

Alteryx Fundamentals for Finance Training Course Outline

Audience: Beginner Users with 0 to 3 months of experience with Alteryx

Time Frame: 1 Day

Recommended class size: 12 students

Schedule: 9:00 a.m. to 4:00 p.m., 1-hour lunch and 15-minute breaks, morning and afternoon

Instructor: Courses are taught by a Certified Alteryx Professional

Price: \$2,000

This introductory course is designed for students in Finance organizations who are new to Alteryx and beginning their data analytics journey. The virtual classroom environment provides a hands-on experience in building Alteryx workflows using easy to follow step-by-step instructions, along with provided datasets.

Students will utilize datasets based on Finance industry data, such as tax data, ticker prices by year, holdings data and more. Upon completion of the course, students will be familiar with the most frequently used tools in the Favorites Toolbar!

Topics include:

- **Intro to Alteryx**

- Explore the Alteryx Designer Interface
- Navigate the Designer User and Workflow Settings
- Learn the Alteryx Designer terminology
- Use Browse Anywhere to view data throughout the workflow

- **Input Data**

- Input Excel, .csv and more file formats
- Manually input Excel sheets, data ranges and list of sheet names
- Dynamically input Excel sheets
- Use wildcards to input numerous .csv and text files

- **Data Prep**

- Select, change data types and size, and rename fields
- Sort data and learn about Dictionary order
- Sample data: Find the top records
- Find unique and duplicate values
- Filter records based on criteria Formula tool expressions

- **Data Blending**

- Use Transpose and Cross-Tab tools to pivot data
- Summarize and Group data
- Join data on a shared key field
- Union data from numerous inputs

- **Data Parsing (basic)**

- Parse data into separate fields based on delimiters
- Understand and convert date and time formats

- **Data Output**

- Output data to Excel, .csv and other file formats
- Generate multiple Excel spreadsheets within a single Excel file

- **Workflow documentation**

- Utilize tool containers to enable or disable portions of workflows

- **Achieve Goals:**

- Gain in-depth knowledge of the tools in the Favorite Tools toolset
- Advance to Intermediate Alteryx User Level



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Contact us today!
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