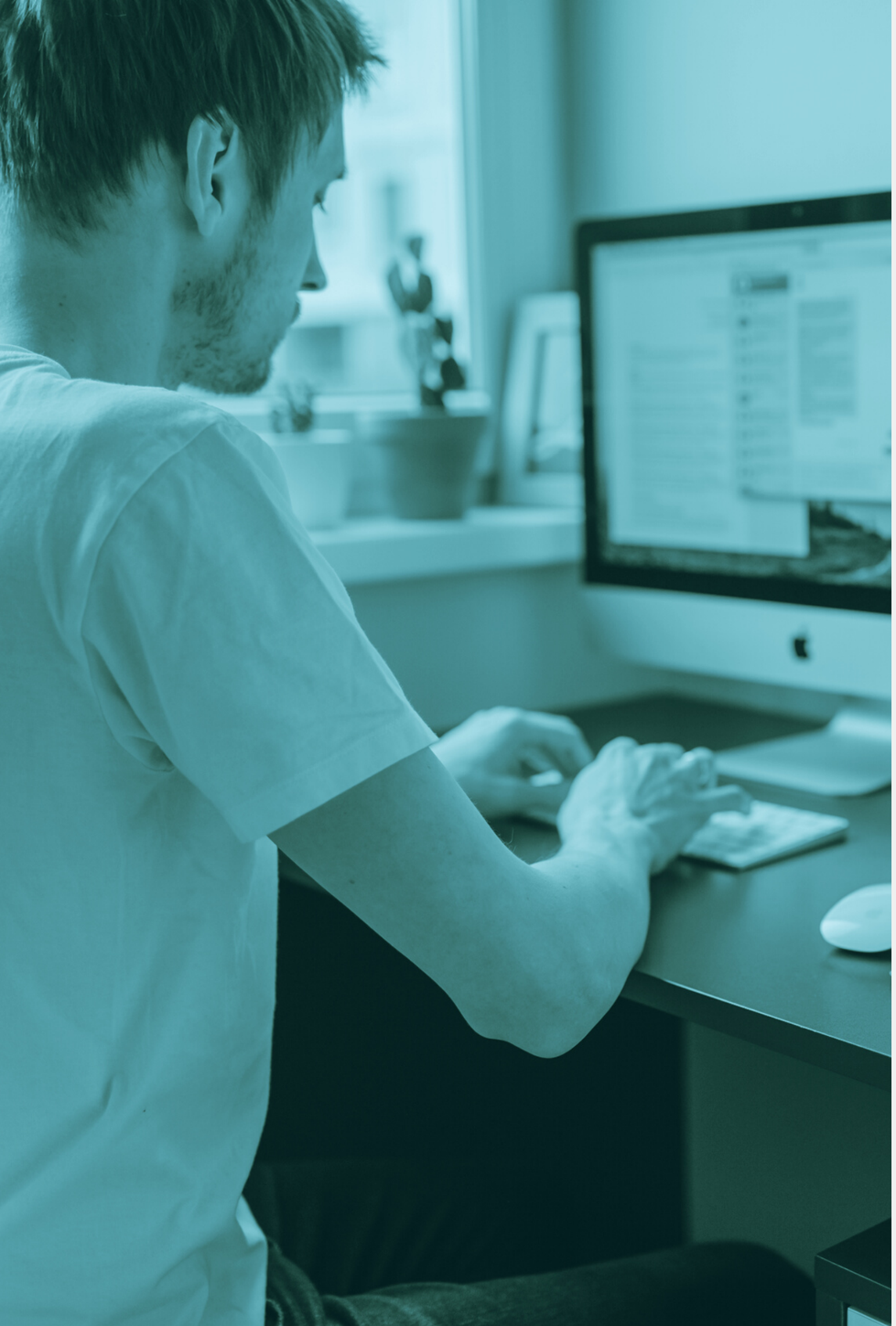
Alteryx Tips & Tricks

By

DATA PREP U

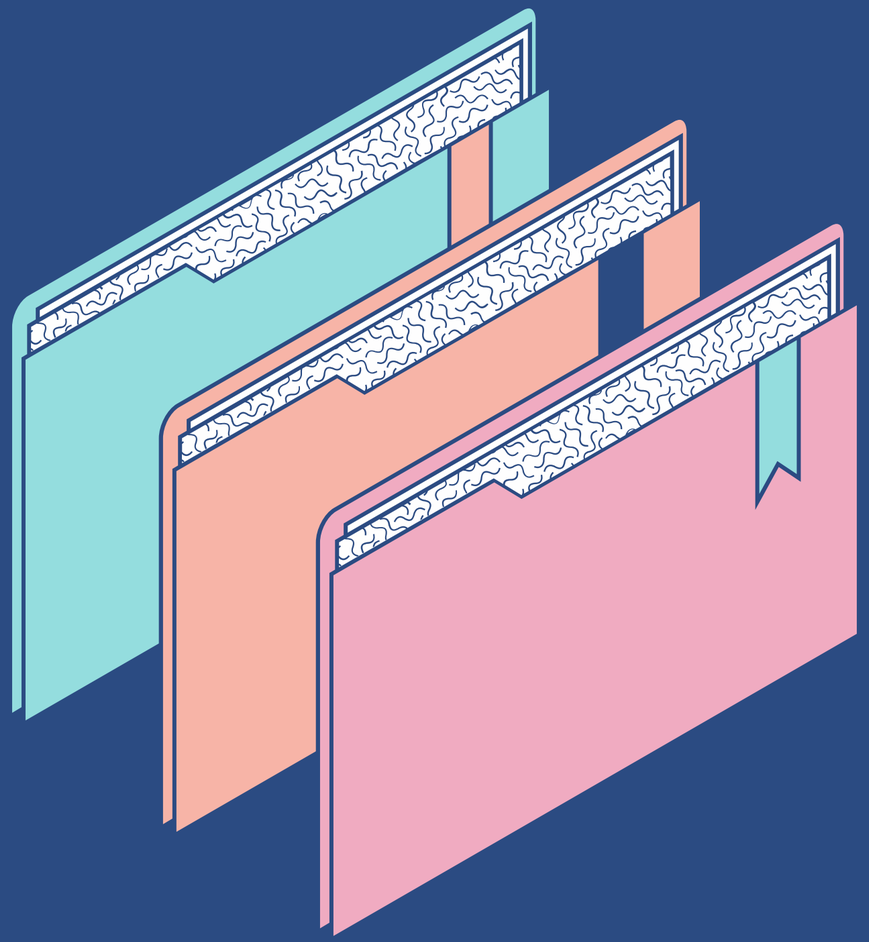


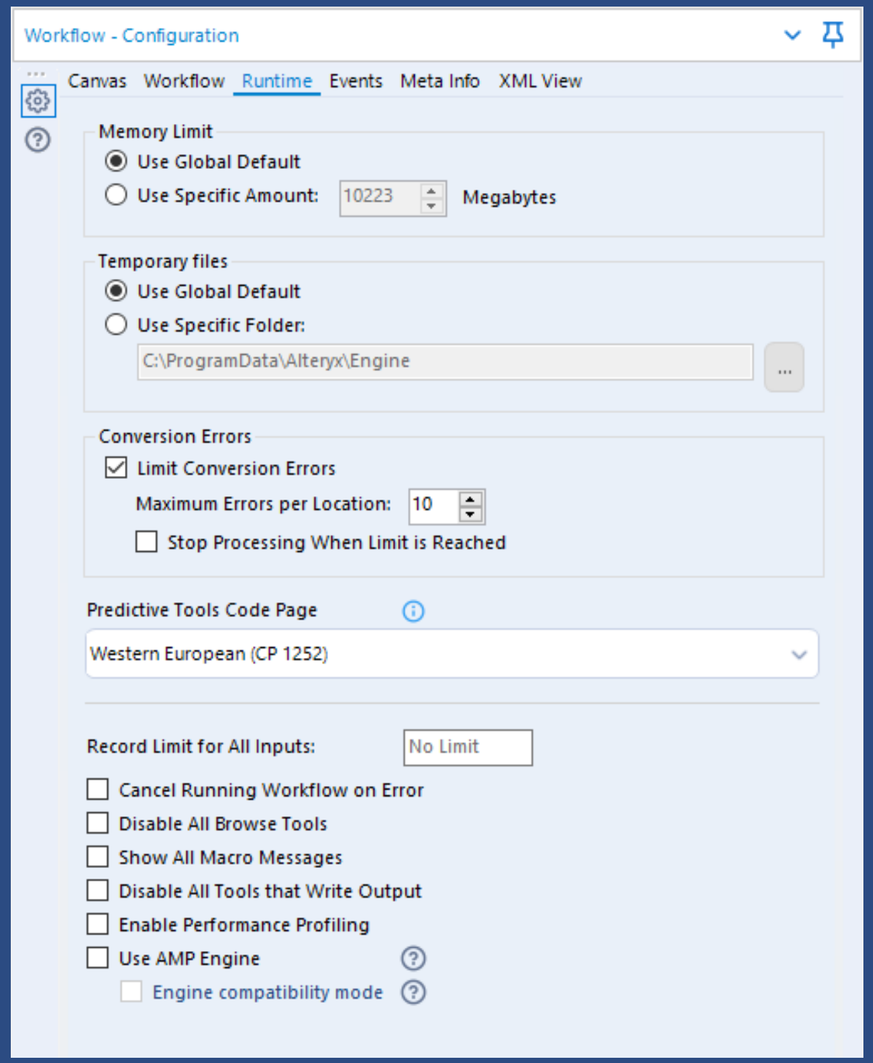
Less is More

THE BASIC FOUNDATION OF ALTERYX IS IN HOW IT PROCESSES DATA

Alteryx primarily processes data one record at a time. While this seems tedious, think of it being able to dedicate immense resources for one single record, then repeating that thousands, hundreds of thousands, and millions of times.

Runtime Settings





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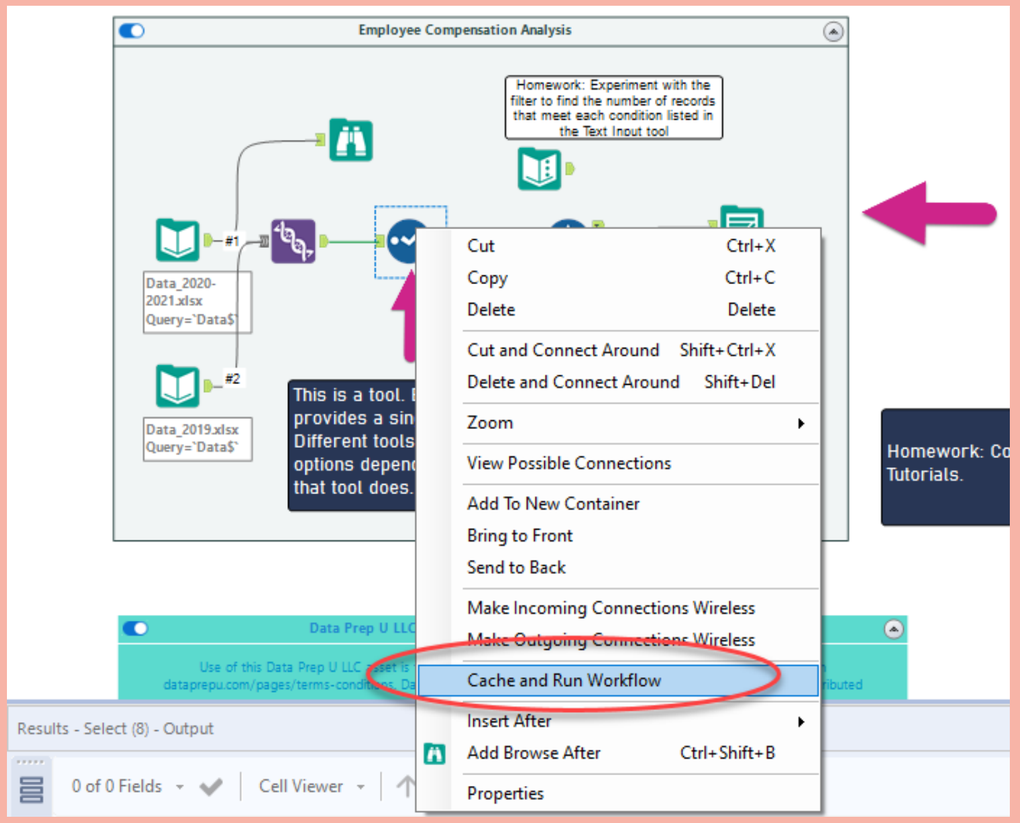
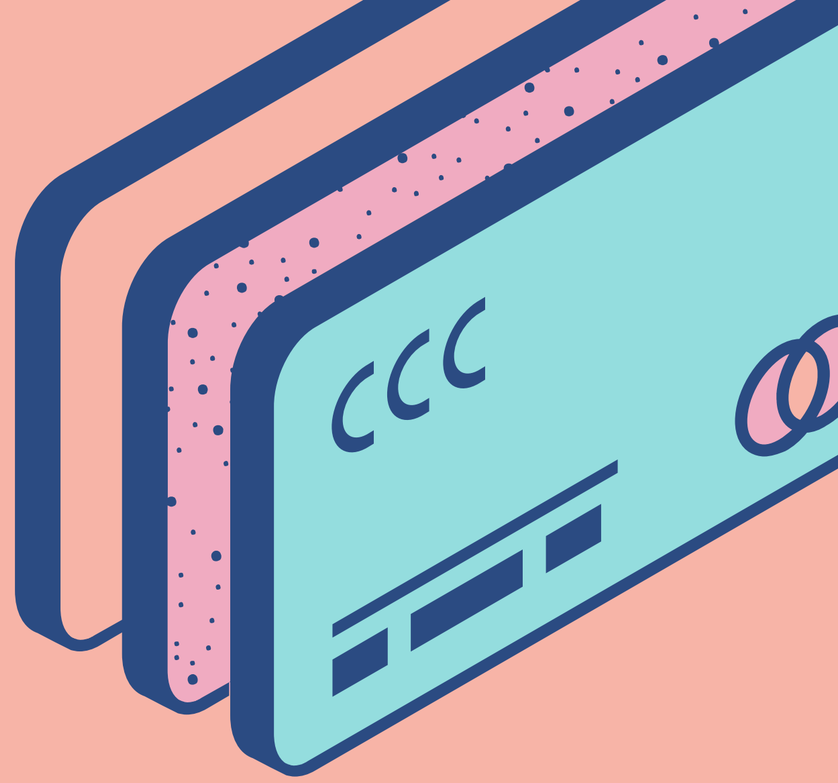
Cache Your Workflow!

REDUCE DEVELOPMENT TIME BY CREATING STRATEGIC CACHE POINTS





Fewer tools = Faster processing

Caching creates a temporary .yxdb file at a mid-point in your workflow. This allows for a workflow to be run from this point, rather than having to run the entire workflow every time.

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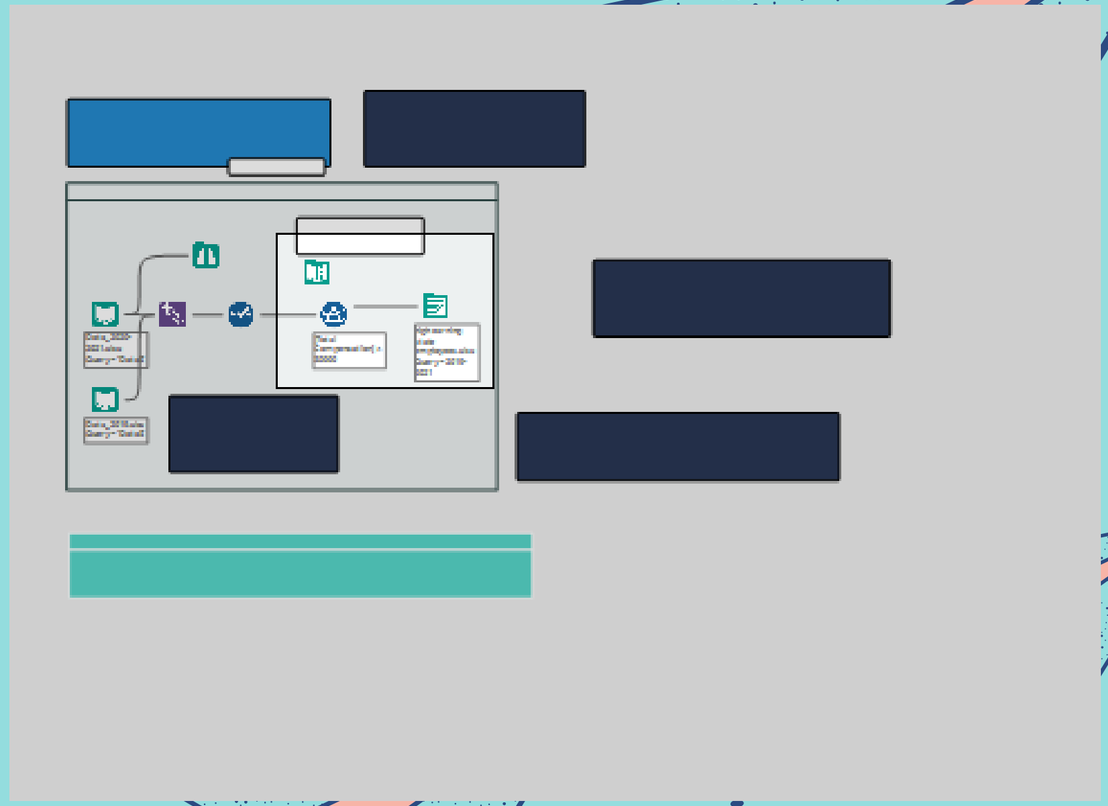
Enable the Overview Window

CLICK VIEW -> OVERVIEW

Enabling the Overview Window can be extremely helpful for navigating large workflows.



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Input Data Record Limit

- Cuts off reading in data as soon as the limit is reached.
- Much faster for initial development.
- Not as widely known so can be tougher to troubleshoot.

vs.

Sample Tool Limit

- Cuts off reading in data as soon as the limit is reached.
- More widely known, easier to troubleshoot.
- Prior tools will continue to fully process.

- Hint! Use the Sample Tool with

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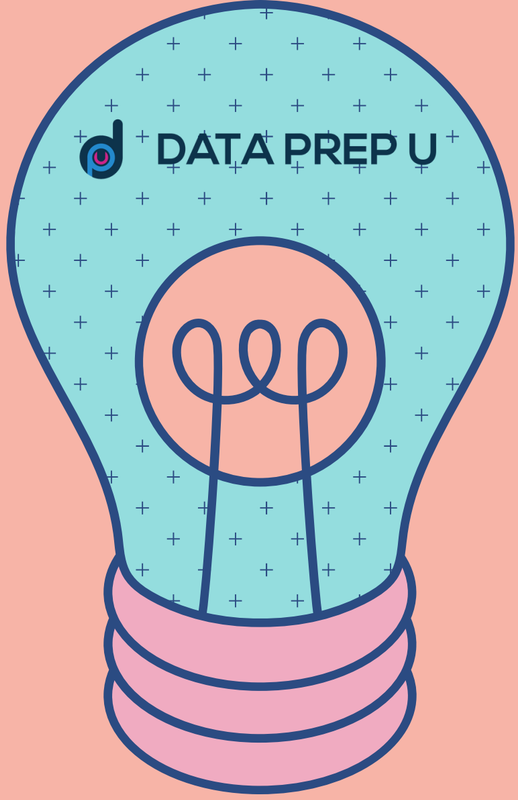
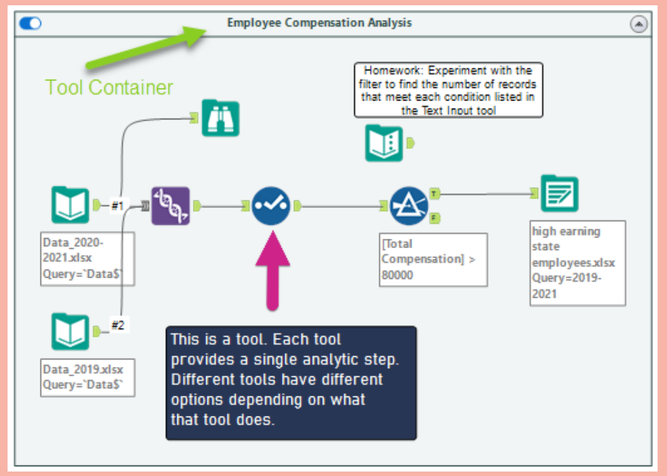
Document Your Workflows!

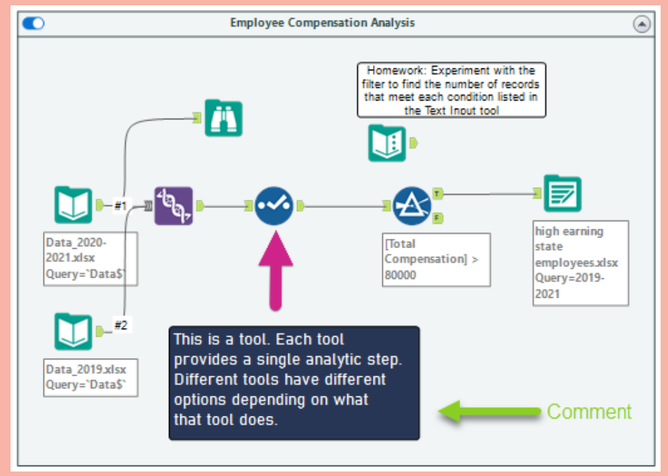
COME UP WITH A STANDARD FOR YOUR TEAM'S DOCUMENTATION



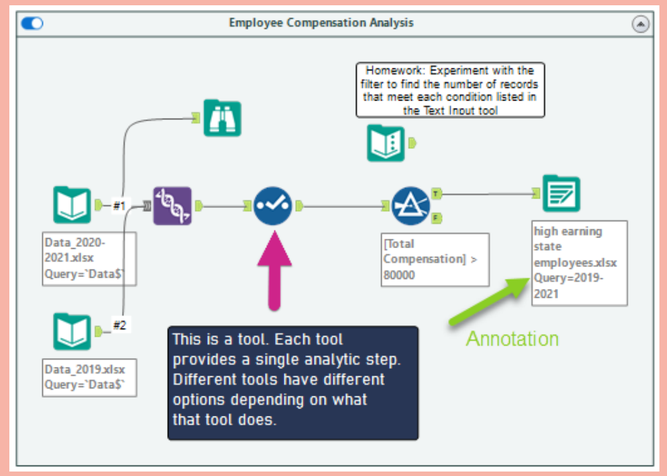
Tool Containers

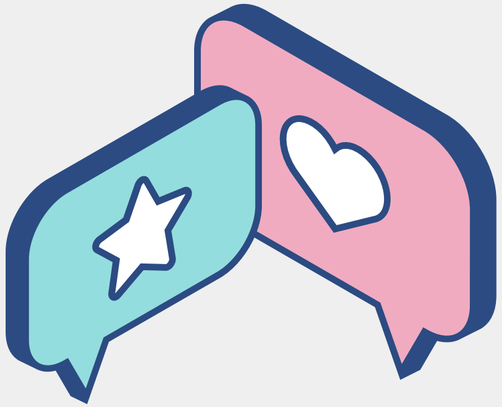


Comment Tools



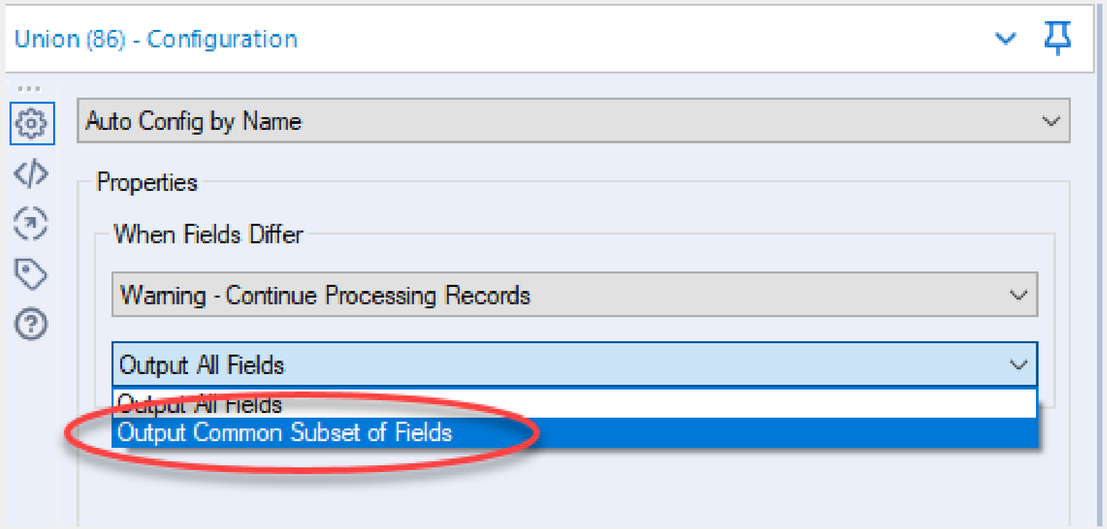
Annotations





Union Tool Tips

- Use "Output Common Subset of Fields" to preserve desired field names.
- Pair this with a Sample tool, set to First N rows (where N=0) to ensure your field names remain exact.



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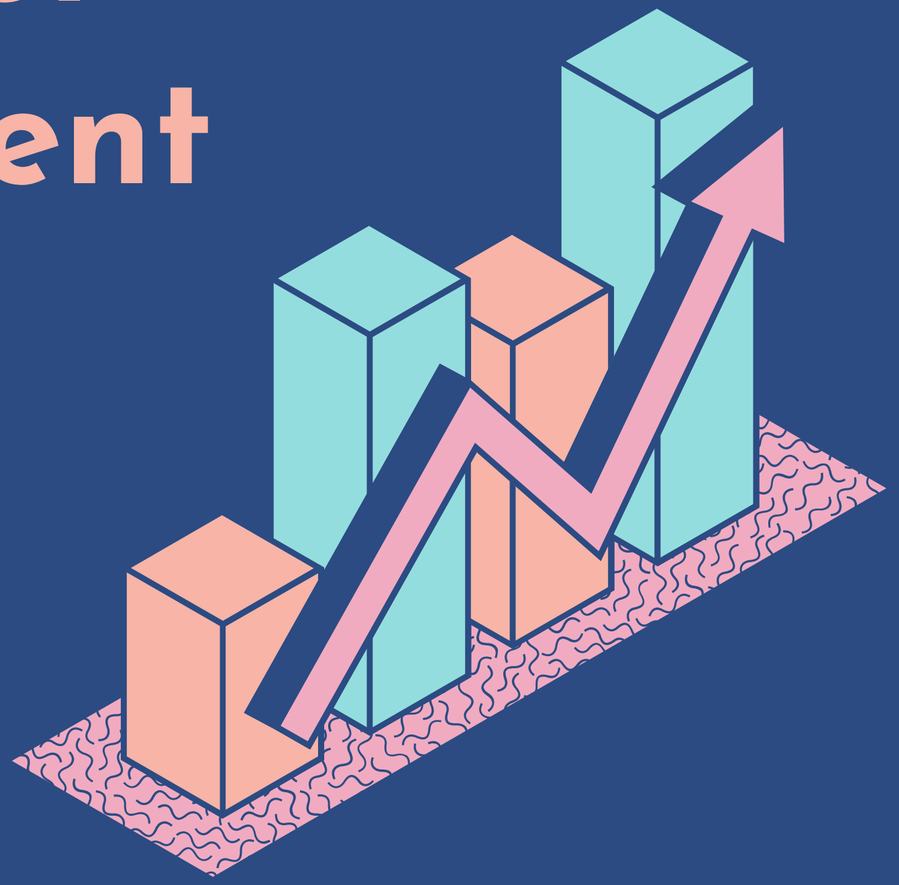
Use Auto Field Tool Only In Development



The Auto Field tool is excellent for using the most efficient workflows. However, it also requires more processing power, so isn't ideal for production level workflows.

Pair the Auto Field tool with a Select tool immediately after, and save your field configuration in a .yxft file, then remove the Auto Field tool and set your Select to use your field configuration file.

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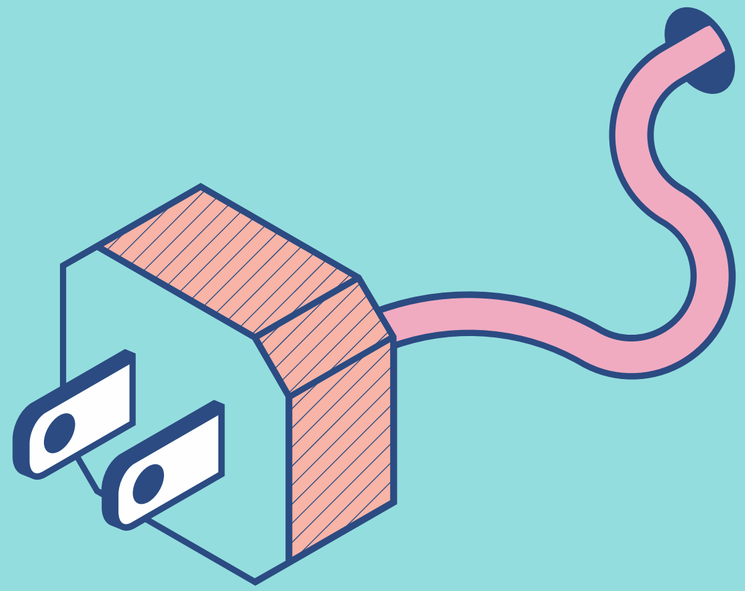
Input CSVs When There Are Extra Delimiters

Sometimes you may encounter the error "Too many fields...". This is when there are extra delimiters in your data, often in addresses.

To counteract this, use \0 as your delimiter (rather than a comma), then use the Text to Columns tool to begin parsing.



Too many fields in record #1

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Preserving Field Order With Cross Tab

1 STEP

Generally begins with transposed data

Often, our customers require the row order to be preserved when pivoting, or cross tabbing the data

2 STEP

With the transposed data

Assign a new ID for each header value

3 STEP

Cross Tab using the new ID

This will ensure your vertical order is preserved, as the Cross Tab sorts headers in alpha-numeric order

4 STEP

Add a Dynamic Rename

Use the Dynamic Rename tool to automatically rename the numeric field names back to their desired names

5 STEP

Document!

For both yourself and your colleagues, document the process!!

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Thank You!

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