Inputting Data into Your Workflow

It starts with Data...
Your workflow begins with your data. Between the supported databases, APIs and file types that can be used to read data into Designer, the analytic possibilities and the insights waiting to be discovered in your workflow are endless.

The Input Data Tool
Nearly every workflow you build will begin with an Input Data tool, which can be used to connect to a variety of databases and file types. The Input Data tool, which can be found in the In/Out and Favorites tool categories, reads data into Designer from a connected source. However, data at the connected source remains unchanged; an input's data values and metadata are only changed when overwritten with an Output Data tool. Because the Input Data tool represents a point at which data enters a workflow, it includes only one anchor, an output anchor, to make data available to other connected tools. As a best practice, any input to be used in Designer should be closed in other applications to preserve data integrity and avoid errors.

Drag an Input Data tool onto the Canvas.

Connect to a File
Use the Input Data tool to connect to three commonly used input files: a CSV, an Excel Workbook and an Alteryx Database. Use the Dropdown menu in the Input Data tool to connect to a file.

Selecting a File
Select the file to use to read in data.

CSV Configuration
A CSV file contains string values that are usually comma delimited. When a CSV is used as in the input file type, the Input Data tool's configuration window displays options that allow you to customize how data is read in. Click on the highlighted configuration options to learn how your input can be configured.

Limit the number of records that are read in from your connected file to improve runtimes when developing a workflow, especially if the entire dataset is not necessary to prove a concept. Manually type the number of records to input in the Configuration window.

Use the dropdown to add a column showing the source file name or full path. This is particularly helpful when you want an input's source information to be used as part of the workflow or accessible to understand a value's origin.

A CSV file may not always be delimited with commas. Manually enter the delimiter used in your input, such as a pipe (|) or space (\s) here.

In the event that your input does not contain names for each column of data, ensure that this box is deselected to correctly import all the data values.

By default, each column in a CSV file is set to a length of 254 characters. If you observe that data values are truncated upon input, manually edit this value to accommodate your data values.

Your input may contain additional notes or information that are not useful data values for your analysis. Specify the line on which data values start by manually entering the line number in the Input Data tool's Configuration window.

A dataset may contain values encoded with a particular format, such as UTF-8, or language. Select an appropriate code page to correctly input data using the Drop Down menu.

Excel Workbook Configuration

An Excel workbook stores data in a tabular structure in sheets or a named range. When inputting an Excel workbook, use the dialog window to input data from a single sheet in a workbook or a designated named range, or even a list of the sheet names a workbook contains, into Designer. When an Excel Workbook, and in this case, a sheet, is used to input data, the Input Data tool's configuration updates to accommodate specific input needs. Click on the highlighted configuration options to learn more.

Manually type the number of records to input from your connected file in the Configuration window.

Your configuration, such as the selected sheet name, from the initial input configuration will display here. To change the configuration, click the ellipsis to select a different input option.

Output an additional column of data containing the source file name or full path using the dropdown. This is particularly helpful when you want an input's source information to be used as part of the workflow or accessible to understand the origin of a value.

Select this box if the first row of an input data contains data values, not column names.

Specify the line on which data values start by manually entering the line number in the Input Data tool's configuration window to eliminate input values that are not part of your analysis.

YXDB Configuration
An Alteryx database file, or .YXDB file, is the most efficient file type for reading data into Alteryx. Because it is compressed for maximum speed and stores values in the same column types and structures as Designer, an Alteryx database will read in data quickly and cleanly. Click on the highlighted configuration options to learn more.

Like with other input file types, you can limit the number of records that are read in from your connected file to improve runtimes when developing a workflow or to prove a concept. Manually type the number of records to input in the Configuration window.

Select the box to search subdirectories of the connected file's path to input other files sharing the same file name or, if using wildcard characters in the input, file type and structure.

Output an additional column of data containing the source file name or full path using the Drop Down. By default, none of this information will be included with the input data.

Previewing Data
The Input Data tool's Configuration window displays only the first one hundred (100) rows of data from the connected input as a preview. To input the contents of the entire dataset, click "Run" to initiate the flow of data from the source to Designer.