Introduction to Alteryx Designer

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With Alteryx Designer, you are empowered to unlock the insights that are buried in your data, so you can experience the thrill of getting to the answer faster. By connecting tools to perform analytic processes in a workflow, you will not just alter your data's structure or values to reach your desired results, but you'll alter your belief of what's possible with analytics.

The Components
The Alteryx Designer contains four primary components that are used to construct a workflow: the Tool Palette, the Canvas, the Configuration window, and the Results window.

The Tool Palette
The Tool Palette contains the tools that are used to alter data. Tools are separated into categories based on the types of functions they perform, such as inputting data, parsing information or creating reports. Each category's tools share a color and shape, making it easy to visually identify the types of functions being applied in a workflow. If you are unsure as to the function for which a tool is used, click the tool icon for a description. For more detailed information on a tool's application or configuration, right click on the tool icon and select "Help", which is denoted by the question mark, to access the Help Documentation for that specific tool.

The Canvas
Add tools to the Canvas and connect them to create a workflow. To relay data from tool to tool, connect the output anchor of one tool to the input anchor of another. Linking tools together applies a sequence of operations to a data stream. You can add tools to the Canvas in a couple of different ways. First, you can drag a tool from the Tool Palette, and drop it on the Canvas. You can also search for a tool and drag the tool from the Search results onto the Canvas. In addition, tools can be inserted by right clicking on the Canvas and selecting the tool from the list of tool categories. Connect tools by clicking the output anchor of one tool and dragging the cursor to meet the input anchor of another tool or drop a tool in the proximity of another to establish a connection.

Configuring Tools
Tools must be configured to take an action on your data. The Configuration window lets you customize that action using available options. The available configuration options change depending on the tool that is selected on the Canvas. Tools that are configured incorrectly will display a red exclamation mark on the tool icon in the Canvas to alert you that the configuration must be fixed to successfully run the workflow. To change a configuration, select the tool, apply changes in the configuration window and click "Apply" or click the Canvas to resolve the issue.

Running a Workflow
Running a workflow initiates the flow of data from the input source through the workflow, transforming the data according to the configurations set in each of the tools. If you're worried about altering your original data, don't be! Running your workflow does alter the data you see in Designer, but data at the source remains unchanged until it is overwritten by an Output Data tool. Click Run to begin this process.

Results Window
Once a workflow has run, the Results window populates with information on the process that was executed. These messages include links to inputs and outputs in the workflow, summaries of changes that have been applied to the data, and the time stamps at which a workflow started and completed its run. Any error messages or warnings will also be visible in this window. View the Results at each step of the workflow by clicking a tool on the Canvas and exploring the Results window.

Saving & Sharing
Once you created a workflow, save it by clicking "File" and "Save". Your workflow will be saved as a .YXMD file, which preserves the workflow and its configured tools. You can also export the workflow by selecting "Options", then "Export Workflow". This option will create a file with the extension of .YXZP, which is an Alteryx package containing your .YXMD file and any assets, such as input datasets or macros, that are associated with this workflow.