

Delving Into Dynamic Tools

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About Me:

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With Alteryx I can solve problems we have struggled with for years.

When I use Alteryx, I feel like I know what I am doing.

2021 Alteryx Goals: Pass my Advanced Certification Exam



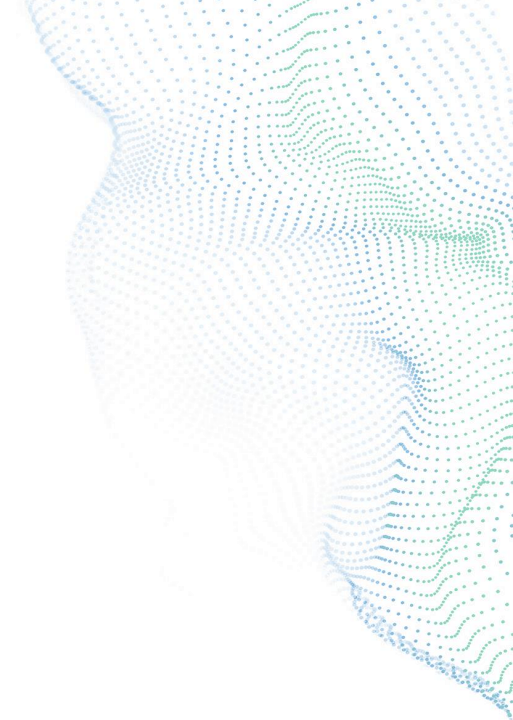
Use Case

Problem

- You need to ingest and analyze historical data
- This data only exists on Excel reports saved to a local drive.
- The data will require a lot of data cleansing.

Solution

- Alteryx's Dynamic Tools



Reading In Specific Sheets From Multiple Files



Input Data (1) - Configuration

Connect a File or Database

H:\Triangle Alteryx UG\dynamic presentation\reallyimportantreport*.xlsx

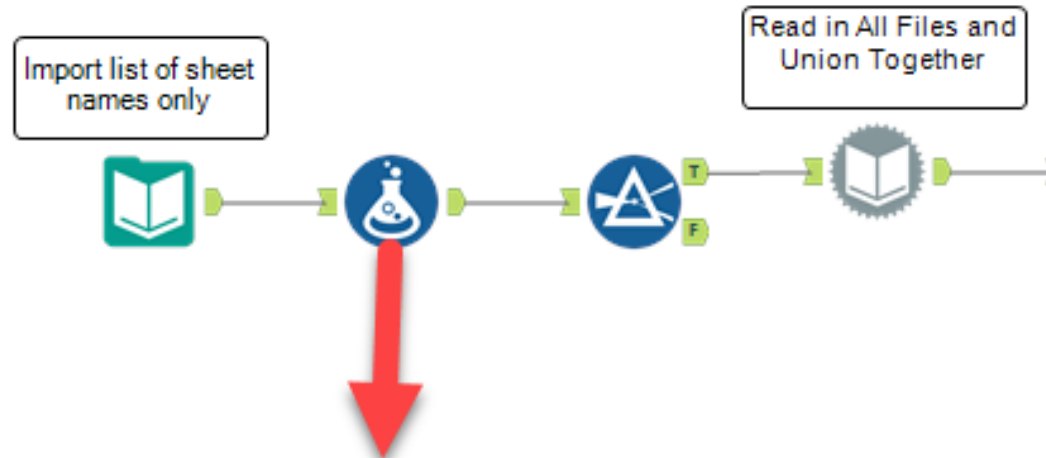
Options

Name	Value
1 Record Limit	
2 File Format	Microsoft Excel (*.xlsx)
3 Table or Query	<List of Sheet Names>
4 Search SubDirs	<input type="checkbox"/>
5 Output File Name as Field	Full Path
6 First Row Contains Data	<input type="checkbox"/>

Preview (first 100 records)

Refresh

Creating Dynamic Filenames+ Sheet Names



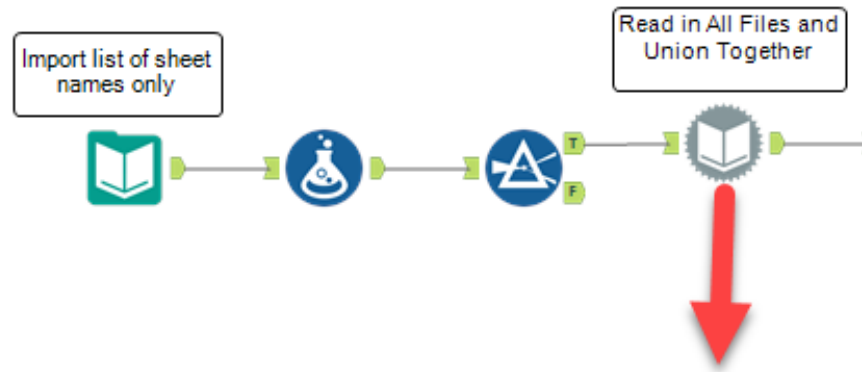
Formula (8) - Configuration

Output Column	Data Preview
File_and_sheet	H:\Triangle Alteryx UG\dynamic presentati...

```
Replace([FileName], "<List of Sheet Names>", [Sheet Names])
```

Data type: V_WString Size: 1073741823

Use Dynamic Input To Read In Files



Dynamic Input (3) - Configuration

Input Data Source Template

Edit... H:\Triangle Alteryx UG\dynamic presentation\reallyimportantreport8_3.xlsx

Read a List of Data Sources

Field: File and sheet

Action: Change Entire File Path

Modify SQL Query

Add

Edit

Up

Down

Delete

Removing Empty Columns With Dynamic Select

Remove Empty Columns

Auto Field changes string columns to the smallest data-type available. Empty columns convert to boolean.

Dynamic Select (10) - Configuration

Select Field Types

- Bool
- Byte
- Int16
- Int32
- Int64
- FixedDecimal
- Float
- Double
- String
- WString
- V_String
- V_WString
- Date
- Time
- DateTime
- Blob
- SpatialObj

Make sure to un-check Bool

All
None
Numeric
String
Spatial

Renaming Columns with Dynamic Rename

The image shows the configuration of the Dynamic Rename tool in Alteryx. The tool is named "Dynamic Rename (17) - Configuration". The "Rename Mode" is set to "Take Field Names from First Row of Data". A list of fields is shown with checkboxes, all of which are checked: "Really Important Membership Report Monday August 2, 2021", "F2", "F3", "F4", "F5", and "F6". There are "All" and "Clear" buttons next to the list. Below the list, the "Properties" section shows a dropdown menu set to "Warn" with the text "if missing fields".

To the right of the configuration window, a workflow diagram shows a source tool connected to the Dynamic Rename tool, which is then connected to a destination tool. The Dynamic Rename tool is highlighted with a dashed blue box.

Below the workflow diagram, a data preview window is shown. It displays "4 of 4 Fields" and "Cell Viewer" with "37 records displayed". The data is presented in a table with columns labeled "Record", "F4", "F6", "F7", and "F8".

Record	F4	F6	F7	F8
1	Group	Medical	Dental	Life
2	[Null]	[Null]	[Null]	[Null]
3	Rachel	Y	Y	N
4	Ross	Y	N	N
5	Phoebe	Y	Y	N
6	Joey	Y	Y	N
7	Chandler	Y	Y	Y
8	Monica	Y	Y	Y

alteryx

Thank you

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