



Alteryx

Module 1:

- Understand Alteryx Designer terminology
- Learn the Designer User and Workflow Settings
- Become familiar with the Alteryx Designer Interface
- Utilize all of the tools in the Favourite Tools toolset
- Learn how the Designer processes data
- Browse data at any point in the workflow
- Connect to data sources and update data:
 - A. Files and databases
 - B. Load Excel
 - C. Spreadsheets and CSV files
 - D. Enter data manually with the text input tool
- Manually and dynamically rename fields
- Remove fields from the data stream
- Sample and sort data
- Filter records
- Add a Record ID
- View and modify field data types manually and automatically
- Blend data from various sources:
 - A. Join records from separate sources on key fields
 - B. Union records from multiple sources
- Transpose (Pivot) data
- Group Records
- Construct expressions to modify, update or add fields:
 - A. Applying basic calculations
 - B. Using a conditional expression to update/add fields
- Parse data into multiple fields
- Utilize date/time formats
- Output data to various file formats
- Create basic reports containing tables and maps
- Annotate and document your workflow
- Use tool containers to manage workflows
- Save workflows and share them with other Alteryx Designer users
- Find additional resources on the Alteryx training website and Alteryx Community
- Spatial Analytics tools
 - A. Geocode and create a spatial point
 - B. Generate a trade area using radii and drive time polygons
 - C. Combine polygons by removing overlapping areas
 - D. Spatially match and query data within trade areas
 - E. Find the nearest location(s)



Module 2:

- Dynamically load Excel sheets
- Output multiple .csv files at one time
- Append records from one dataset to all records in another
- Using the Join Multiple tool
- Generate formula expressions using string length and position
- Advanced parsing techniques
- Understanding Demographic and Segmentation datasets (students will need licensed access to the additional Demographic Data Bundle)
- Utilizing Demographic reporting options IX. Intermediate report design
- Advanced spatial analytics:
 - A. Matching store and/or customer locations with demographic data
 - B. Thematic mapping of Census block group level spatial data
 - C. Working with segmentation data at the block group level
 - D. Creating a non-overlap drivetime area
- Using the Spatial Process tool options
 - A. Combine objects
 - B. Clip polygons
 - C. Create intersection object
 - D. Inverse intersection objects
 - E. Obtaining spatial metadata
- Alteryx Scheduler configuration and use (client will need licensed access to the additional Desktop Automation Package, or the Alteryx Server)
- Using the In-Database Tools*
 - A. Connect to Databases
 - B. Filter and Select In-Database
 - C. Apply Formulas In-Database
 - D. Join and Union In- Database
 - E. Summarize and Group In-Database
 - F. Add external data to the In Database workflow
 - G. Create or update a table
- For Gallery Data Artisans: Create an Analytic App and save it to your Alteryx Gallery Private Studio (Data Artisans have advanced permission levels in order to create apps via Alteryx Designer and upload apps to the Gallery)
- Design Apps using the Interface Components
 - A. Simple numeric and text entry
 - B. Dynamic lists, trees, and check boxes
 - C. Conditional actions
 - D. Interactive maps
 - E. Generating reports using Apps
 - F. Chaining Apps
- For Gallery Members: Utilize an existing Gallery Analytic App from your company's Server Gallery (Members can only utilize apps, and cannot design or upload apps to the Gallery)