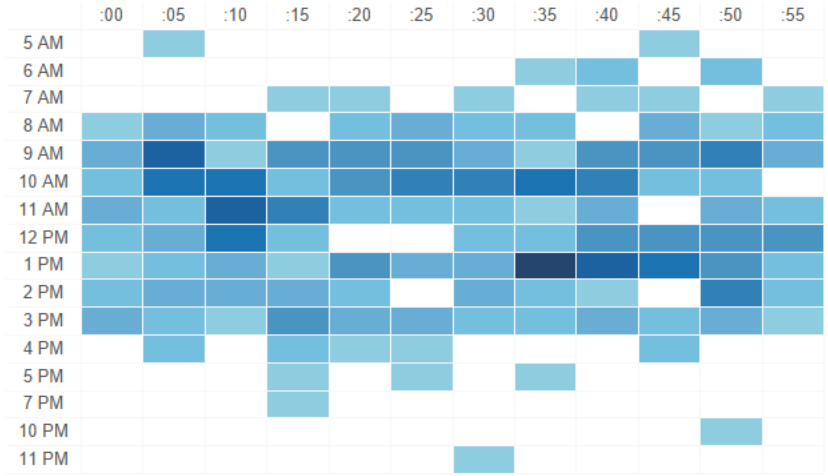
Logins by Day of Week

This quarter



Logins by Time of Day

Login time rounded down to nearest five minute increment



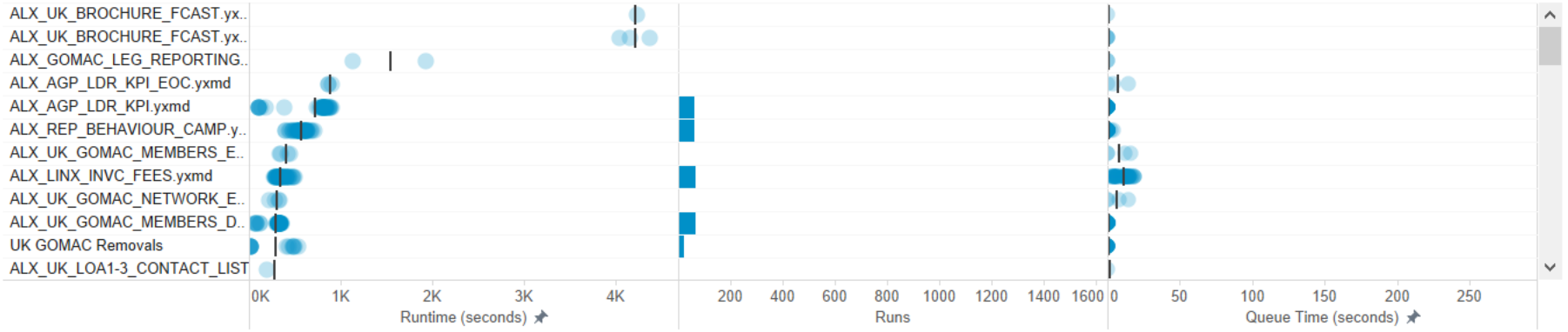
Alteryx Server Report | Job Analysis

Success Warning Error

This quarter

45

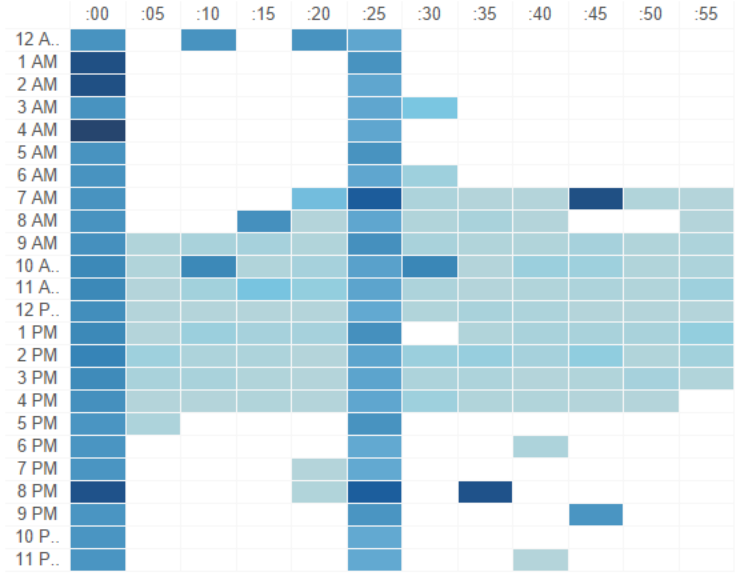
App Runtime, Count, and Queue Time



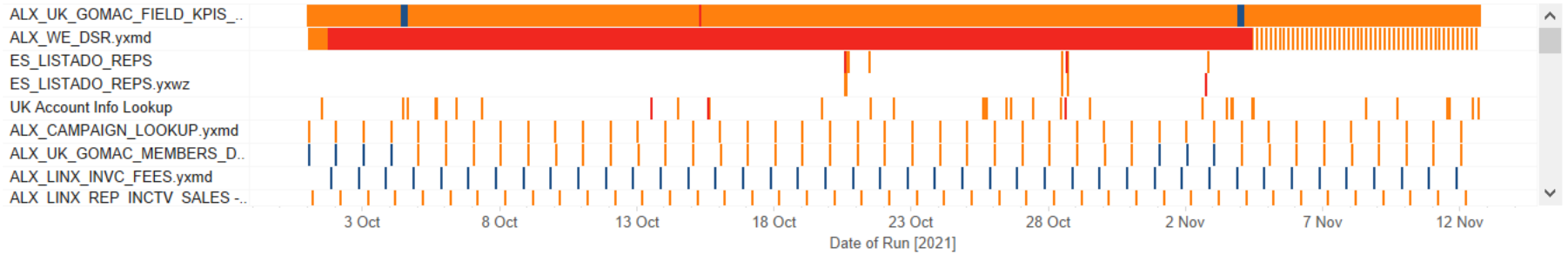
Volume by Day of Week

Volume by Time of Day

Start time rounded down to nearest 5 minute increment



App Runs Over Time



Run Details

Run Date	Job Name	App Name	
12/11/2021 16:00:19	Null	ALX_UK_GOMAC_FIELD_KPIS_HOURLY.yxmd	Result: Name: Message Value: -1|1|Running at a Low Priority. Name: Message Value: 10|1|ODBC Driver version: 03.52 Name: Message Value: 3|5|TimeStamp: "2021-11-12 00:00:00" was truncated Name: Message Value: 3|5|TimeStamp: "2021-11-12 00:00:00" was truncated Name: Message..
12/11/2021 15:47:14	UK Account Info Lookup	UK Account Info Lookup	Result: Name: Message Value: -1|1|Running at a Low Priority. Name: Message Value: 118|1|1 record was output Name: Message Value: 115|1|199 records were summarized to 1 groups Name: Message Value: 113|1|ODBC Driver version: 03.80 Name: Message..

Alteryx Server Report | Content

Show content that is

Deleted
- (•) Not Deleted
- ( ) Deleted

Credentials: (All)

Downloadable: (All)

Public: (All)

Req. Approval: (All)

Runnable: (All)

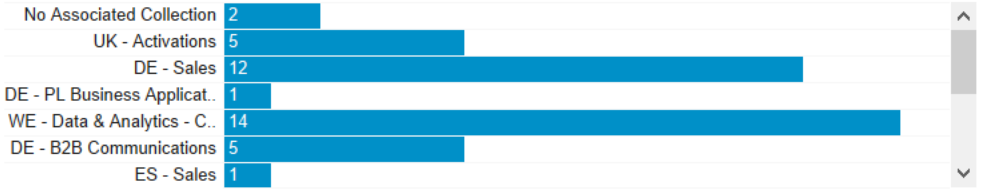
Valid: (All)

Type

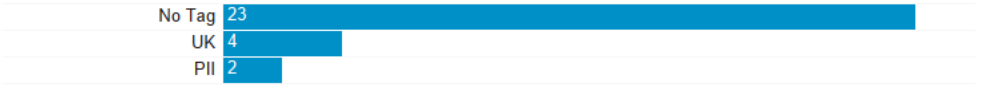
Execution Mode

Studio

Collection

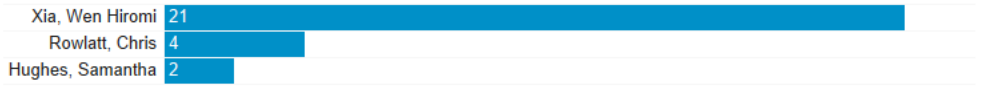


Tag



Author

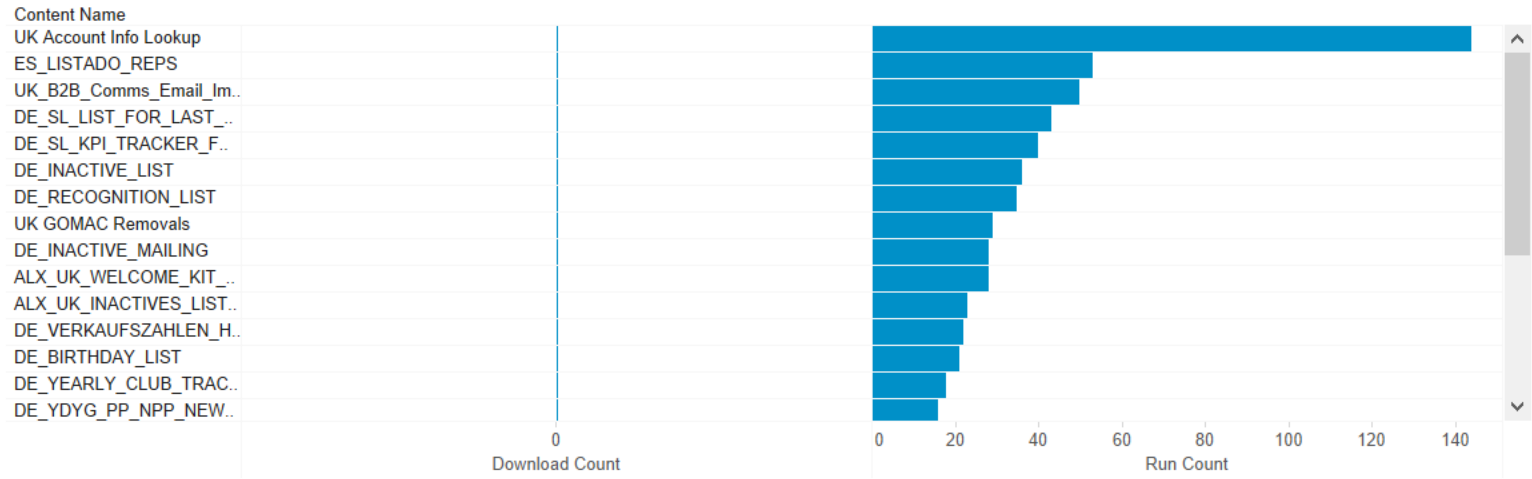
Search:



Content Attributes

Content Name	Version	Description	Published	Credentials	Downloadable	Public	Requires Approval	Run Disabled	Valid
KICK_START_FOR_SURVEY_MONKEY	1	Null	11/10/21	✗	✓	✗	✗	✗	✓
ES_LISTADO_REPS	1	An App to get Rep li..	11/2/21	✗	✓	✗	✗	✗	✓
DE_SL_KPI_TRACKER_FOR_FINANCE	1	An application to tra..	11/2/21	✗	✓	✗	✗	✗	✓
DE_VERKAUFSZAHLEN_HAUTPFLEGE_LEXION_REPORT	1	A report for tracking..	11/2/21	✗	✓	✗	✗	✗	✓
DE_YEARLY_CLUB_TRACKER_2021	1	An application to tra..	11/2/21	✗	✓	✗	✗	✗	✓
DE_YDYG_PP_NPP_NEWS_LETTER_LIST	1	An application to ge..	11/2/21	✗	✓	✗	✗	✗	✓
DE_SL_LIST_FOR_LAST_CLOSED_CAMPAIGN	1	An application to ge..	11/2/21	✗	✓	✗	✗	✗	✓
DE_SL_BANK_PERSONAL_INFO	1	An APP to extract b..	11/2/21	✗	✓	✗	✗	✗	✓
DE_RECOGNITION_LIST	1	EN :..	11/2/21	✗	✓	✗	✗	✗	✓
DE_INACTIVE_LIST	1	A list of 1 (2) times ..	11/2/21	✗	✓	✗	✗	✗	✓
DE_INACTIVE_MAILING	1	An application to ge..	11/2/21	✗	✓	✗	✗	✗	✓
DE_IAC_4_13_LIST	1	An application to ge..	11/2/21	✗	✓	✗	✗	✗	✓
DE_G1_ACTIVES	1	An application to ge..	11/2/21	✗	✓	✗	✗	✗	✓
DE_FIRST_TIME_MAX_TITLE_IN_LAST_CLOSED_CAMPAIGN_LIST	1	EN ..	11/2/21	✗	✓	✗	✗	✗	✓
UK GOMAC Removals	1	This application is t..	9/15/21	✗	✓	✗	✗	✗	✓
DE_REACTIVATION_PROGRAM	1	An application to ge..	9/9/21	✗	✓	✗	✗	✗	✓
ES_VECDAN_2021	1	Null	9/1/21	✗	✓	✗	✗	✗	✓

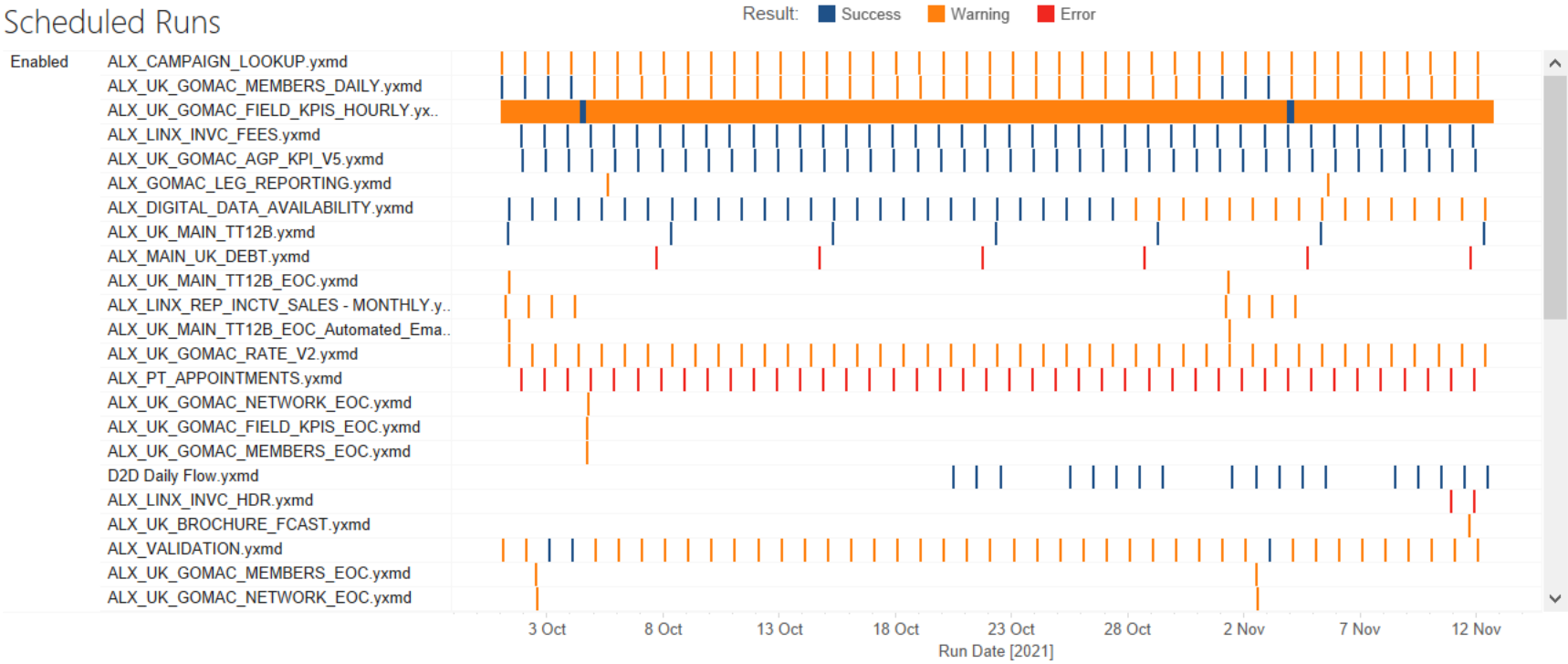
Content Metrics



Alteryx Server Report | Schedule

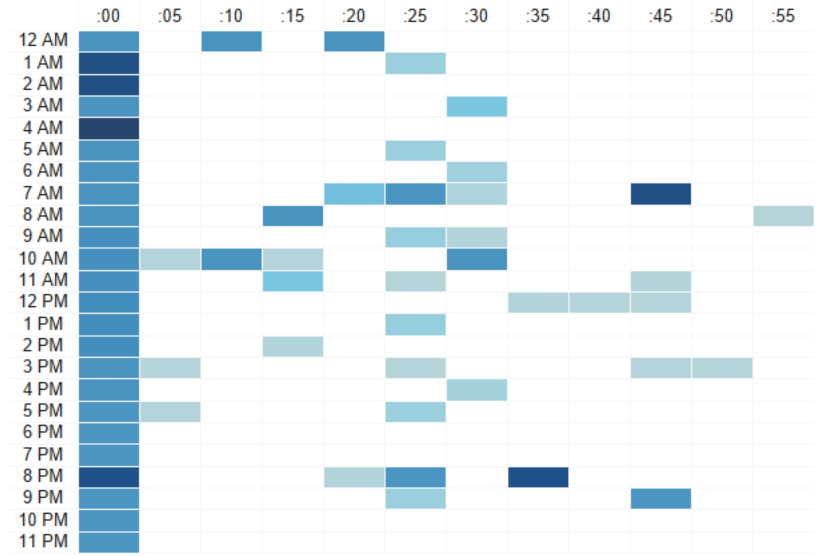
Date Filter: This quarter

Scheduled Runs



Volume by Day of Week

Volume by Time of Day



Scheduled Runs with Errors

Job Start	Job Complete	Schedule Name	
10/15/2021 7:00 AM	10/15/2021 7:00 AM	ALX_UK_GOMAC_FIELD_KPIS_HOURLY.yxmd	Runtime of 32.435 Second(s) Error Message ToolId 10: Error SQLExecute: [Oracle][ODBC][Ora]ORA-03114: not connected to ORACLE
11/11/2021 4:30 PM	11/11/2021 4:30 PM	ALX_MAIN_UK_DEBT.yxmd	Runtime of 4.443 Second(s) Error Message ToolId 19: Error SQLDriverConnect: Incorrect username or password was specified.
11/4/2021 4:30 PM	11/4/2021 4:30 PM	ALX_MAIN_UK_DEBT.yxmd	Runtime of 3.29 Second(s) Error Message ToolId 19: Error SQLDriverConnect: Incorrect username or password was specified.

MOVING BETWEEN ENVIRONMENTS

DEV → QA → PROD

Canvas | Workflow | Runtime | Events | Meta Info

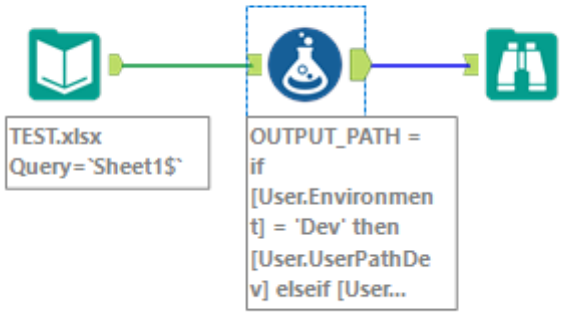
Path:

Type

- (•) Standard Workflow
- ( ) Analytic App
- ( ) Macro: Standard Macro

Constants:

Type	Name	Value	#
Engine	TempFilePath	C:\Users\hughesam\AppData\Local\Temp\	
Engine	Version	2020.4.6.36807	
Engine	WorkflowDirectory	C:\Program Files\Alteryx\bin\	
Engine	WorkflowFileName	New Workflow6	
Engine	GuiInteraction	True	
User	UserPathDev	C:\Users\local\DEV	
User	UserPathQA	C:\Users\local\QA	
User	UserPathProd	C:\Users\local\Prod	
User	Environment	Dev	

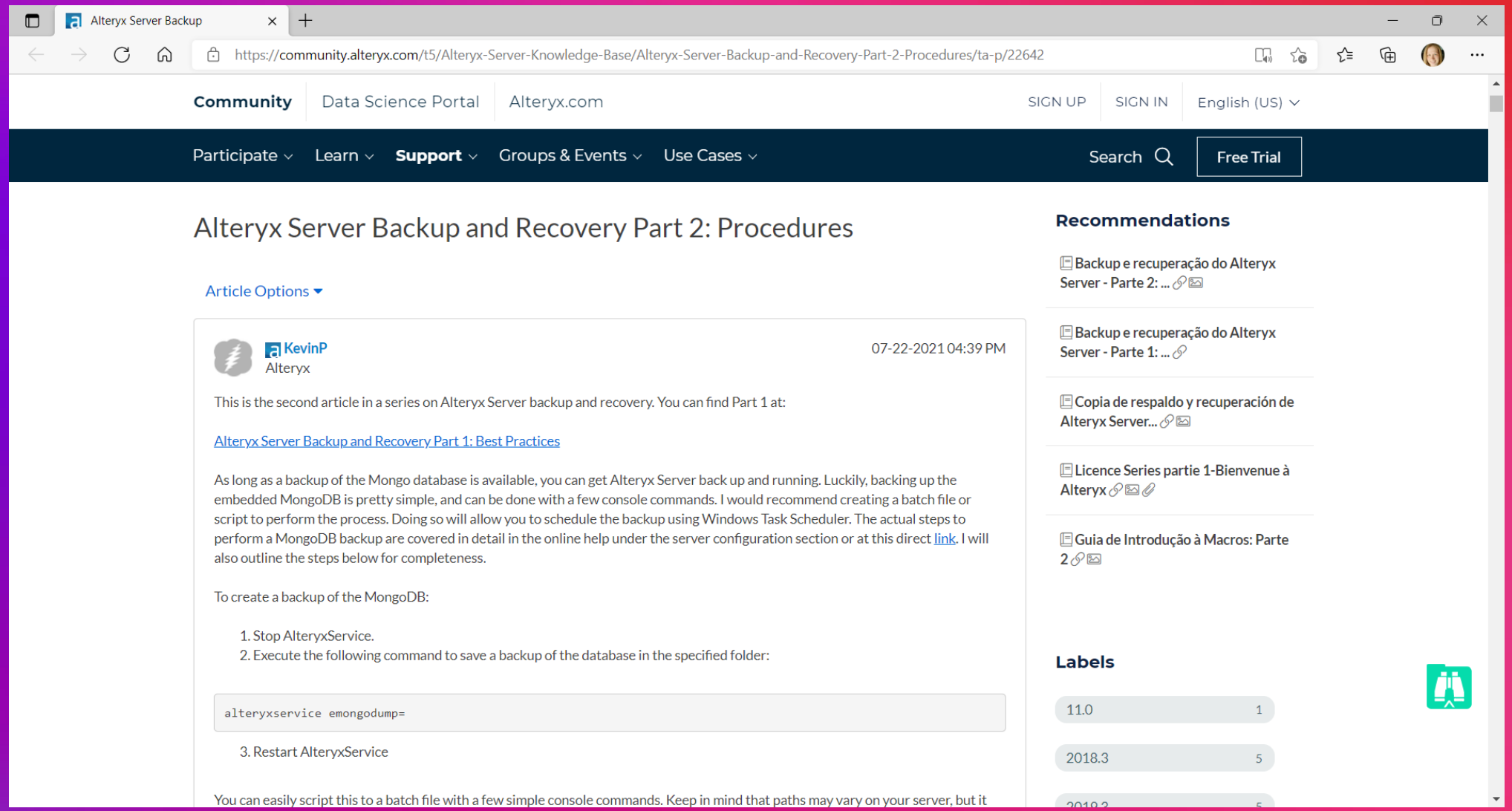


Output Column	Data Preview
OUTPUT_PATH	C:\Users\local\DEV

```
if [User.Environment] = 'Dev' then [User.UserPathDev] elseif
[User.Environment] = 'QA' then [User.UserPathQA] elseif [User.Environment]
= 'Prod' then [User.UserPathProd] else "ERROR" endif
```

Data type: V_WString Size: 1073741823

RISK ADVERSE



MIGATING RISK

Use **EVENTS** in your workflows to email the right people when your workflows error on run.

Use the **USAGE REPORT** report to manage and maintain your Alteryx Server.

REMOVE users who have been inactive / left the business regularly – set up a diary invite once a month to check and clean up.

MIGATING RISK

Have a local **BACKUP** of all your files away from the Alteryx Server itself for ease of restoring when things go really wrong.

Have controls / checks in place before people **UPLOAD** apps that they actually work first.

Code packages within Python & R – **CHECK** them against known spyware risks before installing them on your server environment,.

CHAT BOX

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BREAKOUT - NETWORKING

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