

Alteryx Designer Advanced

Alteryx Designer Advanced equips data professionals with advanced Alteryx Designer expertise for enterprise-level data processing, automation, and analytics workflows.

This 5-day hands-on program covers complex transformations, dynamic processing, reporting automation, macros, and production deployment through structured modules and real-world case studies.

Total Duration: 40 Hours

Pre-requisites: Basic Alteryx Designer knowledge

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Module 1: Foundations & Core Tools (Day 1)

- Alteryx Platform Overview
- Designer Interface walkthrough
- Canvas, workflow configuration, results window
- File formats (.yxmd, .yxzp, .yxmc)
- Data Input Output
- Input Data Tool deep dive
- Connecting Excel, CSV, DB sources
- Output Data configurations
- Data type metadata handling
- Core Preparation Tools
- Select Tool
- Data Cleansing Tool
- Sort Tool
- Unique Tool
- Sample Tool
- Filtering Basic Transformation
- Filter Tool logic
- Basic Formula creation

- Date string functions
- Container Creation
- Tool Containers
- Control Containers
- Documentation containers
- Workflow structuring best practices
- Case Study: Customer master data standardization workflow

Module 2: Advanced Joins & Summarization (Day 2)

- Join Strategies Advanced
- Join vs Union vs Append
- Multi-field joins
- Fuzzy Match overview
- Handling unmatched records
- Data Blending Techniques
- Union configurations
- Auto config vs manual mapping
- Schema drift handling
- Summarization Deep Dive
- Group By aggregations
- Multi-level summarization
- Conditional summaries
- Running totals
- Advanced Transformation
- Multi-Row Formula
- Cross Tab Transpose
- Tile Tool
- Record ID ranking logic
- Case Study: Multi-region sales consolidation KPI aggregation

Module 3: Reporting & Documentation (Day 3)

- Reporting Toolset Overview
- Reporting workflow architecture
- Data vs layout separation
- Core Reporting Tools
- Table Tool
- Layout Tool
- Section Tool
- Field Summary Tool
- Advanced Report Formatting
- Conditional formatting
- Charts reporting visuals
- Report Text Image embedding
- Render Tool Output Automation
- PDF, Excel, HTML outputs
- Report batching
- Dynamic report naming
- Workflow Documentation
- Comment Tool
- Annotation best practices
- Container documentation
- Case Study: Automated executive sales performance report

Module 4: Dynamic Workflows & Automation (Day 4)

- Dynamic Workflow Creation
- Dynamic Input Tool
- Dynamic Select
- Dynamic Rename
- Metadata-driven workflows
- Parameterization Techniques
- Workflow Constants

- Control Parameters
- Environment variables
- File Batch Automation
- Folder-based ingestion
- Wildcard file processing
- Time-partitioned data loads
- Scheduling Automation
- Alteryx Scheduler
- Command line execution
- Event-based triggers
- Error Handling Logging
- Message Tool
- Workflow events
- Failure notifications
- Case Study: Automated monthly financial data pipeline

Module 5: Macros & Capstone (Day 5)

- Macro Architecture
- Standard Macros
- Macro inputs outputs
- Reusability design
- Interface Tools
- Drop-downs
- File browse
- Action Tool configuration
- Batch Macros
- Parameter-driven execution
- File iteration use cases
- Iterative Macros
- Looping workflows
- Convergence logic

- Performance considerations
- Capstone Project: End-to-End Implementation
 - ✓ Dynamic data ingestion
 - ✓ Advanced joins summarization
 - ✓ Automated reporting layer
 - ✓ Macro-driven modular design
 - ✓ Scheduled workflow execution