



Alteryx and Tableau Presentation Meeting Minutes

Call to Order:

A UAS meeting was held on April 16, 2019 beginning at 6:37 pm.

Attendees:

- Executive Board: All Present
- Andrew Packer, PwC Associate (andrew.j.packer@pwc.com)

Meeting Agenda:

During the meeting, PwC Associate Andrew Packer gave a presentation and demonstration on data visualization tools and detailed the way that firms like PwC have been using programs such as Alteryx and Tableau in their day-to-day activities

The Pace of Change

- Deliver visual solutions internally
 - The rate at which developers are being hired is increasing and PwC offers the digital accelerator program to help people develop their skills
 - During his time at PwC, Andrew found the implementation of data visualization tools in his work to be incredibly helpful. Although it was not a necessity, use of these applications made his tasks simpler
- Ideal skills for today
 - CPA
 - Excel
 - Social skills
- Ideal skills for tomorrow
 - Underlying concepts of tools such as Alteryx will provide the average worker with better ways to approach problems and deliver solutions more efficiently
- Data wrangling
 - Data wrangling is the process of cleaning and unifying messy data sets for easy access and analysis. In other words, making the data more useful
 - Some tools that accomplish this are Alteryx, Microsoft BI, Qlik Sense Enterprise, MicroStrategy, and Oracle Big Data

- Typical data manipulation issues include volume, velocity, multiple data sources, disaggregated data, different key fields, data type.
- Basics of Data Visualization
 - Step 1 – Look at the Data
 - What file format is the data in?
 - How many records are there? Is this what we expected?
 - What are the field names (i.e. employee ID, cost, wages)
 - Step 2 – Identify Potential Cleaning Issues
 - Are there going to be extra fields?
 - Will fields be combined?
 - Are the naming conventions different between files?
 - Do we only need parts of a specific field?
 - Step 3 – Tackle each problem
- Skills more than tools
 - The tools available during your career will change but learning the core knowledge and skills used to understand and manipulate data will remain largely unchanged and will provide a lasting benefit

**During the second half of the meeting, Andrew showcased a visualization of Alteryx and Tableau. This visualization illustrated the basics of how the programs are used in public accounting firms such as PwC.*

Adjournment

The meeting was adjourned at 7:38pm.

Adil Khan

Internal Vice President
Undergraduate Accounting Society

April 21, 2019

Date of Approval