

June 15, 2023

# Welcome to the Alteryx Community event!

It's a relaunch!

NETHERLANDS

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# Our Agenda

- Intro's!
- Ice breaker
- Hot news from Inspire - a Grand Prix competitor's perspective!
- What's new in Alteryx 2023 ... by Alteryx
- How Alteryx helps with sustainability (ESG) use cases

# Let's Quiz!!

<https://crowdparty.app/rooms/rlyns6c>





DO IT  
AGAIN!

inspire  
2023

# Update from the Las Vegas Conference

Grand Prix, stories & more!

LIU ZHANG

Watch On Demand

<https://www.alteryx.com/inspire>





# The latest features from Alteryx...by Alteryx!

What's new?

Florian Carrier

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# ESG Use case

Alteryx in the real world!

Tom Welgemoed  
Decision Crew

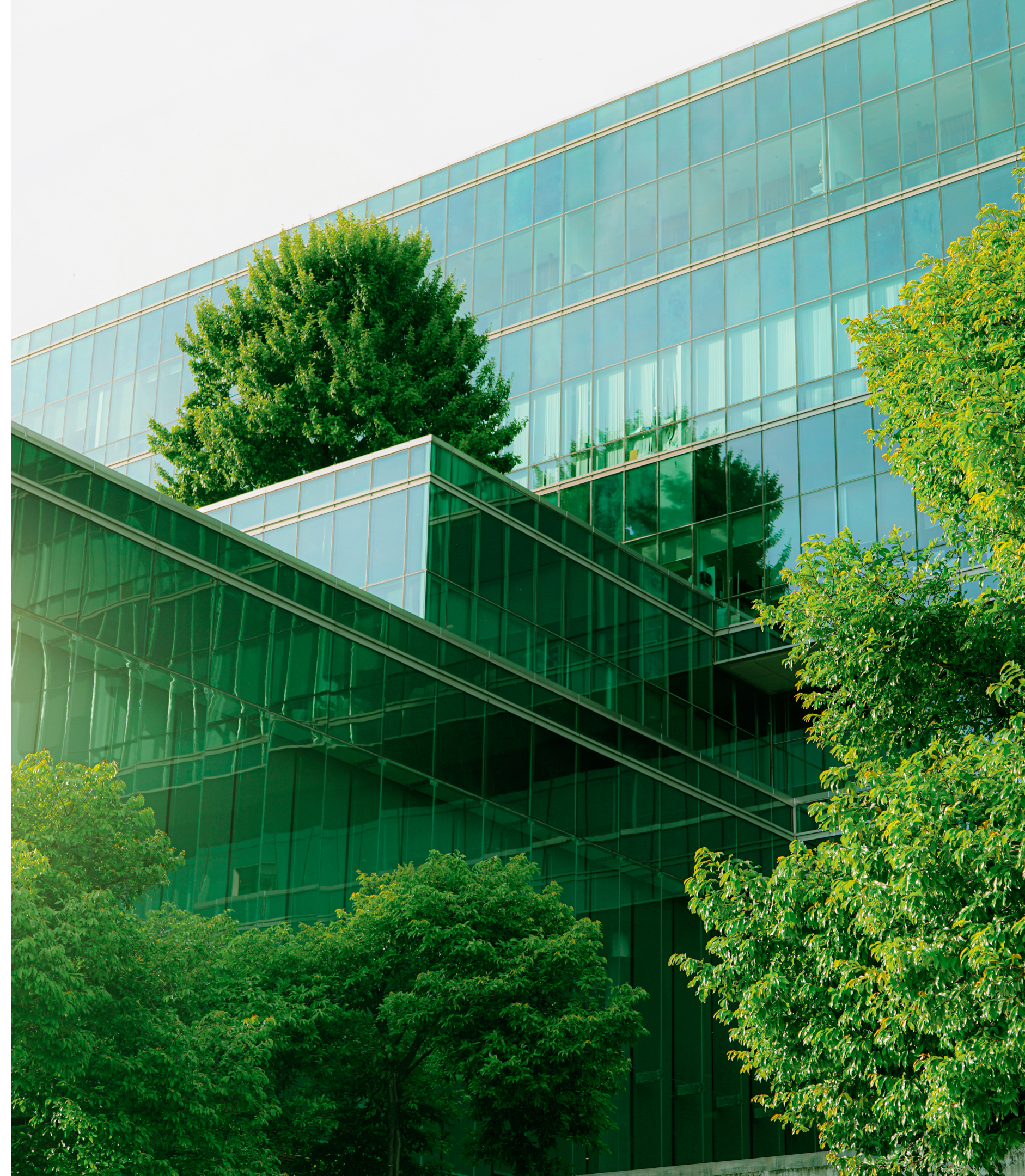
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# ESG use case

## THINGS TO KNOW

- Short for Environment, Social & governance
- Has a wide-reaching impact for all organizations to report their sustainability metrics
- Companies who do not make this a focus, will over time suffer business losses!
- This use case will focus on the financial industry and on Sustainable Finance Disclosure Regulation (SFDR)
- ESG reporting is a complex and evolving area - but Alteryx can help!



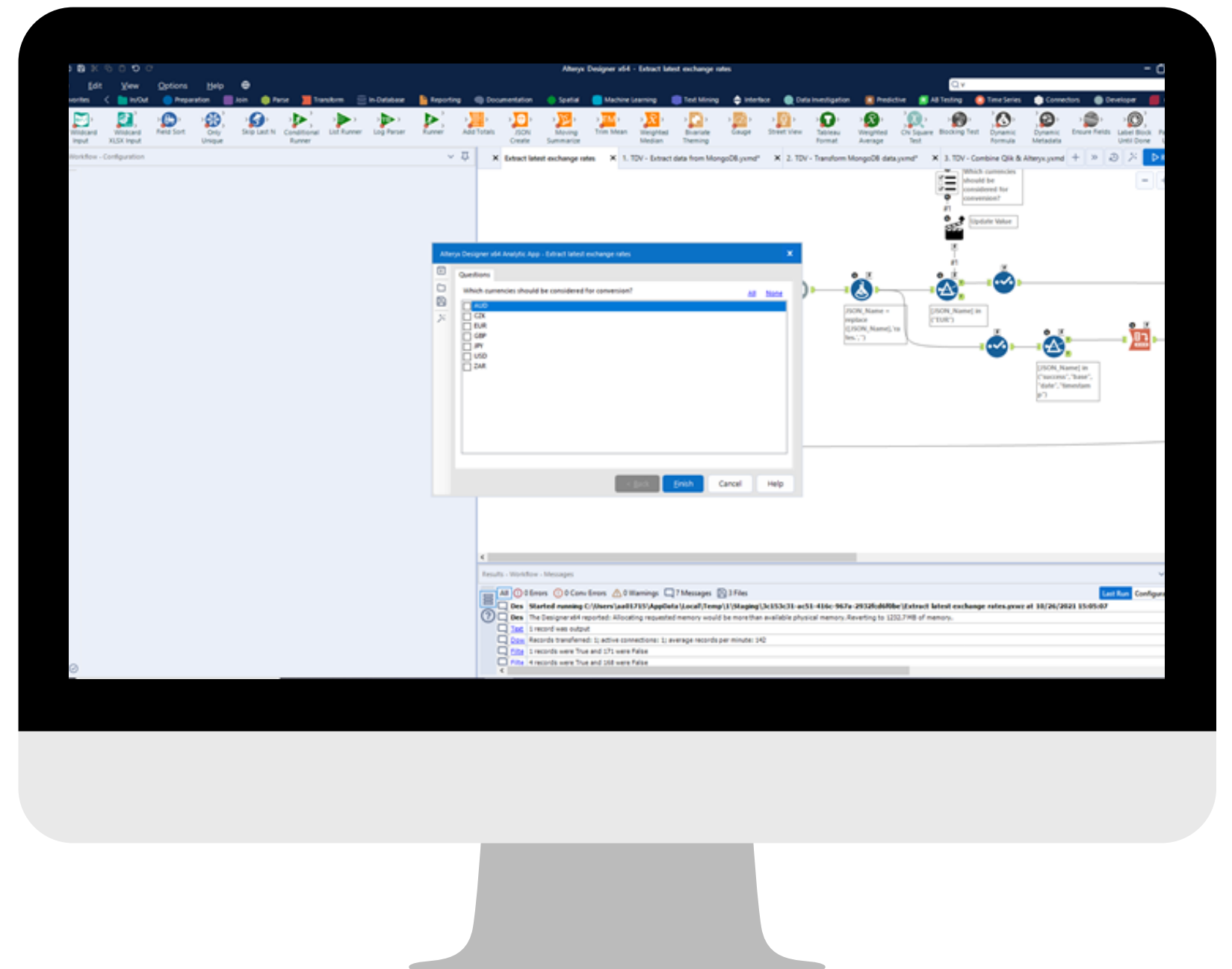


# SFDR: problem statement

## IT'S A JOURNEY!

Particular large financial client is obligated by EU regulations to perform SFDR reporting and also subject to providing reports to its key clients.

As an entirely new subject area, a task force team was assembled to understand, define and ultimately solve the problem.





# EU regulations are tricky!

## THE EU SET OUT HOW TO CALCULATE SFDR MEASURES

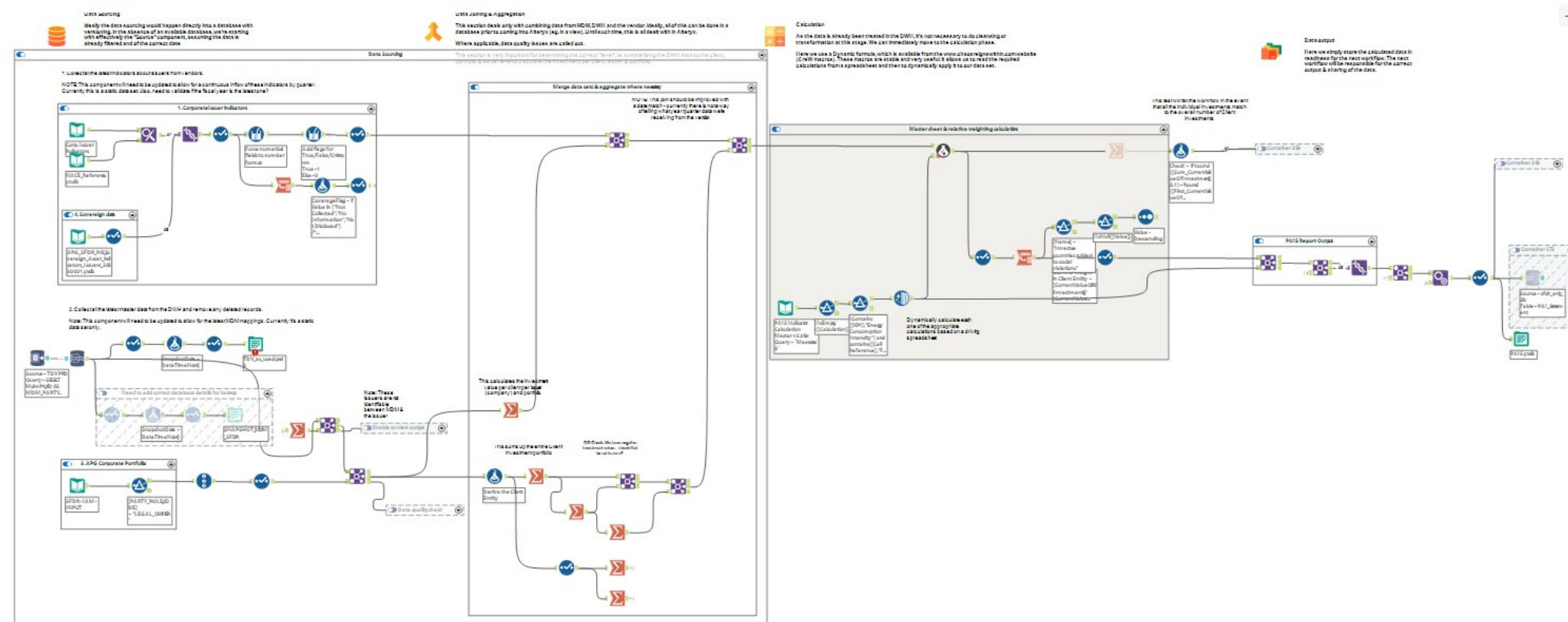
- Understanding EU regulations regarding SFDR takes time and organizational alignment
- Finding the data is a challenge
- Defining the calculations is an even bigger challenge!

Indicators applicable to investments in investee companies						
Adverse sustainability indicator		Metric	Impact [year n]	Impact [year n-1]	Explanation	Actions taken, and actions planned and targets set for the next reference period
CLIMATE AND OTHER ENVIRONMENT-RELATED INDICATORS						
Greenhouse gas emissions	1. GHG emissions	Scope 1 GHG emissions				
		Scope 2 GHG emissions				
		Scope 3 GHG emissions				
		Total GHG emissions				
	2. Carbon footprint	Carbon footprint				
	3. GHG intensity of investee companies	GHG intensity of investee companies				
	4. Exposure to companies active in the fossil fuel sector	Share of investments in companies active in the fossil fuel sector				
	5. Share of non-renewable energy consumption and production	Share of non-renewable energy consumption and non-renewable energy production of investee companies from non-renewable energy sources compared to renewable energy sources, expressed as a percentage of total energy sources				
6. Energy consumption intensity per high impact climate sector	Energy consumption in GWh per million EUR of revenue of investee companies, per high impact climate sector					
Biodiversity	7. Activities negatively affecting biodiversity-sensitive areas	Share of investments in investee companies with sites/operations located in or near to biodiversity-sensitive areas where activities of those investee companies negatively affect those areas				

# Alteryx & SFDR

## ALTERYX ALLOWS FOR ITERATIVE DEVELOPMENT AND DATA SHARING

- Alteryx helped accelerate the overall project by quickly adapting logic and incorporating new data sets
- Alteryx is also used to export results in reports to Excel & Microsoft Dynamics
- But perhaps the biggest benefit was in the reusable, dynamic formula tool...





# Tip: Dynamic formulas

A MACRO THAT HELPS TO AUTOMATE VARIOUS FORMULAS

- Downloadable from Crew macros  
([chaosreignswithin.com](https://chaosreignswithin.com))
- Allows you to run completely different calculations over the same data with one tool!
- This was used to calculate all SFDR calculations without overcomplicating workflow (20+ KPIs)



# Tip: Excel output

## DON'T CHOOSE TO FORMAT EXCEL AFTERWARDS

- Did you know you can retain your Excel formatting when outputting data?
- We created a workflow that could dynamically output to different sheets all the KPIs whilst keeping preferred client formatting!

Output Data (4) - Configuration

Write to File or Database

C:\Users\tom\OneDrive - decisioncrew.com\Projects\Capitola\Workflows\Account events.xlsx\Sheet1

Set Up a Connection

☐ Use Data Connection Manager (DCM)

Options

Name	Microsoft Excel (*.xlsx)
3 Output Options	Create New Sheet
4 Append Field Map	By Field Name
5 Skip Field Names	<input checked="" type="checkbox"/>
6 Preserve Formatting on Overwrite (Range Required)	<input checked="" type="checkbox"/>

☐ Take File/Table Name From Field

Append Suffix to File/Table Name

Field Containing File Name or Part of File Name

☒ Keep Field in Output

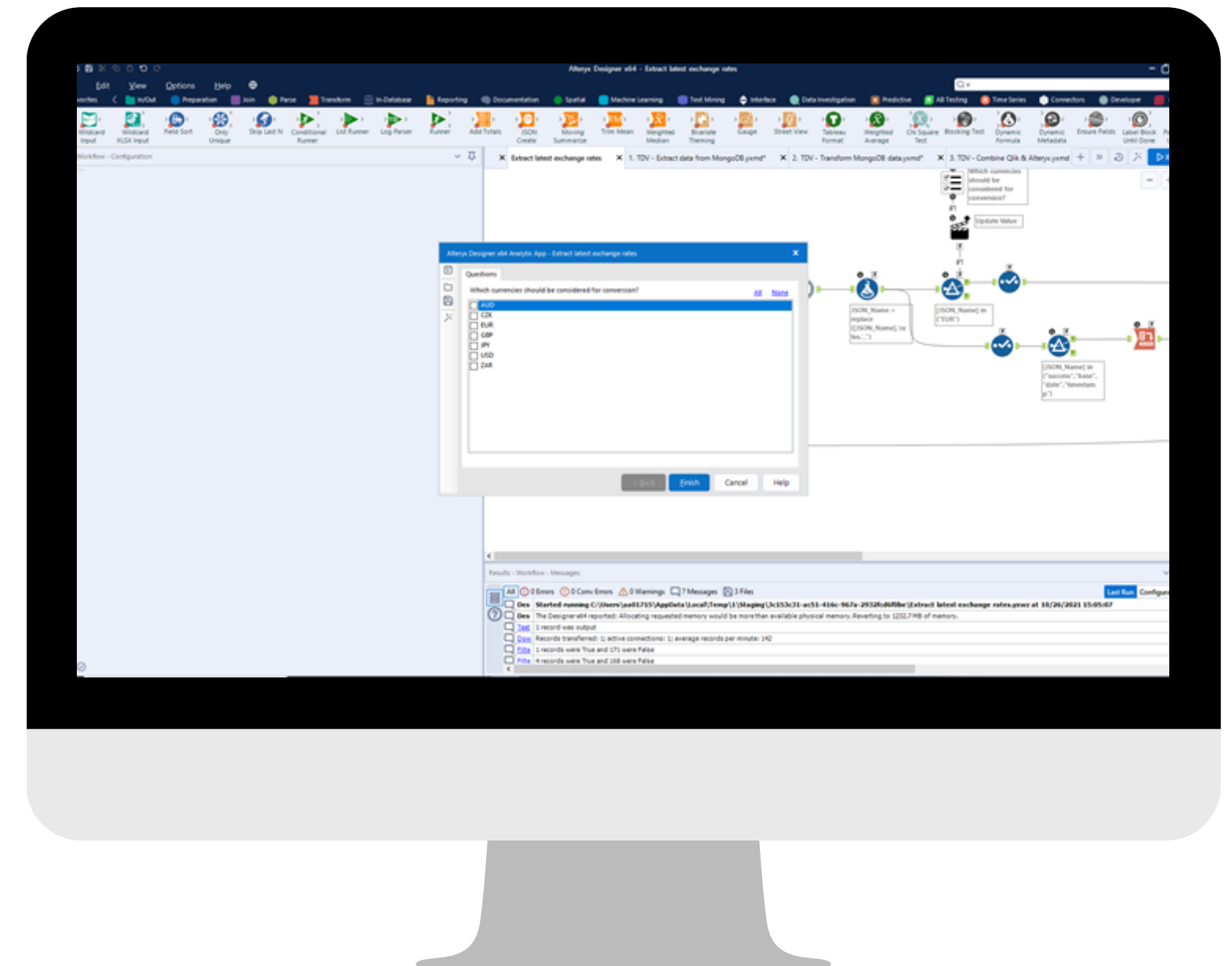
☐ Disable Tool



# Summary

## ALTERYX CAN HELP ACCELERATE ESG & SFDR INITIATIVES

- ESG regulation is here to stay!
- Alteryx can allow a quick-start, building insights and iterative processes
- 2 tips to take away - dynamic formulas and retaining Excel formatting when creating reports



# Before we wrap-up!

Let's stay connected! Follow us on LinkedIn for community & Alteryx updates:

- [Decision Crew](#)
- [LarkInfo Lab](#)
- [The Information Labs NL](#)

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# Alteryx Innovator Program

## Empowerment

- Networking across all functions and industries
- First access to roadmap and product enhancements

## Recognition

- Industry award nominations
- Quarterly Innovator awards

## Influence

- In-person and virtual speaking platforms
- Create blogs and articles for the Alteryx community



## Loving Alteryx?

Help your peers by sharing your experience through a review on G2.

Once your review is approved by G2 you will be sent a \$25 Amazon gift card.



# User Group Meeting Survey

