ALTERYX RICHMOND USER GROUP

Q2 2020 | May 28, 2020 1:00-2:30 PM

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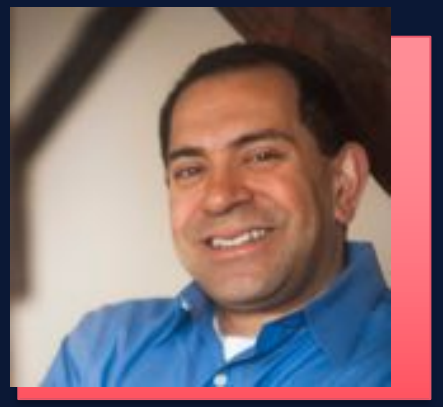
LEADERSHIP TEAM:

CAROLYN WESTLAKE

American Strategies

cgwestlake@gmail.com



ALEX CORDERO

Lasso Data Partners

alex@lassodatapartners.com

JOHN HAYES

Developer/Consultant

john.hayes@mac.com

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AGENDA

INTRODUCTIONS 1:00 PM – 1:10 PM

WORKFLOW BEST PRACTICES 1:10 PM – 1:30 PM
Alex Cordero – Lasso Data Partners

COMMUNITY UPDATES 1:30 PM – 1:40 PM
Carolyn Westlake

WEEKLY CHALLENGE WORKSHOP 1:40 PM – 2:25 PM
Alex Cordero – Lasso Data Partners

FEEDBACK/Q&A 2:25 PM – 2:30 PM

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BEST PRACTICES

The following slides provide some guidelines to encourage consistency in the development and design of workflows. They also help to support the widespread deployment of Alteryx through your organization and to assist in the development of workflow authors.

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BEST PRACTICES

Business environment

- Determine what role workflows will have in your company, and plan your standards, processes and controls accordingly.
- Adopt standards that work well with your company culture and organizational goals.
- Ensure that everyone involved in the creation or use of workflows has an appropriate level of knowledge and competence. These levels will differ from designer, user, and reviewer/approver.

Data investigation

Accept the fact that data is often inaccurate, contradictory, inconsistent, stale, missing or in the wrong format. Work towards fixing the issues.

- Identify and document where the source data is generated, and the parameters used to query the data
- Ensure data being sourced is coming from a governed/vetted system to the extent possible.
- Complete a data dictionary template to identify and describe the data being brought into the workflow
- Visually inspect the source data in Excel, Notepad++, or other software prior to a more comprehensive review of the contents and structure.

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BEST PRACTICES

Designing and building a workflow

- Identify the audience. If a workflow is intended to be understood and used by others, the design and results should facilitate this.
- Don't handle data you're not going to process. Remove unnecessary data at the beginning of your workflow.
- Correct data types and sizes at the beginning of the workflow.
- Clean up data at the beginning of the workflow.
- Use meaningful column and formula names.
- Document the processes as the workflow is being built.
- Keep formulas as simple as practicable. Use multiple formulas or columns to simplify the audit trail.
- Never hardcode in a formula anything that might change or need to be changed.
- Don't try to accomplish tasks using the fewest possible tools or least amount of canvas space if it will hinder auditing or troubleshooting the workflow.
- Use the proper folder structure and workflow dependencies to ensure portability
- Clean and organize to improve efficiency and overview of the workflow. Align and space tools. Separate processes. Use containers and comment boxes.
- Output should be verified to ensure the correct data type for downstream consumption is used.

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BEST PRACTICES

Workflow risks and controls

Accept that no matter how hard we try, we make mistakes, errors occur, and they can escape our detection. Find the errors, fix them and learn from the experience.

- Always review Results pane for Errors, Conversion Errors, Warnings and Messages
- Rigorously test the workflow. The higher level of risk and complexity, the more testing and validation that should be built into the workflow.
- Use the Test tool and the Message tool to conduct testing.
- Asses how to validate the data to ensure accuracy - Know your data and test for holes, outliers, or unexpected data.
- Verify the business rules for the workflow have not changed and have been applied correctly
- Build in checks, controls and alerts from the outset during workflow design
- Test for unexpected results from processes
- Consider sending event alerts via email as the level of risk rises
- Utilize a system of peer reviews to minimize the risk of errors

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ALTERYX COMMUNITY UPDATES

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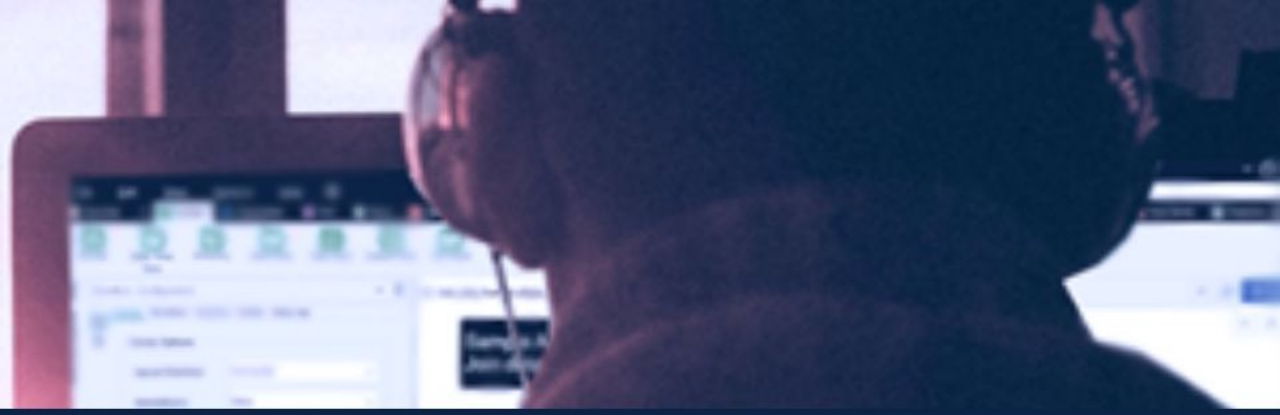
ANALYTICON

AN INSPIRED EXPERIENCE
FOR DATA PEOPLE

DALLAS, JUNE 7 - 10, 2021

https://bit.ly/3c1qWZm

ADAPT:
ADVANCING DATA + ANALYTICS POTENTIAL TOGETHER



WHAT IS IT?

A program that provides free data science and analytics learning courses, an Alteryx Designer license, Community access and 1:1 virtual support from Alteryx associates to help upskill those affected by COVID-19

WHO QUALIFIES?

Anyone who's employment status has been affected by COVID-19 including (but not limited to): recently unemployed, furloughed, reduced-hours and recent college graduates

SPREAD THE WORD

Visit the Alteryx For Good space on Community for more information and to share this program with others

TOGETHER WE SOLVE

ALTERYX IS OFFERING

- **Virtual Solution Center** on Community available today!
- **Virtual Use Case Discussions** through Industry Forums on Community
- **Work from Home Licenses** can be requested for use the Alteryx Platform on your home machines for **90 days**
  - Contact your account manager or reach out to fulfillment@alteryx.com

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NEW INDUSTRY DISCUSSIONS FORUM

HOW TO GET INVOLVED

1. Subscribe
2. Like
3. Share

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SIGN IN. GEEK OUT.

COMMUNITY.ALTERYX.COM

- 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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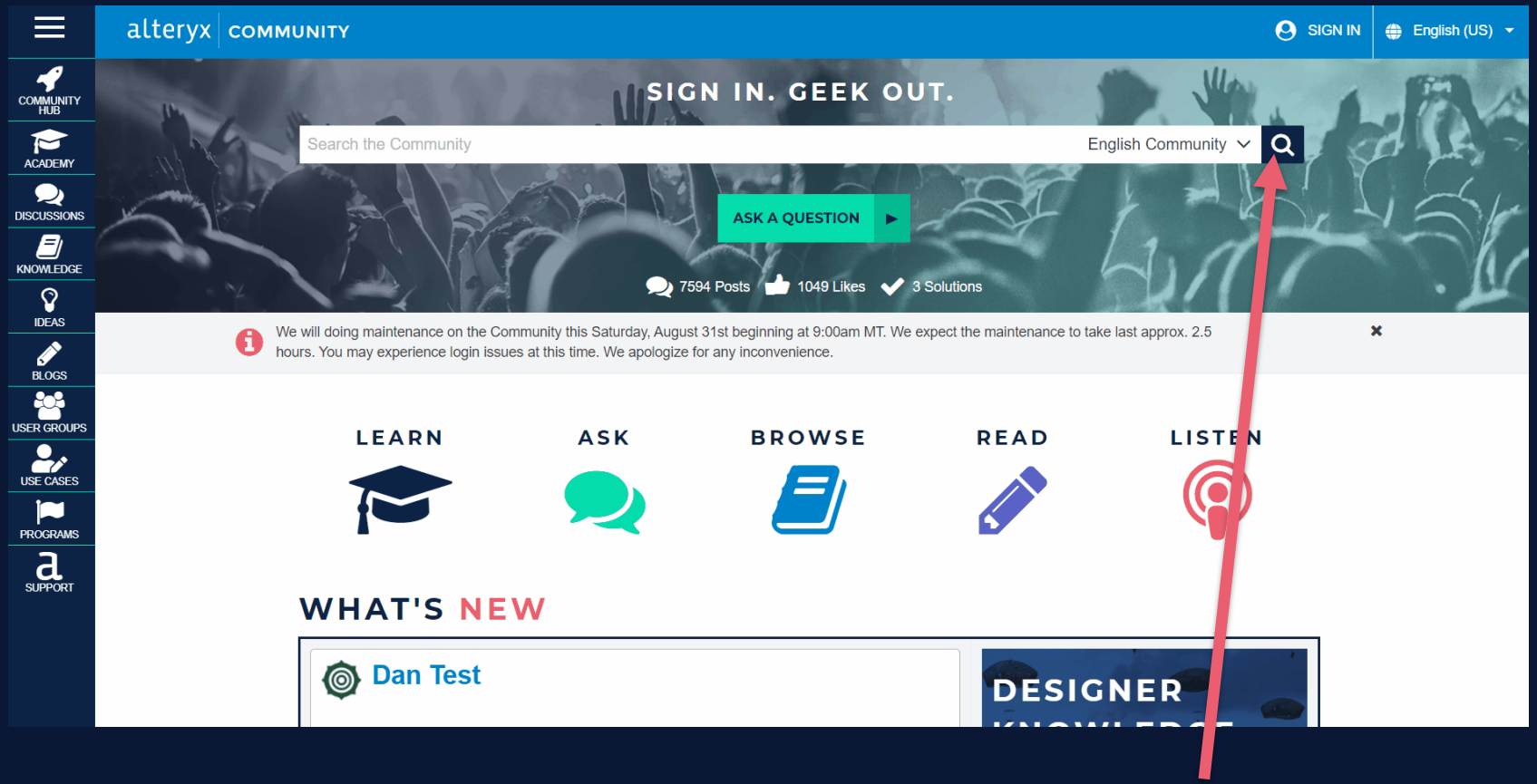
NEW COMMUNITY SEARCH

JUST RELEASED

- New Search Features!
  - Create search bookmarks
  - Search by language
  - New filters (type, category, place, label, author, and more!)
  - Search by Community, Help Doc, YouTube, etc.



Click on magnifying glass to get started.

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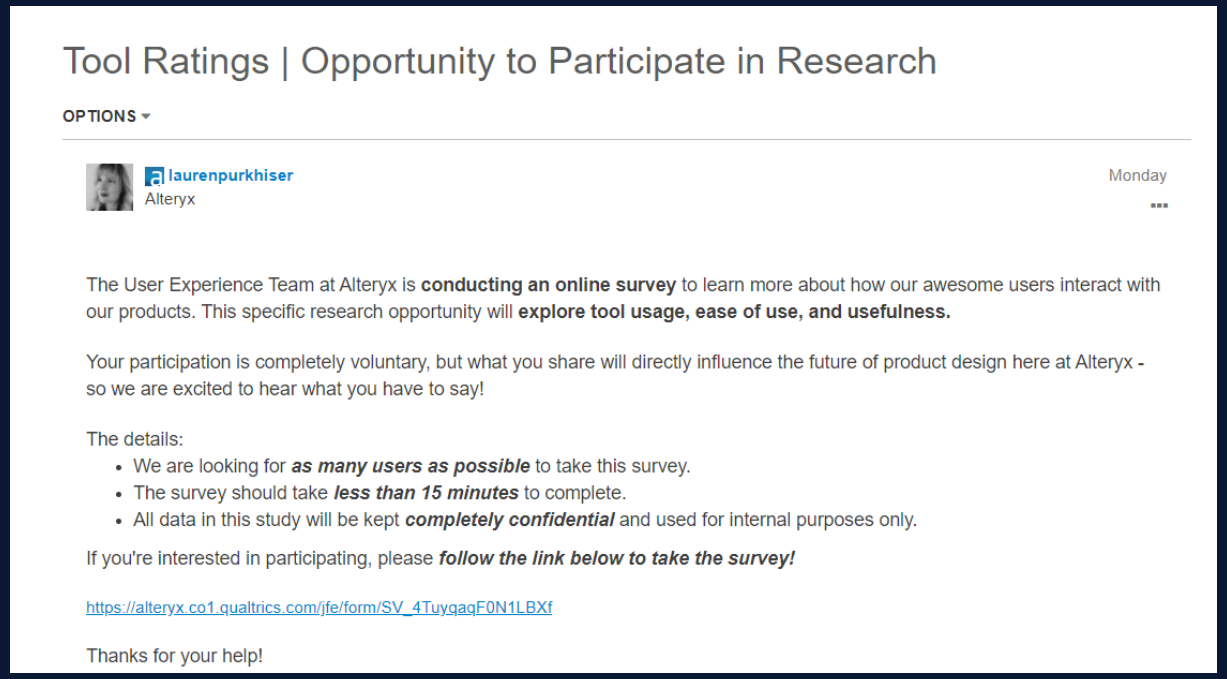
OPPORTUNITY TO PARTICIPATE IN RESEARCH

ALTERYX UX TEAM INVITES YOU TO PARTICIPATE IN A SURVEY TO EXPLORE TOOL USAGE, EASE OF USE, AND USEFULNESS

- Looking for ***as many users*** as possible to take survey
- Survey should take ***less than 15 minutes*** to complete
- All data in survey will be kept ***completely confidential*** and used for internal purposes only



Tool Ratings | Opportunity to Participate in Research

OPTIONS

laurenpurkhiser
Alteryx

Monday

The User Experience Team at Alteryx is **conducting an online survey** to learn more about how our awesome users interact with our products. This specific research opportunity will **explore tool usage, ease of use, and usefulness.**

Your participation is completely voluntary, but what you share will directly influence the future of product design here at Alteryx - so we are excited to hear what you have to say!

The details:

- We are looking for ***as many users as possible*** to take this survey.
- The survey should take ***less than 15 minutes*** to complete.
- All data in this study will be kept ***completely confidential*** and used for internal purposes only.

If you're interested in participating, please ***follow the link below to take the survey!***

https://alteryx.co1.qualtrics.com/jfe/form/SV_4TuyqaqF0N1LBXf

Thanks for your help!

Take the survey: https://bit.ly/3dDHYyB

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KNOWL-EDGE IS POWER

ALTERYX ACADEMY

- Interactive lessons
- Live training
- Weekly challenges
- Product certification – Now on demand!

community.alteryx.com/training

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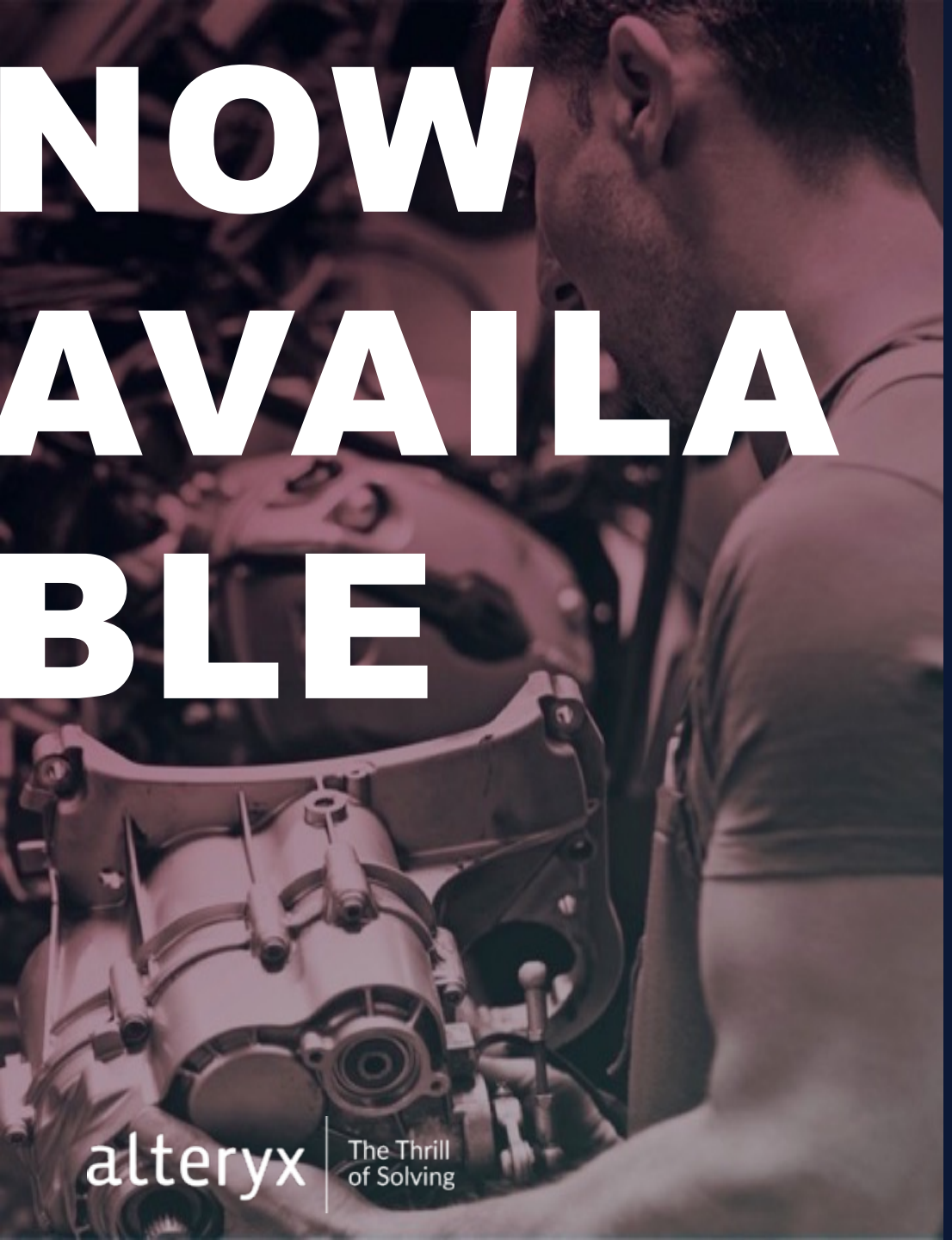

DATA SCIENCE LEARNING PATH

This learning path focuses on predictive modeling and includes interactive lessons on:

- The modeling process
- Key statistics concepts
- Data investigation techniques and strategies
- The most commonly applied predictive modeling algorithms in Designer

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GOT A WEEKLY CHALLENGE IDEA?

SUBMIT YOUR IDEAS!

We're always looking for new challenge ideas. If you've got one, we'd love to hear it.

Send your ideas to:
ACADEMY@ALTERYX.COM

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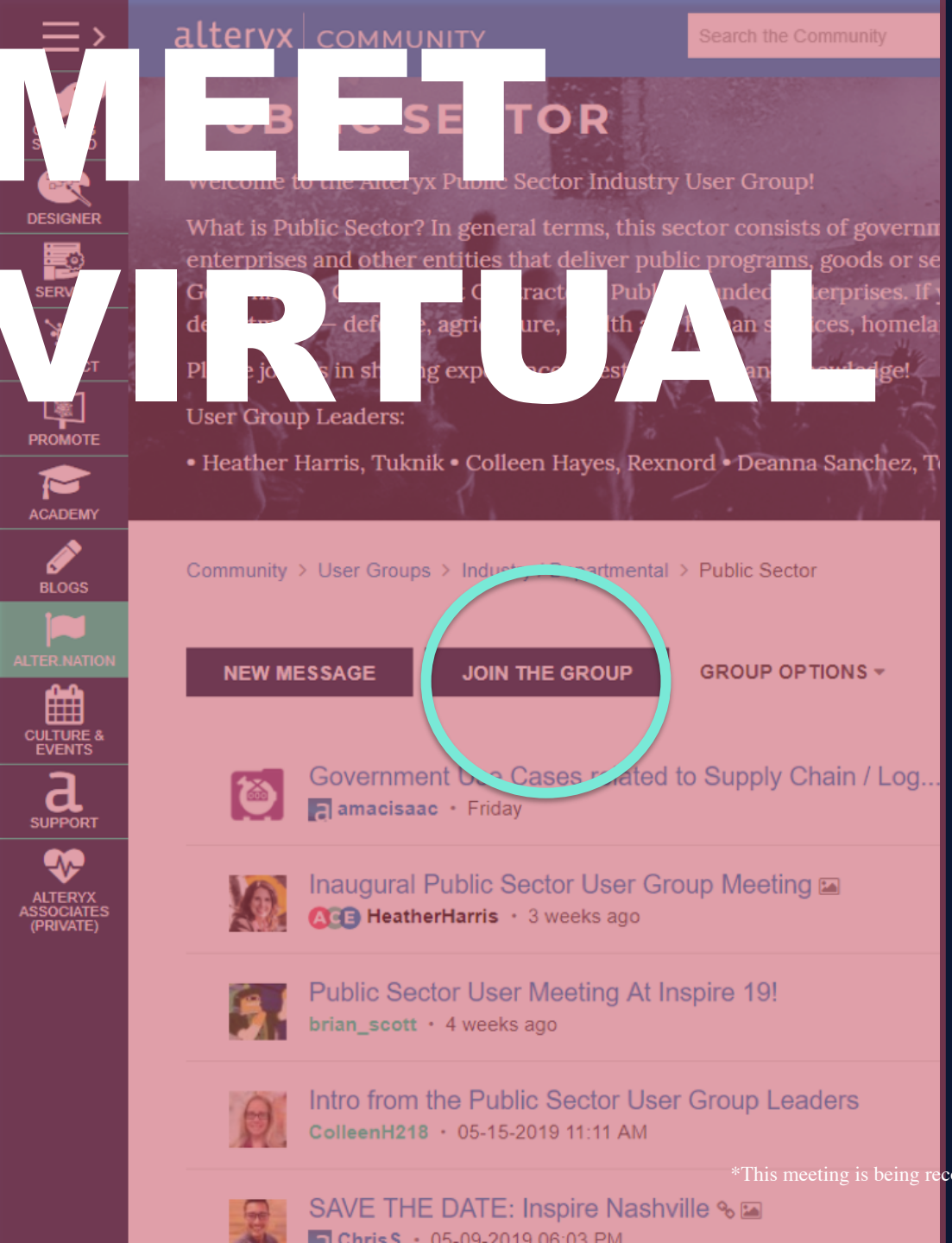

MEET VIRTUAL

INDUSTRY DEPARTMENTAL USER GROUPS

- Join & subscribe
- Customer use cases
- Alteryx scalability
- Follow discussions
- Post on the page

Contact for more details:

cshernaman@alteryx.com

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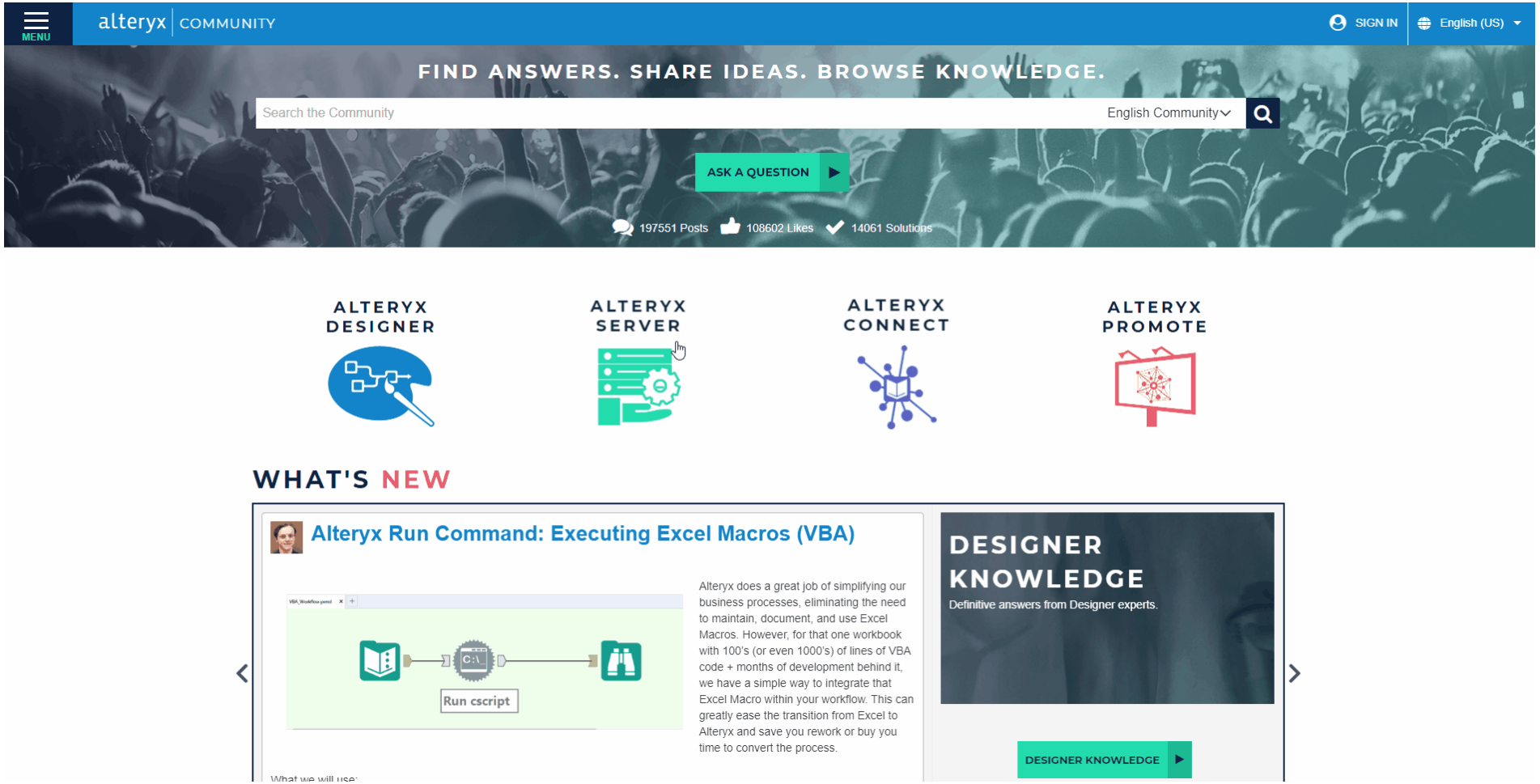
MEETING ROUND UP IS LIVE!

- Catch up on missed meetings!
- Share content with colleagues!
- Discover what other User Groups are up to!



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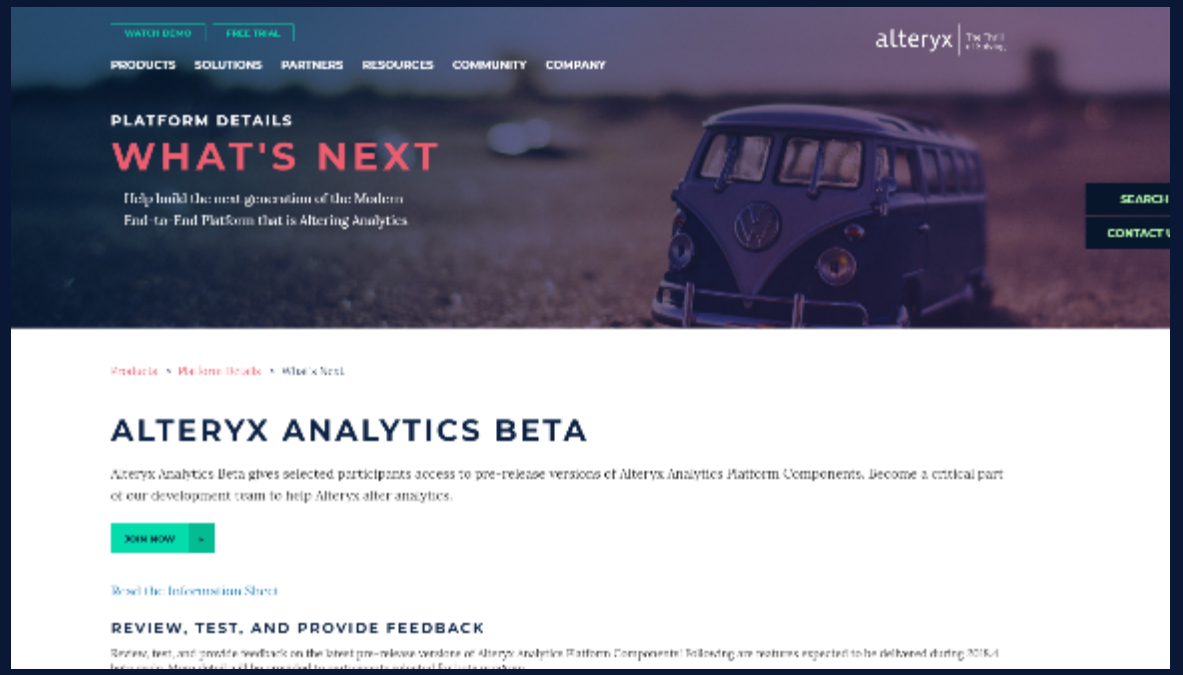
ALTERYX ANALYTICS BETA PROGRAM

REVIEW, TEST, AND PROVIDE FEEDBACK

- Become a critical part of our development team!
- Try the latest features and give feedback to help Alteryx deliver the best versions of our product!



Join now: https://community.alteryx.com/t5/Join-Beta-Program/tkb-p/beta-programs

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ALTER
EVERYTHING
A podcast about data science and analytics culture
community.alteryx.com/podcast
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WEEKLY CHALLENGE 207

	Video Game Data
1	Game ID|Name|Platform|Year|Genre|Publisher|NA_Sales|EU_Sales|JP_Sales|Other_Sales|Global_Sales
2	0000001Wii Sports Wii (2006) CAT:Sports PUB:Nintendo $41.49million, $29.02million, $3.77million, $8.46million, $82.74million
3	0000002Super Mario Bros. NES (1985) CAT:Platform PUB:Nintendo $29.08million, $3.58million, $6.81million, $0.77million, $40.24million
4	0000003Mario Kart Wii Wii (2008) CAT:Racing PUB:Nintendo $15.85million, $12.88million, $3.79million, $3.31million, $35.82million
5	0000004Wii Sports Resort Wii (2009) CAT:Sports PUB:Nintendo $15.75million, $11.01million, $3.28million, $2.96million, $33million
6	0000005Pokemon Red/Pokemon Blue GB (1996) CAT:Role-Playing PUB:Nintendo $11.27million, $8.89million, $10.22million, $1million, $31.37mill
7	0000006Tetris GB (1989) CAT:Puzzle PUB:Nintendo $23.2million, $2.26million, $4.22million, $0.58million, $30.26million
8	0000007New Super Mario Bros. DS (2006) CAT:Platform PUB:Nintendo $11.38million, $9.23million, $6.5million, $2.9million, $30.01million

	Game ID	Name	Platform	Year	Genre	Publisher	NA_Sales	EU_Sales	JP_Sales	Other_Sales	Global_Sales
1	0000001	Wii Sports	Wii	2006	Sports	Nintendo	41.49	29.02	3.77	8.46	82.74
2	0000002	Super Mario Bros.	NES	1985	Platform	Nintendo	29.08	3.58	6.81	0.77	40.24
3	0000003	Mario Kart Wii	Wii	2008	Racing	Nintendo	15.85	12.88	3.79	3.31	35.82
4	0000004	Wii Sports Resort	Wii	2009	Sports	Nintendo	15.75	11.01	3.28	2.96	33
5	0000005	Pokemon Red/Pokemon Blue	GB	1996	Role-Playing	Nintendo	11.27	8.89	10.22	1	31.37
6	0000006	Tetris	GB	1989	Puzzle	Nintendo	23.2	2.26	4.22	0.58	30.26
7	0000007	New Super Mario Bros.	DS	2006	Platform	Nintendo	11.38	9.23	6.5	2.9	30.01

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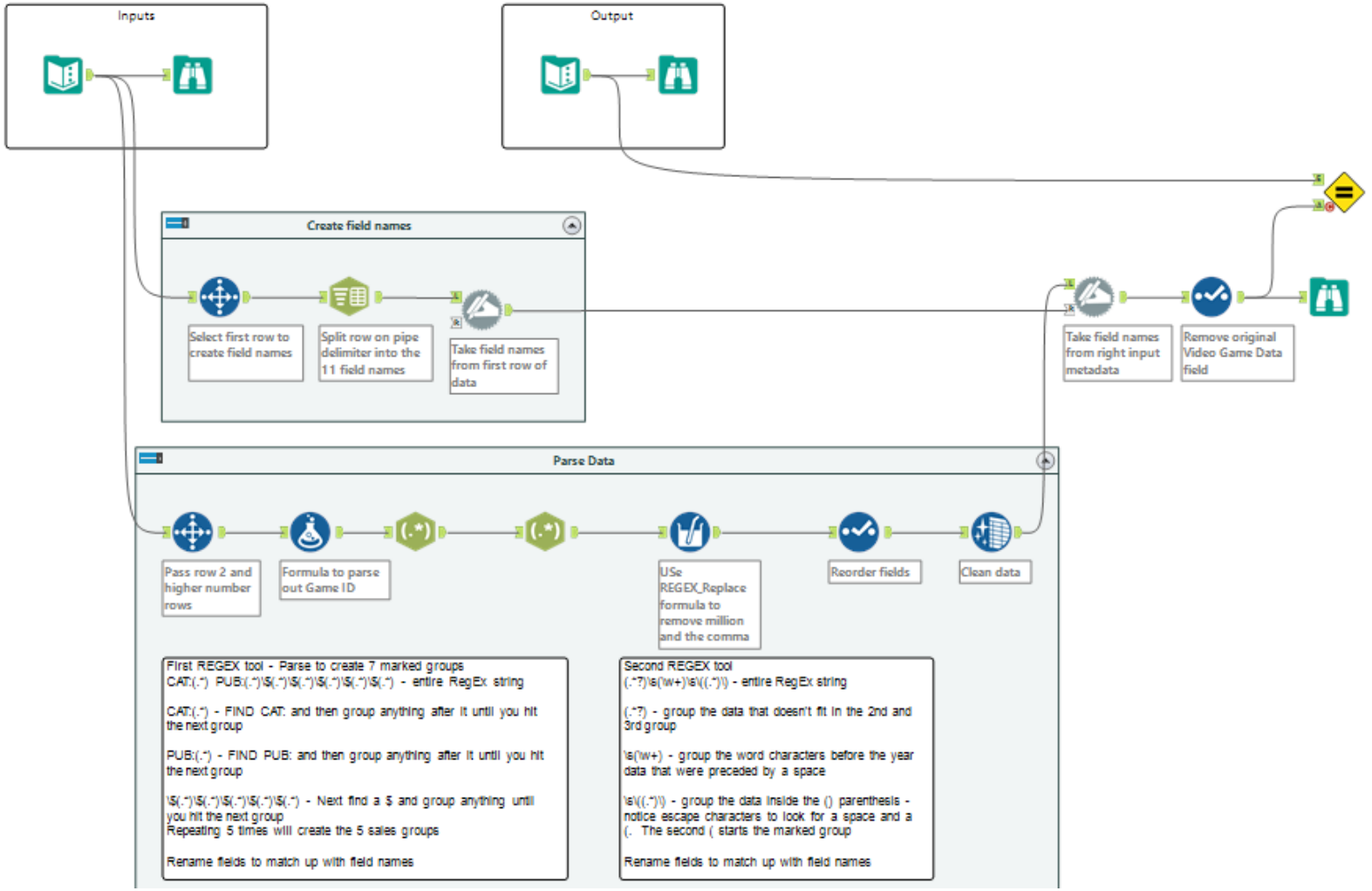
WORKFLOW SNAPSHOT



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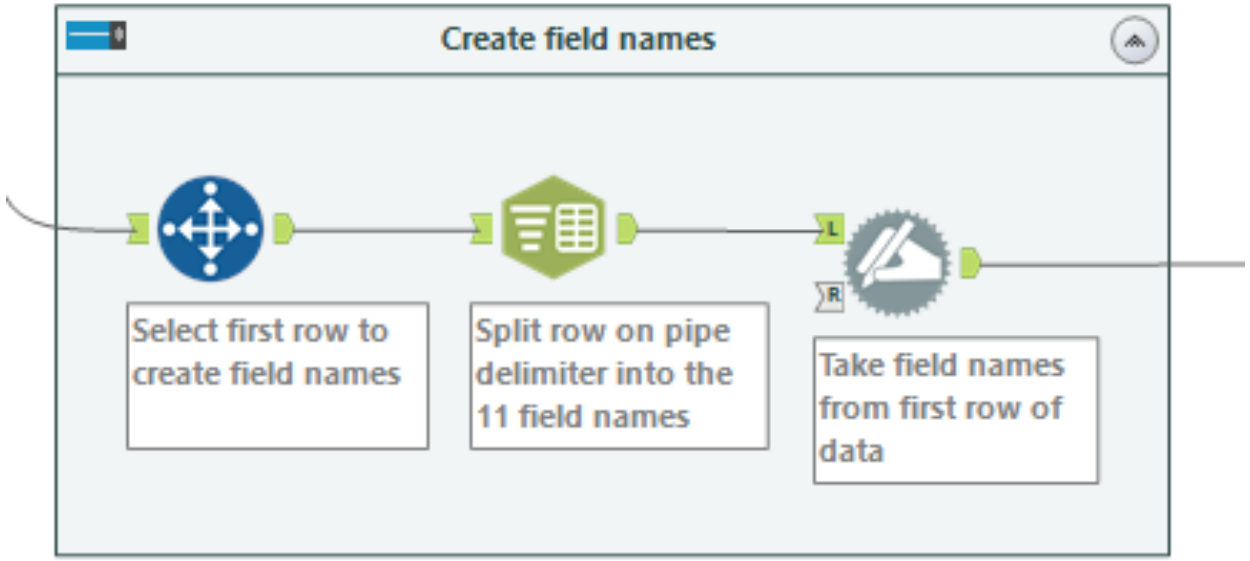

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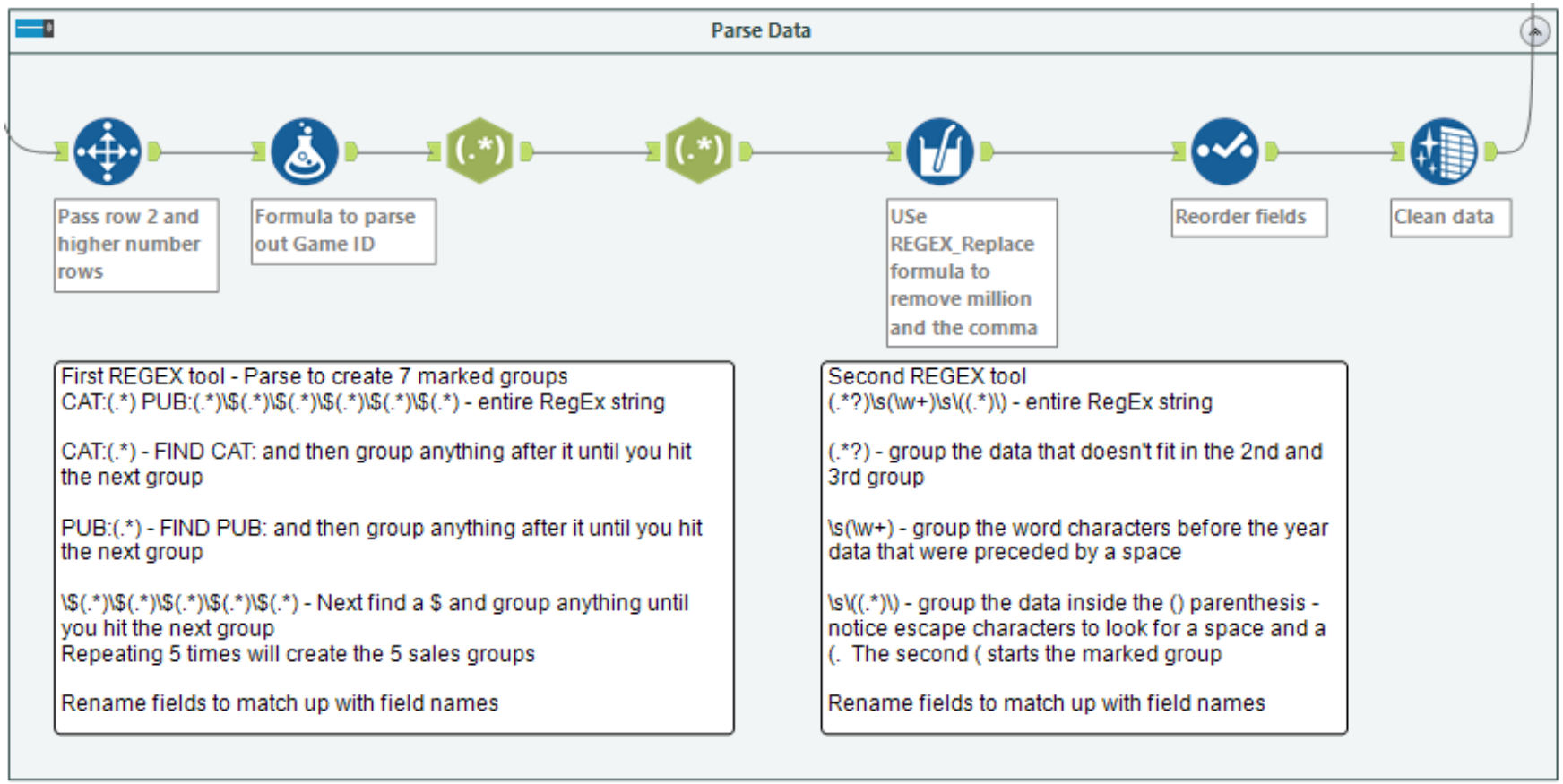

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REGEX SITES

Websites to help you learn more about RegEx

- https://community.alteryx.com/t5/Interactive-Lessons/tkb-p/interactive-lessons/label-name/Parsing%20Data
- https://regexone.com/ - interactive tutorial for beginners
- https://www.ntu.edu.sg/home/ehchua/programming/howto/Regexe.html#zz-1.
- https://www.regular-expressions.info/tutorial.html
- https://www.regular-expressions.info/examples.html
- https://regex101.com/

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NEXT STEPS

- Register on Community
- Register on Richmond User Group
- Meeting recap w/recording
- Post follow-up questions/comments
- Survey coming
- Next meeting

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