Introduction to Alteryx Designer - Transcript

Alteryx Designer

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.

Tool Palette Description

The Tool Palette contains the tools that are used to transform your 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 of a given tool, 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" to access the Help Documentation for that specific tool.

To see an example workflow featuring your selected tool, click "open example" from the tool card.

Canvas

To create a workflow, simply start adding tools to the canvas. Typically, your first tool is an Input Data tool, which connects to your data source. 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 onto the Canvas. Or simply double click a tool in the Tool Palette.

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 linking their output and input anchors, or just drop a tool in the proximity of another to establish a connection.

Configure Tools

Tools must be configured to take an action on your data. The Configuration window lets you customize that action using tool-specific options. The available configuration options change, depending on the tool that is selected.

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 back to 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! Your input data remains unchanged as the data moves through the workflow. Generally, the resulting data is written to a new file or cloud location using an Output Data Tool – although it CAN be configured to overwrite your source data if your particular process requires it.

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 and 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 zip file with the extension of .yxzp, which is an Alteryx package containing your workflow file and any associated assets.