Hong Kong Alteryx User Group

Q1 - 2024

12 Mar 2024

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*This meeting is being recorded and will be shared on the User Group page.

Agenda

Hong Kong User Group
Mar 2024

1	Welcome & Introductions to the User Group	Chad and Bella 6:45 PM – 7:00 PM
2	Platform Update and AiDIN	Paul Baptist 7:00 PM – 7:20 PM
3	MI PoC Live Demo	Regina, Edwin & Jacqui 7:20 PM – 7:45 PM
4	Experience Sharing & SparkEd	Calvin 7:45 PM – 8:10 PM
5	Closing Remarks and Drinks	Chad 8:10 PM – 8:45 PM

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Hong Kong Alteryx User Group Leadership:

Bella Chow

Senior Consultant
KPMG

Chadwick Cheung

Senior Manager
Oliver Wyman

Clementine Pages

Associate Director
KPMG

Lily Loi

Senior Consultant
KPMG

Hong Kong Alteryx User Group Community
https://community.alteryx.com/t5/Hong-Kong-CN/gh-p/hongkong

*This meeting is being recorded and will be shared on the User Group page.

HOUSEKEEPING

This meeting will be recorded and shared to the Community.

- Fire Exit
- Toilets
- Wi-fi
- Registration

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Hong Kong User Group Roadmap

Bella Chow

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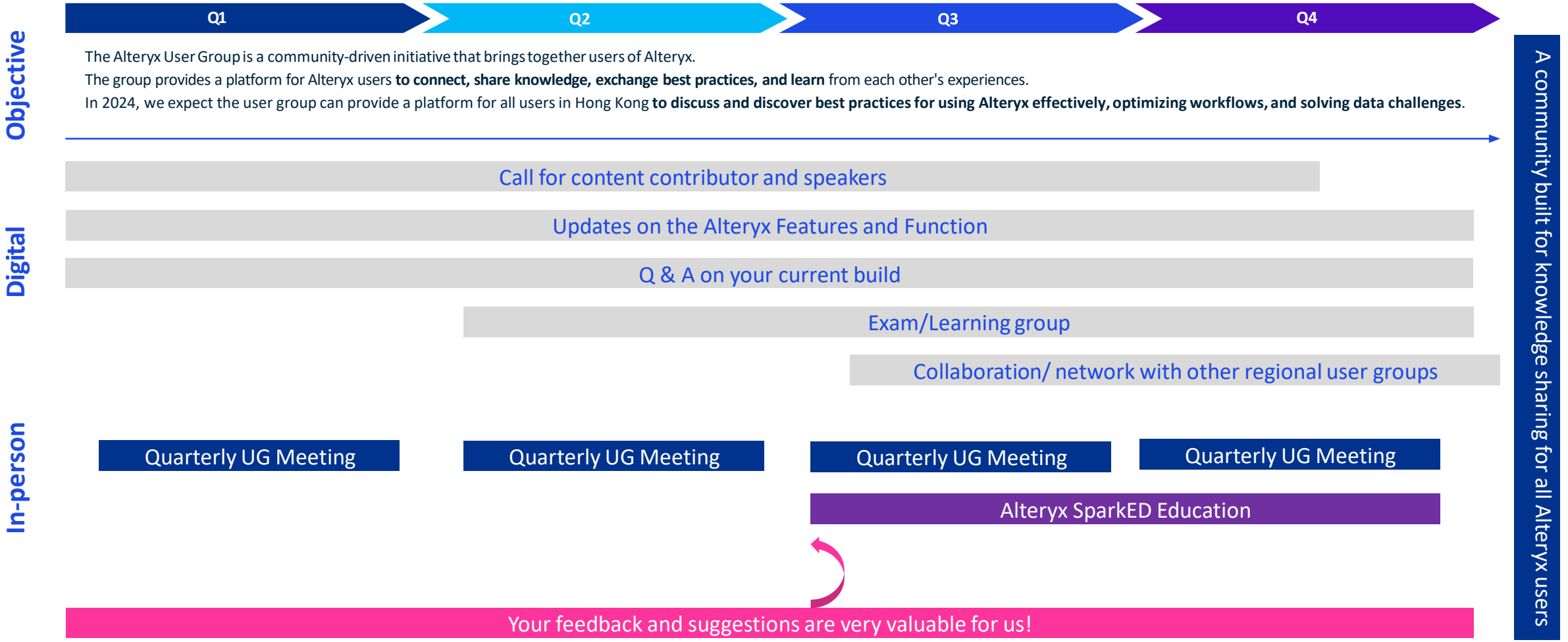
Hong Kong Alteryx User Group 2024 Roadmap(1/2)

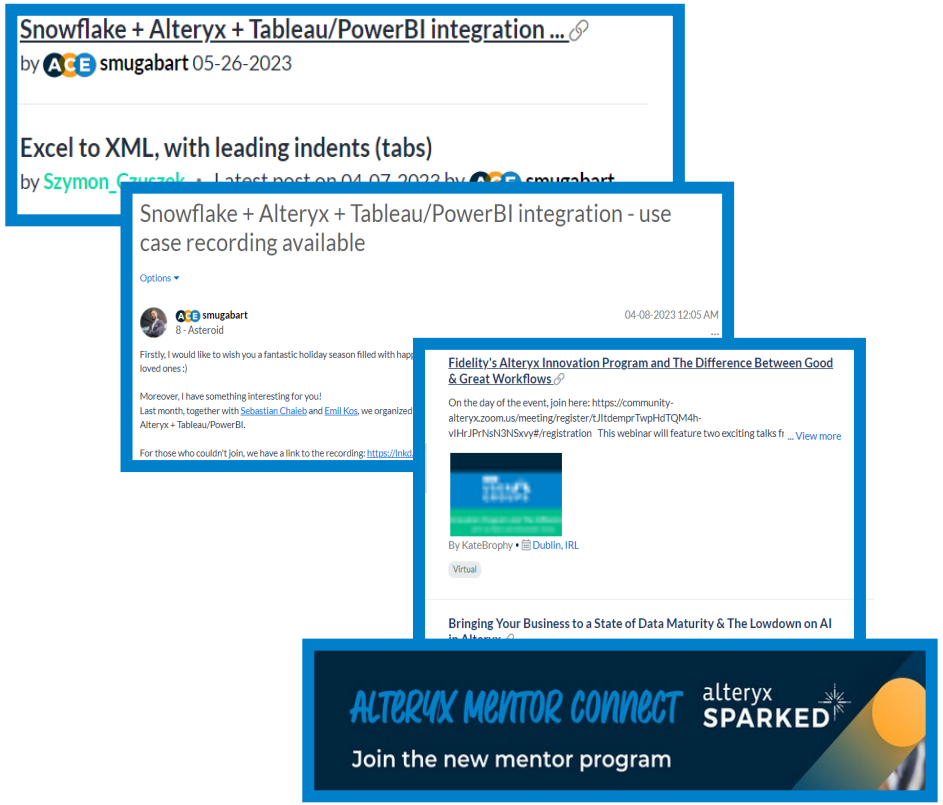


Hong Kong Alteryx User Group 2024 Roadmap(2/2)

A community built and maintained by users for users

To connect

To Learn



Source:
On-Site in Warsaw - Alteryx User Group Meeting Q1 ... - Alteryx Community
Boston Alteryx User Group Q4 Meeting (Recap) - Alteryx Community
Dublin, IRL - Alteryx Community

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Thank you

MARCH 2024

ALTERYX PLATFORM UPDATE

HONG KONG USER GROUP MEETING

PAUL BAPTIST
VP, Solutions Engineering APJ

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This presentation includes "forward-looking statements" within the meaning of the Private Securities Litigation Reform Act of 1995. These forward-looking statements may be identified by the use of terminology such as "believe," "may," "will," "intend," "expect," "plan," "anticipate," "estimate," "potential," or "continue," or other comparable terminology. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product availability, growth and financial metrics and any statements regarding product roadmaps, strategies, plans or use cases. Although Alteryx believes that the expectations reflected in any of these forward-looking statements are reasonable, these expectations or any of the forward-looking statements could prove to be incorrect, and actual results or outcomes could differ materially from those projected or assumed in the forward-looking statements, including, but not limited to, as a result of: the impact to the economy, our customers and our business due to the COVID-19 pandemic; our ability to manage our growth and the investments made to grow our business effectively; our ability to retain and expand our talent base, particularly our sales force and software engineers, and increase their productivity; our history of losses; our dependence on our software platform for substantially all of our revenue; our ability to attract new customers and expand sales to and retain existing customers; our ability to develop and release product and service enhancements and new products and services to respond to rapid technological change in a timely and cost-effective manner; intense and increasing competition in our market; the rate of growth in the market for analytics products and services; our ability to establish and maintain successful relationships with our channel partners; our dependence on technology and data licensed to us by third parties; risks associated with our international operations; our ability to develop, maintain, and enhance our brand and reputation cost effectively; litigation and related costs; security breaches; and other general market, political, economic and business conditions. Additionally, these forward-looking statements involve risk, uncertainties and assumptions, including those related to the impact of COVID-19 on our business and global economic conditions. Many of these assumptions relate to matters that are beyond our control and changing rapidly, including, but not limited to, the timeframes for and severity of the impact of COVID-19 on our customers' purchasing decisions and the length of our sales cycles, particularly for customers in certain industries highly affected by COVID-19. Alteryx's future financial condition and results of operations, as well as any forward-looking statements, are subject to risks and uncertainties, including but not limited to the factors set forth above, in Alteryx's press releases, public statements and/or filings with the Securities and Exchange Commission, especially the "Risk Factors" section of Alteryx's most recent Annual Report on Form 10-K. These documents and others containing important disclosures are available at www.sec.gov or in the "Investors" section of Alteryx's website at www.alteryx.com. All forward-looking statements are made as of the date of this presentation and Alteryx assumes no obligation to update any such forward-looking statements.

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ENTERPRISE MANAGEMENT

CUSTOMER LOVE

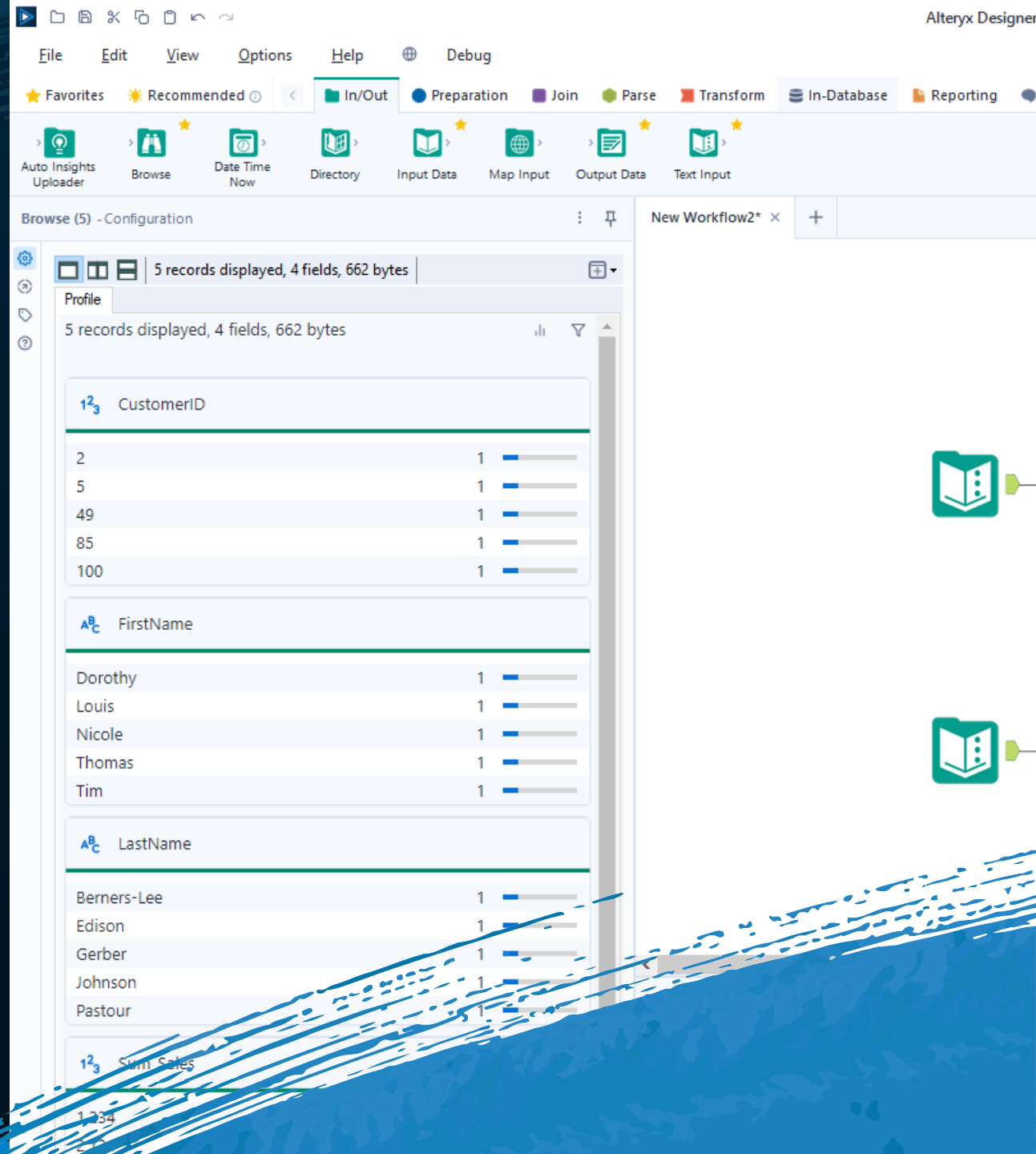
ENTERPRISE MANAGEMENT

CUSTOMER LOVE

NEW!

ENTERPRISE UTILITIES

- Migrate workflows from one Server environment to another
- Server API tool
- Analyze customer managed telemetry



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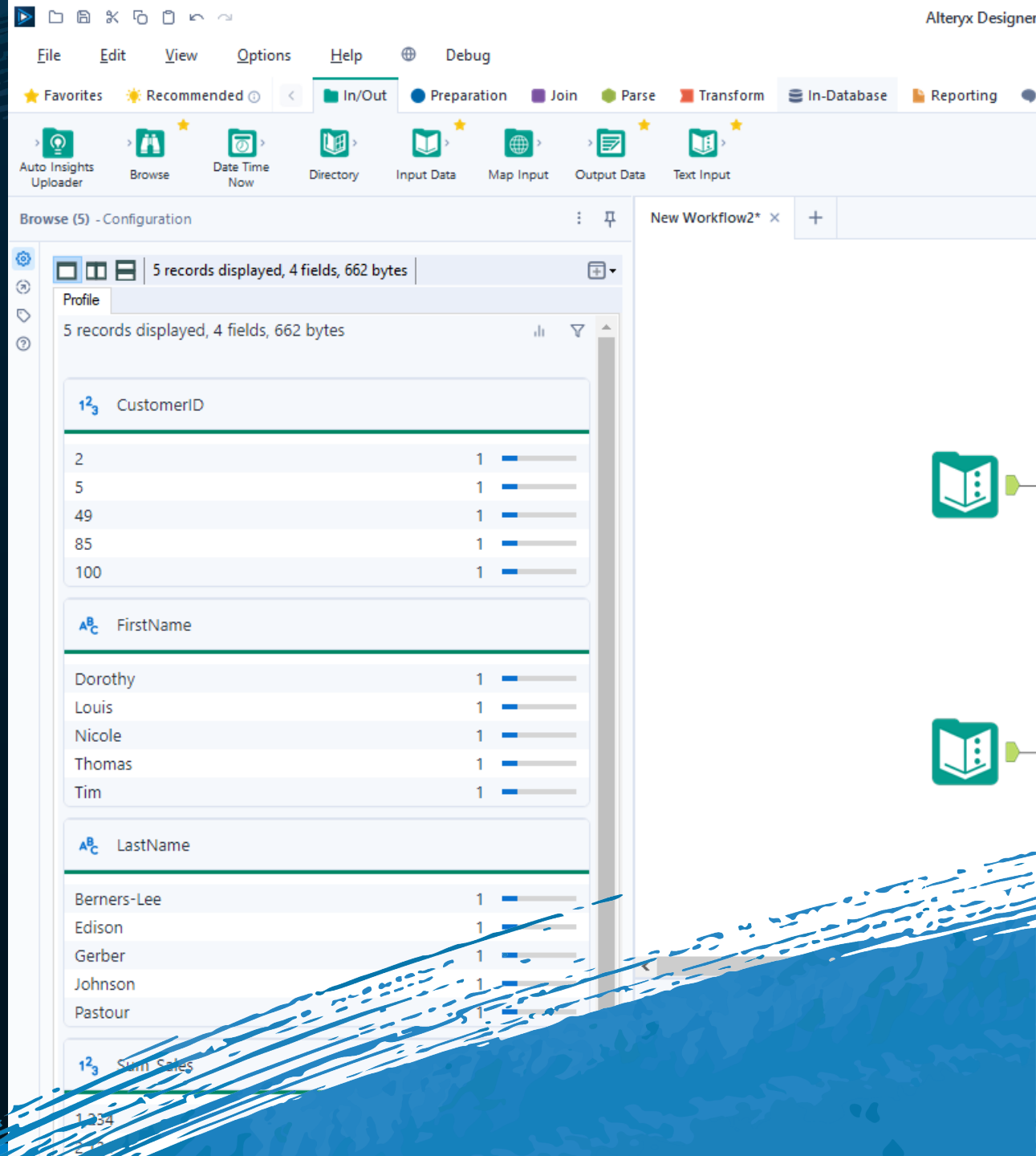

ENTERPRISE MANAGEMENT

CUSTOMER LOVE

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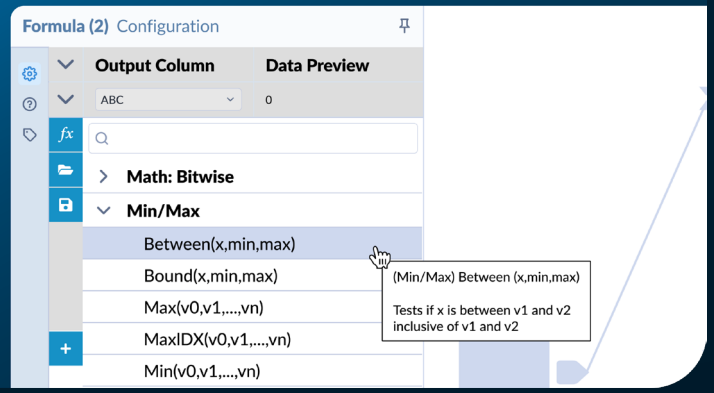
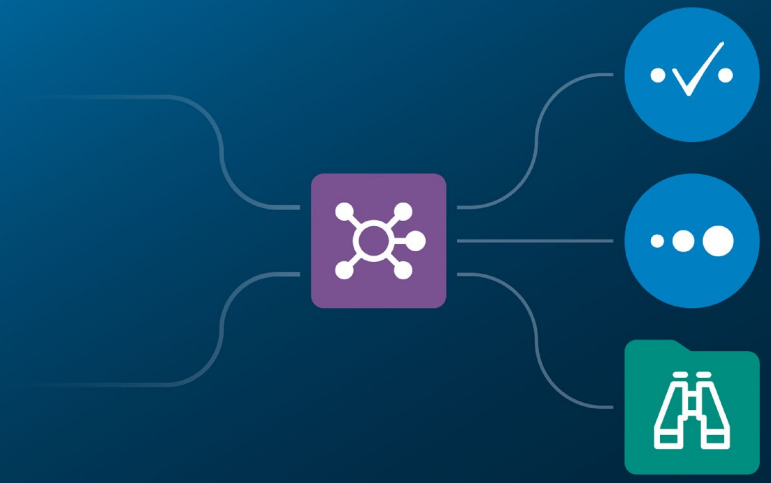
NEW SEARCH BOX IN SELECT TOOL

BETWEEN FUNCTION

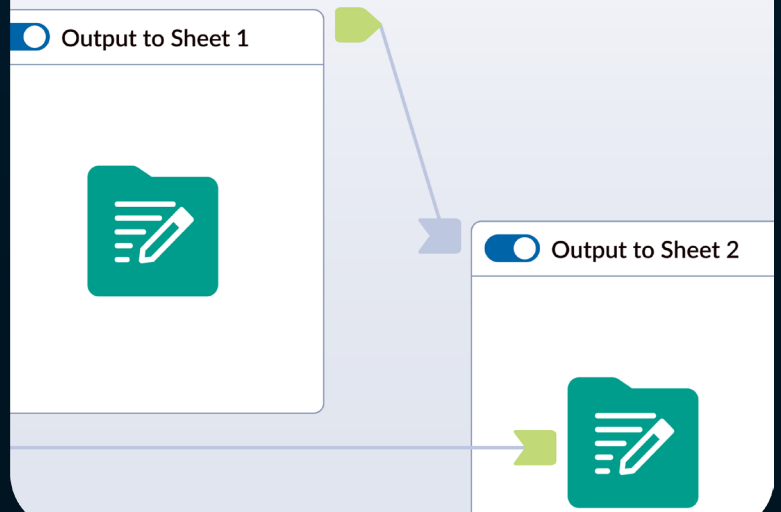


PDF TO TEXT TOOL

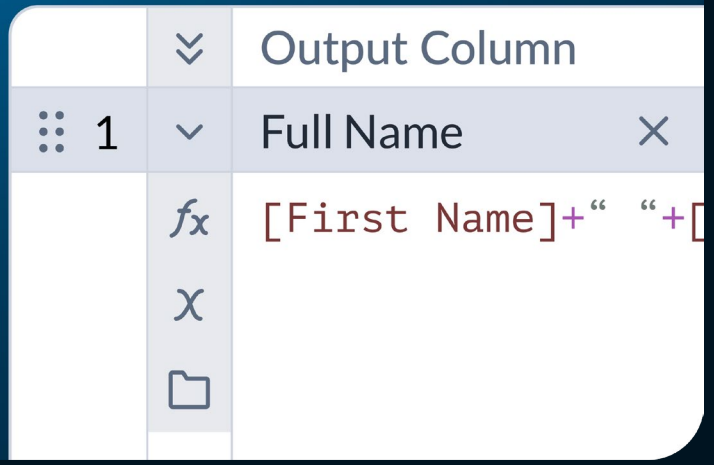
MULTI-ANCHOR CACHING



CONTROL CONTAINERS



EXPAND/ COLLAPSE ALL



Powered by AI with AiDIN

Copilot • AI Engine • AI Studio

Please refer to the recording to view full demo illustration.

Register Today for Inspire 2024

Session catalog now available

Register | View Catalog

Inspire 2024 is happening May 13-16, 2024, at The Venetian in Las Vegas, NV.

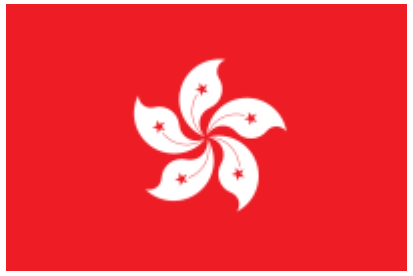
THANK YOU

OliverWyman

PLEASE REFER TO THE RECORDING FOR FULL DEMO.

CHADWICK CHEUNG, OLIVER WYMAN

CHADWICK.CHEUNG@OLIVERWYMAN.COM



Hong Kong User Group

Hong Kong, China

Date: 12th March 2024
Time: 6:30 PM – 8:30 PM HKT
Venue: Central Plaza
Address: Oliver Wyman, 34/F, Central Plaza, Wan Chai, Hong Kong

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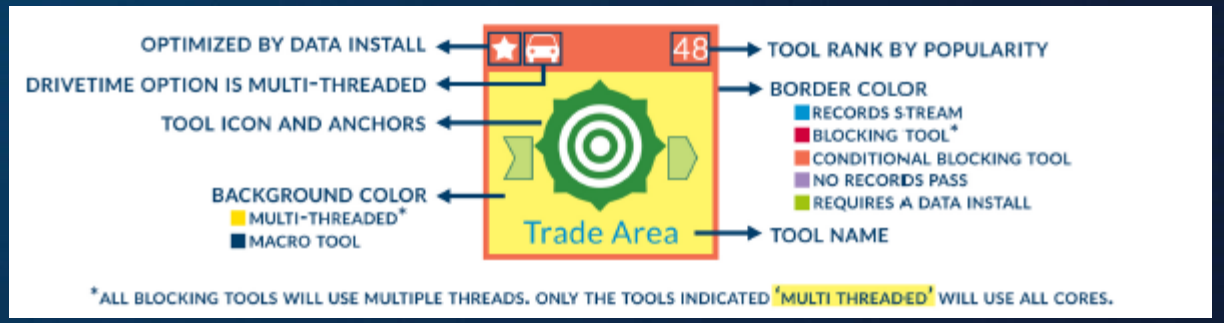
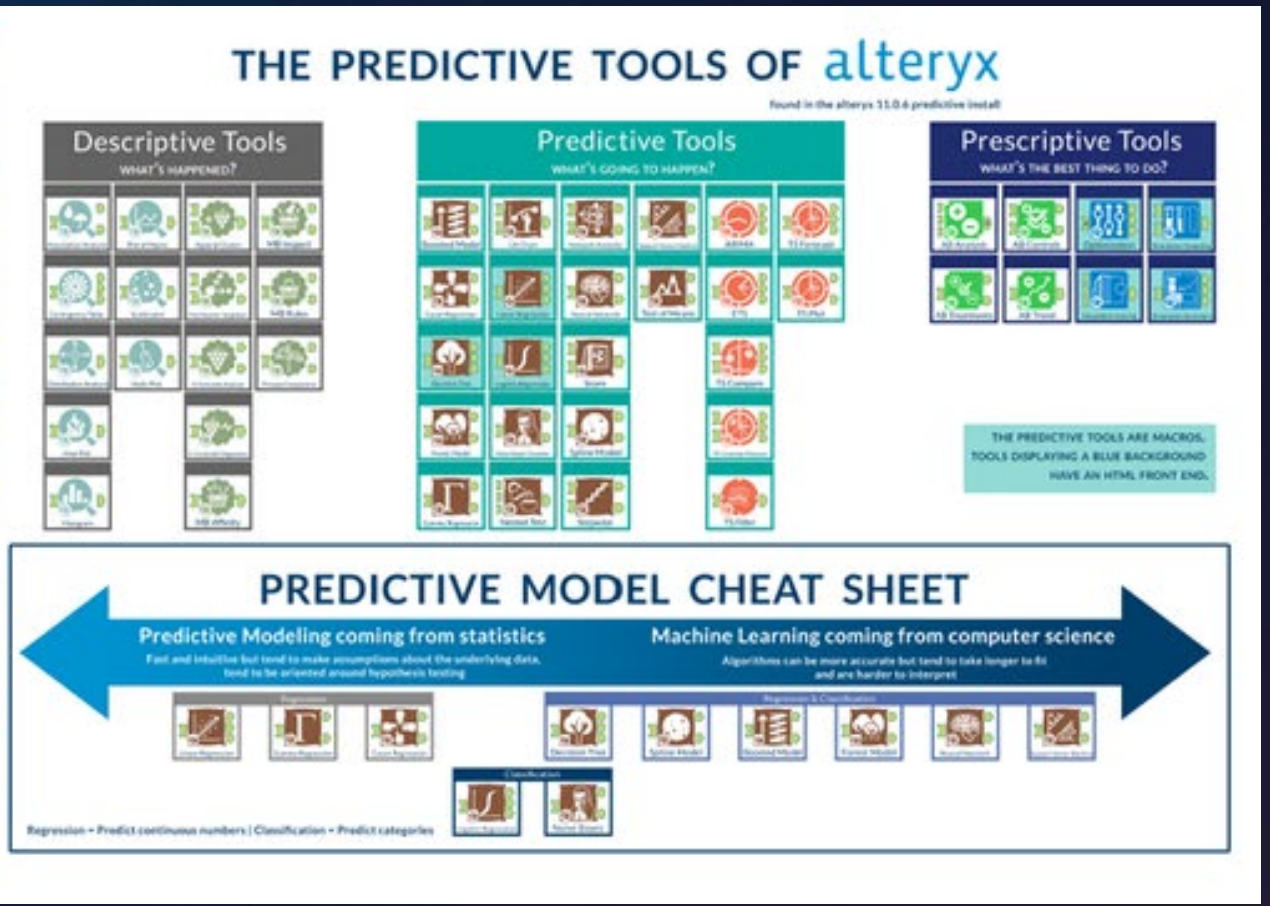
ALTERYX IS FUN!





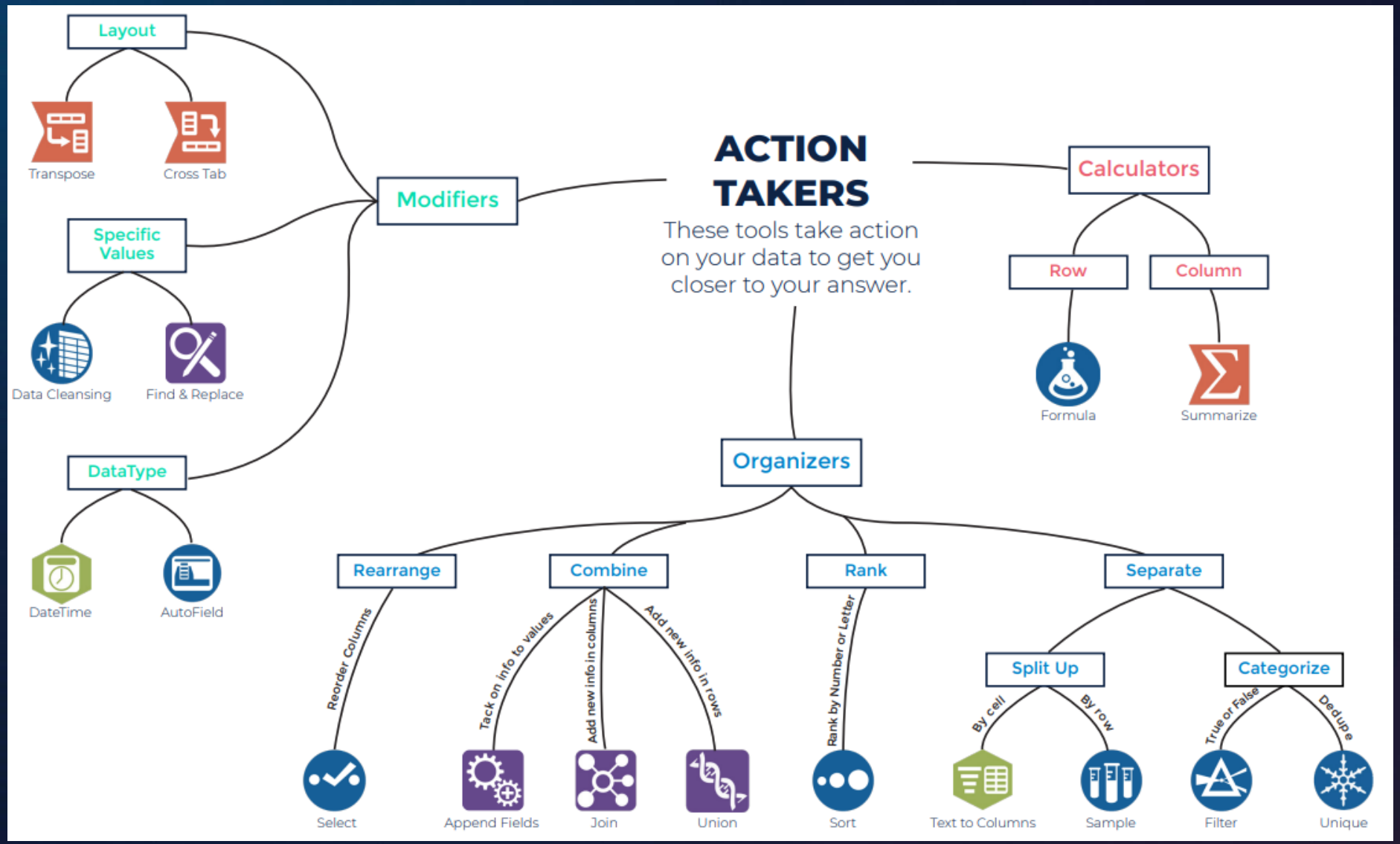
CHOOSING THE RIGHT TOOL

Knowing how to use it is important, but knowing what to use it for is more important

ENABLERS

Tools that help you when using other tools.

Browse | Input Data | Output Data



ALTERYX TOOL CHEATSHEET

You will need to combine tools to achieve certain actions

ACTIONS YOU MAY WANT TO TAKE...	TOOLS THAT CAN DO THAT IN DESIGNER
Change Datatype	Select, Formula, Autofield
Row to Column	Transpose
Column to row	Cross Tab
Split one cell into multiple cells	Text to Column, Formula
Combine lists by adding rows	Union
Combine lists by adding columns	Join, Find & Replace, Append Fields
Group Information	Union, Find & Replace, Summarize
Rank Data	Sort, Summarize
Get rid of columns	Select
Get rid of empty values	Formula, Filter
Get rid of rows	Formula, Filter, Sample
Get rid of puncutation or whitespace	Data Cleansing

Perform a calculation	Summarize, Formula
Work with dates	DateTime, Formula
Find a value (unique, min, max)	Summarize, Unique, Find & Replace
Identify records with a unique ID	Record ID
Replace a value	Find & Replace, Formula
Input Data	Input Data
Rename Fields	Select
Reorder Fields	Select
View Results	Browse
Ouput Results	Output Data

ALTERYX FUNCTIONS & TERMINOLOGY CHEATSHEET

Know the terms to use Alteryx like a pro!

FUNCTIONS

When using functions in Designer, keep in mind that datatype is very important. The table on the right shows the function category and an X indicates that functions in that category are compatible with that column's corresponding datatype. This is not an exhaustive list. Rather, use this table to match your data's type and find a category that is compatible with that datatype to ensure the function will work. Note that you may need to change your data's datatype if you wish to use it with a particular function.

	String	Numeric	DateTime	Boolean	Spatial
Conditional	X	X	X	X	X
Conversion	X	X			
DateTime	X		X		
File	X				
Finance		X			
Math		X			
Math: Bitwise		X			
Min/Max		X			
Operators	X	X	X	X	X
Spatial		X			X
Specialized	X	X	X	X	X
String	X				
Test	X	X	X	X	X

TERMINOLOGY

Blend – merging data from different sources into one dataset, such as data from different spreadsheets, databases, or other sources into one complete dataset.

Concatenate – joining one or more text strings together.

Datatype – an attribute of data which lets the computer know how to interpret that value. There are 5 main datatypes in Designer (string, numeric, DateTime, Boolean, Spatial). Data-types can be changed for particular values.

Delimiter - a sequence of one or more characters that creates a boundary between values. Common delimiters include commas, pipes, and quotes.

Filter – filtering separates your data into two streams: True containing the data met your criteria, and False containing the data that did not meet your criteria.

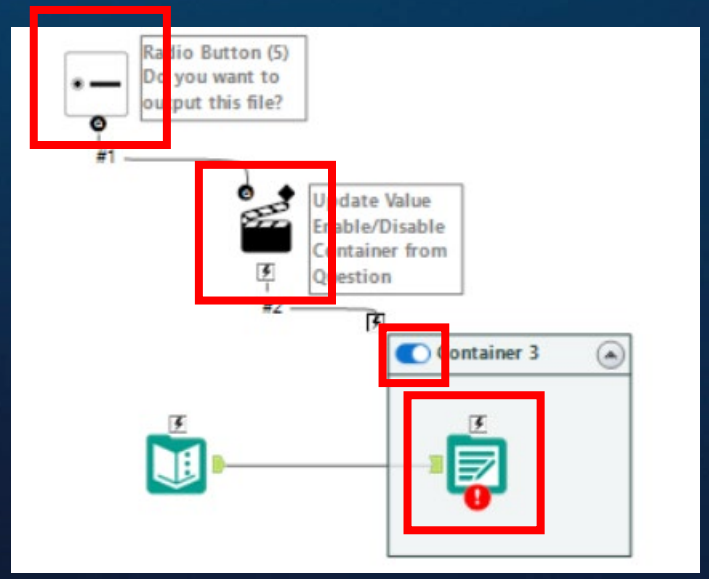
Flag – flagging data is a technique used to categorize data. This is usually accomplished with a conditional statement which checks values against a set of criteria and creates a correspond-ing flag in another column.

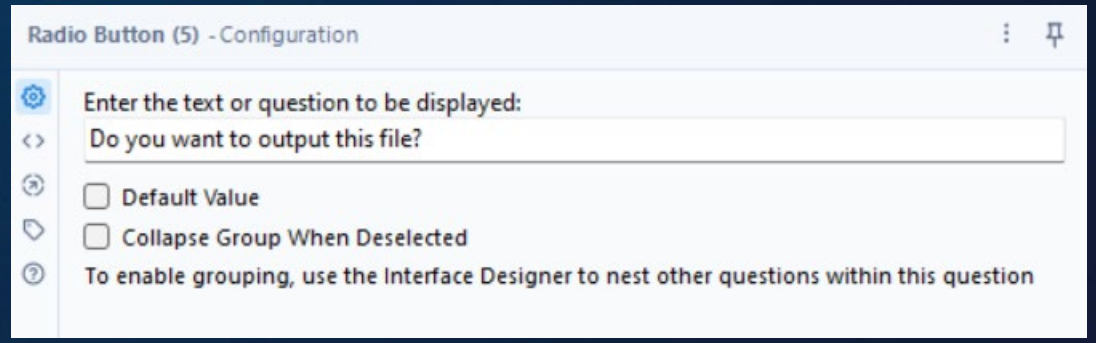
Parse – parsing separates values based on delimiters. Examples include: separating keywords from phrases, separating numbers from letters, or area codes from phone numbers.

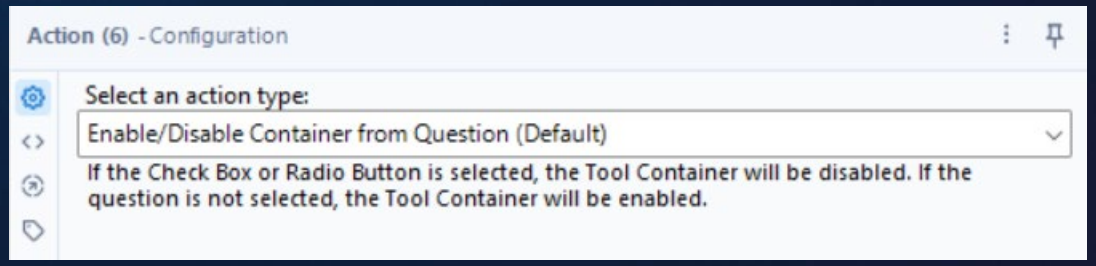
Sort – ranking items in ascending or descending order.

DETOUR DATA WITH APPS & CONTAINERS

Tools inside a container will not process if the container is disabled







QUICK TIPS

Compressing Data

- Reduces runtime, processes faster, reuseable & best for development work.
- Actuarial fact data can be compressed and save up to 95% of space in dev work.
- Speed increases drastically as well.

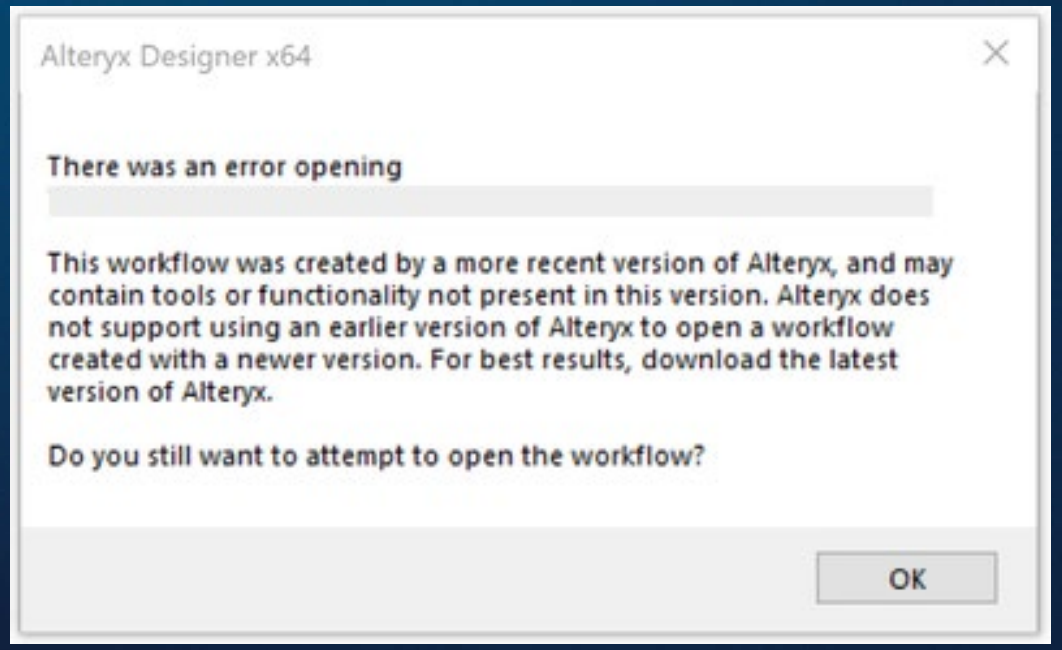
Compressing Workflows into Macros

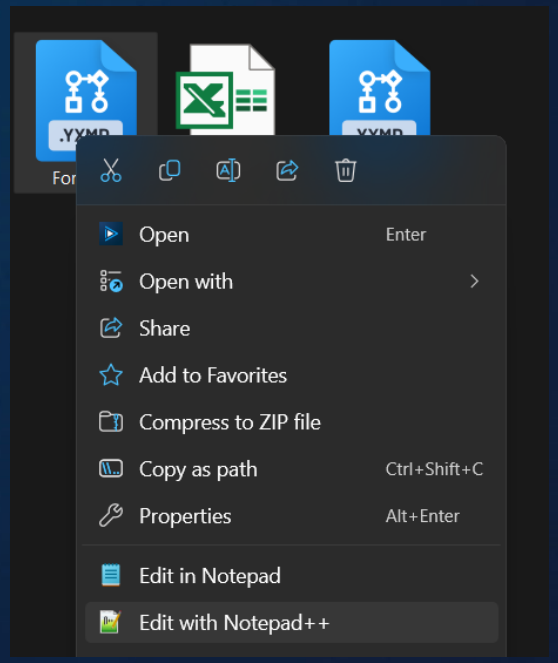
- Saves space and helps run multiple workflows in the same canvas/app.
- Better UI/UX for developers and end users.
- Compresses better when zipped.

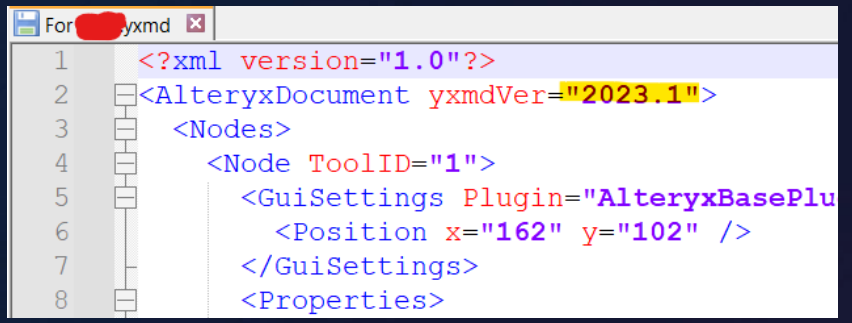
Manage input/output/macro paths

- **Absolute**: C:\Users\Caltang\\My_Workflows\Finance\Data > directory on the computer
- **Relative**: .\Data > refers to the directory where the workflow containing this object is stored.
- **UNC**: \\Computer Name\C\Users\Caltang\\My_Workflows\Finance\Data > directory including the computer

VERSION ERROR HANDLING







Alteryx Version Differences

- Change the version of the workflow/macro/app using Notepad or Notepad++ and save it.
- Ensure that the version gap is not too big, and ensure your tools are backward compatible. E.g: Control Containers are only in v2023.1 onwards.
- Once changed, it should work for the receiving party.

APPENDIX

Appendix A: Core Concepts

Data Parse, Blend and Transform in Excel vs Alteryx

Task	Excel	Alteryx	Alteryx Tool
Update data types, rename columns, remove columns, and change column order.	Format cells or change syntax, rename column headers, delete columns or select and shift to move columns.	Use the **Select Tool** to easily change data types, rename fields, remove fields or re-order fields	
Change data types	Format cells using the format cells menu or change syntax	Use the **Auto Field Tool** to automatically update the data types of your fields to match the values contained in the field	
Remove Rows	Manually select the rows you'd like to delete or use a quick filter to remove what you don't need	Use the **Filter Tool** to create simple or complex filters on your data rows.	
Sort	Highlight the columns and do a regular or custom sort.	Use the **Sort Tool** to sort your data	
Formulas	Write formula in cell and drag down to carry formula into more cells	Use the **Formula Tool** to create new fields or update existing fields with a wide variety of formulas	
Formulas containing multiple rows of data i.e. Cumulative Sum	Enter value into first cell then create formula using the starting point and additional rows of data. Drag formula to applicable rows.	Use the **Multi Row Formula Tool** to utilize more than one row of data in your formulas.	
Apply formula to multiple columns of data i.e. Calculate the % each field makes of the whole	Create a table of your data and pivot on the data	Use the **Multi Field Formula Tool** to execute a single function on multiple fields	

Appendix A: Core Concepts (*continued*)

Data Parse, Blend and Transform in Excel vs Alteryx

Task	Excel	Alteryx	Alteryx Tool
Parse data	Select columns and use the Text to Columns Wizard	Use the **Text to Columns Tool** to split a field with a regular format, such as, a csv.	
Join two tables with a common field	Use VLOOKUP formula or wizard	Use the **Join Tool** to join two tables with a common field.	
Append Rows	Copy and paste contents of table so fields align appropriately	Use the **Union Tool** to combine multiple worksheets based on the field names or maintaining the position of each column.	
Pivot Table (Rows to Columns)	Build a pivot table and mold data to desired shape	Use the **Cross Tab Tool** to pivot the orientation of the data table so vertical data fields can be viewed on a horizontal axis summarizing data where specified.	
Pivot Table (Columns to Rows)	Build a pivot table and mold data to desired shape	Use the **Transpose Tool** to pivot the orientation of the data table. It transforms the data so you may view Horizontal data fields on a vertical axis.	
Aggregate and Sum data	Write a sum formula or use the auto-sum symbol	Use the **Summarize Tool** to aggregate data perform operations, like sum or count, on numeric fields.	

APPENDIX B: DATA TYPES 1

Strings

More memory intensive

Type	Description	Simplified	Example
String	Fixed Length Latin-1 String. The length should be at least as large as the longest string you want to be contained in the field, or values are truncated. Limited to 8,192 Latin-1 characters.	Fixed String	Any string whose length does not vary much from value to value, and only contains simple Latin-1 characters. **E.G:** House; Dog; Partner; Hello **Cannot read:** Монгол Улс,香港
Wstring	Wide String accepts any character (Unicode.) Limited to 8,192 characters.	Variable String which is memory optimized	Any string whose length does not vary much from value to value and contains any character. **E.G:** Hi, I have a house in Монгол Улс & 香港
V_String	Variable Length. The length of the field adjusts to accommodate the entire string within the field.	Fixed String which allows Unicode	Any string whose length varies from value to value, and only contains simple Latin-1 characters. **E.G:** Hi, I have a house in Hong Kong **Cannot read:** Монгол Улс,香港
V_WString	Variable Length Wide String. The length of the field adjusts to accommodate the entire string within the field and will accept any character.	Variable String which is memory optimized which allows Unicode	Any string whose length varies from value to value and contains any character. **E.G:** Hi, I have a house in Монгол Улс & 香港

APPENDIX B: DATA TYPES 2

Numerical Data

Type	Description	Example
Byte	A unit of data that is 8 binary digits (bits) long. A byte field is a positive whole number that falls within the range 0 thru 255, or 2^8	0, 1, 2, 3....253, 254, 255
Int16	A numeric value without a decimal equal to 2 bytes, or -(2^{15}) to (2^{15})-1	–32,768 to 32,767
Int32	A numeric value without a decimal equal to 4 bytes, or -(2^{31}) to (2^{31})-1	–2,147,483,648 to 2,147,483,647
Int64	A numeric value without a decimal equal to 8 bytes, or -(2^{63}) to (2^{63})-1	A numeric value without a decimal equal to 8 bytes, or -(2^{63}) to (2^{63})-1
Fixed Decimal	A numeric value with a decimal. The length (precision) of a fixed decimal is equal to the width of the integer (left side of decimal) plus the decimal point plus the width of the scale (right side of decimal). If a number is negative, the negative sign is also included in the length. Alteryx defaults a Fixed Decimal to 19.6. The maximum precision is 50, inclusive of the decimal point and negative sign (if applicable). A Fixed Decimal is the only numeric data type with an adjustable length.	A value of 1234.567 with a length of 7.2 results in 1234.57
Float	A standard single-precision floating-point value. It uses 4 bytes & can represent values from +/- 3.4 x 10-38 to 3.4 x 1038 with 7 digits of precision. A float uses a decimal that can be placed in any position & is mainly used to save memory in large arrays of floating-point numbers.	+/- 3.4 x 10^{-38} to 3.4 x 10^{38} with 7 digits precision
Double	A standard double-precision floating-point value. It uses 8 bytes & can represent values from +/- 1.7 x 10-308 to 1.7 x 10308 with 15 digits precision. A double uses a decimal that can be placed in any position. A double uses twice as many bits as a float & is generally used as the default data type for decimal values.	+/- 1.7 x 10^{-308} to 1.7 x 10^{308} with 15 digits

APPENDIX B: DATA TYPES 3

Date & Time Data + Boolean Data + Spatial Objects

Type	Description	Example
Date	A 10-character String in "yyyy-mm-dd" format.	December 2, 2005 = 2005-12-02
Time	Default is an 8-character String in "HH:MM:SS" format. Specify additional precision up to 18 digits, for a max of 27 characters, including the decimal separator.	2:47 and 53 seconds a.m. = 02:47:53 2:47 and 53.236 seconds p.m. = 14:47:53.236
DateTime	Default is a 19-character String in "yyyy-mm-dd HH:MM:SS" format. Specify additional precision up to 18 digits, for a max of 38 characters, including the decimal separator.	2011-05-15 07:20:33 2005-12-02 14:47:53.123456

Type	Description	Example
Bool	An expression with only two possible values: True or False.	The words 'True' and 'False' display in the results where 'False' = 0 & 'True' = non-zero.

Type	Description	Example
SpatialObj	The spatial object associated with a data record. A table can contain multiple spatial object fields.	A spatial object can consist of a point, line, polyline, or polygon.

APPENDIX C: DATETIME FUNCTIONS

Useful tips & tricks for datetime data

Convert a datetime to a string

Functions	Result
DateTimeFormat(**dt, f, l**)	Returns a string representation of a datetime field based on the input of parameter **f** and **l** (**l** is optional).

Convert a string to a datetime

Functions	Result
DateTimeParse(**dt, f, l**)	The function parameters **f** (format) and **l** (language, optional) have to match the incoming string field to be converted.

Convert a string (in ISO) or number to a datetime

Functions	Result
1. ToDate(**x**)	Date or datetime, incoming date-time should be in YYYY-MM-DD hh:mm:ss (hours optional).
2. ToDateTime(**x**)	Date or datetime, incoming date-time should be in YYYY-MM-DD hh:mm:ss (hours optional).

Return the difference between two datetime values

Functions	Result
DateTimeDiff(**dt1, dt2, u**)	Difference between two datetime values, truncated (not rounded), where **u** is the datetime unit (e.g. years or minutes).

Want to change the datetime to another date or time

Functions	Result
1. DateTimeAdd(**dt, i, u**)	New datetime based on –(i)/+(i) and **u**. e.g. a datetime 10 days from now DateTimeAdd(DateTimeNow(), 10, "days".
2. DateTimeTrim(**dt, t**)	Standardizes date based on **t**.

Return a number or count from a datetime

Functions	Result
1. DateTimeSeconds(dt)	Number of seconds
2. DateTimeMinutes(dt)	Number of minutes
3. DateTimeHour(dt)	Number of hours
4. DateTimeDay(dt)	Number of day in month
5. DateTimeMonth(dt)	Number of month in year
6. DateTimeYear(dt)	Number of year

Generate the current datetime

Functions	Result
1. DateTimeNow()	Current system datetime
2. DateTimeToday()	Today's date (no time)
3. DateTimeStart()	Datetime workflow started running
4. DateTimeFirstofMonth()	Datetime first of month midnight
5. DateTimeLastofMonth()	Datetime last of month 1 second before day end

PARAMETERS

dt =
- [Field] (in datetime/date)
- Specified value between " ", e.g. "2017-03-24 11:43:23" (can also be a date)
- Another function that represents a datetime.

f =
- Is either the format of the incoming string (for DateTimeParse) or the outgoing string (for DateTimeFormat). **f** is always specified by at least one specifier and most likely separators.

l =
- Optional parameter to set the language for DateTimeFormat and DateTimeParse. Language is mostly relevant for users that have names in a certain language (for incoming string fields, Parse) or want names in a certain language (outgoing string fields, Format).

x =
- [Field] (in datetime/date OR string OR number (as in number of days since 01-01-1900))
- Specified value between " ", e.g. "2017-03-24 11:43:23" (can also be a date)
- Another function that represents a datetime

i =
- Positive or negative integer (no fractions!)

u=
- Between quotes " ": years, months, days, hours, minutes or seconds

t =
- between quotes " ":
  - firstofmonth (midnight)
  - lastofmonth (59:59)
  - year (first of January midnight)
  - month (first day of the month midnight)
  - day (sets time to zero but keeps date-time format)
  - hour (sets to zero minutes/seconds)
  - minute (sets to zero seconds)

Specifier	Output from DateTimeFormat / DateTimeParse
%a or %A	Abbreviated weekday name ("Mon") **OR** Full weekday name ("Monday")
%b or %B	Abbreviated month name ("Sep") **OR** Full month name ("September")
%c or %C	The date and time for the computer's locale **OR** The century number ("20") / **NA**
%d or %D	Day of the month ("01") **OR** Equivalent to %m/%d/%y
%e	Day of the month, leading 0 replaced by a space (" 1")
%h or %H	Same as %b ("Sep") **OR** Hour in 24-hour clock, 00 to 23
%I	Hour in 12-hour clock, 01 to 12 / **NA**
%j	The day of the year, from 001 to 365 (or 366 in leap years)
%k or %l	24 hours, leading zero is space, " 0" to "23" **OR** 12 hours, leading zero is space, " 1" to "12"
%M	Minutes, 00 to 59
%m	Month number, 01 to 12
%p or %P	"AM" or "PM" **OR** "am" or "pm"
%S	Seconds, 00 to 59
%T	Time in twenty-four-hour notation. Equivalent to %H:%M:%S / **NA**
%u or %U	Day of week as a decimal, 1 to 7, with Monday as 1 **OR** This returns the week number, as 00 – 53, with the beginning of weeks as Sunday. / **NA**
%w or %W	Day of week as a number, 0 to 6, with Sunday as 0 OR This returns the week number, as 00 – 53, with the beginning of weeks as Monday. / **NA**
%x or %X	The date for the computer's locale OR The 12-hour clock time, including AM or PM ("11:51:02 AM") / **NA**
%y or %Y	Last two digits of the year ("16") OR All four digits of the year ("2016")
%z or %Z	Offset from UTC time ("-600") OR Full time zone name ("Mountain Daylight Time") / **NA**

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