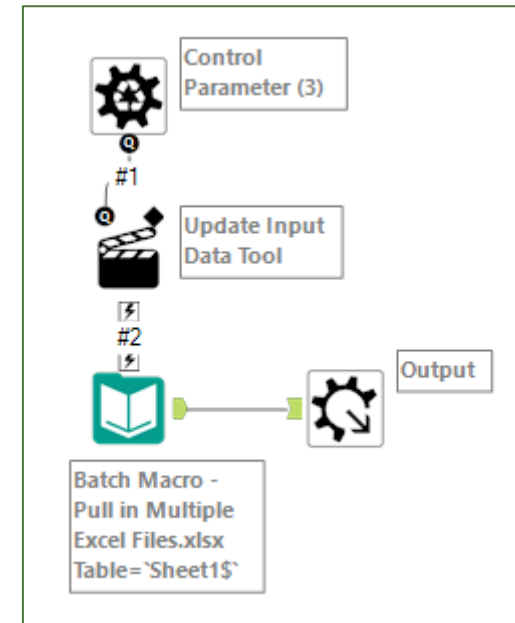
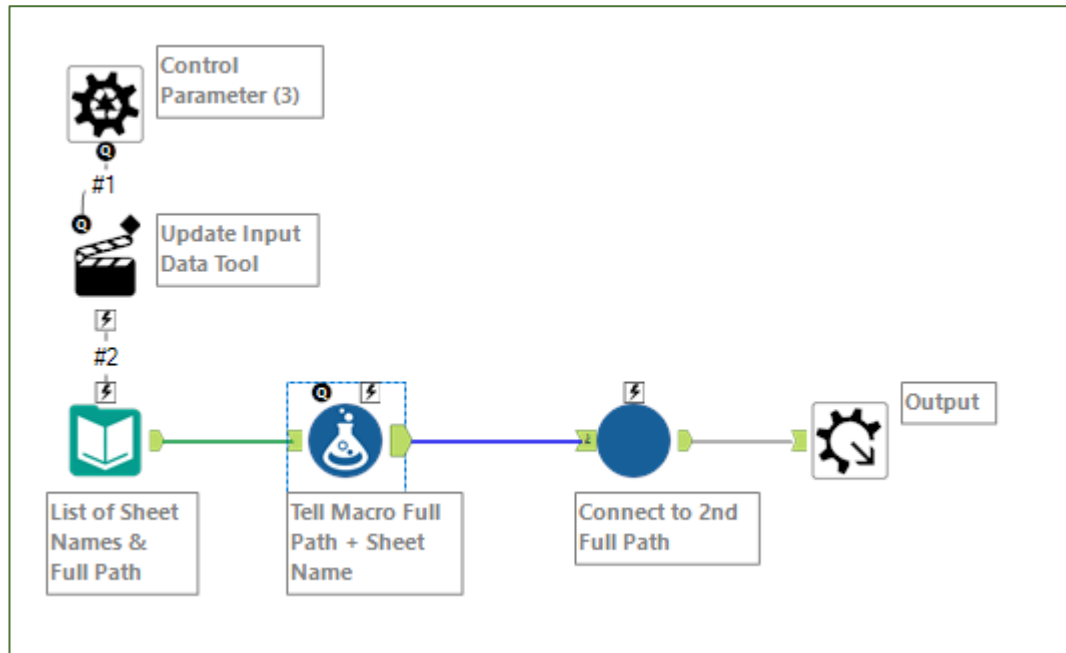


Project Spotlight: Dynamic Excel Input with Batch Macro

Presented by:

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Project Overview – Dynamic Excel Input with Batch Macro



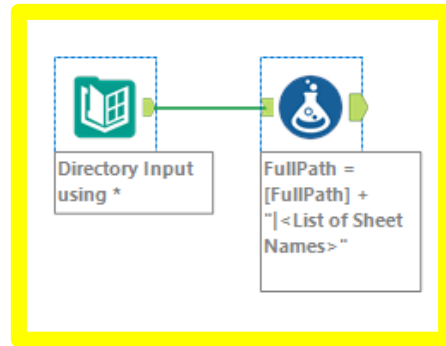
Use Case: Excel Dynamic Input with Batch Macro

- Your workflow requires input of:
 - Multiple Excel sheets with different *schemas*
 - different column headings/field names
 - Multiple Excel sheets with different sheet names
- Options:
 - Directory Tool + Dynamic Input – only works if sheet names are consistent
 - Input each file separately – time consuming, and works best if sheet names are consistent
- Solution?
 - **BATCH MACRO!**

Batch Macro – Step by Step: Prepare Data

- Begin with **Directory Tool**
- **Formula Tool**
 - FullPath – [FullPath] + "*<List of Sheet Names>*"
- **Filter** out unnecessary files

Batch Macro – Step by Step: Prepare Data



Results - Formula (2) - Output

19 of 19 Fields | Cell Viewer | 3 records displayed | Search

Record	FullPath
1	[Redacted] \Training\Alteryx\Community Questions\Crestwood - Copy (2).xlsx <List of Sheet Names>
2	[Redacted] \Training\Alteryx\Community Questions\Crestwood - Copy.xlsx <List of Sheet Names>
3	[Redacted] \Training\Alteryx\Community Questions\Crestwood.xlsx <List of Sheet Names>

Batch Macro – Step by Step: Create Batch Macro pt. 1

- **Control Parameter** – automatically adds Action Tool (keep default option) once connected to **Input**
- **Input (Trainer) File**
 - Bring in List of Sheet Names & Full Path
- **Formula Tool**
 - FullPath2 – [FileName] + [Sheet Names]
 - FullPath2 – Replace([FullPath2], "<List of Sheet Names>", "")
- **Sort Sheet Names Descending / depends on your data needs**
- **Sample First 1 rows**
- **Batch Macro Pt. 2 & Output**

Batch Macro: Action Tool

The screenshot displays a software interface with two main panels. The left panel, titled "Action (4) - Configuration", contains a dropdown menu labeled "Select an action type:" with "Update Input Data Tool" selected. Below the dropdown is a checked checkbox labeled "Required". The right panel shows a workflow diagram with several steps: a "Control Parameter (2)" step, followed by an "Update Input Data Tool" step (highlighted with a blue dashed box and labeled "#1"), then a step labeled "#2", and finally a step labeled "Crestwood.xlsx Table= <List of Sheet Names>". A partial view of another step labeled "FullF [File [She FullF" is visible on the far right. The top of the interface shows tabs for "Input Options.yxmd*" and "Batch".

Batch Macro: Input Data

Input Data (3) - Configuration

Connect a File or Database

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"/>
7 Start Data Import on Line	1

Control Parameter (2)

#1 Update Input Data Tool

#2 Crestwood.xlsx
Table= <List of Sheet Names>

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Overview: Batch Macro Pt. 1

The screenshot displays a software interface for configuring a batch macro. The window title is "Sample (8) - Configuration".

Select Sample Type

- First N rows
- Last N rows
- Skip 1st N rows
- 1 of every N rows
- 1 in N chance to include each row
- First N% of rows

N = 1

Group by column (optional)

Sheet Names

FileName

FullPath2

Workflow Diagram:

- Control Parameter (2)
- Update Input Data Tool
- Crestwood.xlsx Table= <List of Sheet Names>
- FullPath2 = [FileName] + [Sheet Names]
FullPath2 = Replace ([FullPath2], "~<List ...
- Sheet Names - Descending
- First 1
- Output

Results - Sample (8) - Output

3 of 3 Fields | Cell Viewer | 1 record displayed

Record	Sheet Names	FileName	FullPath2
1	Ord Aug01-Rel Aug31		

Batch Macro – Step by Step: Create Batch Macro pt. 2

- **Control Parameter** – automatically adds Action Tool (keep default option) once connected to **Input**
- **Input (Trainer) File**
 - Select a Sheet
 - Bring in File Name
- **Output**

Overview: Batch Macro Pt. 2

The screenshot displays the Alteryx interface, split into two main sections: the configuration window on the left and the workflow canvas on the right.

Configuration Window: Input Data (1) - Configuration

Connect a File or Database

Options

Name	Value
1 Record Limit	
2 File Format	Microsoft Excel (*.xlsx)
3 Table or Query	`Ord Apr01-Rel Apr30\$`
4 Search SubDirs	<input type="checkbox"/>
5 Output File Name as Field	File Name Only
6 First Row Contains Data	<input type="checkbox"/>

Preview (first 100 records) Refresh

Workflow Canvas

The workflow consists of the following tools and connections:

- Control Parameter (3)**: A gear icon tool at the top.
- Update Input Data Tool**: A clapperboard icon tool labeled #1, connected to the Control Parameter tool.
- Input Data Tool**: A book icon tool labeled #2, connected to the Update Input Data Tool. Its configuration is shown in a tooltip:
Crestwood.xlsx
Table= `Ord Apr01-Rel Apr30\$`
- Output Tool**: A gear icon tool with a circular arrow, connected to the Input Data Tool.

Batch Macro – Step by Step: Success!

- Data will come out of Macro Output Anchor