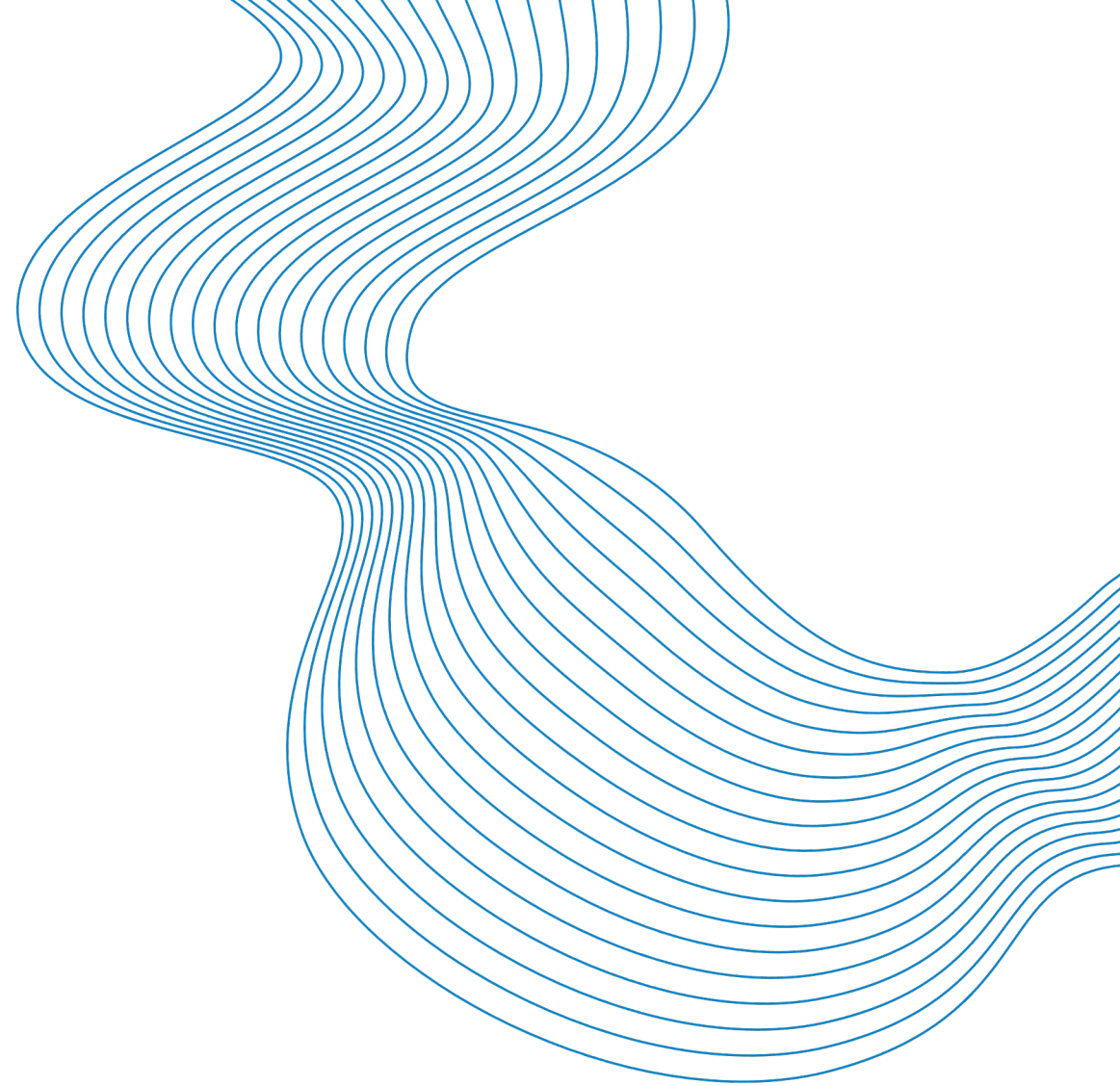


The Alteryx logo, consisting of the word "alteryx" in a lowercase, blue, sans-serif font. A solid blue vertical bar is positioned to the left of the text.

alteryx

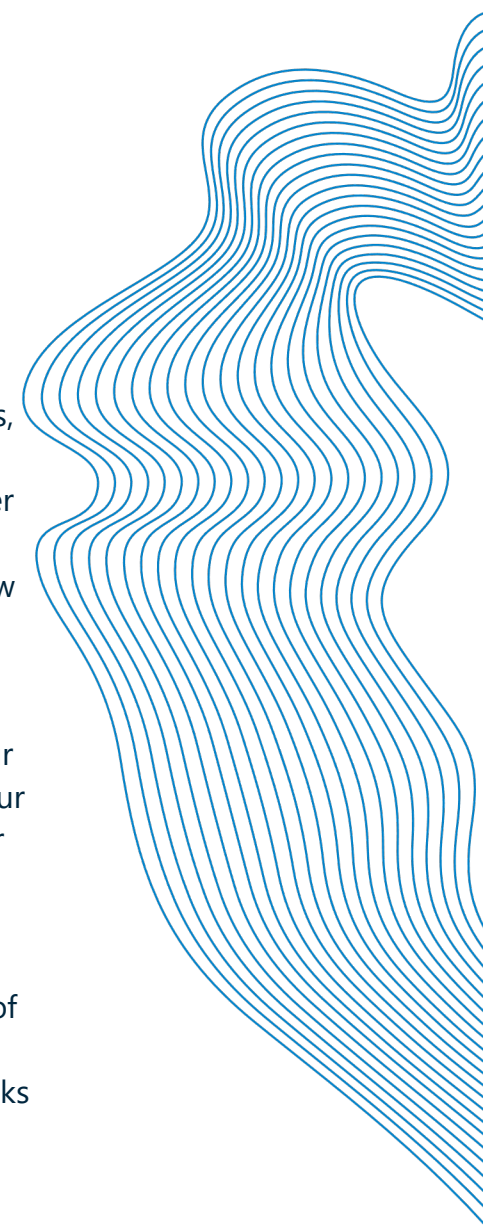
Tips & Tricks

Stéphane Portier | Sales Engineer Southern Europe



Forward Looking Statements

This presentation includes “forward-looking statements” within the meaning of the Private Securities Litigation Reform Act of 1995. These forward-looking statements may be identified by the use of terminology such as “believe,” “may,” “will,” “intend,” “expect,” “plan,” “anticipate,” “estimate,” “potential,” or “continue,” or other comparable terminology. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product availability, growth and financial metrics and any statements regarding product roadmaps, strategies, plans or use cases. Although Alteryx believes that the expectations reflected in any of these forward-looking statements are reasonable, these expectations or any of the forward-looking statements could prove to be incorrect, and actual results or outcomes could differ materially from those projected or assumed in the forward-looking statements, including, but not limited to, as a result of: the impact to the economy, our customers and our business due to the COVID-19 pandemic; our ability to manage our growth and the investments made to grow our business effectively; our ability to retain and expand our talent base, particularly our sales force and software engineers, and increase their productivity; our history of losses; our dependence on our software platform for substantially all of our revenue; our ability to attract new customers and expand sales to and retain existing customers; our ability to develop and release product and service enhancements and new products and services to respond to rapid technological change in a timely and cost-effective manner; intense and increasing competition in our market; the rate of growth in the market for analytics products and services; our ability to establish and maintain successful relationships with our channel partners; our dependence on technology and data licensed to us by third parties; risks associated with our international operations; our ability to develop, maintain, and enhance our brand and reputation cost effectively; litigation and related costs; security breaches; and other general market, political, economic and business conditions. Additionally, these forward-looking statements involve risk, uncertainties and assumptions, including those related to the impact of COVID-19 on our business and global economic conditions. Many of these assumptions relate to matters that are beyond our control and changing rapidly, including, but not limited to, the timeframes for and severity of the impact of COVID-19 on our customers’ purchasing decisions and the length of our sales cycles, particularly for customers in certain industries highly affected by COVID-19. Alteryx’s future financial condition and results of operations, as well as any forward-looking statements, are subject to risks and uncertainties, including but not limited to the factors set forth above, in Alteryx’s press releases, public statements and/or filings with the Securities and Exchange Commission, especially the “Risk Factors” section of Alteryx’s most recent Annual Report on Form 10-K. These documents and others containing important disclosures are available at www.sec.gov or in the “Investors” section of Alteryx’s website at www.alteryx.com. All forward-looking statements are made as of the date of this presentation and Alteryx assumes no obligation to update any such forward-looking statements.



Forward Looking Statements Cont'd

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Agenda

- Before the configuration
- Configuration phase
- Stabilization & finalization
- Document in Designer
- Optimize the workflow
- After the production phase
- Day to day

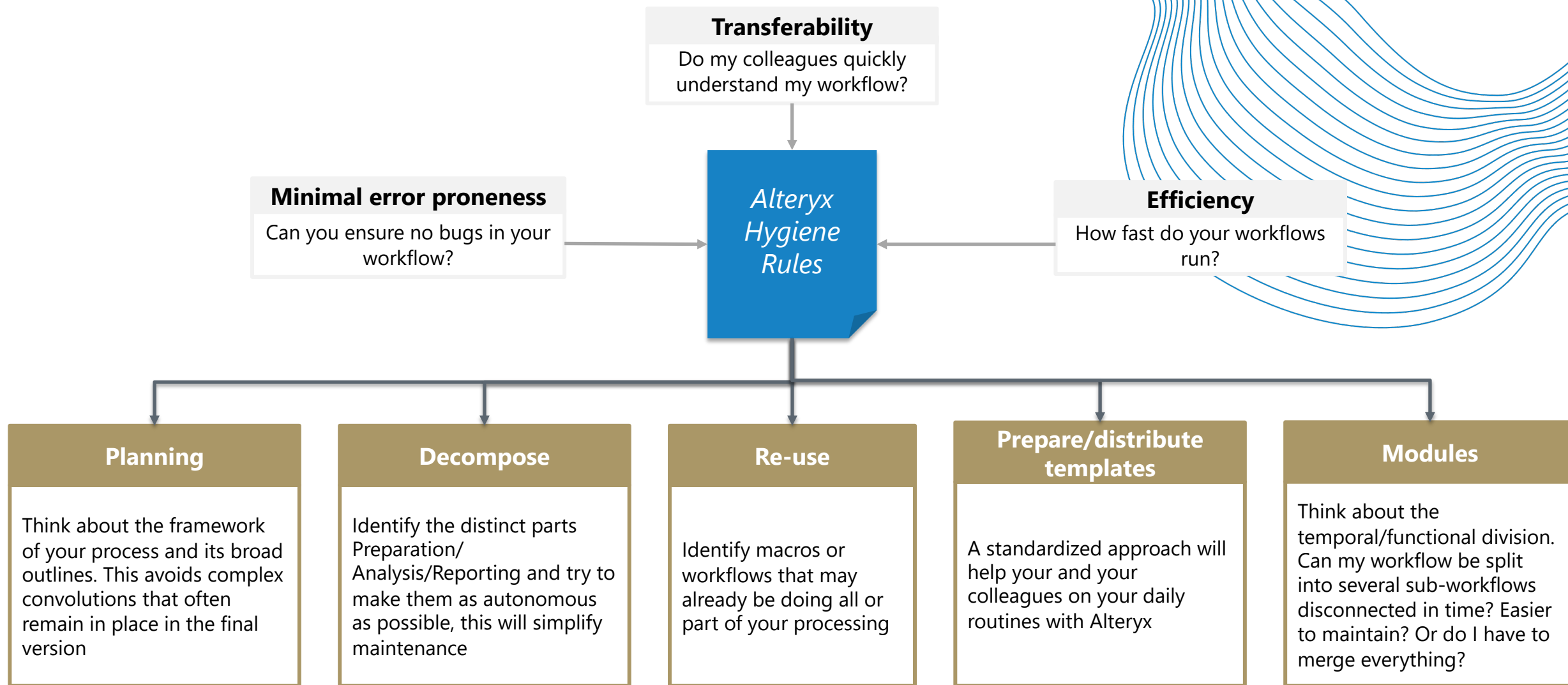
A COMPLETE CYCLE



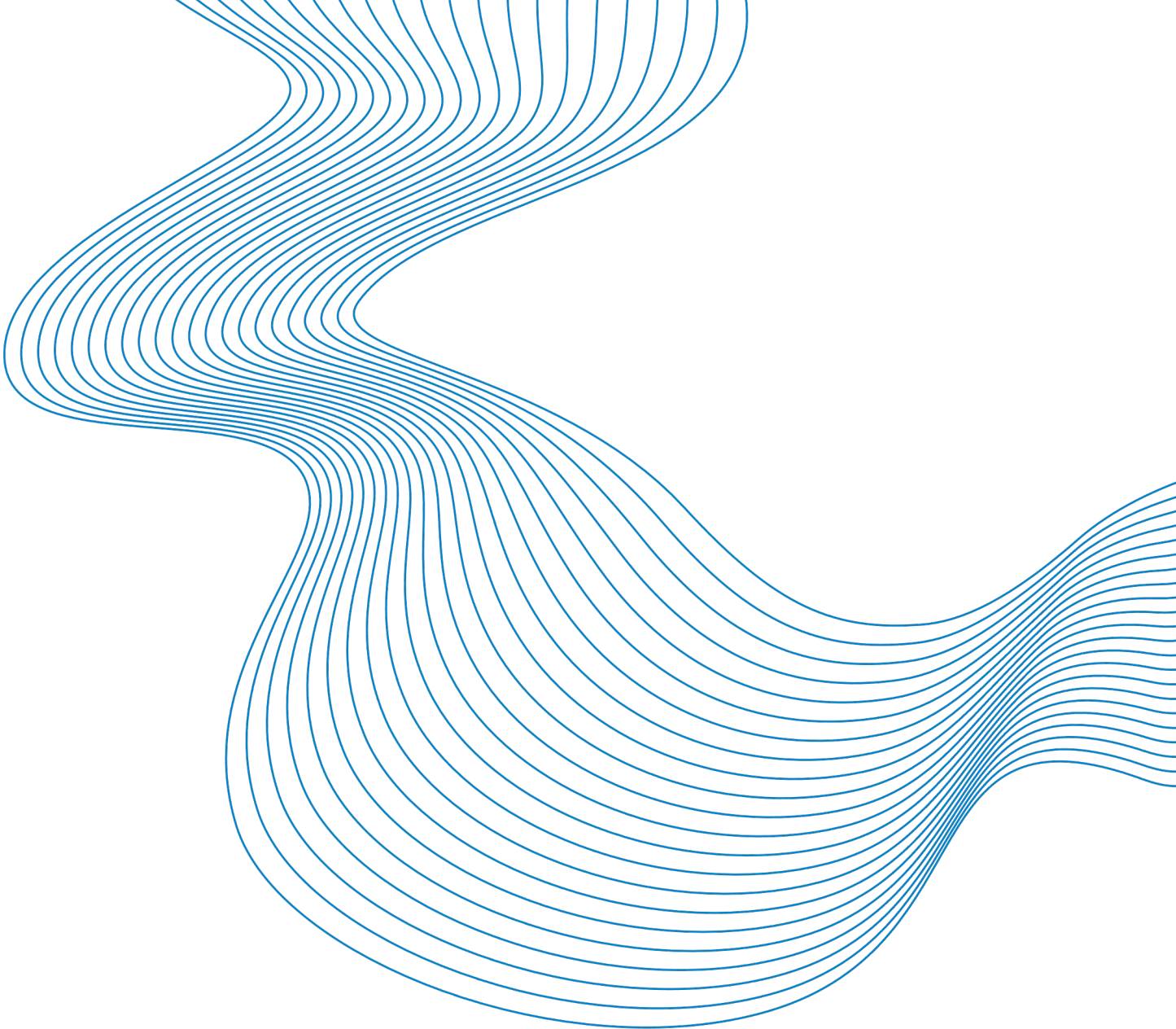
Before the Configuration



BEFORE THE CONFIGURATION



Configuration Phase









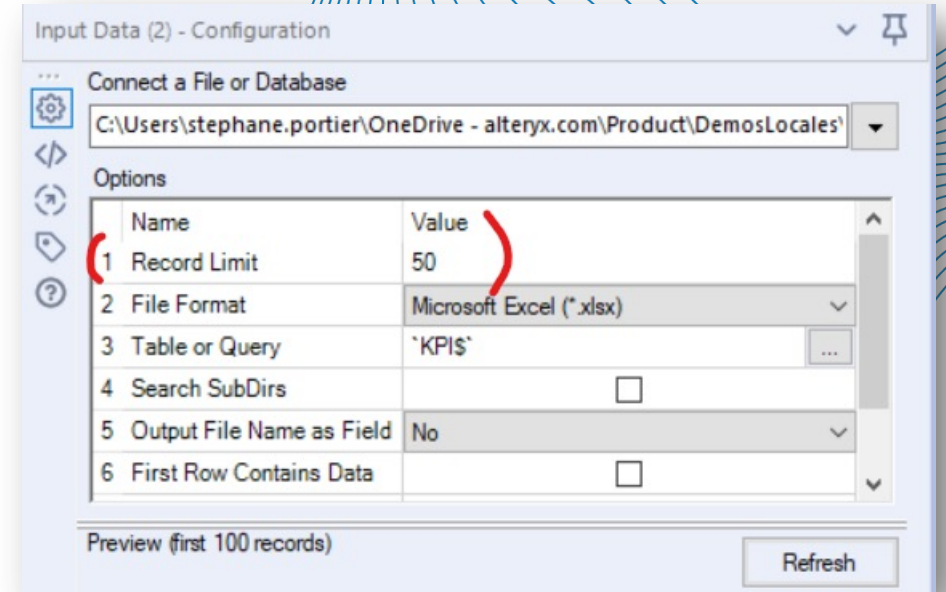
CONFIGURATION PHASE

Dev = many launches = "The shorter, the better."
Dev = having completeness of data is not yet important

→ Usually, the number of rows we work on can be reduced

Sampling, in Test /dev via:

- INPUT: Input line count (flat file or SQL) and cache 
- SAMPLE: No. of lines or sampling 
- RANDOM SAMPLE: sampling 
- SELECT RECORDS: focus on particular lines 
- FILTER certain lines 
- DETOUR combined with one of these objects can allow to activate in 1 click the sample/full data mode 



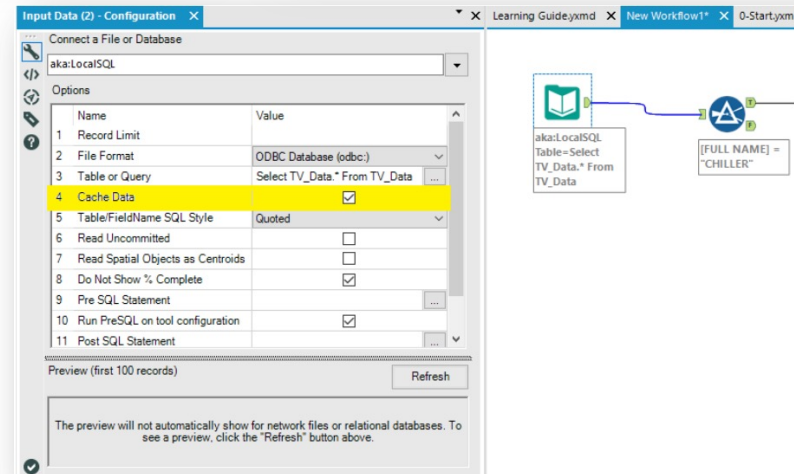
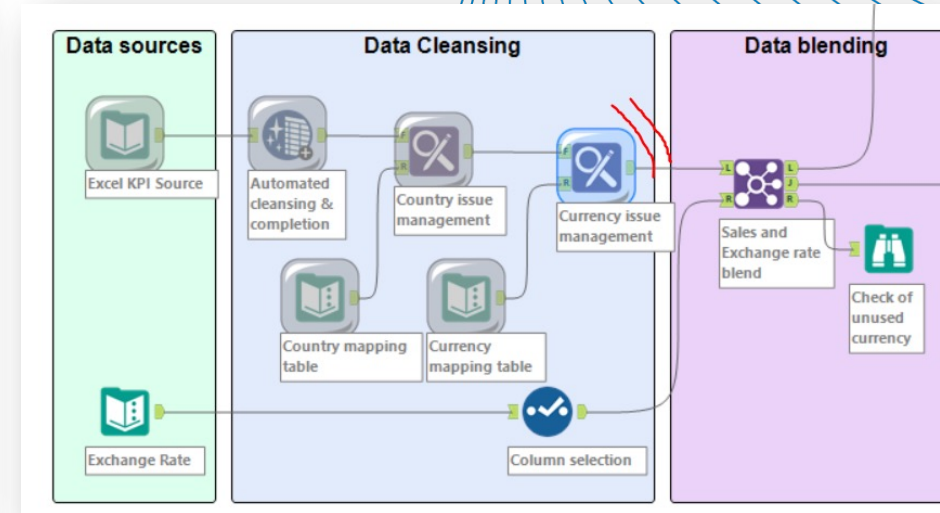
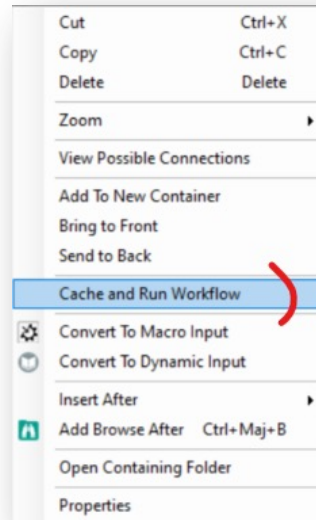
CONFIGURATION PHASE

Cache:

At a stage via "Cache and run Workflow".

The workflow starts again from the step that has been cached

- Results in reduced execution time
- In the INPUT for databases. Data is cached when launched



CONFIGURATION PHASE

Filter the columns:

- Immediately after the 1st INPUT add a SELECT and uncheck the unnecessary columns (even if you want to add them later)
- At each step of your workflow, respect this principle (JOIN, CROSS TAB, UNION...)

Optimize data format:

A currency code only takes 3 characters, whereas by default, 255 are reserved for him.

Change each field to its optimal size.

When in doubt, use the AUTOFIELD tool before the SELECT tool that determines the appropriate format automatically.

Caution on large files this tool sweeps all the lines.



Field	Type	Size	Rename	Description
<input checked="" type="checkbox"/> Region	V_String	255		
<input checked="" type="checkbox"/> Date	V_String	255		
<input checked="" type="checkbox"/> Segment	V_String	255		
<input checked="" type="checkbox"/> Country	V_String	255		
<input checked="" type="checkbox"/> Currency	V_String	3		
<input type="checkbox"/> Product	V_String	255		
<input checked="" type="checkbox"/> Discount B...	V_String	255		
<input type="checkbox"/> Units Sold	Double	8		
<input type="checkbox"/> Manufactu...	Double	8		
<input checked="" type="checkbox"/> Sale Price	Double	8		
<input checked="" type="checkbox"/> Gross Sales	Double	8		
<input type="checkbox"/> Discounts	Double	8		
<input type="checkbox"/> Sales	Double	8		
<input checked="" type="checkbox"/> COGS	Double	8		
<input checked="" type="checkbox"/> Profit	Double	8		
<input checked="" type="checkbox"/> *Unknown	Unknown	0		

After
AUTOFIELD

Field	Type	Size
<input checked="" type="checkbox"/> Region	String	6
<input checked="" type="checkbox"/> Date	Date	10
<input checked="" type="checkbox"/> Segment	String	16
<input checked="" type="checkbox"/> Country	V_String	24
<input checked="" type="checkbox"/> Currency	String	3
<input type="checkbox"/> Product	String	9
<input checked="" type="checkbox"/> Discount B...	String	6
<input type="checkbox"/> Units Sold	Double	8
<input type="checkbox"/> Manufactu...	Double	8
<input checked="" type="checkbox"/> Sale Price	Double	8
<input checked="" type="checkbox"/> Gross Sales	Double	8
<input type="checkbox"/> Discounts	Double	8
<input type="checkbox"/> Sales	Double	8
<input checked="" type="checkbox"/> COGS	Double	8
<input checked="" type="checkbox"/> Profit	Double	8
<input checked="" type="checkbox"/> *Unknown	Unknown	0

CONFIGURATION PHASE

Remove unnecessary Browse tools as soon as you no longer need them.



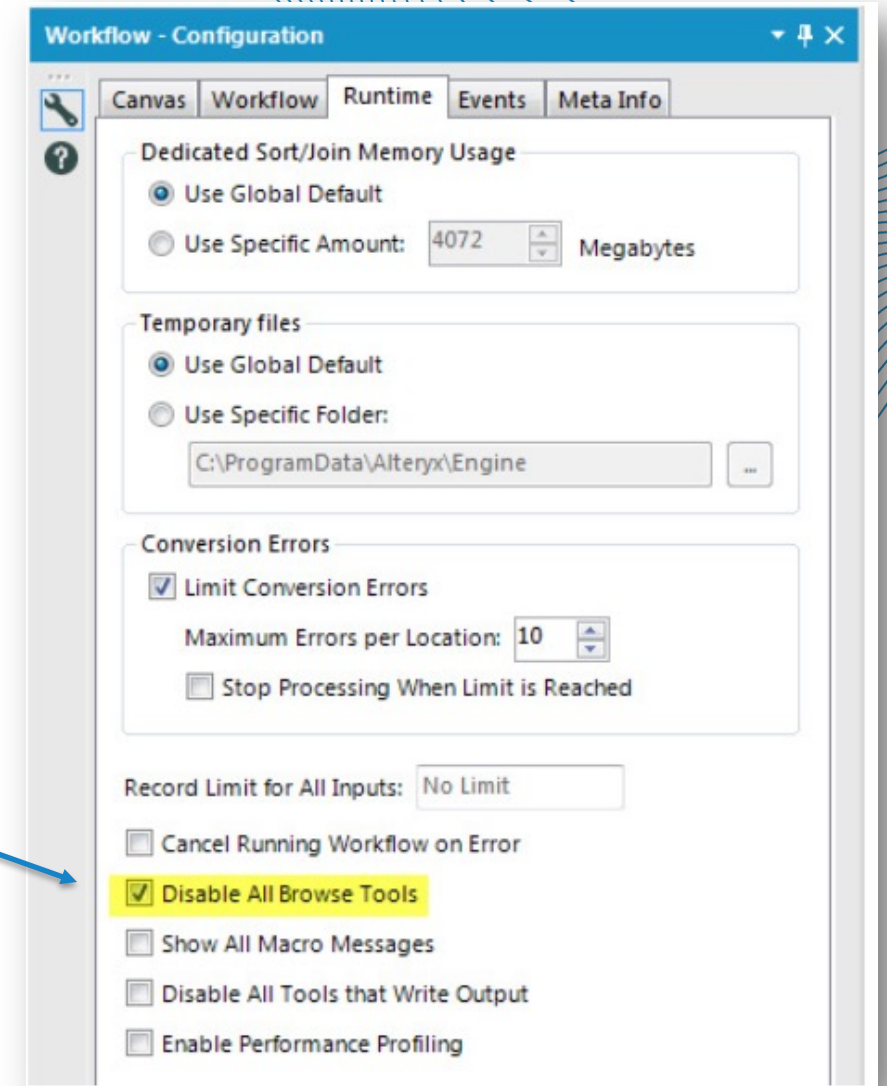
Indeed its particularity is that it repatriates all the data to this step and stores them in a temporary file. So it is to be deleted once you've visualized what's needed.

Deactivate all postings in the workflow at once

- This can be used to save time on a process that is being throws often

Avoid writing output data while testing

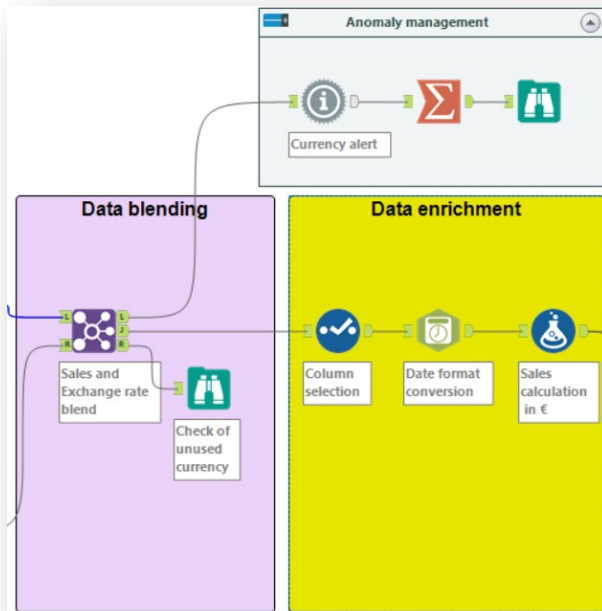
- Save your memory and time



CONFIGURATION PHASE

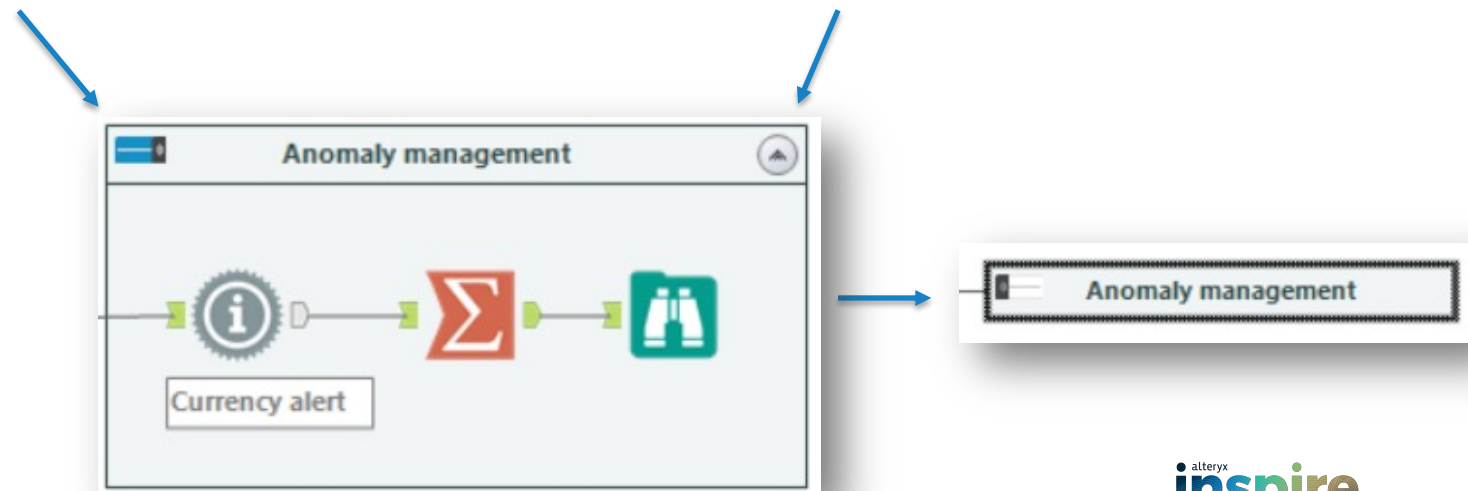
Disable unnecessary branches via containers

- During the workflow configuration when executed, it runs in its entirety – even though you only work on a portion of it.
- Thus, put the finished portions in deactivatable containers.
- They then will not take any resource or time while being processed.



Visually closes the Workflow but it is NO LONGER executed.

Visually closes the Workflow but continues to run



Stabilization & Finalization



STABILIZATION FINALIZATION

Make Your Workflow Readable

Avoid hidden steps

The formula tool in Alteryx is extremely powerful – however try to use a least complex logic:

Use other tools instead of formulas if possible

Do not nest formulas but create several steps



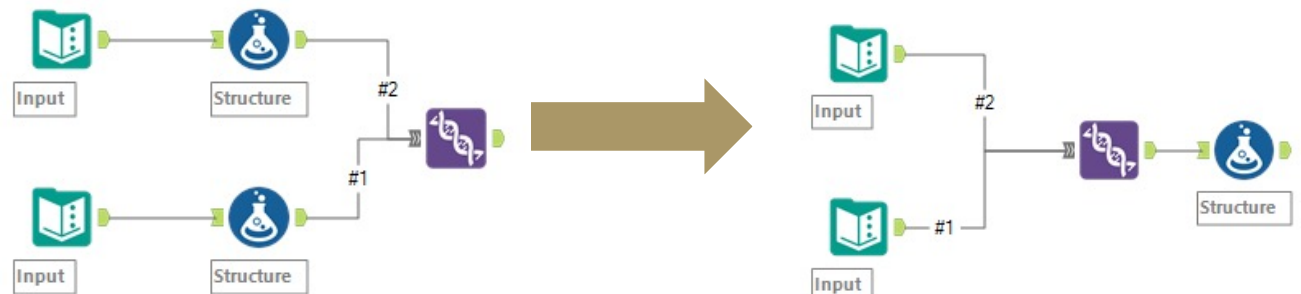
Output Column	Data Preview
B	1

```
IF ([A]=" " OR isempty([A])) THEN "5"  
elseif [A]="1" then tonumber([A]) else  
"0" endif
```

```
B 0  
IF ([A]=" ") THEN "5" else "0" endif  
Data type: WString Size: 64  
B  
IF (isempty([A])) THEN "5" else "0" endif  
Data type: WString Size: 64  
B 1  
if [A]="1" then tonumber([A]) else "0" endif
```

Try not to duplicate steps

Whenever possible, first blend the data and then apply additional structuring steps.
➔ Easier to maintain and reduce inconsistency between different branches



STABILIZATION FINALIZATION

Make the Workflow Dynamic

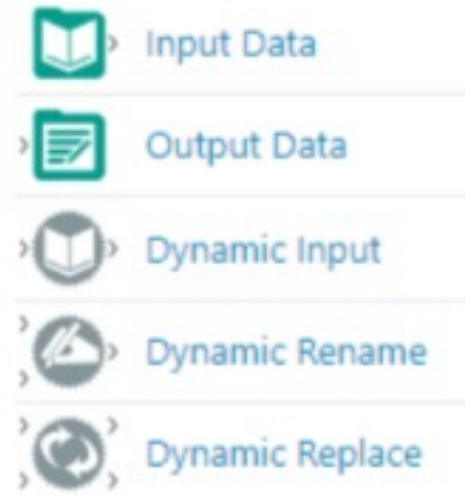
This answers the question:

"When should I make a manual change to my workflow and how can I avoid doing so ? "

→ by making it "dynamic" in the face of external developments or uncertainties

- Does my workflow take into account all the natural evolutions of my business/IT environment?
- Will it be resistant to external changes?
- What happens if :
 - I have new files appearing (subsidiary, week...)?
 - I have more product tomorrow than today?
 - I change year?
 - I know that the name of the source/target directory will change every month, year...
 - I do calculations/operations/renaming on a variable number of columns ?
 - ...
- Think then to use the more advanced objects which propose this dynamism
- Video presentation of the potential of the tools:

<https://community.alteryx.com/t5/Videos/Making-Dynamic-Workflows/td-p/330579>



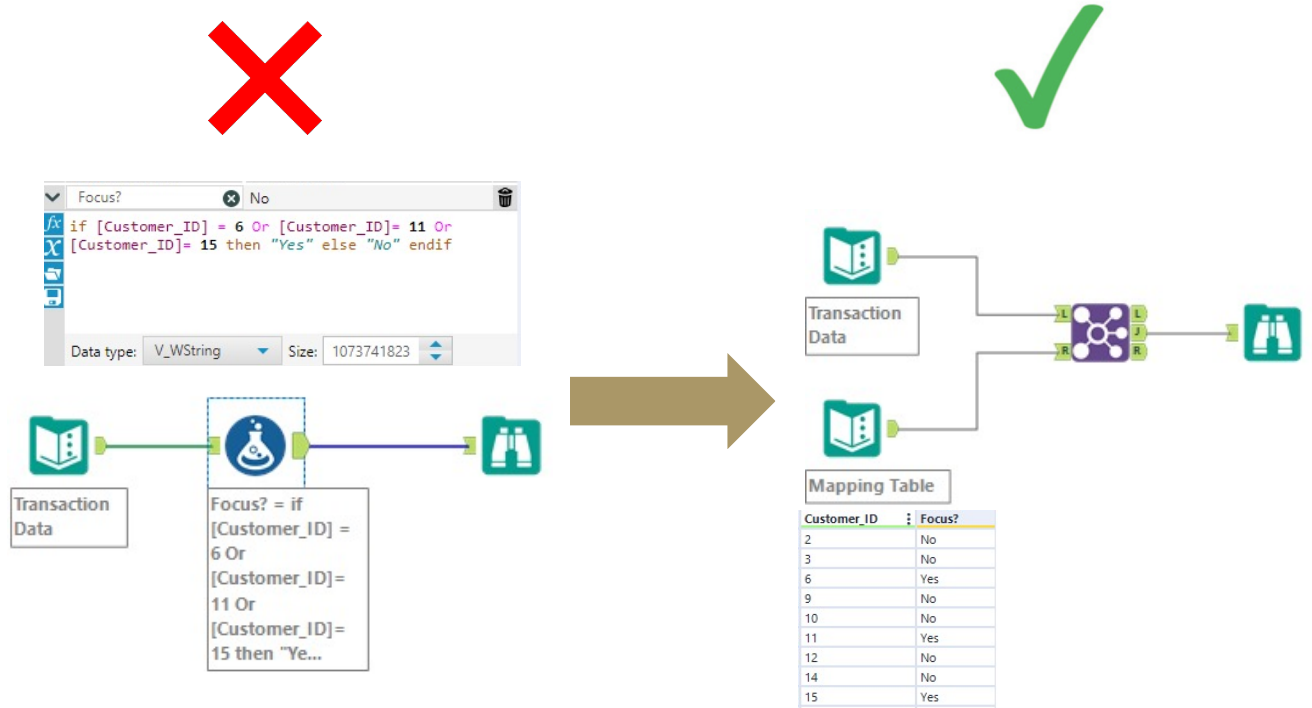
STABILIZATION FINALIZATION

Make the Workflow Dynamic

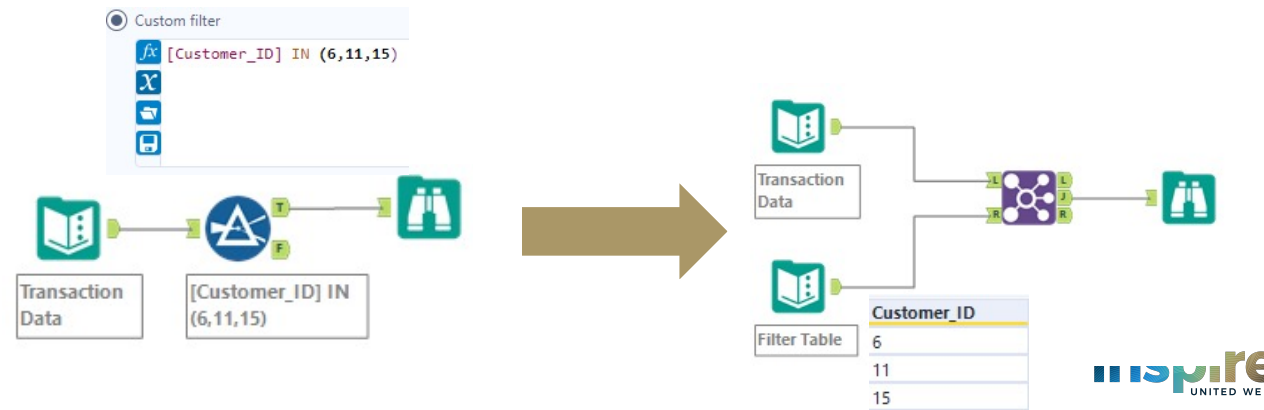
Use mapping tables and avoid hard plugs

A mapping table helps you making updates to your workflow smarter – you don't have to check each and every tool which you otherwise configured with hard plugs:

for formulas



for filters



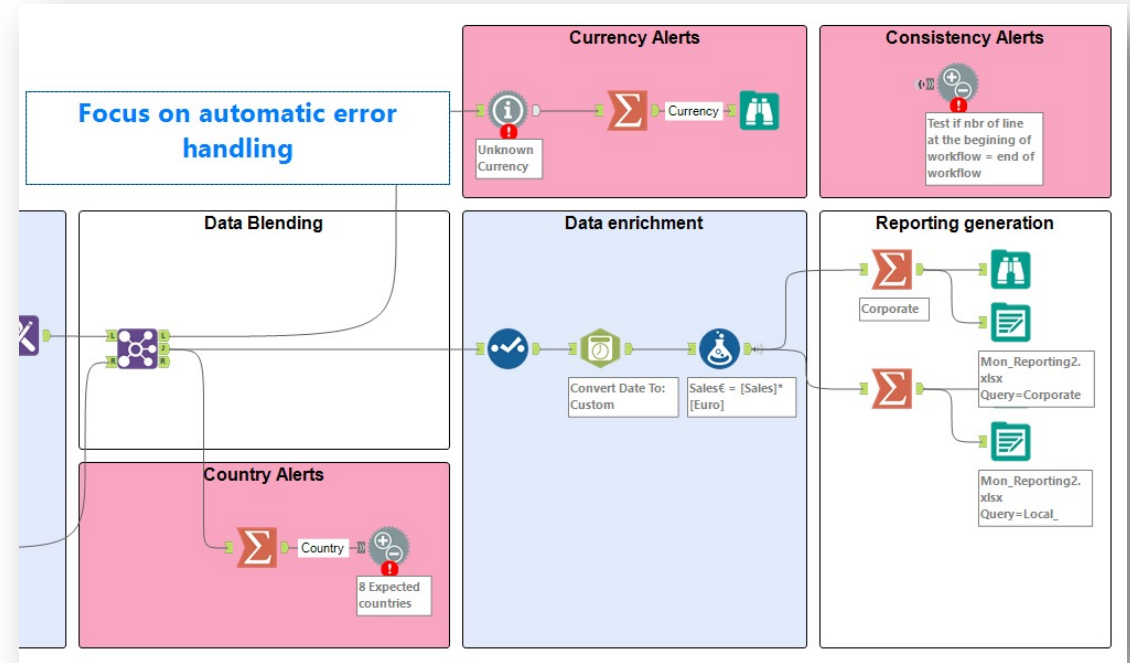
STABILIZATION FINALIZATION

Take a step back

It works OK, but with the big picture and understanding the detail is it:

- Maintainable?
- Simplifiable?

Set up Controls and Alerts



Test



Verify data or processes in a workflow.

[Open Example](#)

Testing and comparing data

Count Records



Count the records passing through the data stream. A count of zero is returned if no records pass through.

[Open Example](#)

Line count
(Interesting for grouping errors)

Message



Write log messages to the Output Window. Generally used in authoring macros.

[Open Example](#)

To remove errors in the outputs or on the screen (error, warnings, conv errors,...)

STABILIZATION FINALIZATION

Manage input/output/macro paths

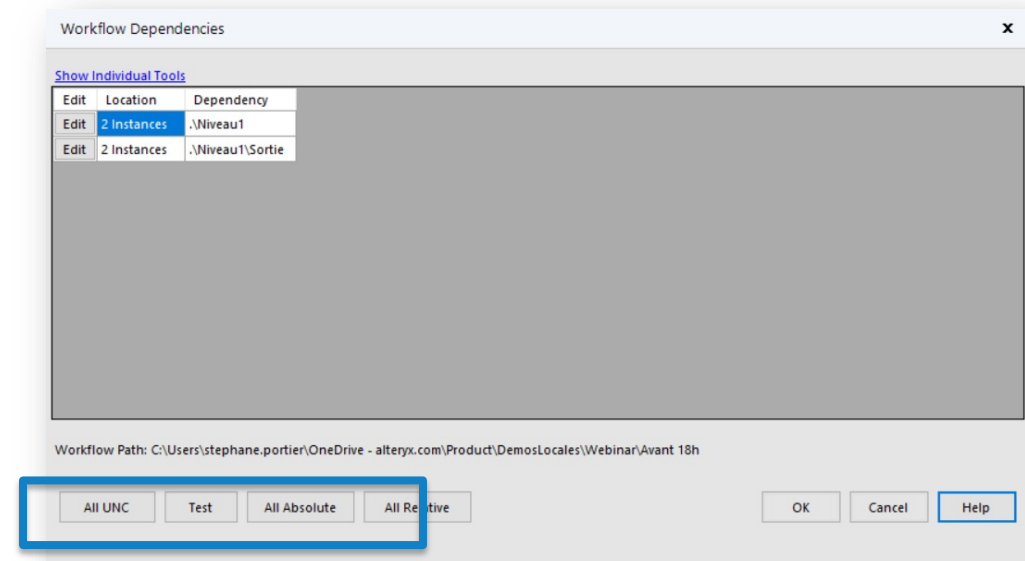
Any reading or writing to a file is referenced by a path. It can be:

- *Absolute*: **C:\Users\Jean.porte\My_Workflows\Finance\Data** → directory on the computer
- *Relative*: **.\Data** → refers to the directory where the workflow containing this object is stored.
- *UNC*: **\\Computer Name\C\Users\Jean.porte\My_Workflows\Finance\Data** → directory including the computer

Those options need to be cared of when sharing workflows to make sure inputs and outputs can be accessed. A team reflexion can be needed to find the appropriate protocole.

To identify and manage these paths:

Options / Advanced Options / Workflow dependencies



STABILIZATION FINALIZATION

Principles:

Objects are made interactively configurable. Before any launch, the user is asked for parameters.

2 main objectives:

1. Make your workflow configurable

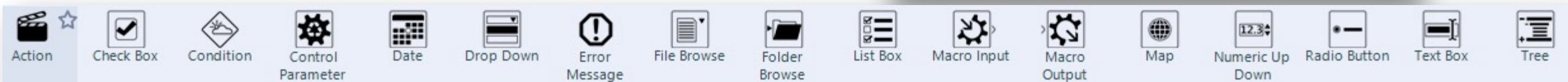
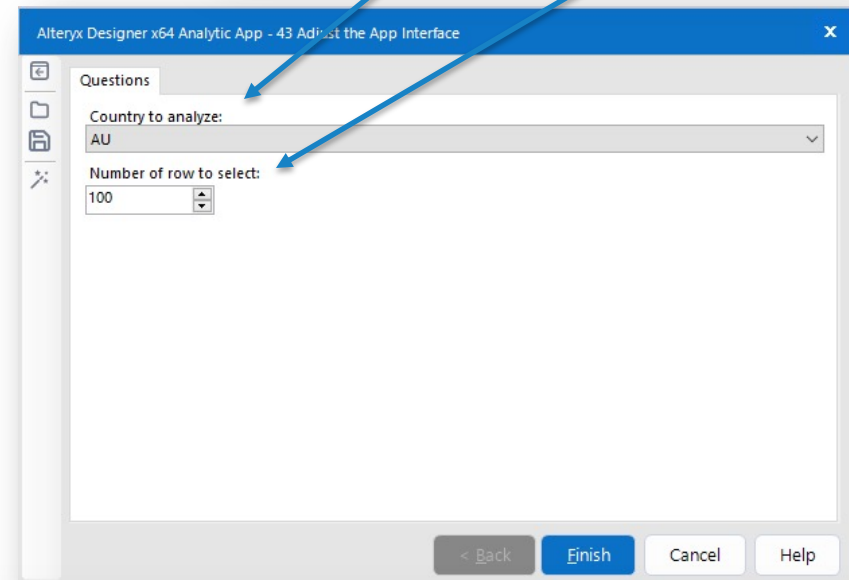
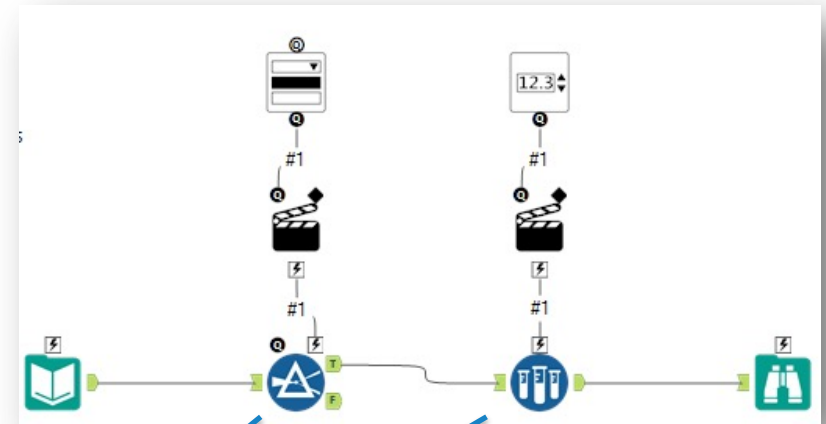
- Avoids having to change it manually every time you launch or change a parameter

2. Disseminate treatment on a large scale to non-designer users

- Without Alteryx knowledge, I'm just here to use a treatment made available on the web

It all makes sense with the server.

Analytical Application



STABILIZATION FINALIZATION

Macros ?

- Are macros interesting to implement for maintainability?
- Process redundancy within the workflow
- Common use for other processes or teams
- Process Simplification (batch or iterative vs multiple steps)

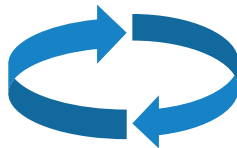
Standard (SHARED PROCESS)

- Like a standard Workflow
- Group of combined tools



Iterative (DO UNTIL Condition)

- Process to be repeated until...
- Stops when hit threshold

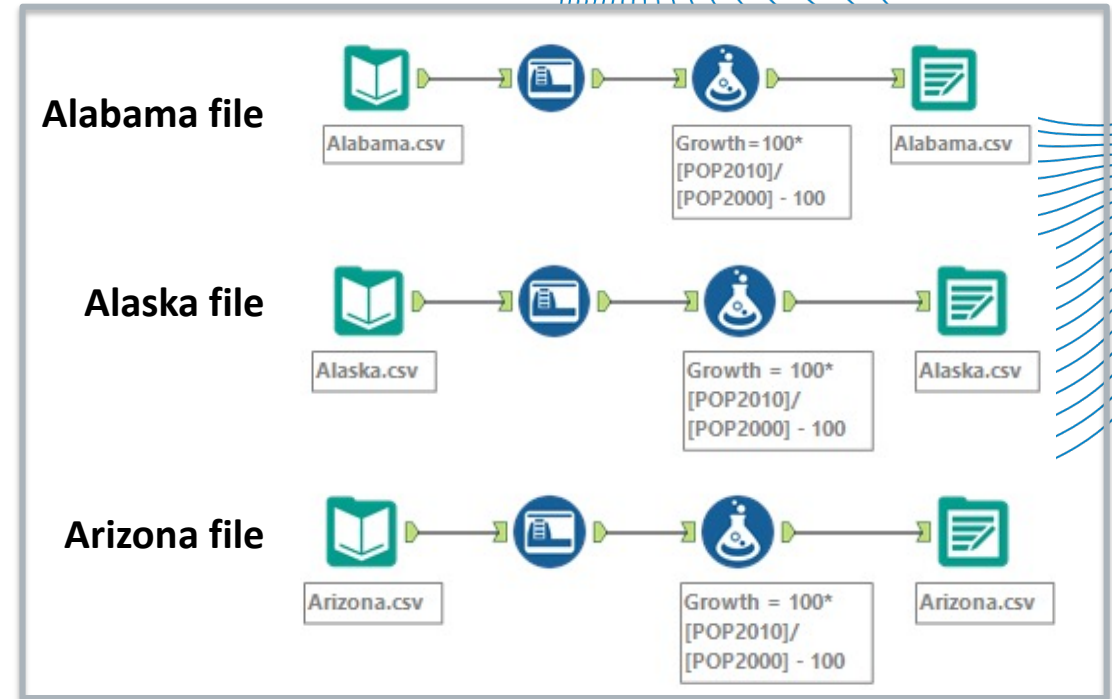


Batch (FOR EACH)

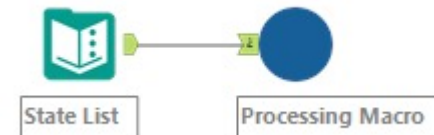
- Treat each registered group like having a common characteristic



Macros



Everything wrapped in one Macro

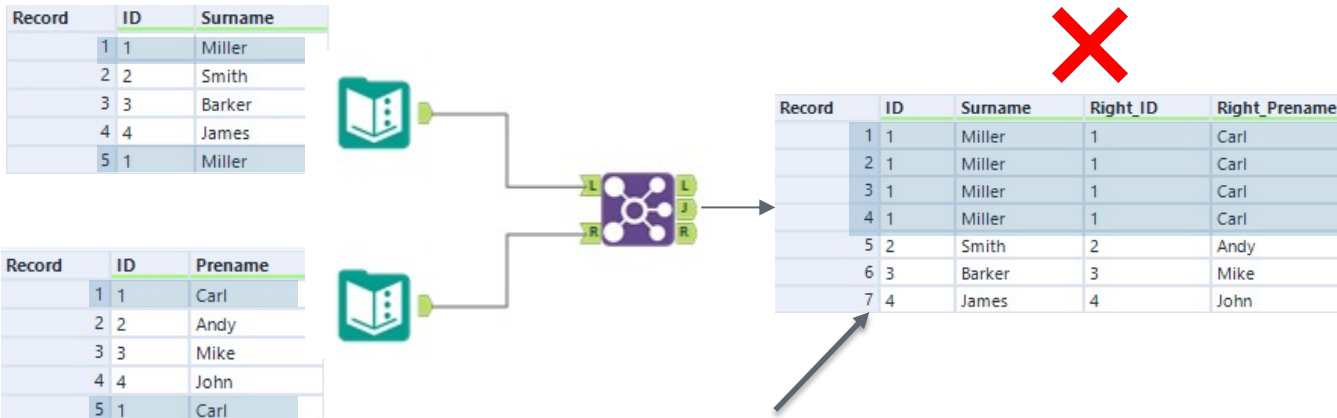


STABILIZATION FINALIZATION

Check Uniqueness when Joining Data

- **Joining two datasets requires at least one unique join-field ("1-N")**

Otherwise it will output N-N duplicates



"J" Output must not have more rows than the longest input table

- **Methods for making data unique:**

a) "Group by" join-field of the summarize tool:



b) Unique tool:

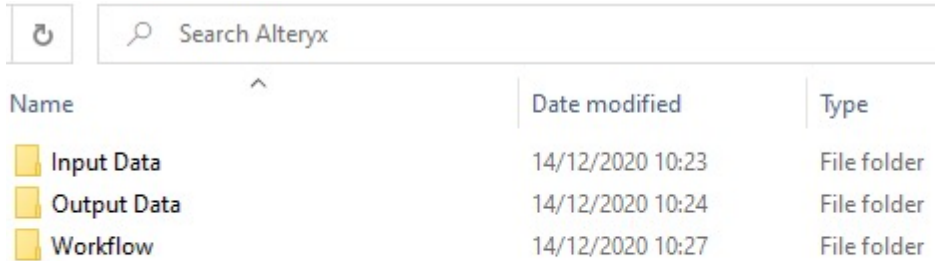


STABILIZATION FINALIZATION

Naming Convention

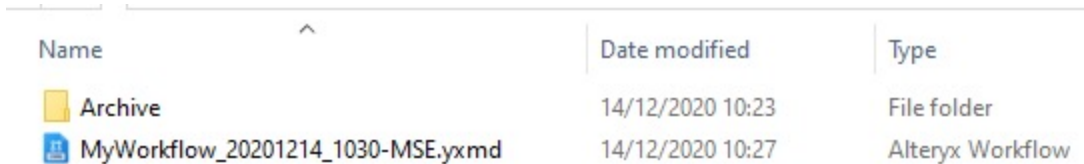
Apply a structure to your folders and filenames

- Use **subgroup folders** for Input, Output and Workflows for your project



Name	Date modified	Type
Input Data	14/12/2020 10:23	File folder
Output Data	14/12/2020 10:24	File folder
Workflow	14/12/2020 10:27	File folder

- During the development phase save **regular new named backups** (at least twice a day) – put previous versions in an **archive folder**



Name	Date modified	Type
Archive	14/12/2020 10:23	File folder
MyWorkflow_20201214_1030-MSE.yxmd	14/12/2020 10:27	Alteryx Workflow

- Use a **structured filename format**: **Projectname** _ **yyyMMdd_hh:mm** - **Your Credentials**

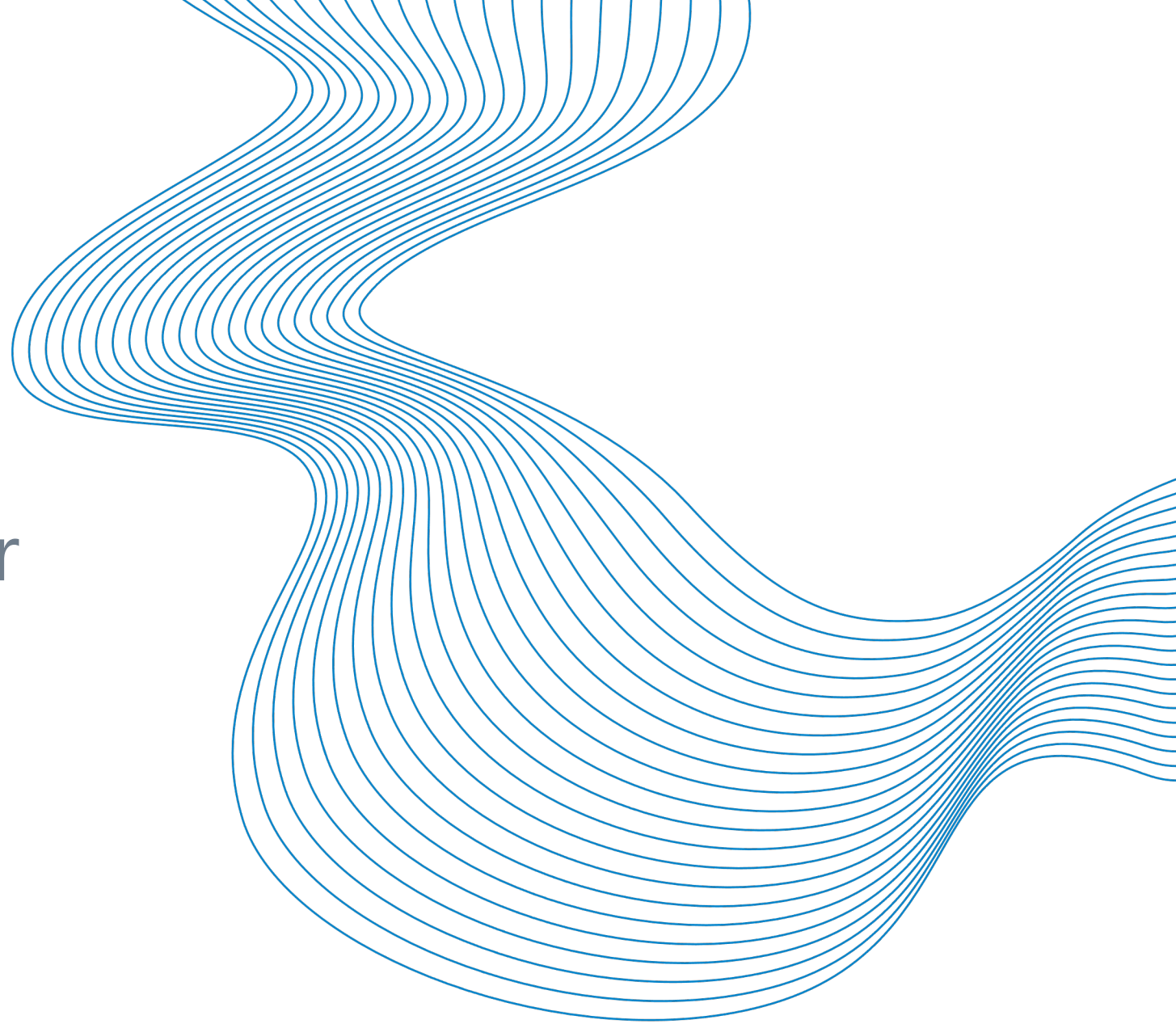
The name of your file

Date-Time Stamp provides you transparency.

Structure helps you sorting it easily.

Tagging your workflow gives everybody the info of the latest adapter – particularly helpful on shared drives

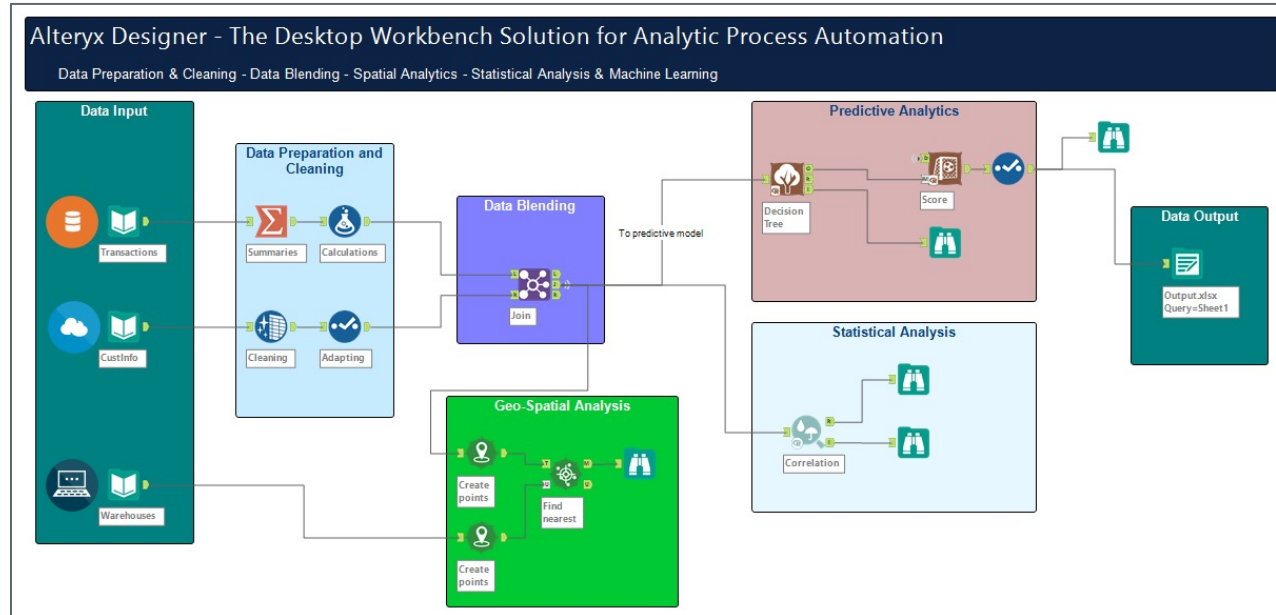
Document in Designer



DOCUMENT IN DESIGNER

Reviewability

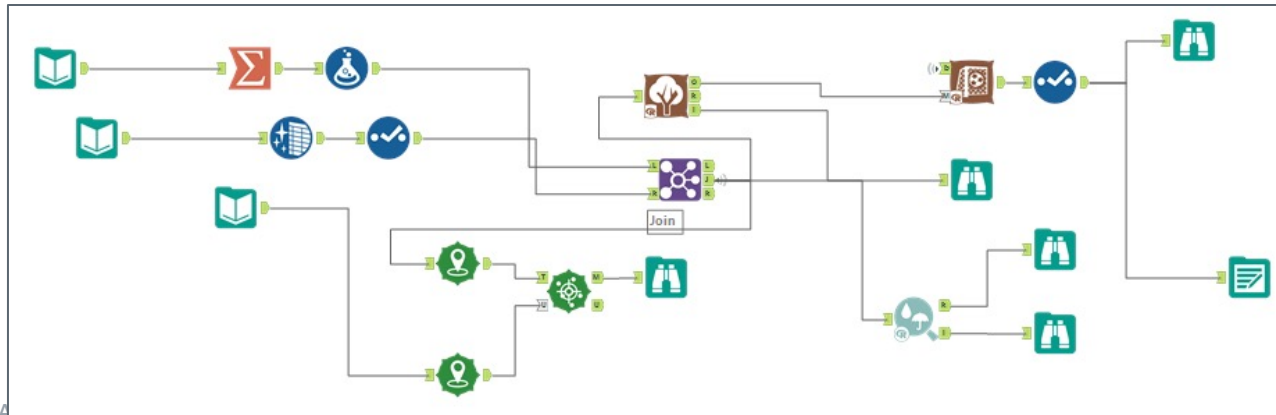
Would you rather like to review this?



Golden rules

- **Keep it simple**
A person who knows Alteryx should be able to understand the purpose and high-level operations of the workflow without clicking on any tool
- **Don't overengineer it**
If a workflow is too complex to explain, redesign it to be simpler or break into components
- **Stick to layout and documentation recommendations**
It will help yourself, colleagues and other third party reviewers to quickly find the way

Or this?



DOCUMENT IN DESIGNER

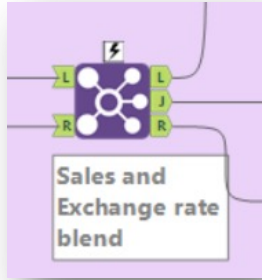
Annotations:



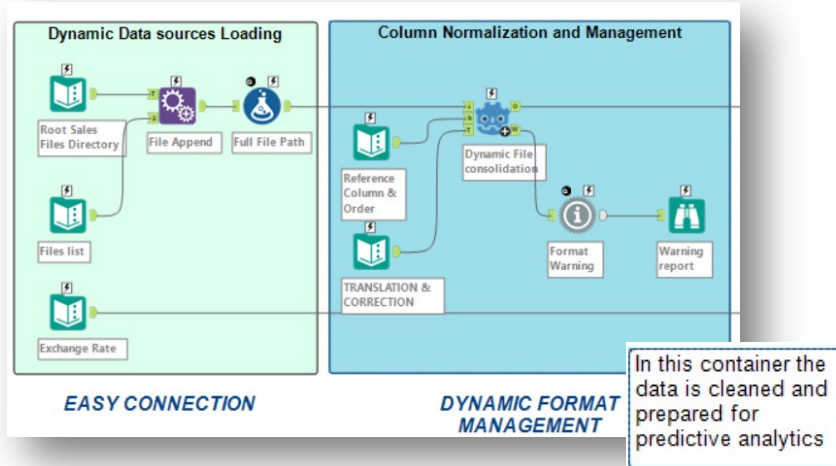
Comments:



Containers:

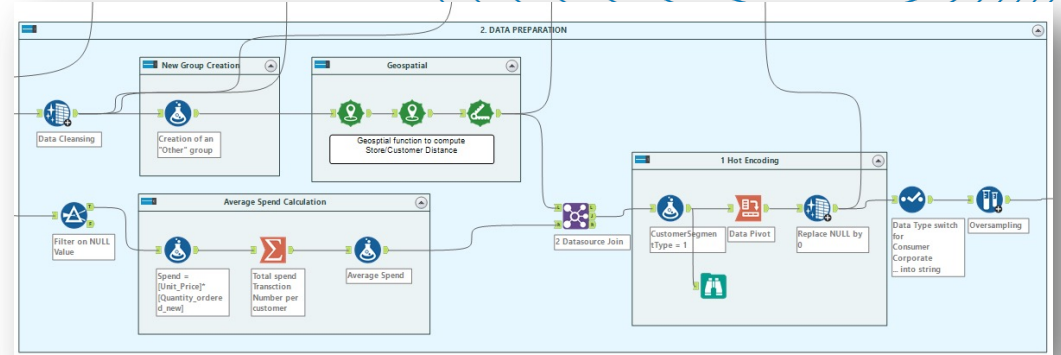


Edit the labels under the tools for further clarification



Add comment boxes to describe the overall process.

It can be used for commenting, structuring and headlining



Use containers for structuring your workflow into logical parts.

Give your containers a name or description.

DOCUMENT IN DESIGNER

Formulas:

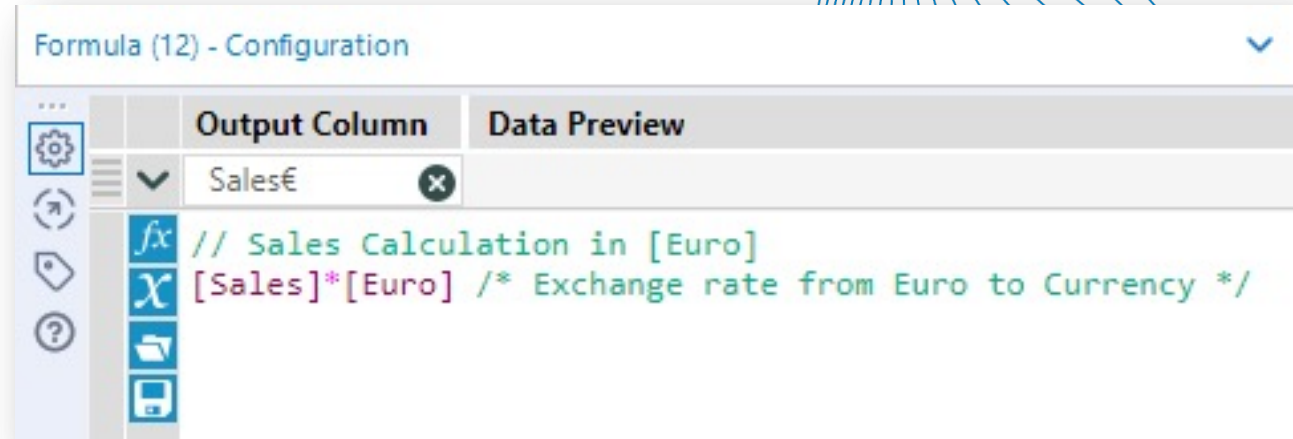
Think about inputting comments through:

- // My comment
- or with /* My comment */

*Create similar formulas within one tool –
for different topics use several formula tools*

Columns (SELECT or others)

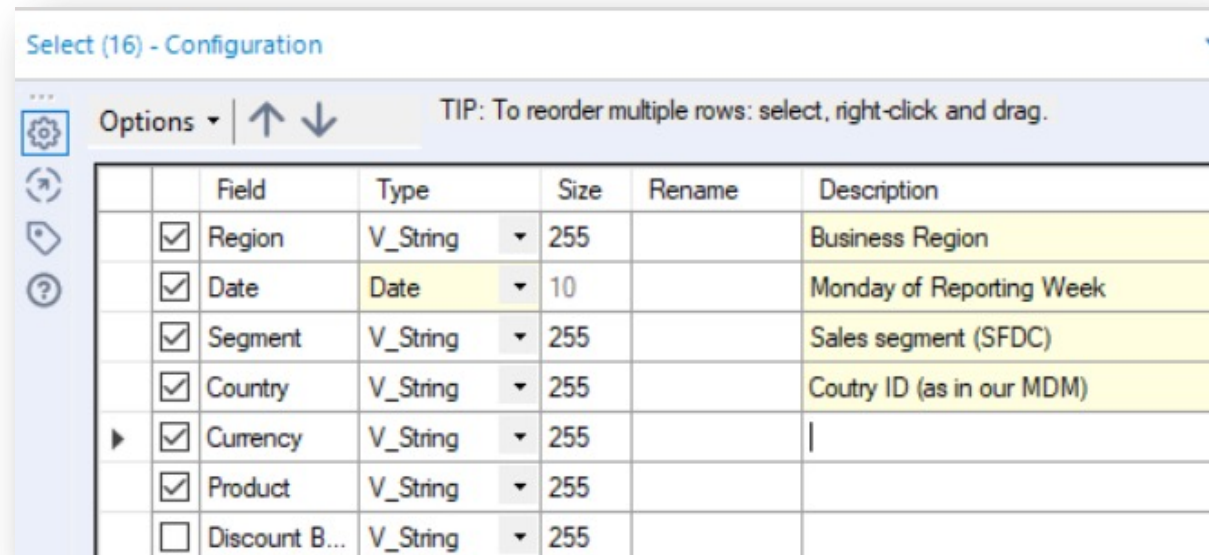
- As soon as possible in your flow
- Add description fields



Formula (12) - Configuration

Output Column: Sales€

```
// Sales Calculation in [Euro]
[Sales]*[Euro] /* Exchange rate from Euro to Currency */
```



Select (16) - Configuration

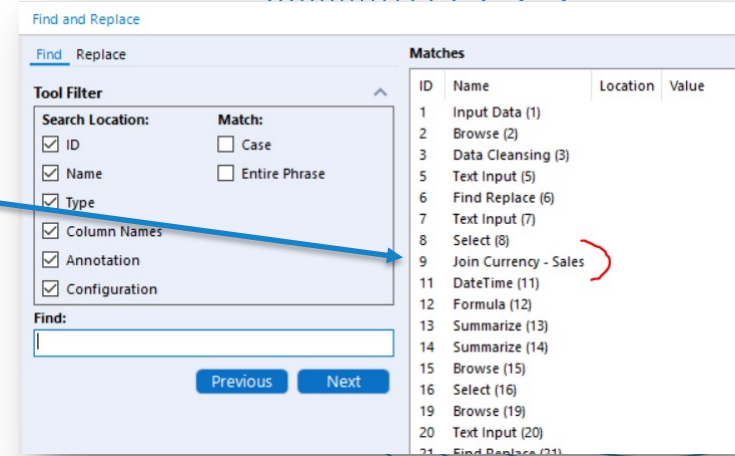
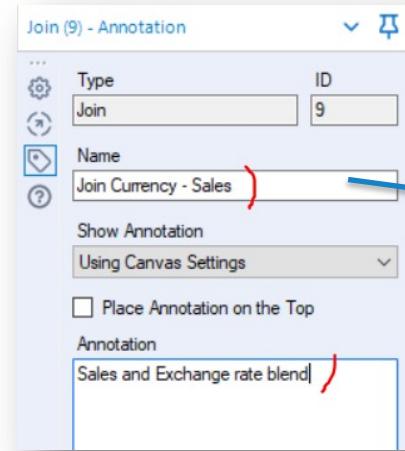
Options: [Up Arrow] [Down Arrow] TIP: To reorder multiple rows: select, right-click and drag.

	Field	Type	Size	Rename	Description
<input checked="" type="checkbox"/>	Region	V_String	255		Business Region
<input checked="" type="checkbox"/>	Date	Date	10		Monday of Reporting Week
<input checked="" type="checkbox"/>	Segment	V_String	255		Sales segment (SFDC)
<input checked="" type="checkbox"/>	Country	V_String	255		Coutry ID (as in our MDM)
<input checked="" type="checkbox"/>	Currency	V_String	255		
<input checked="" type="checkbox"/>	Product	V_String	255		
<input type="checkbox"/>	Discount B...	V_String	255		

DOCUMENT IN DESIGNER

Rename important tools

- To simplify their search and log analysis



Use wireless connections

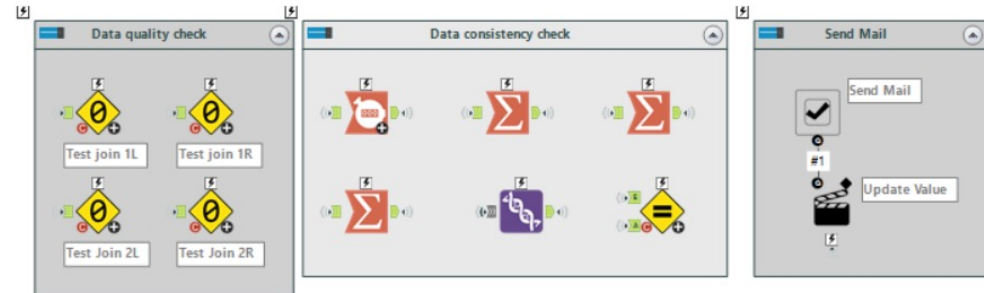
- To avoid too many connection lines

Create a cartridge at the top of the wkf

- Containing the interfaces and errors/checks
- At a glance I can see what's wrong



Shareholders of public companies have to disclose once their shares reach a certain threshold. Their level of participation must be reported to the company itself and to the AMF (French autorité des marchés financiers), which publishes this information on its website. The declaration must be made within four days of reaching that threshold. This workflow shows the consolidation of the positions held by a financial institution, a check of the data's quality, a comparison vs. regulatory thresholds and alerting if applicable.



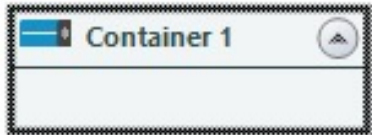
DOCUMENT IN DESIGNER

Color code your workflow

Use the right tools

There are 2 tools you can use to color-code:

- **Tool Container**



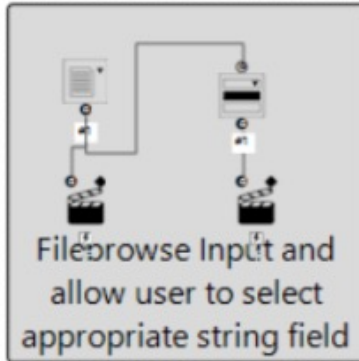
- **Comment**



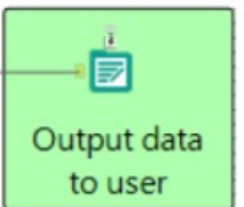
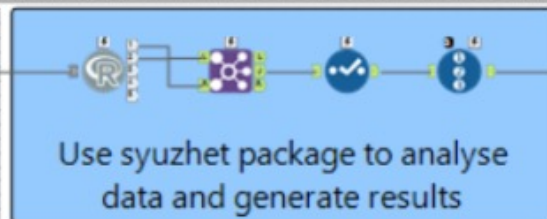
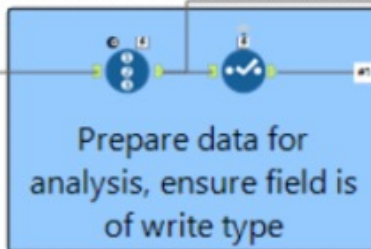
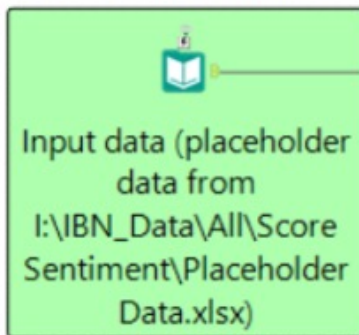
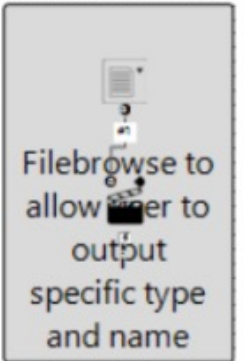
Score Sentiment

This app takes a text field within a dataset loaded by the user and assigns sentiment scores to the values within that field.

Workflow built by: peter.gb@theinformationlab.co.uk



Use colored text boxes to **identify the type of processes** which are being applied. For example, **purples** for **joins** and **blues** for **data preparation**.



DOCUMENT IN DESIGNER

Color code your workflow

Standardize your templates

Create a workflow template containing:

- The colors to be used by type of processing.
- Specific areas to present the workflow
- Upload this template to the Gallery
- Share it with all the private studios via a collection.
- All users will be able to download it

Workflow Title

[A longer subtitle that explains in more detail what the workflow is doing]

Workflow built by: EMAILADDRESS

Last modified by: EMAILADDRESS

Documentation Guide:

Green for inputs and outputs

Blue to highlight general data prep

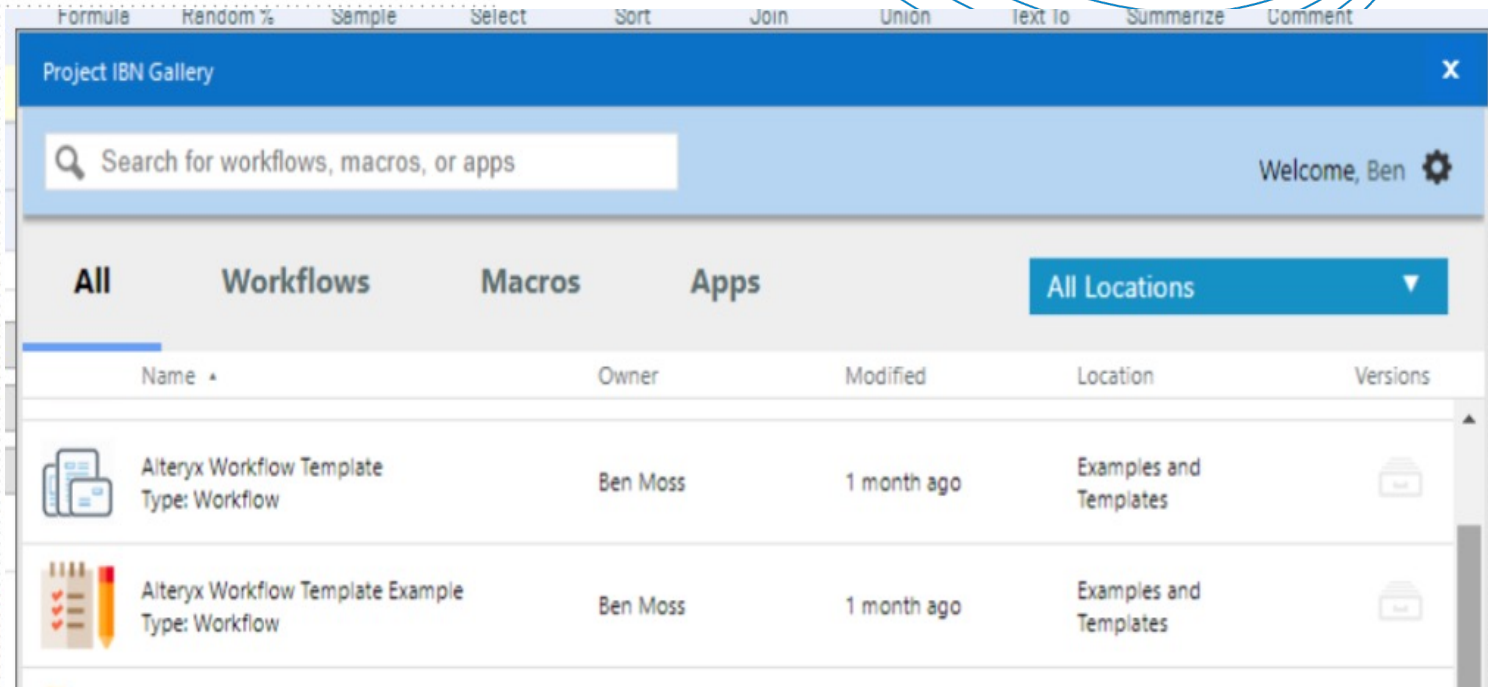
Purple for joins and unions

Grey for interface tools





Orange for test tool segments

Red for To-Do lists on unfinished workflows

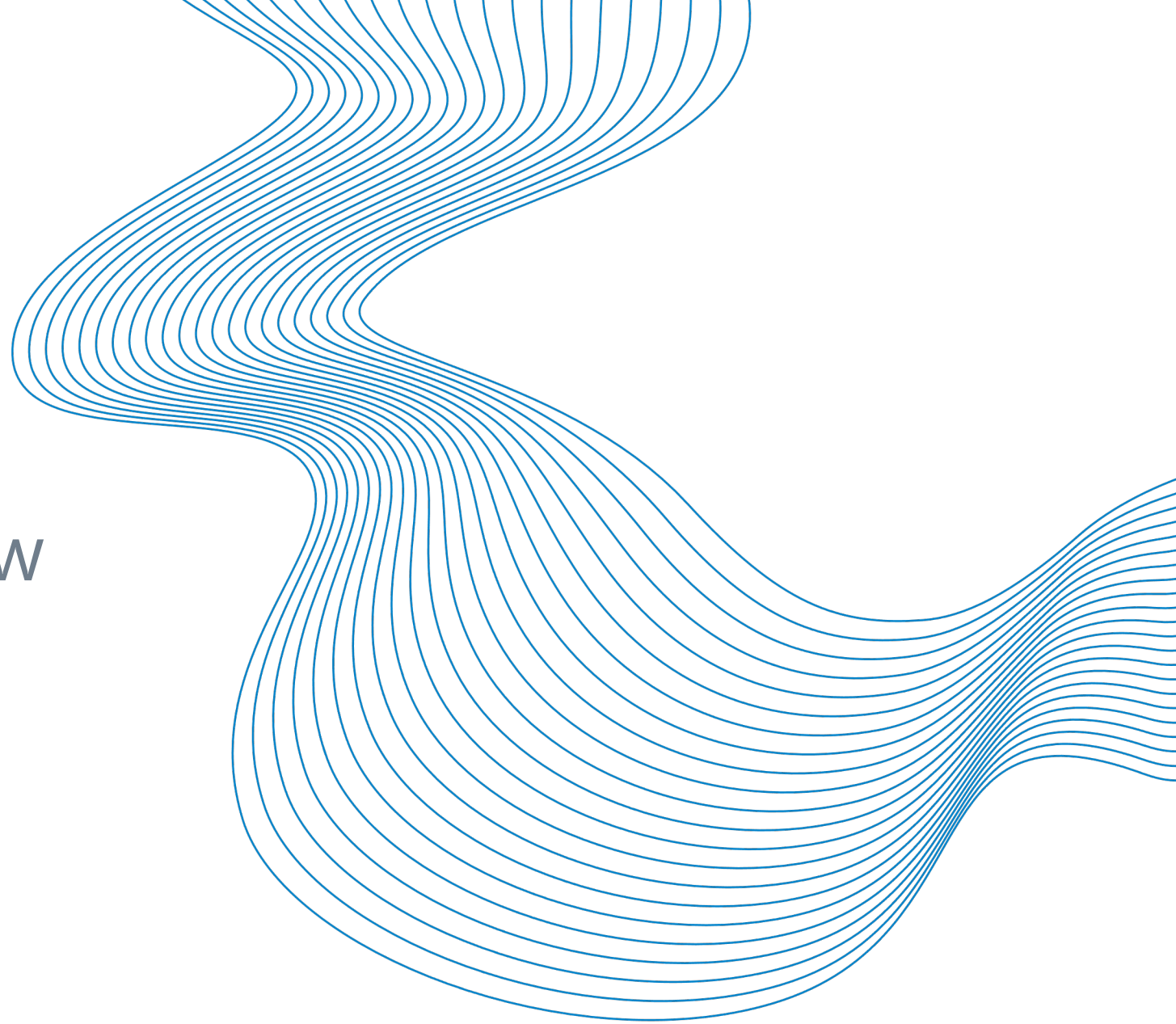
Yellow sticky notes for handovers and WIP



The screenshot shows the Alteryx Gallery interface. At the top, there is a search bar with the text "Search for workflows, macros, or apps" and a user greeting "Welcome, Ben". Below the search bar, there are tabs for "All", "Workflows", "Macros", and "Apps", and a dropdown menu for "All Locations". The main content area displays a table of workflow templates.

Name	Owner	Modified	Location	Versions
 Alteryx Workflow Template Type: Workflow	Ben Moss	1 month ago	Examples and Templates	
 Alteryx Workflow Template Example Type: Workflow	Ben Moss	1 month ago	Examples and Templates	

Optimize the Workflow

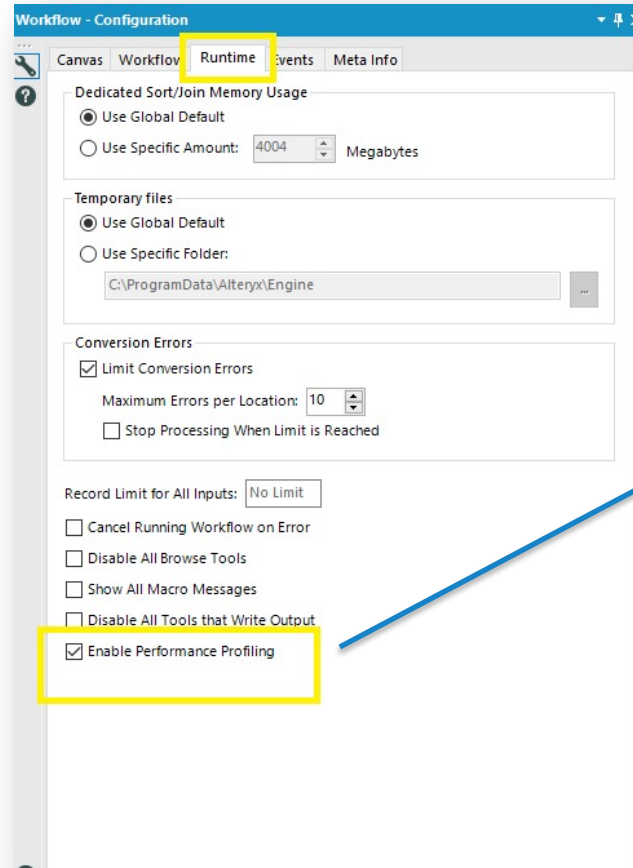


OPTIMIZE THE WORKFLOW

Profile your workflow:

Identify **hot spots** in order to investigate on the causes:

- 1) Activate profiling
- 2) Check the list of the results sorted from most to least time consuming (found at the end of the log)
- 3) Draw a conclusion and find a workaround



Results - Workflow - Messages

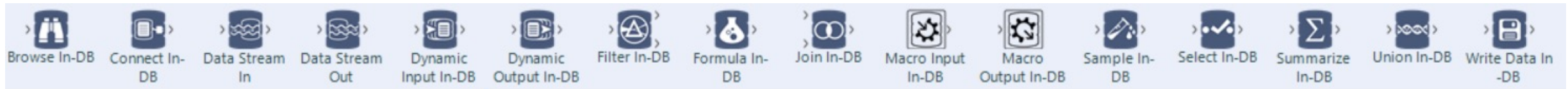
0 Errors 0 Conv Errors 7 Warnings 40 Messages 4 Files All

Local Output	Tableau processing complete.
Local Output	274 records were written to "C:\Users\...
Logistic Regression(182)	Profile Time: 14047.81ms, 44.81%
Local Output	Profile Time: 12660.64ms, 40.39%
Score (188)	Profile Time: 4432.46ms, 14.14%
Auto Field (180)	Profile Time: 36.65ms, 0.12%
Data Cleansing (183)	Profile Time: 35.08ms, 0.11%
Input Data (4)	Profile Time: 25.89ms, 0.08%
Join (151)	Profile Time: 19.71ms, 0.06%
Input Data (179)	Profile Time: 17.02ms, 0.05%
Join (196)	Profile Time: 12.96ms, 0.04%
Input Data (5)	Profile Time: 8.14ms, 0.03%
Filter (192)	Profile Time: 6.10ms, 0.02%
Create Points (198)	Profile Time: 5.03ms, 0.02%
Select (181)	Profile Time: 4.50ms, 0.01%
Filter (201)	Profile Time: 4.29ms, 0.01%
Summarize (59)	Profile Time: 3.90ms, 0.01%
Distance (199)	Profile Time: 3.29ms, 0.01%
Filter (208)	Profile Time: 2.91ms, 0.01%
Create Points (70)	Profile Time: 2.41ms, 0.01%
Formula (57)	Profile Time: 1.01ms, 0.00%
Text To Columns (62)	Profile Time: 0.19ms, 0.00%
Designer x64	Finished running 2-Prep&Blend--Customer Campaign Analyt

OPTIMIZE THE WORKFLOW

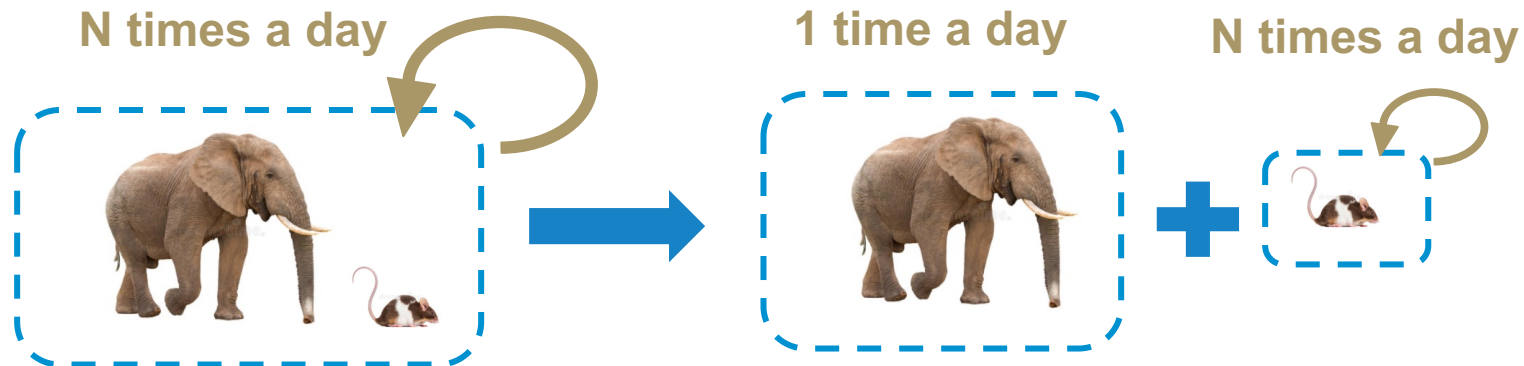
Think about "IN-DATABASE" tools

- For large volumes, the purpose is to move the processing to the database server – it's generally more powerful



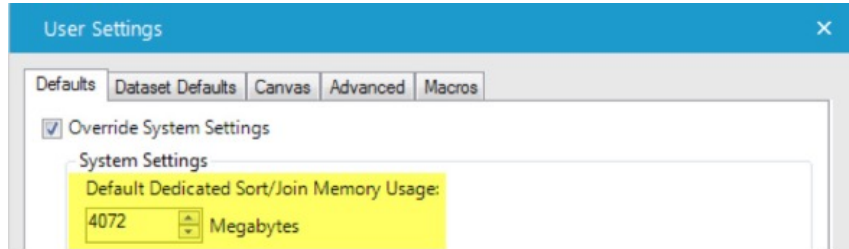
Split the workflow into disconnected sub-units

- Create one workflow containing the **heavy load data prep & blend** with an **.yxdb** file as output
 - Use this **.yxdb** as a **performant input** to a **second workflow with focus on analysis**.
- ➔ This 2nd workflow can be re launch far more quickly as many times as you want

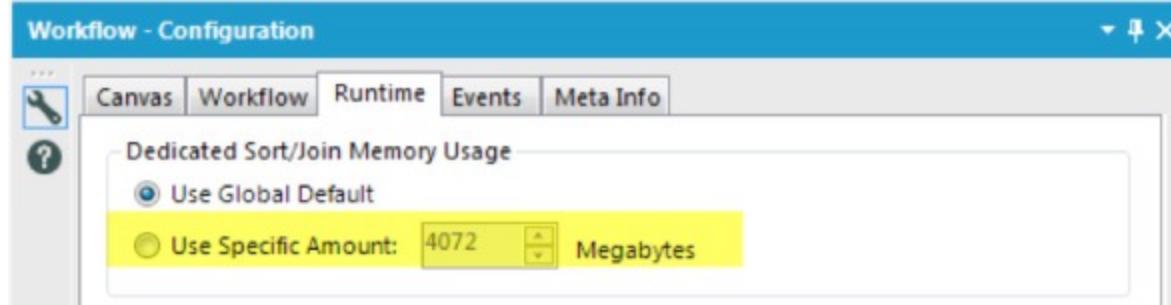


OPTIMIZE THE WORKFLOW

a) Users Settings



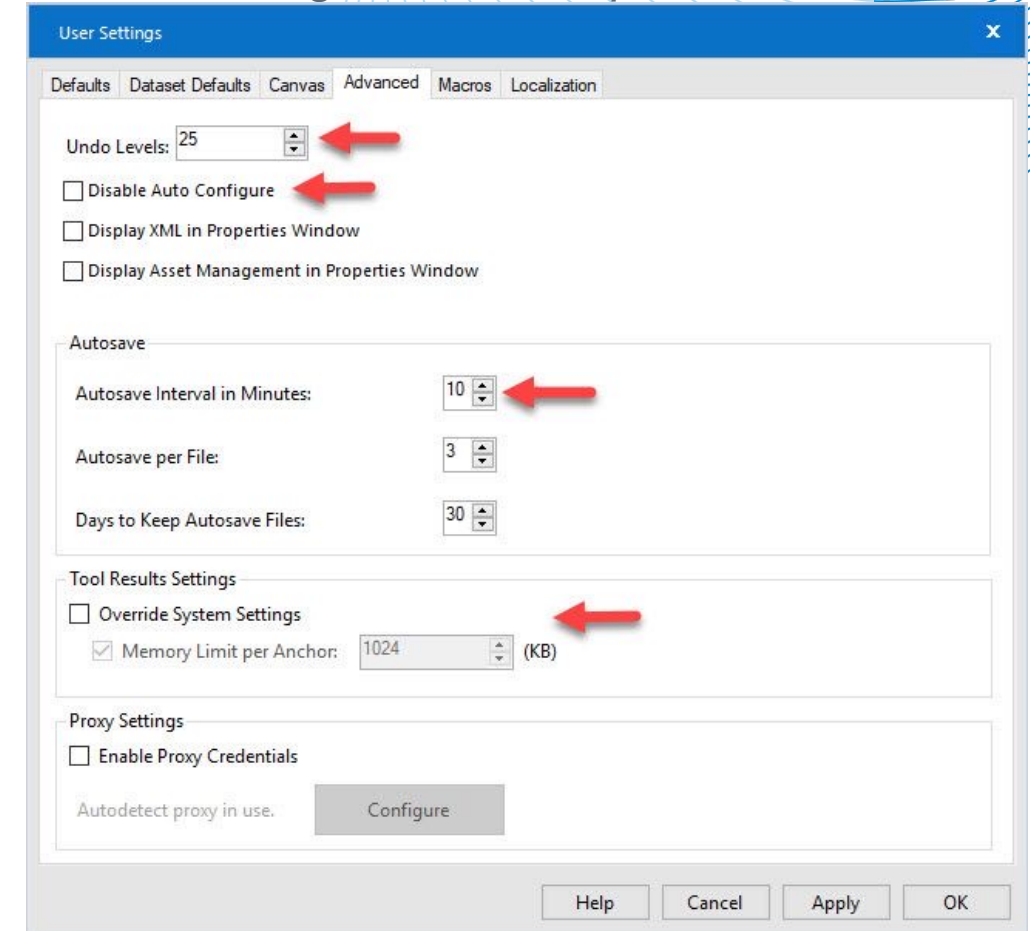
b) Workflow setting



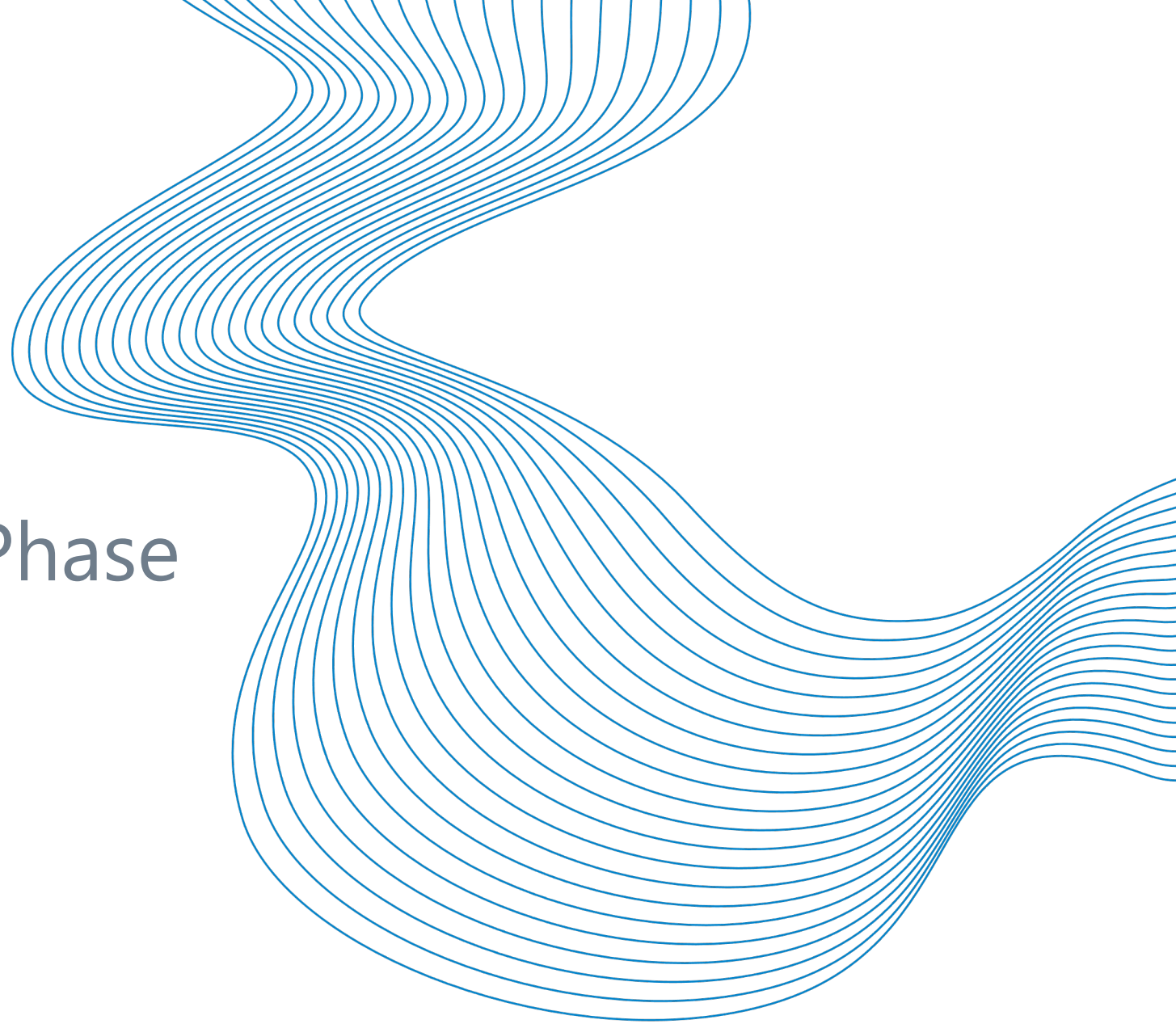
- Resource utilization can be controlled via Sort/Join Memory settings – both for default and for particular workflows
- Ex: If you build processes that require a lot of memory but no SORT is used then you turn it down. Conversely, we increase it

- Detail can be found here: <https://community.alteryx.com/t5/Alteryx-Designer-Knowledge-Base/What-is-the-Sort-Join-Memory-Setting/ta-p/1302>

Further settings for cache optimization:



After the Production Phase



AFTER THE PRODUCTION PHASE

What will I do differently next time?

(How will I be faster, how will the WF be more maintainable, stable, etc.)

What can be reusable for me?

What might be of interest to other people in my organization from that project/workflow?

- methodology or know-how
- technical: part of workflow, macros...
- datasource preparation / database special connection
- intermediate or final data produced

It saves time and effort!

In Analytics, sharing is caring

It is all about information already created by experts made available to others

AFTER

THE PRODUCTION PHASE

How can the produced insights enrich others?

- Should it be made available on the server?
- Is it necessary to make a customizable analytical application on the web?
- Do we need scheduling – maybe even early morning or weekend?

How to share that these insights are available?

- Network/ Internal Portal/ Gallery Server/ Connect
- Champions
- Regular User Group
- Mailing List
- Centre of Excellence/ Enablement

What do I need to improve on next time?

→ Community, Community, Community... and the Alteryx team



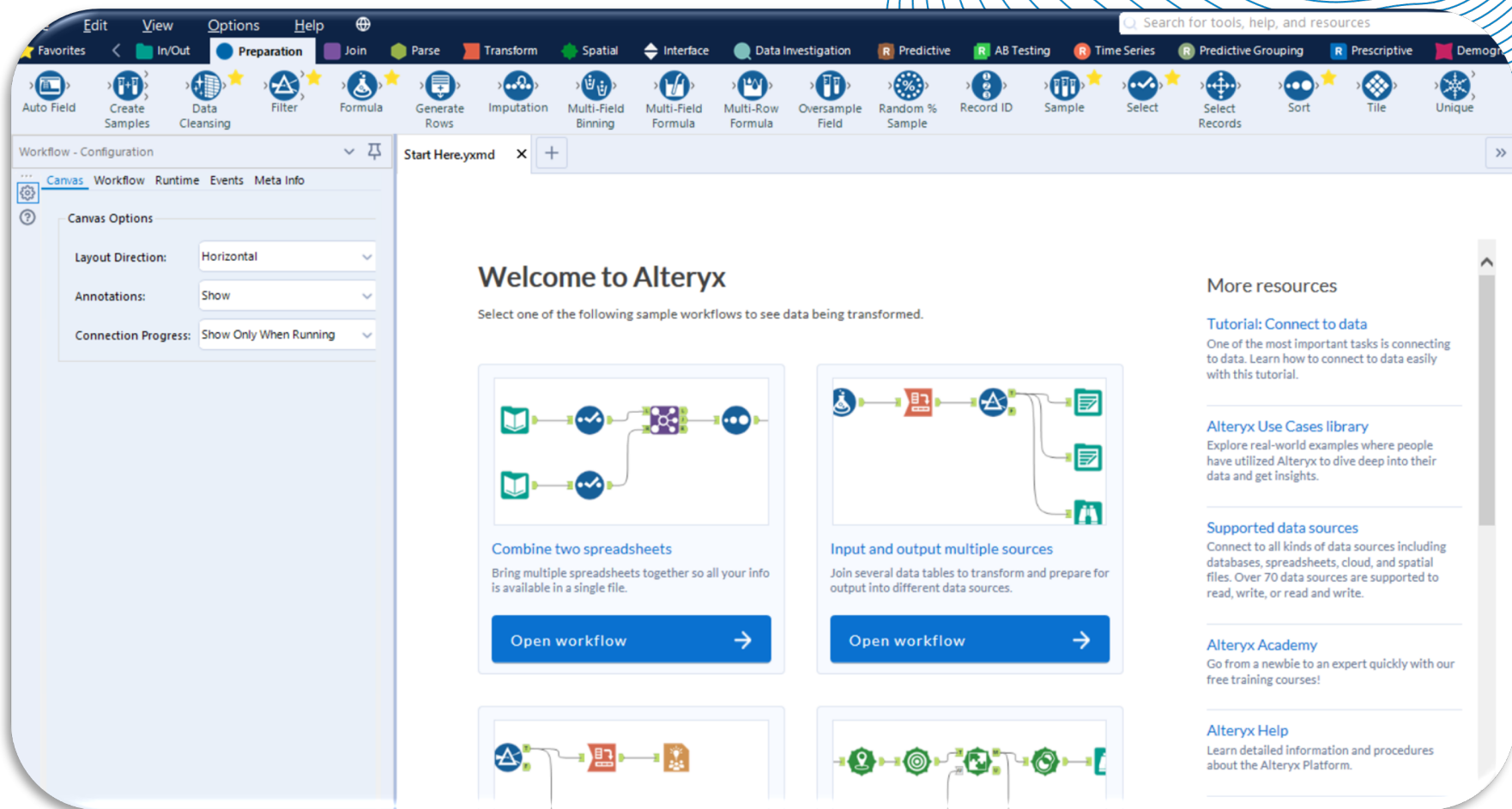
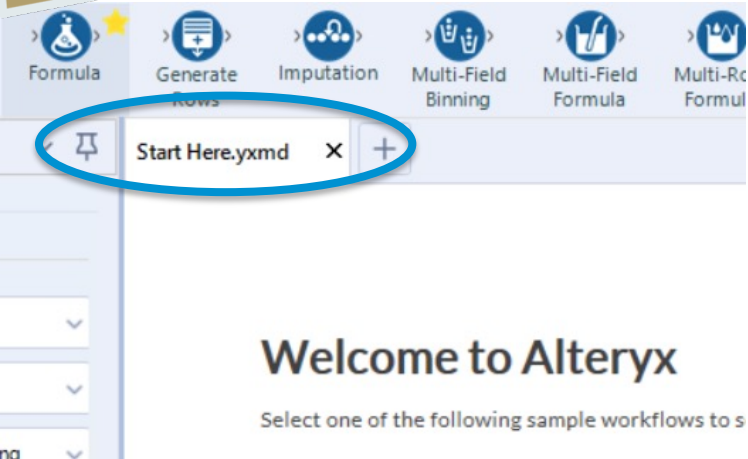
Day to Day

Support for Your Journey

DAY TO DAY

Designer: « Start Here »

1ST STEPS IN
DESIGNER



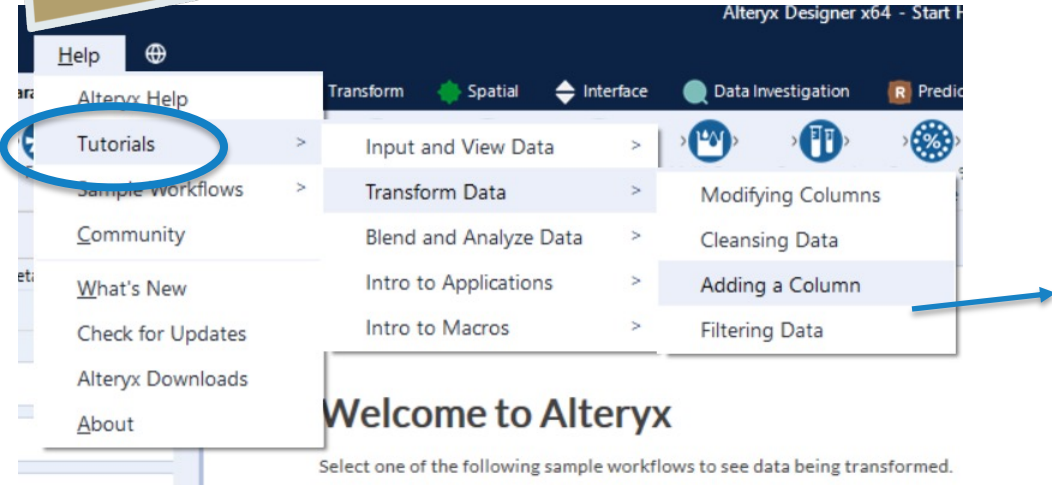
As soon as it opens, starting workflows allows you to enter directly into the solution.

By theme, simple and didactic, they guide you in your first steps.

DAY TO DAY

DESIGNER: Tutorials

INTEGRATED
GUIDES



Transform Data: Adding a Column

Creating a new column with a Formula tool

A new column using existing data is needed.

Drag a Formula tool onto the canvas from the toolbar and connect it to the Data Cleanse tool.

In the Configuration window on the left, use the Select Column dropdown to select + Add Column. Type Full Name as the name of the new column.

Data type and size can be adjusted under the Expression Editor. Keep the default Data type V_Wstring, and change Size to 35.

In the Expression Editor text box, which says Enter Expression Here, type the following expression:

```
[First Name]+" "+[Last Name]
```

Run the workflow. See the new Full Name column in the Results window.

Continue to [Transform Data: Filtering Data](#) →

Additional resources

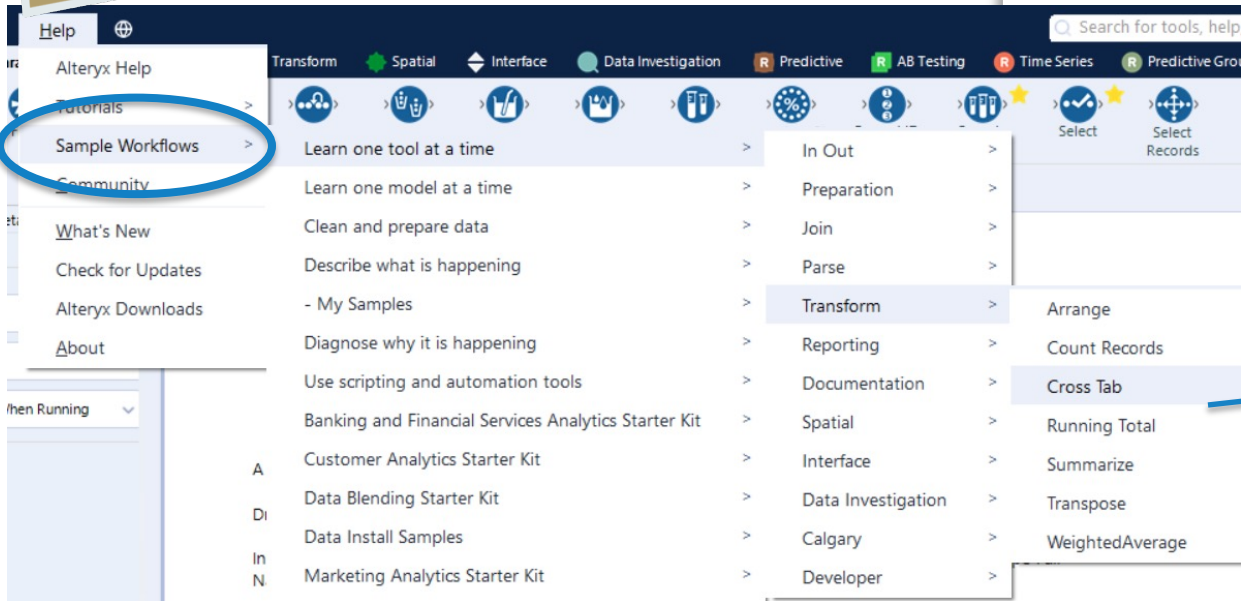
- [Formula Tool Help](#)
- [Diving Into Expressions](#)
- [Tool Mastery | Formula](#)
- [Formula tool one tool example](#)

Directly in designer, step-by-step workflow building on classic beginner's topics. Oriented on precise tasks to be carried out: transforming, merging, cleaning...

DAY TO DAY

DESIGNER: Sample Workflows

INTEGRATED
SAMPLES



Cross Tab Tool

The Cross Tab tool creates 1 new column for each categorical value held in a single existing column, pivoting the data from a vertical layout to a more horizontal layout.

1) Run the workflow (Ctrl+R).

2) Select a tool to view its output in the Results window.

Cross Tab - A Basic Example

Group data by these values: These will be grouped together so that there is one row per unique value. In this example, there will be one row per presidentNo.

Change column headers: A new column will be created for each unique value contained within the column selected. In this example, Pres_or_VP contains 2 unique values, President and Vice President. A new column will be created for each value.

Values for new columns: This column will be used to populate the new columns created by the "Header column". Since there may be multiple rows that are being grouped together, a Method for aggregating values must be selected. In this example, we are concatenating all "Names" values that are associated with each unique Grouping/Header combination.

Note that the Separator in the example is set as ",\s" to represent a comma followed by a space. Whitespace characters can be represented as separators by their escaped versions (see below).

Space -
Tab - \s
New line - \n

Cross Tab - Another Example

By changing the Change column headers column to VicePresidentNo, a column will be created for rows where VicePresidentNo is Null (the president), 1 (the first VP), 2 (the second VP), or 3 (the third VP).

This is very similar to the data set produced in the above example, but the vice presidents are put in 3 columns instead of 1. The Cross Tab tool provides you with the flexibility to shape your data to your specifications.

A menu that centralizes all the samples on given topics. You will also find there the starter kits that you will have downloaded.

DAY TO DAY

DESIGNER: Starters kits

<https://www.alteryx.com/fr/resources/resource-library/starter-kits>

STARTER KITS

Retail
INDUSTRY STARTER KIT

aws
TECHNOLOGY PARTNER STARTER KIT

Healthcare Analytics
INDUSTRY STARTER KIT

Spatial Analytics
CAPABILITY STARTER KIT

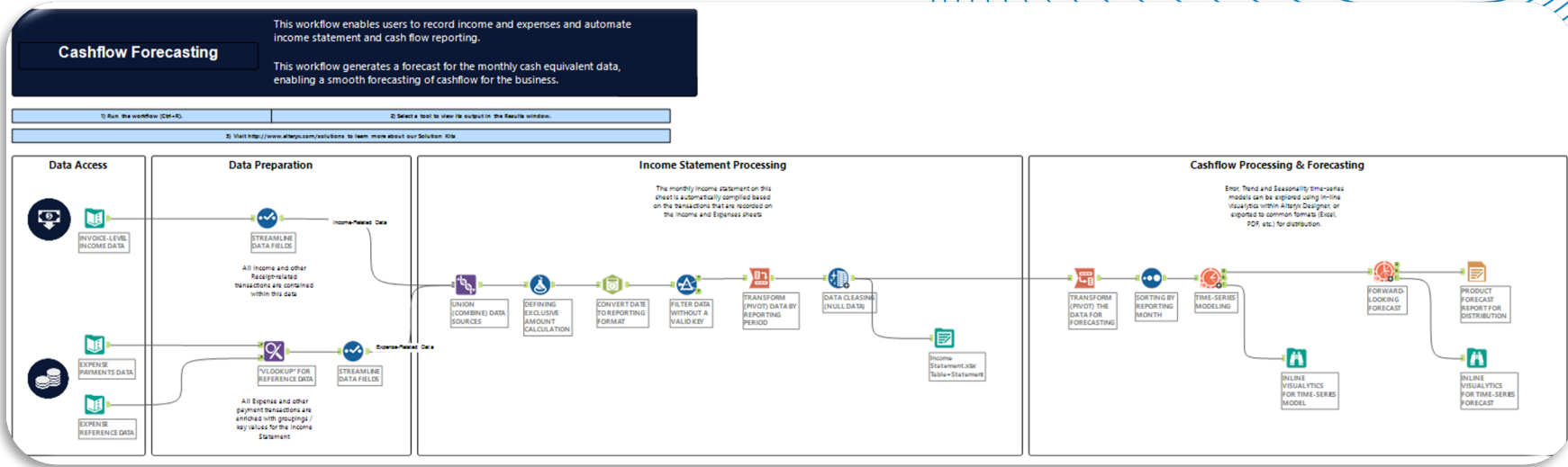
Banking & Financial Services
INDUSTRY STARTER KIT

Data Blending
CAPABILITY STARTER KIT

Customer Analytics
LINE OF BUSINESS STARTER KIT

Marketing Analytics
LINE OF BUSINESS STARTER KIT

Predictive Analytics
CAPABILITY STARTER KIT



Help

- Alteryx Help
- Community
- What's New
- Check for Updates
- Alteryx Downloads
- About

Sample Workflows

- Learn one tool at a time
- Learn one model at a time
- Clean and prepare data
- Describe what is happening
- My Samples
- Diagnose why it is happening
- Workflow scripting and automation tools
- Banking and Financial Services Analytics Starter Kit**
- Customer Analytics Starter Kit
- Data Blending Starter Kit
- Data Install Samples
- Marketing Analytics Starter Kit
- Microsoft Starter Kit
- Office of Finance
- Predictive tool s

Transform Spatial Interface Data Investigation Predictive AB Testing Time Series Predictive Group

random % Sample

creates 1 new column for each categorical value held in a single pivoting the data from a vertical layout to a more horizontal layout.

2) Select a tool to view its output in the Results window.

Supporting Macros

- Table of Contents
- Access to Financial Services
- Central Bank Survey Parsing
- Fraud Ring Analysis
- Marketing Effectiveness for New Product Subscription

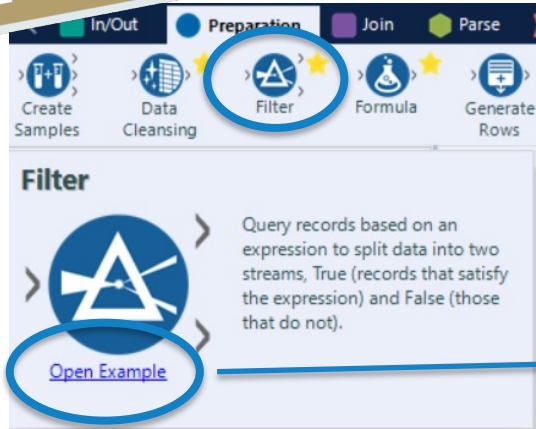
Starter kits on your business topics to download from the Alteryx website. They can then be integrated directly into your designer.

- Data blending
- Predictive Analytics
- Intelligence Suite
- Office of Finance
- Supply chain Analytics
- Banking + Financial Services
- Healthcare Analytics
- Public Sector Analytics
- Retail
- HR Analytis
- Marketing Analytics
- Customer analytics
- Spatial Analytics
- Tableau, Microsoft, Qlik, AWS, Salesforce...

DAY TO DAY

DESIGNER: Examples for each tool

HELP FOR
EACH TOOL



For each tool, an explanation is available but above all a link to an example workflow to practice the tool's options. Very useful to experiment with the nuances and play with the parameters with an already available dataset.

Filter Tool

The Filter tool splits a data stream into 2 streams based on a conditional expression. Rows that satisfy the condition flow out of the True anchor, the rest come out the False anchor.

1) Run the workflow (Ctrl+R).

2) Select a tool to view its output in the Results window.

3) Select T to view True rows and F for False.



Basic Filter, Greater Than

The Basic filter option allows for easy comparisons of columns against a static value.

Records with CustomerID greater than 30 are True; the rest are False.

Basic Filter, Is Not Null

Different operators are displayed in the dropdown list based on the selected column's data type.

The LastName column, type string, is filtered against Null values. Galileo's LastName is Null, so his row is False.

Basic Filter, Date Expressions

Columns that have a data type of date or date/time allow users to dynamically filter on Today, Tomorrow, Yesterday; you can also filter by selecting a Fixed Date.

Rows that are less than or equal to Tomorrow's date are output as True.

Basic Filter, Date and Period Expressions

The operators Date range, Start date and periods after, and End date and periods before require date selection. Operators that require a single fixed date also require a period to be selected.

Rows that are within a period of 2 days from Today's date are True.

**DAY
TO DAY**

COMMUNITY: community.alteryx.com

LEARNING
PATH

GUIDED 1ST
STEPS

INTERACTIVE
LESSONS

TRAINING
VIDEO INDEX

WEEKLY
CHALLENGE

DESIGNER
FORUM

DESIGNER
KNOWLEDGE



Now Please Join Us For A Short Survey



Continue the Alteryx Journey

Alteryx Community

Post your questions, search discussion forums, read Knowledge Base articles and contribute your knowledge at community.alteryx.com.

Alteryx Academy

Register for Live Training sessions, complete Learning Paths and Interactive Lessons, participate in the Weekly Challenge and learn about product certification at academy.alteryx.com.

Virtual Solution Center

Get technical help, advice, direction through 1:1 sessions with Alteryx professionals! Schedule a 30-minute session today at community.alteryx.com/vsc.

The Alteryx logo is displayed in a blue, lowercase sans-serif font. A solid blue vertical bar is positioned to the left of the logo. The background of the slide features a decorative pattern of numerous thin, blue, wavy lines that create a sense of motion and depth, primarily on the right side.

Thank You

See what Alteryx can do for you.
Download a free trial of Alteryx today.
alteryx.com/trial

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alteryx.com