

Alteryx Beginner



Length: 2 Days / 4 Half Days

Overview: This course is for students who are new to Alteryx or who have limited experience with the software. Students will learn the fundamentals of the Alteryx Designer interface and workflow settings. Through hands-on training students will be able to connect to, prepare, blend, parse, pivot, analyze, shape, and transform data.

Objectives:

- Define key Alteryx terminology to build a foundational vocabulary for effective communication.
- Navigate the Alteryx Designer interface to enhance user experience and efficiency.
- Configure user and workflow settings to optimize performance for individual projects.
- Connect to and manage various data sources, ensuring data integrity for analysis.
- Clean and prepare data by removing unwanted characters, ordering records, and renaming fields.
- Blend data from disparate sources and apply techniques for parsing and transforming data.

Course Outline

- Understand Alteryx Designer terminology
- Easily navigate the Alteryx Designer Interface
- Become familiar with Designer User and Workflow Settings
- Be able to share and save workflows
- Understand how Designer processes data
- Connect to and update data sources:
 - Files and databases
 - Dynamically load Excel Spreadsheets
 - Bulk load text-based files such as CSV
 - Write back to the original data source
- Clean unwanted characters in records
- Order records
- Rename fields manually and dynamically
- Detect and change field data types manually and automatically
- Filter records and use conditional expression to update/add fields
- Identify unique records
- Blend data from disparate sources:
 - Append records from different sources
 - Merge records from different sources on key fields
 - Add fields from one data set to all records in another
- Parse data
- Work with date/time fields
- Build expressions to add and update fields, by performing basic calculations
- Replacing text within a field
- Using string length and positions
- Parse data from one field into multiple field
- Pivot data
- Group and Bin Records
- Aggregate data
- Workflow best practices
- Cache a portion of your workflow
- Output data to different file formats
- Advanced Preparation
 - Filtering and cleaning “messy data”
 - Utilizing formulas to reference multiple rows and fields
 - Binning data into respective groups
 - Creating sample sets to prepare data for predictive analytics

Prerequisites

None

Materials

- All students will receive slides with lecture material and data.
- Software Needed on Each Student PC
 - Microsoft Excel 2010 or later (2013 or later recommended)
 - Internet access
 - Alteryx

Other Alteryx Courses Available: Alteryx Intermediate