

ALTERYX DESIGNER TIPS, TRICKS AND BEST PRACTICES

Presented by Vincent Toh

Agenda

- Moving in Designer
 - Customizing your palette and working with results
 - Hot keys and right-clicks for speed
- Workflow Design
 - Documentation techniques to keep you organized
 - Workflow configuration



MOVING IN DESIGNER

Customizing your palette and working with results



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ICONS OF
ANALYTICS

 @alteryx

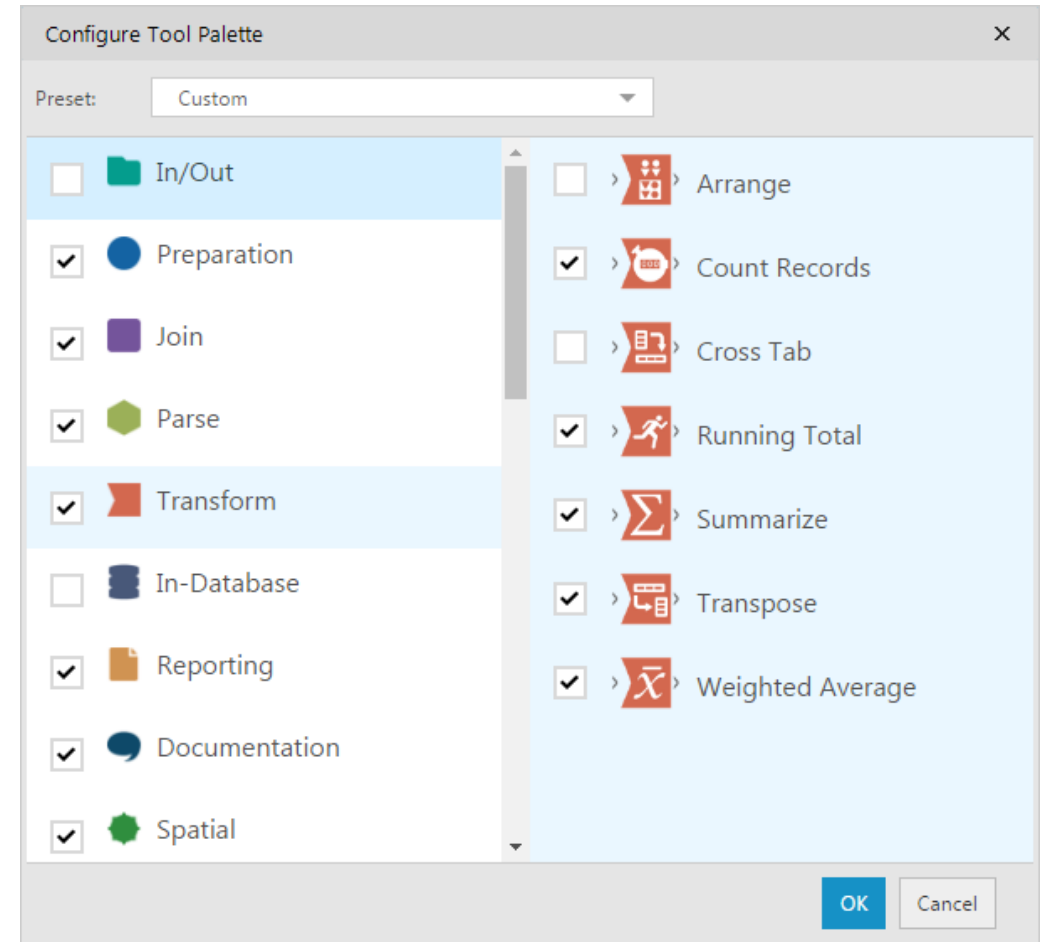
Customize the palette

- Add or Remove Categories

- *Favorited tools from removed categories will remain in 'Favorites'*
- *Tools in removed categories will still appear in search*

- Select which tools are shown in each Category

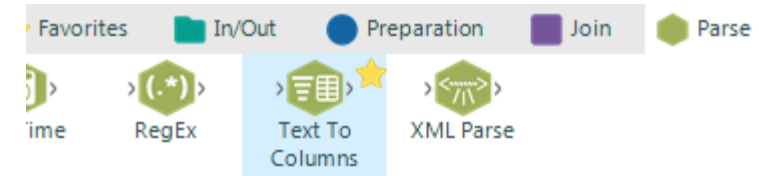
- *Favorited tools removed from a category will remain in 'Favorites'*
- *Removed tools will still appear in search*



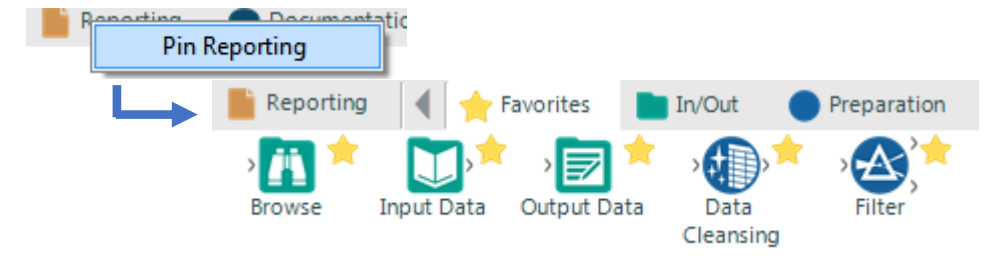
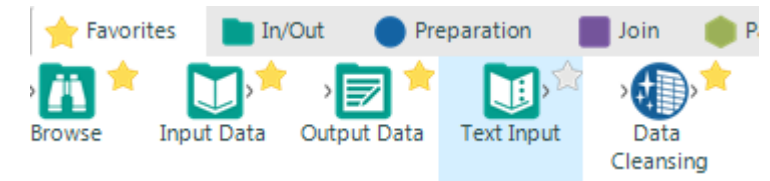
You're my Favorite .. Or maybe not

- Add or remove tools from your favorites by selecting or deselecting the star next to the tool
- Pin your most-used palettes to the left next to your other Favorites
 - *Right-click on category to pin or unpin*

Hello Text to Columns



... Goodbye Text Input



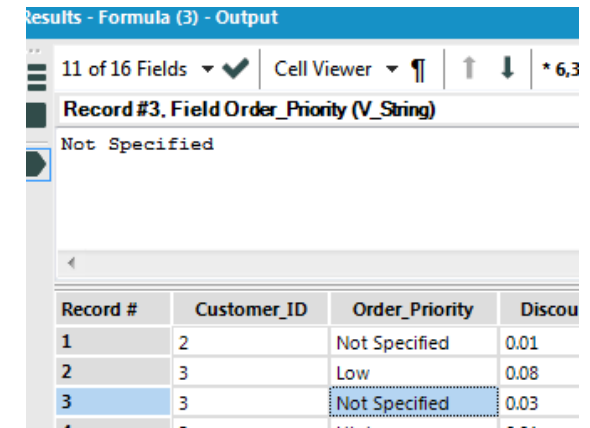
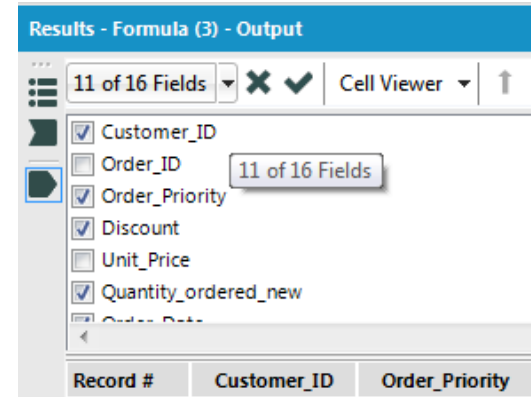


Update your Palette

1. Add and remove tools and tool categories from your palette
2. Add a new tool to your favorites
3. Pin your favorite tool category

Show me the results

- Select or deselect fields for viewing in the results window
- View full contents of a cell by
 - double-clicking on cell
 - Turning on 'Cell Viewer' and selecting cell
 - *Click paragraph icon to view/hide whitespace characters*



Who are you talking about

- Click the tool name link to highlight the tool on the canvas

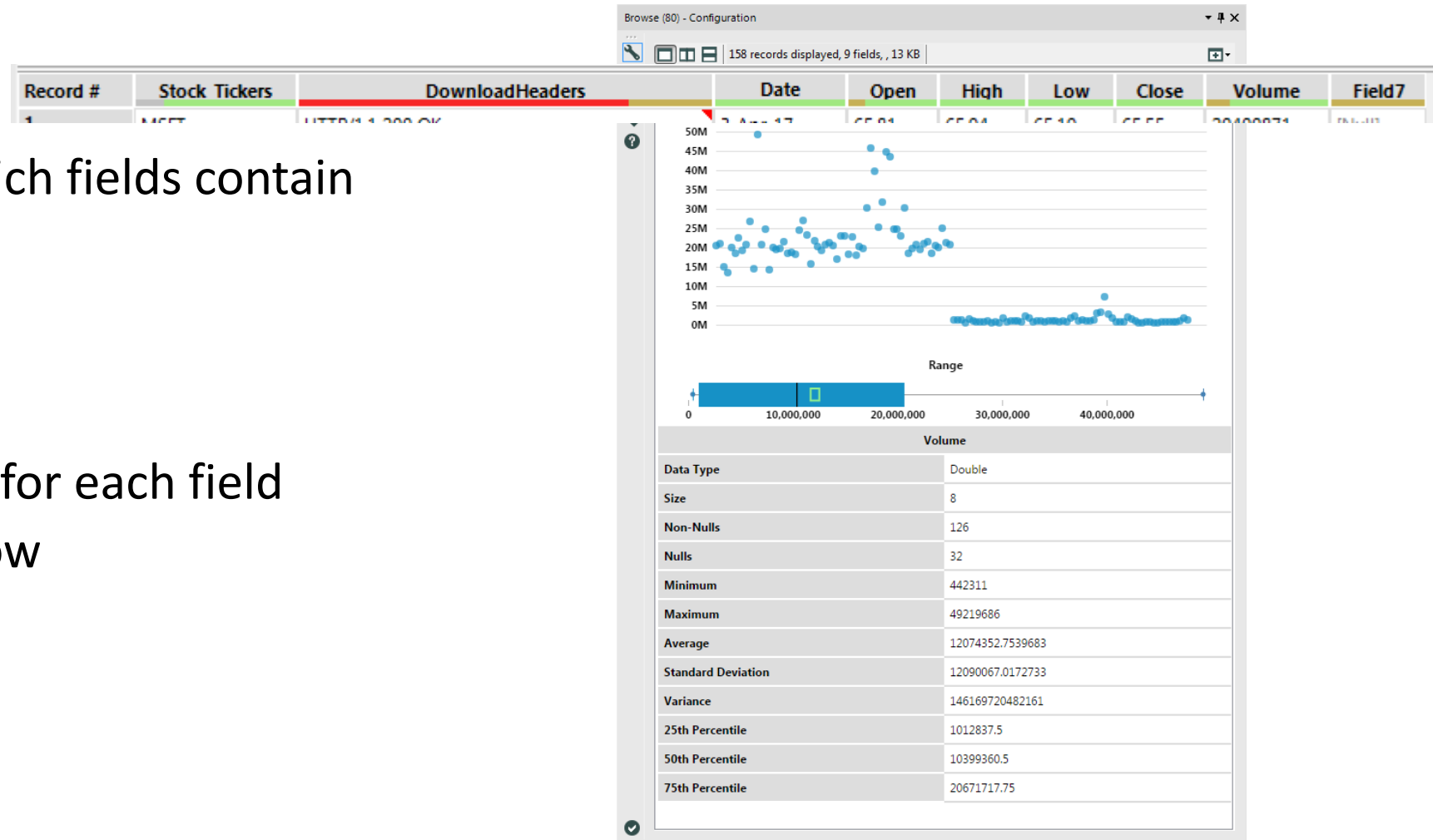
Results - Workflow - Messages	
0 Errors	0 Conv Errors
Designer x64	Started run
Input Data (1)	9426 records
Summarize Sales	9426 records
Join (7)	Joins on Dou
Input Customers	2678 records
Join (7)	2678 records
Filter (9)	2093 records
Browse (8)	2093 records
Designer x64	Finished run

- Click on input or output file links to open the file

Input Data (7)	1447 records were read from "C:\Users\aqlum\Desktop\Alteryx Resources\BootCamp\data\data\CA-Pension-Func
Join (8)	1447 records were joined with 20 un-joined left records and 0 un-joined right records
Filter (10)	30 records were True and 1417 were False
Output Data (12)	30 records were written to "C:\Users\aqlum\Desktop\Alteryx Resources\BootCamp\data\data\output.csv"

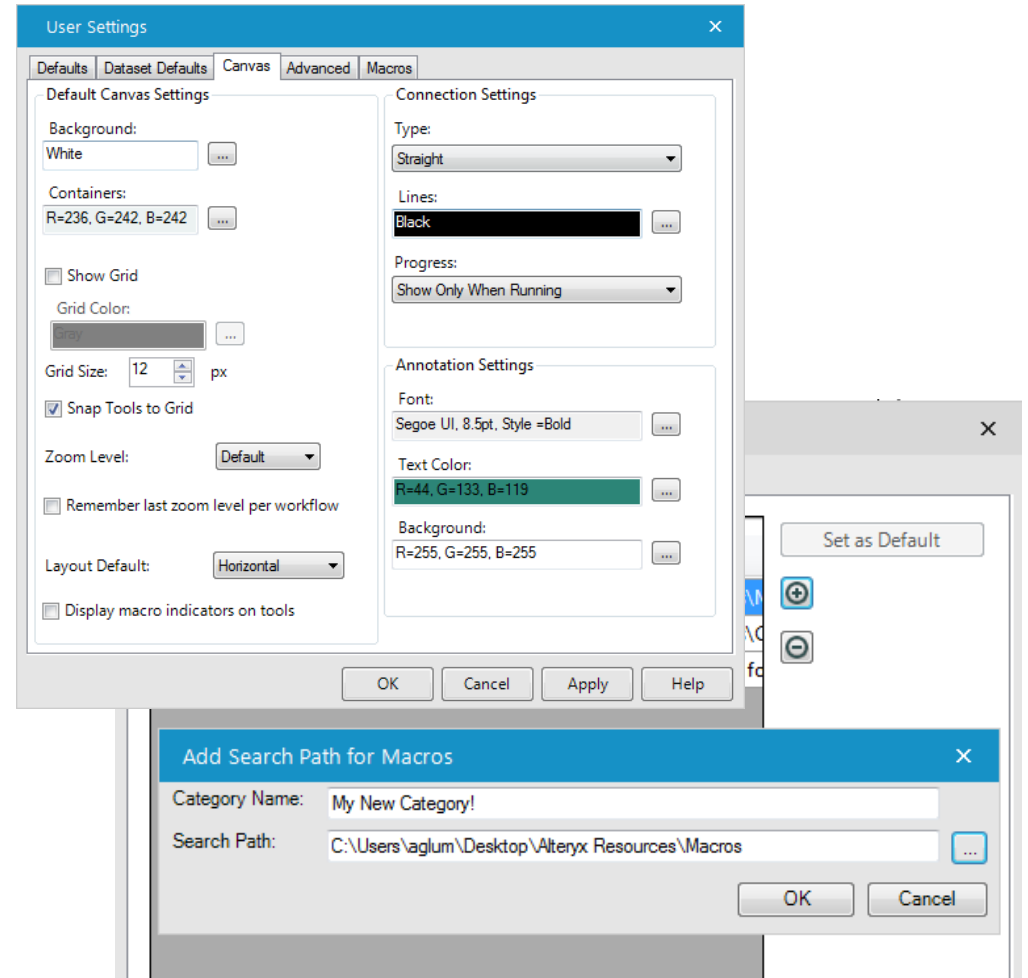
Browse for more

- Add a browse to
 - See at-a-glance which fields contain
 - NOT OK values
 - NULL values
 - EMPTY values
 - OK values
 - View a data profile for each field
 - Open in new window
 - Copy or save data



Use your settings – User Settings

- Options > User Settings > Edit User Settings
- Canvas
 - Background and container defaults
 - Grid size and appearance
 - Layout
 - Connection style
 - Annotation defaults
- Macros
 - Add new tool category to your palette for Macros



MOVING IN DESIGNER

A need for speed : hotkeys and right-clicks for the win

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ANALYTICS

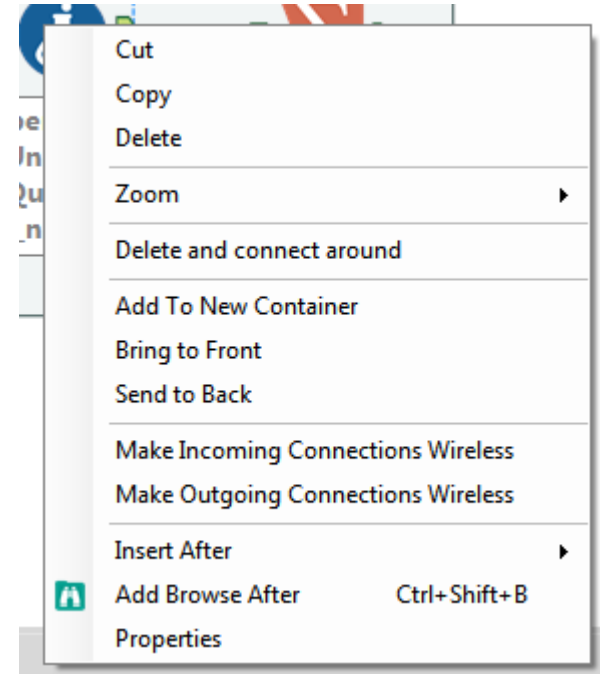


Hot keys

Press this key combo	To do this
CTRL+R	Run workflow
CTRL+SHIFT+ '+'	Align Vertically
CTRL+SHIFT+ '-'	Align Horizontally
CTRL+SHIFT+B	Add all browses
CTRL+0 (Zero)	Zoom to highlighted selection
CTRL+F	Find tool within workflow
F1	Open help page for selected tool

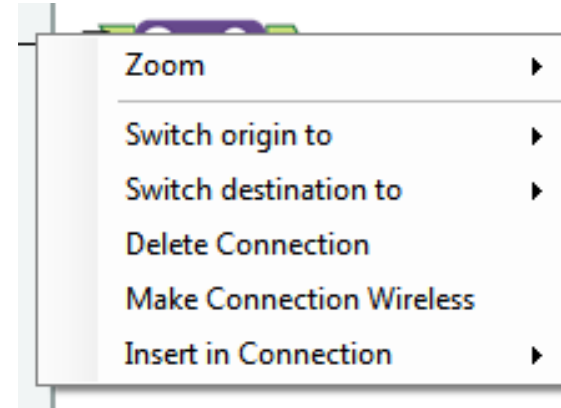
Right-Click on a Tool

- Delete and connect around
- Add to New Container
- Make incoming / outgoing connections wireless / wired
- Insert (Tool) After
- Add browse after
 - *If multiple outputs, you can add browses after all or a specific output*



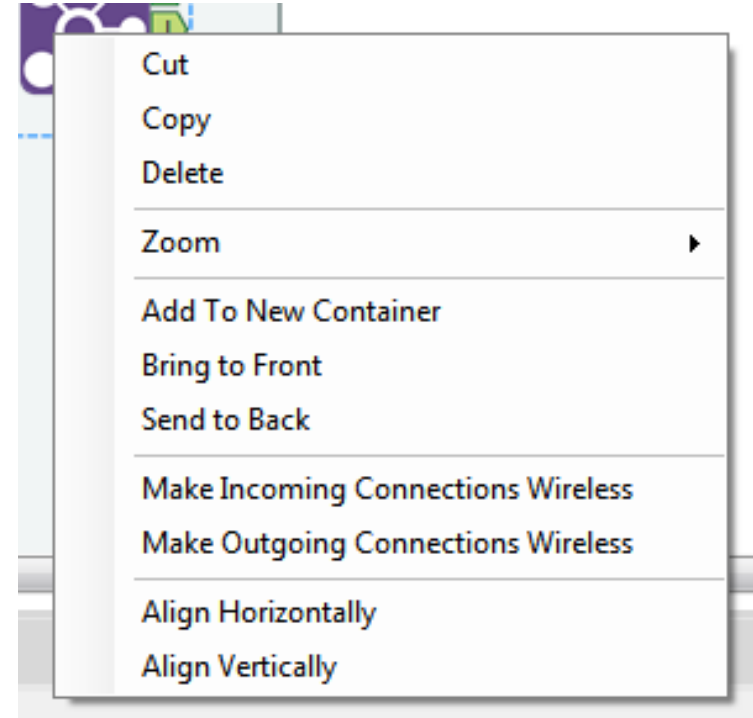
Right-Click on a connection

- Switch origin to
 - *If multiple output options from origin tool*
- Switch destination to
 - *If multiple input options for destination tool*
- Delete connection
- Make connection wireless/ wired
- Insert (tool) in connection



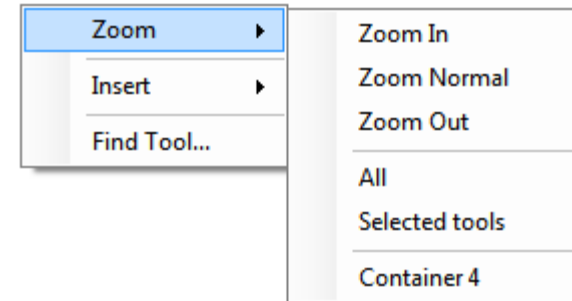
Right-Click on Selection

- Add to New Container
- Make Incoming Connections Wireless
- Make Outgoing Connections Wireless
- Align Horizontally
- Align Vertically



Right-Click on Canvas

- Zoom
 - In, Normal or Out
 - All
 - To specific container
- Insert
 - Tool
 - Macro
- Find Tool
 - Navigate to specific tool on canvas

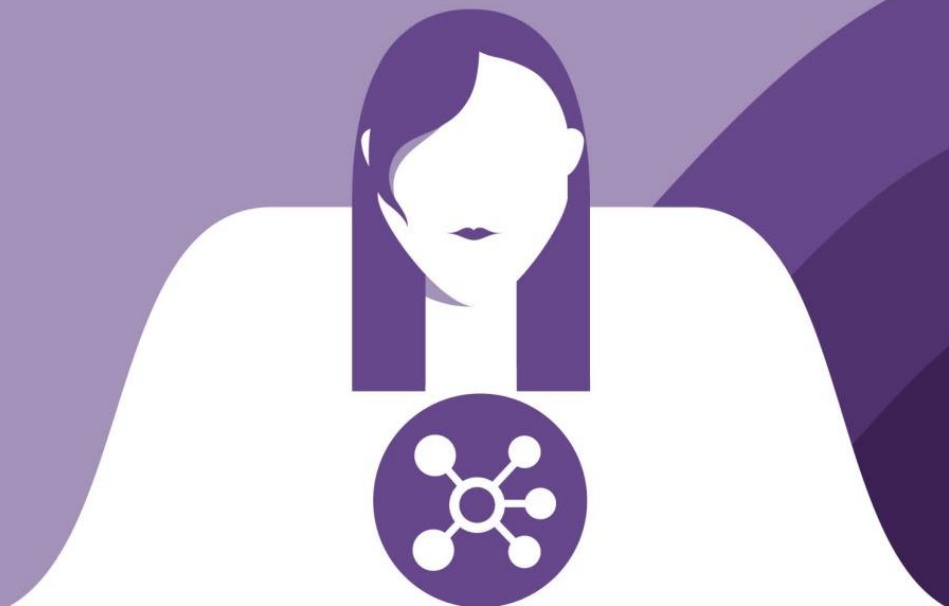


WORKFLOW DESIGN

Documentation techniques to keep you organized

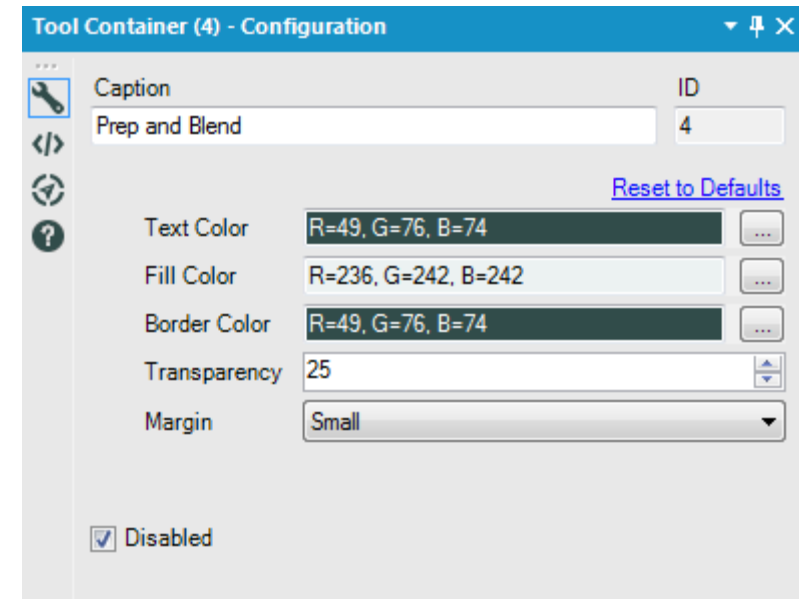
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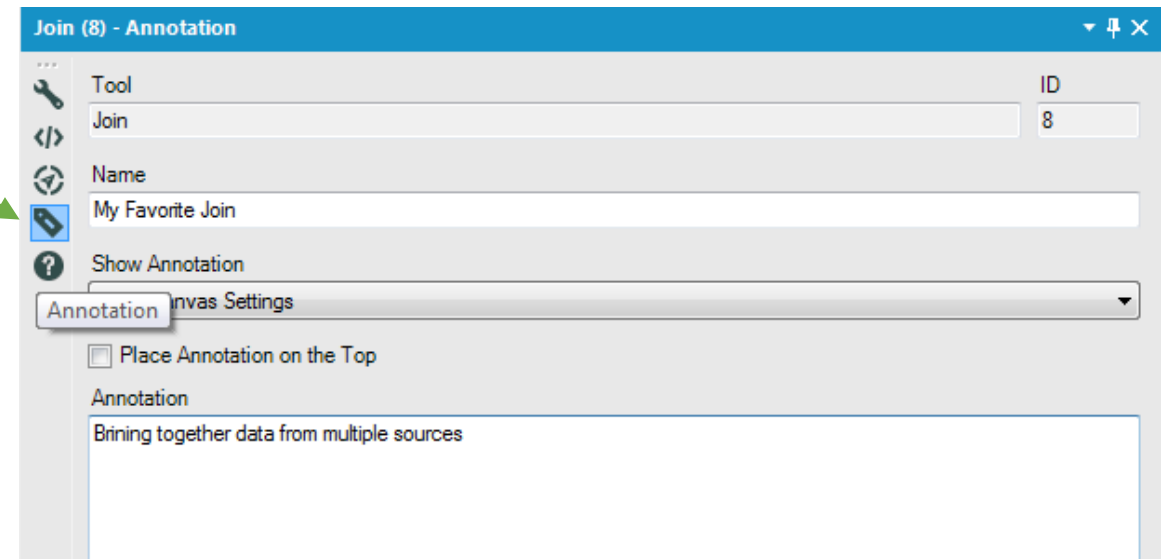
Contain it

- Organize your workflow into logical groups
- Name each container to you can easily find it later
 - *Hint: Right-click and zoom to container*
- Collapse for easier viewing and arranging of your workflow
- Disable containers to prevent its contents from running



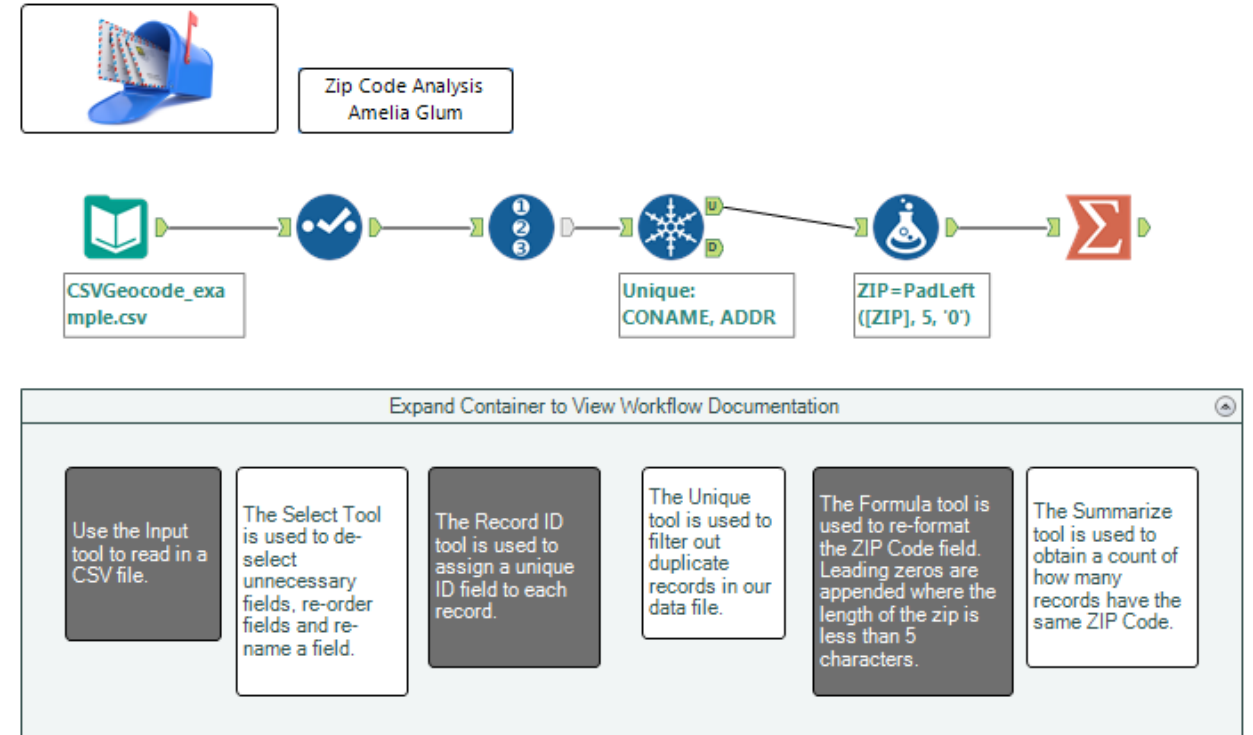
take a note of that: Tool Annotations

- Click the Annotation icon in the left-side nav of configuration window
- Enter a custom tool name to easily navigate to the desired tool and identify results messages
- Add an annotation to document each step in the process



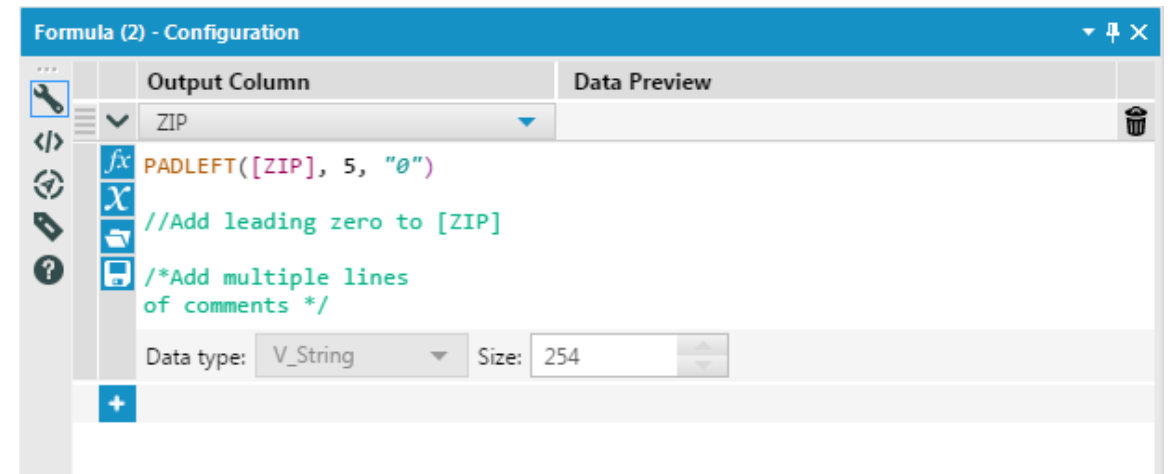
take a note of that: COMMENT tool

- Add comment tools to include images and text on the canvas
- TIP! Add multiple comment tools to a tool container to easily collapse and expand workflow documentation



take a note of that: Expression box comments

- Add comments within an Expression box
 - Use //Comment for a single line
 - Use /* Comments */ for multiple lines



That's so meta

- Name
 - Add a custom name or the workflow file name will be used by default
- Description
- Author
 - *TIP: You can set your defaults in the Author box so you don't have to type in your information every time*

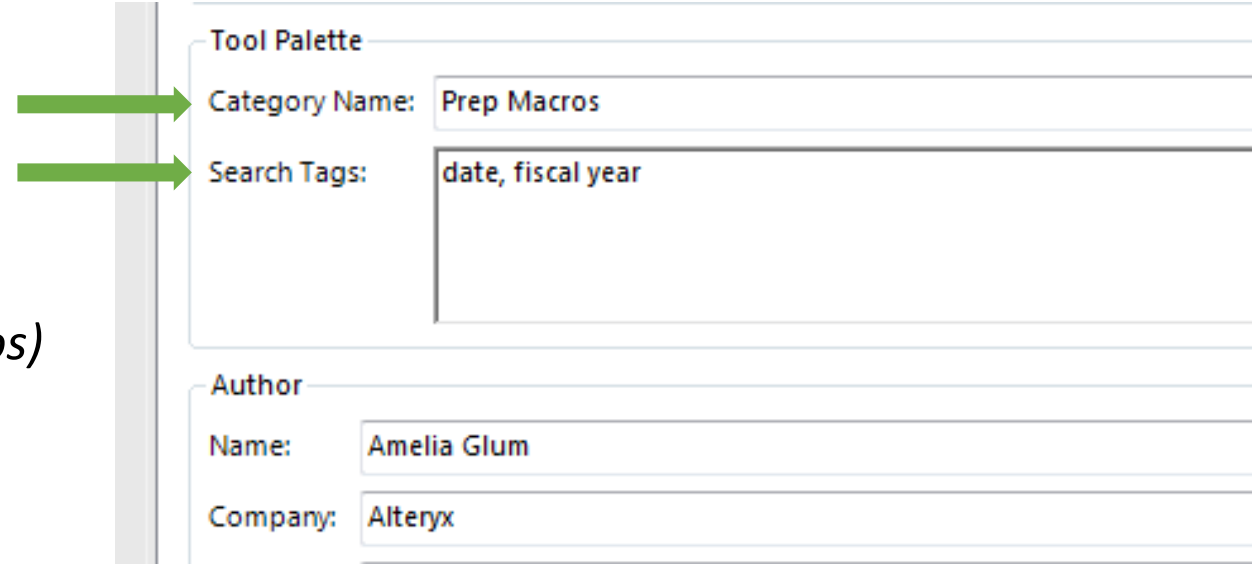
The screenshot shows the 'Workflow - Configuration' dialog box with the following fields and sections:

- Workflow Name:** Radio buttons for 'Use File Name' and 'Custom: Zip Code Analysis'. A green arrow points to the 'Custom' radio button.
- Description:** A text area containing 'Find total cusotmers by zip code'. A green arrow points to this text area.
- URL:** An empty text field.
- Display Text (optional):** An empty text field.
- Tool Settings:**
 - Root Tool Name: Empty text field.
 - Tool Version: Empty text field.
 - Tool In-Database?: Unchecked checkbox.
- Tool Palette:**
 - Category Name: Empty text field.
 - Search Tags: Empty text area.
- Author:**
 - Name: Amelia Glum
 - Company: Alteryx
 - Copyright: Empty text field.
 - Buttons: 'Set to Default' and 'Remember as Default' (highlighted with a green box).

Green arrows on the left side of the dialog point to the 'Custom' radio button, the description text area, and the 'Remember as Default' button.

That's so meta : Macros

- Add a Category Name to organize your macros in the tool palette
 - *Remember, you can add a new Macro tool category in your User Settings*
 - *Options > Settings > Edit User Settings (Macros)*
- Add Search Tags to easily find your macro from the search bar



The image shows a screenshot of a software settings interface. On the left, a vertical grey bar is partially visible. To its right, there are two green arrows pointing towards the 'Tool Palette' section. The 'Tool Palette' section contains two input fields: 'Category Name' with the value 'Prep Macros' and 'Search Tags' with the value 'date, fiscal year'. Below this, the 'Author' section contains two input fields: 'Name' with the value 'Amelia Glum' and 'Company' with the value 'Alteryx'.

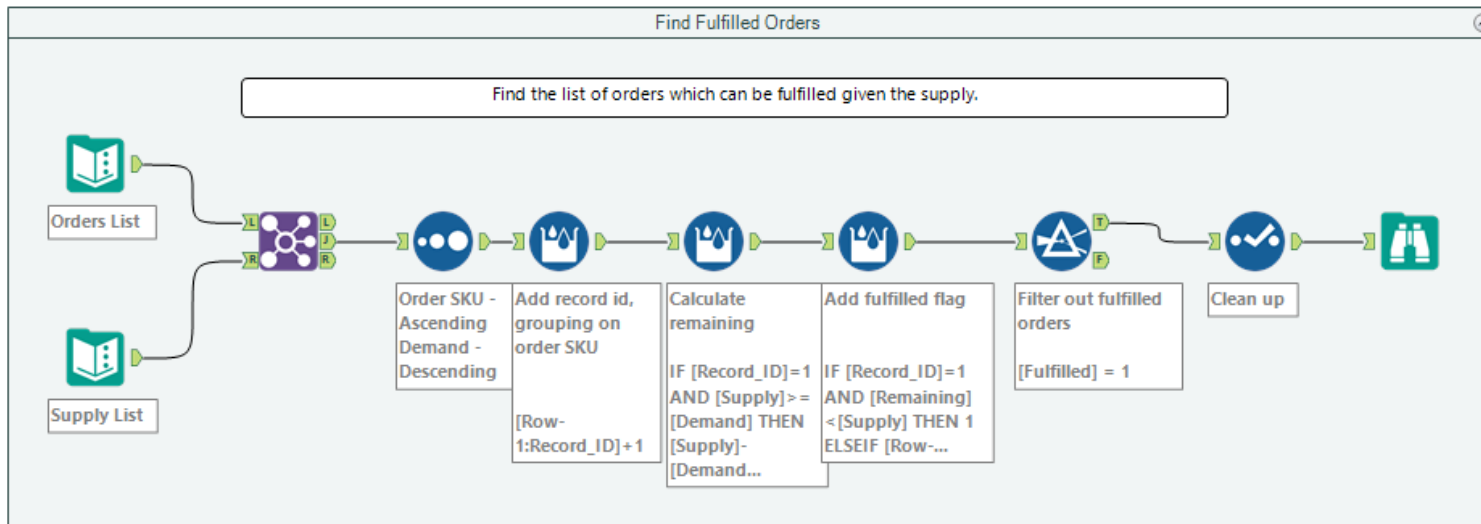
Tool Palette	
Category Name:	Prep Macros
Search Tags:	date, fiscal year

Author	
Name:	Amelia Glum
Company:	Alteryx



Time to Document

- Open Fulfillment.yxmd
- Edit annotations to each formula and filter tool to specify what each is calculating
- Add all tools to a tool container



Workflow - Configuration

Canvas Workflow Runtime Events Meta Info XML View

Workflow Name
 Use File Name
 Custom: Fulfillment

Description
Determine Fulfillment given supply and order list

URL:

Display Text (optional):

Tool Settings
Root Tool Name:
Tool Version:
Tool In-Database?

Tool Palette
Category Name:
Search Tags:

Author
Name:
Company:
Copyright:

[Set to Default](#) [Remember as Default](#)

WHAT'S COMING

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THANK YOU

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