inspire 2026

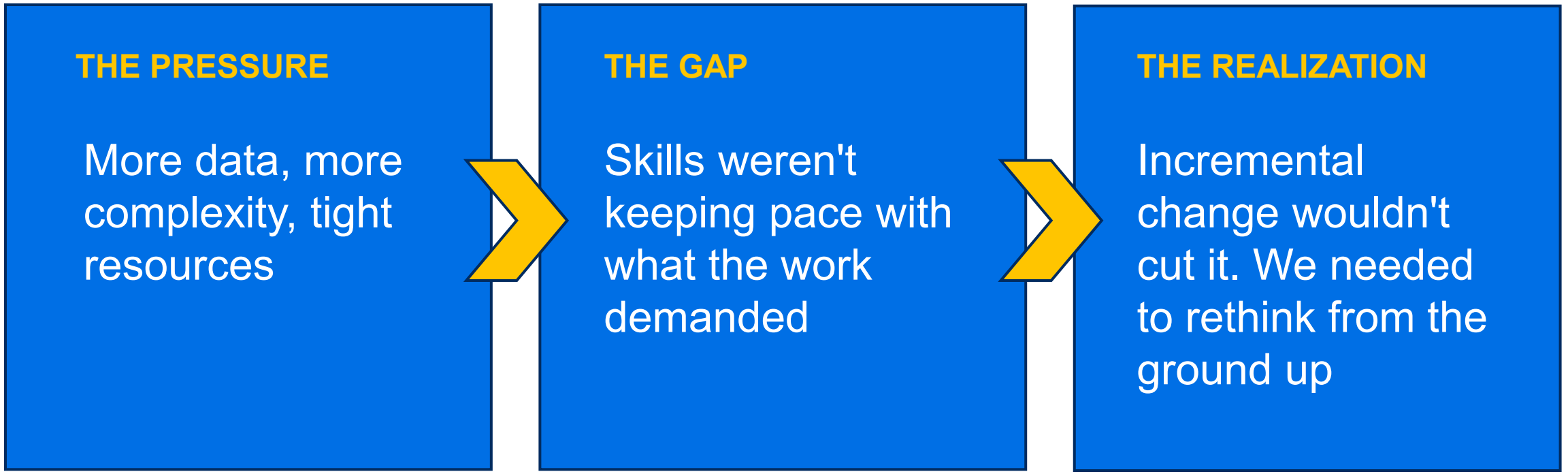
BANK OF AMERICA

How Bank of America Built an Auditor of the Future using Alteryx

Sal Truong, Sr Vice President, Bank of America

Bob Whitley, Sr Vice President, Bank of America

The Auditor of the Future: Our Story



Act 1: Building the Foundation

Phase 1: Excel

In-person Excel training: foundational to advanced

Phase 2: SQL

Four-day SQL program: beginner to advanced querying

The result: A team with a strong data foundation, ready to confidently adopt analytics automation and more advanced audit work.

Act 2: Enabling through Alteryx

Launched a 6-month Alteryx mentoring program

Build technical proficiency and practical confidence

Paired associated with experienced practitioners

Worked through increasingly complex audit and analytics use cases

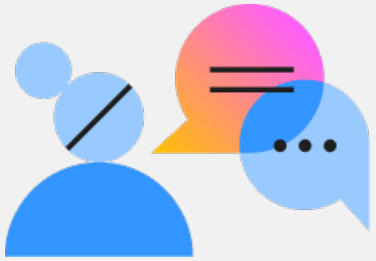
Built a sustainable pipeline of analytics-enabled professionals

By the end of the program, many associates had integrated Alteryx into their daily work and earned Alteryx certifications

Act 3: From Learning to Impact

Applied analytics to real audit scenarios

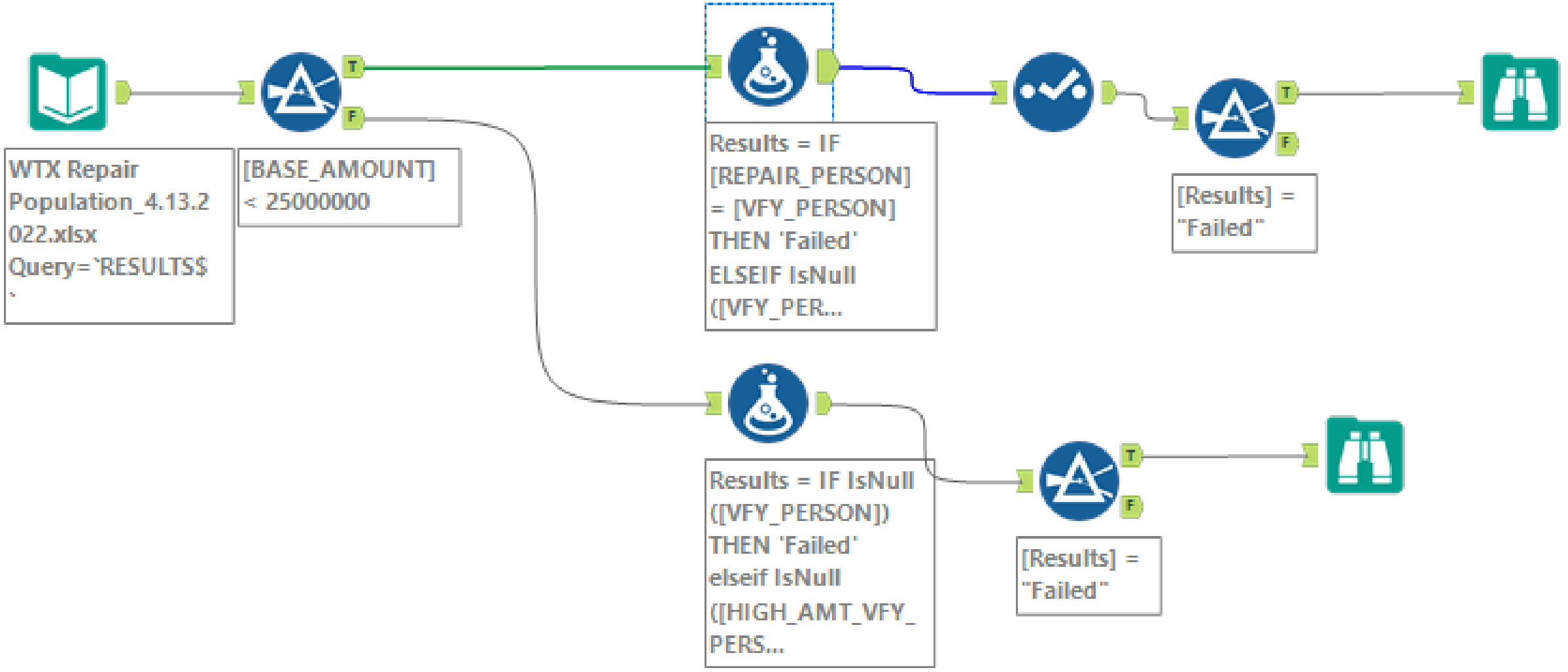
Reduced manual effort and improved consistency



Created more time for judgment and risk analysis

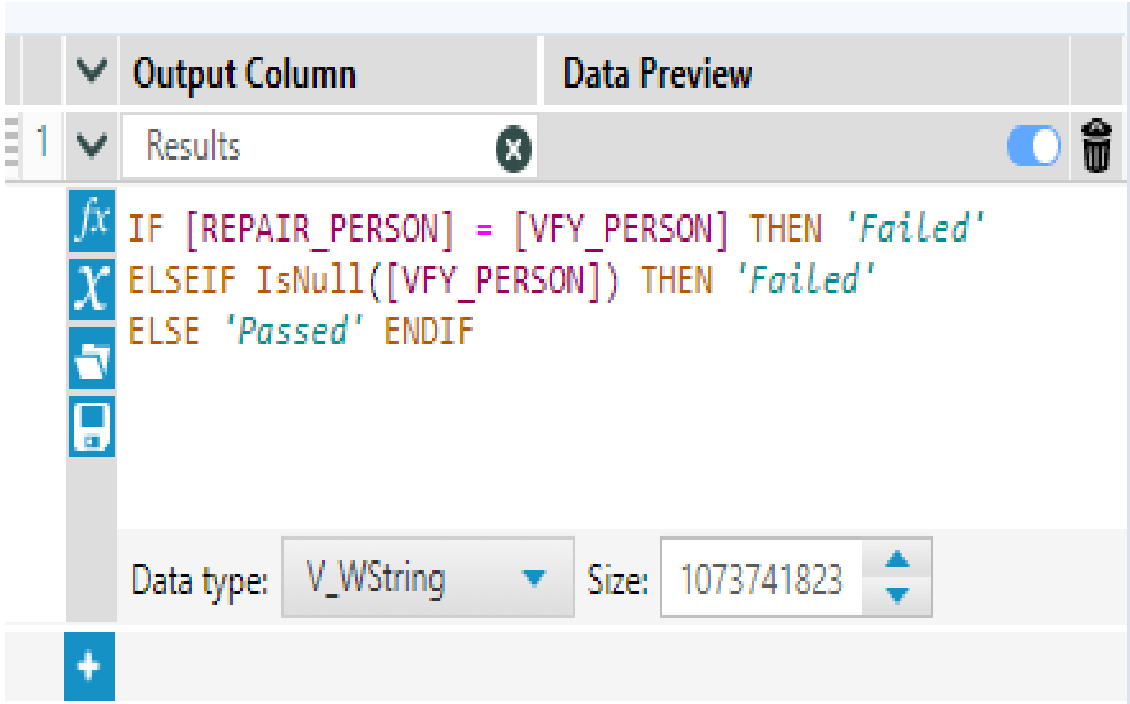
Segregation of Duties

Segregation of Duties

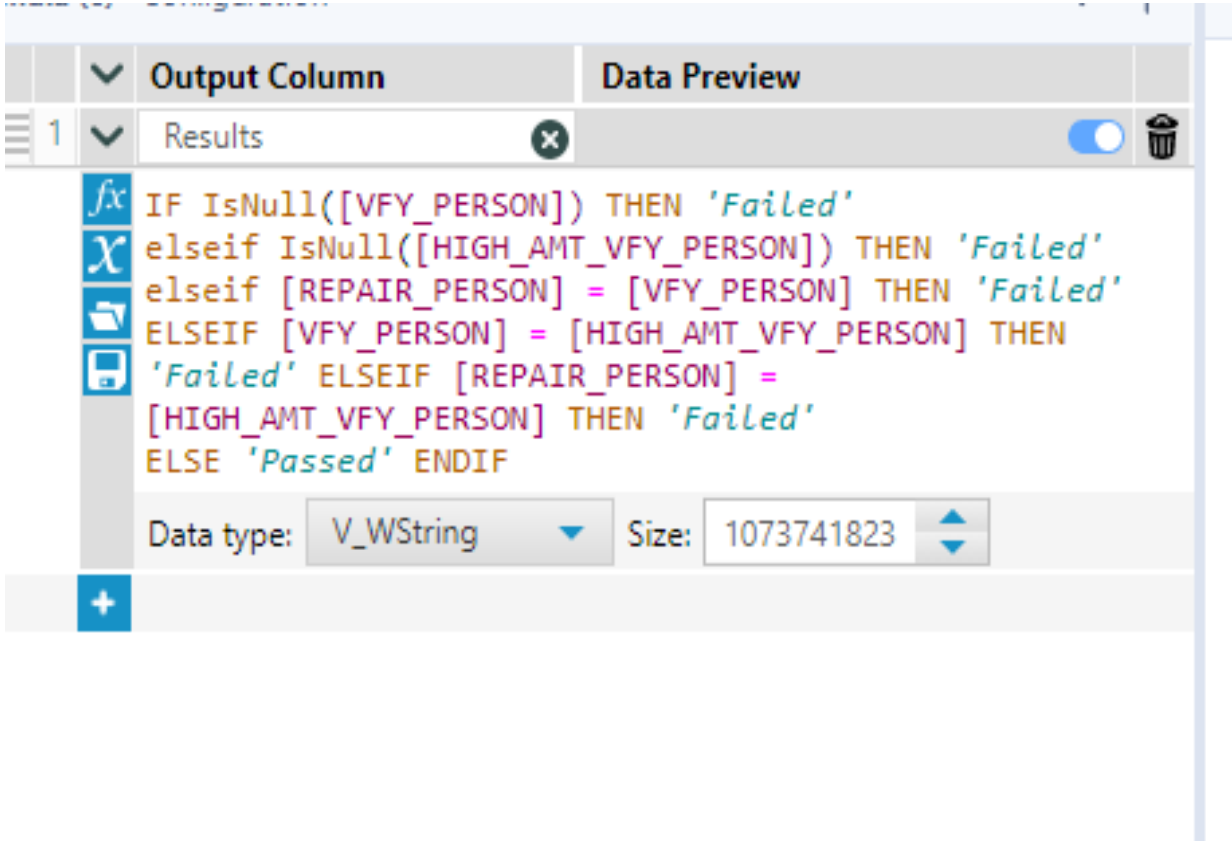


Segregation of Duties

4 eye check



6 eye check



Segregation of Duties

Results

Wire Transfer Number	Wire Amount	REPAIR_PERSON	VFY_Person	HIGH_AMT_VFY_PERSON	Results
992366565	$ 37,925,324.00	TAYTAY13	EMMA90	TAYTAY13	Failed
626165951	$ 25,321,945.28	JHURTS01	DSMITH06	GWEN07	Pass
626265959	$ 67,022,007.00	TAYTAY13	JHURTS01		Failed
958985216	$ 8,041,013.32	SPIDEY07	GWEN07		Pass
795896265	$ 50,024.34	EMMA90			Failed

SLA Calculations

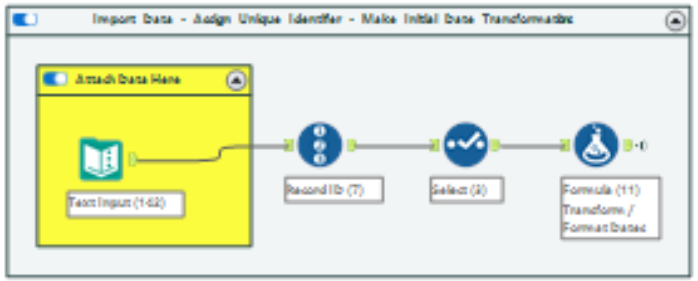
Anyone can use DateTimeDiff, what if the ask is more?

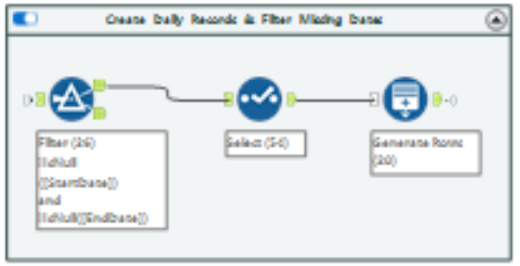
```
DateTimeDiff =
DateTimeDiff
([date1],
[date2], “days”)
```

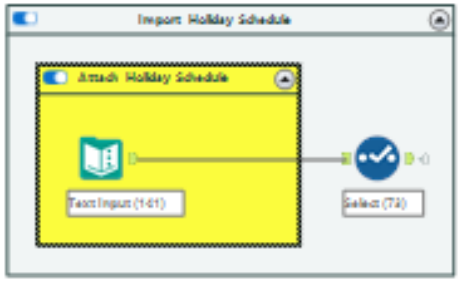
What if the ask….

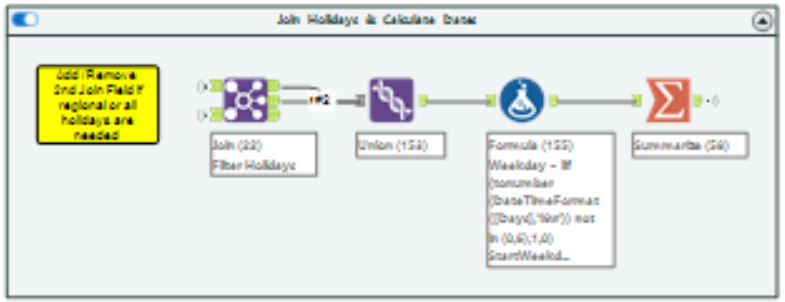
1. Requires excluding weekends
2. Requires excluding holidays
3. Requires excluding weekends and holidays
4. What about regional versus global holidays
5. Need beginner skill level (no apps – advanced functions)

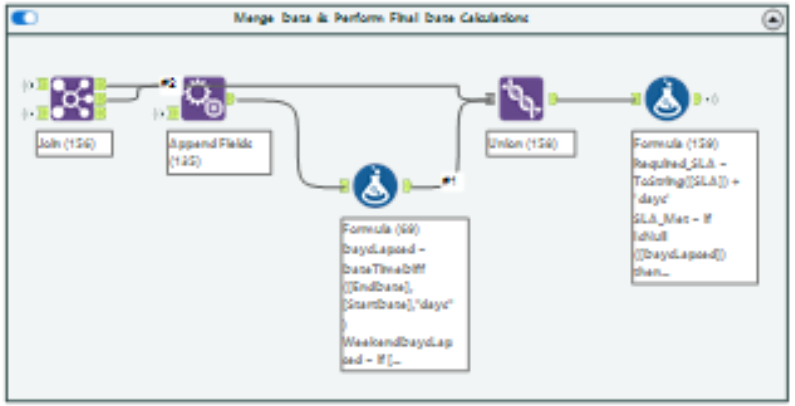
SLA Calculation Workflow with Options

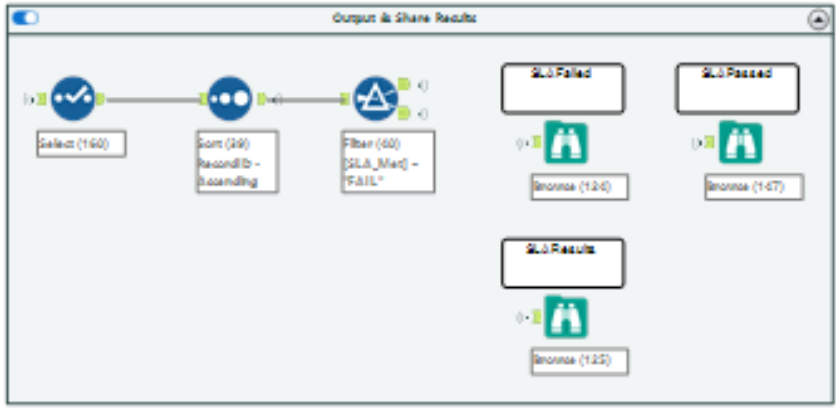












Update Required day SLA Here

Must specify if weekend days are excluded (use exactly):
Y / N

Must specify if holiday days are excluded (use exactly):
Y / N

Text Input (136) - Configuration

Delete Insert

	SLA	Exclude_Weekends	Exclude_Holidays
1	3	Y	Y
...			

Message (138) - Configuration

When To Send Message:

- ○ Before First Record
- ◉ Before Rows Where Expression is True

!isnumber([SLA]) or [Exclude_Weekends] not in ('Y','N') or [Exclude_Holida ...

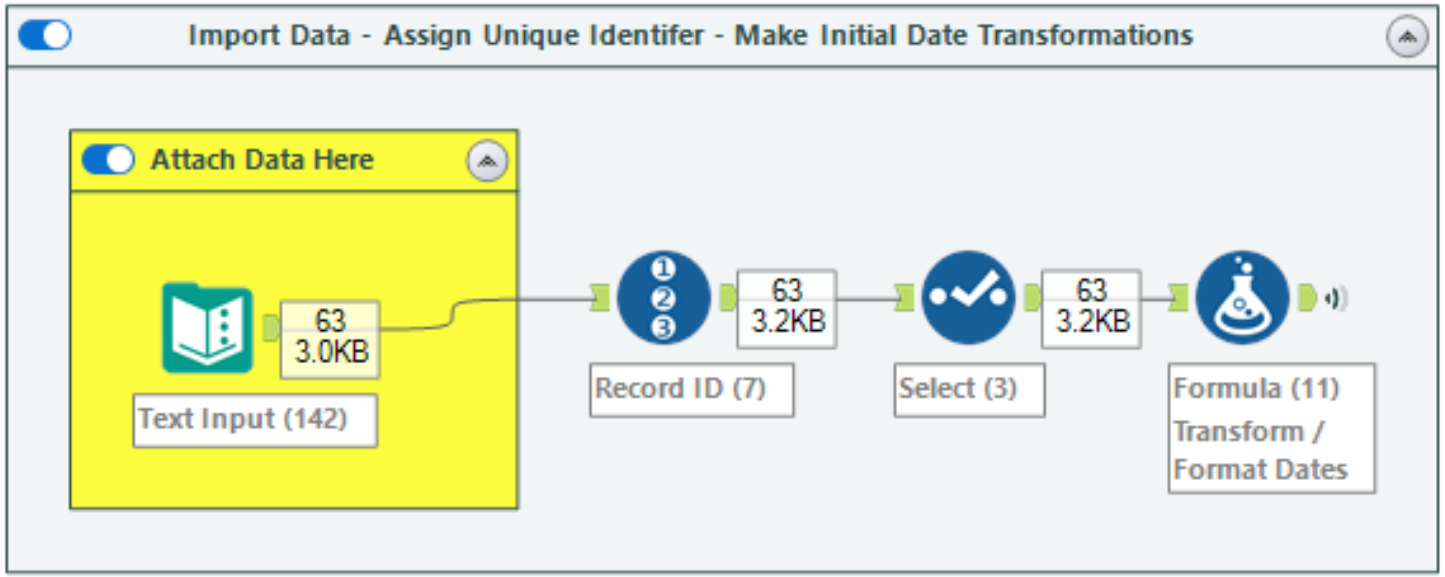
- ○ After Last Record
- ○ After All Down Stream Tools Have Completed

Message Type:
Error - And Stop Passing Records Through This Tool

Message Priority:
High

☐ Transient

Message Expression:
"Text Input Tool Contains Invalid Data" ...



Text Input (142) - Configuration

Delete Insert

	StartDateTime	EndDateTime	Country	Amount	Extra_I
1	2024-12-02 13:55:00	2024-12-02 17:22:00	Japan	2811	Y
2	2024-02-08 13:28:00	2024-02-08 21:15:00	Japan	4256	Y

Formula (11) - Configuration

	Output Column	Data Preview
1	Start_Date_Time	2024-12-02 13:55:00

```
DateTimeParse(TOSTRING([StartDateTime]), "%Y-%m-%d %H:%M:%S")
```

Data type: DateTime Size: 19

2	End_Date_Time	2024-12-02 17:22:00

```
DateTimeParse(TOSTRING([EndDateTime]), "%Y-%m-%d %H:%M:%S")
```

Data type: DateTime Size: 19

3	StartDate	2024-12-02

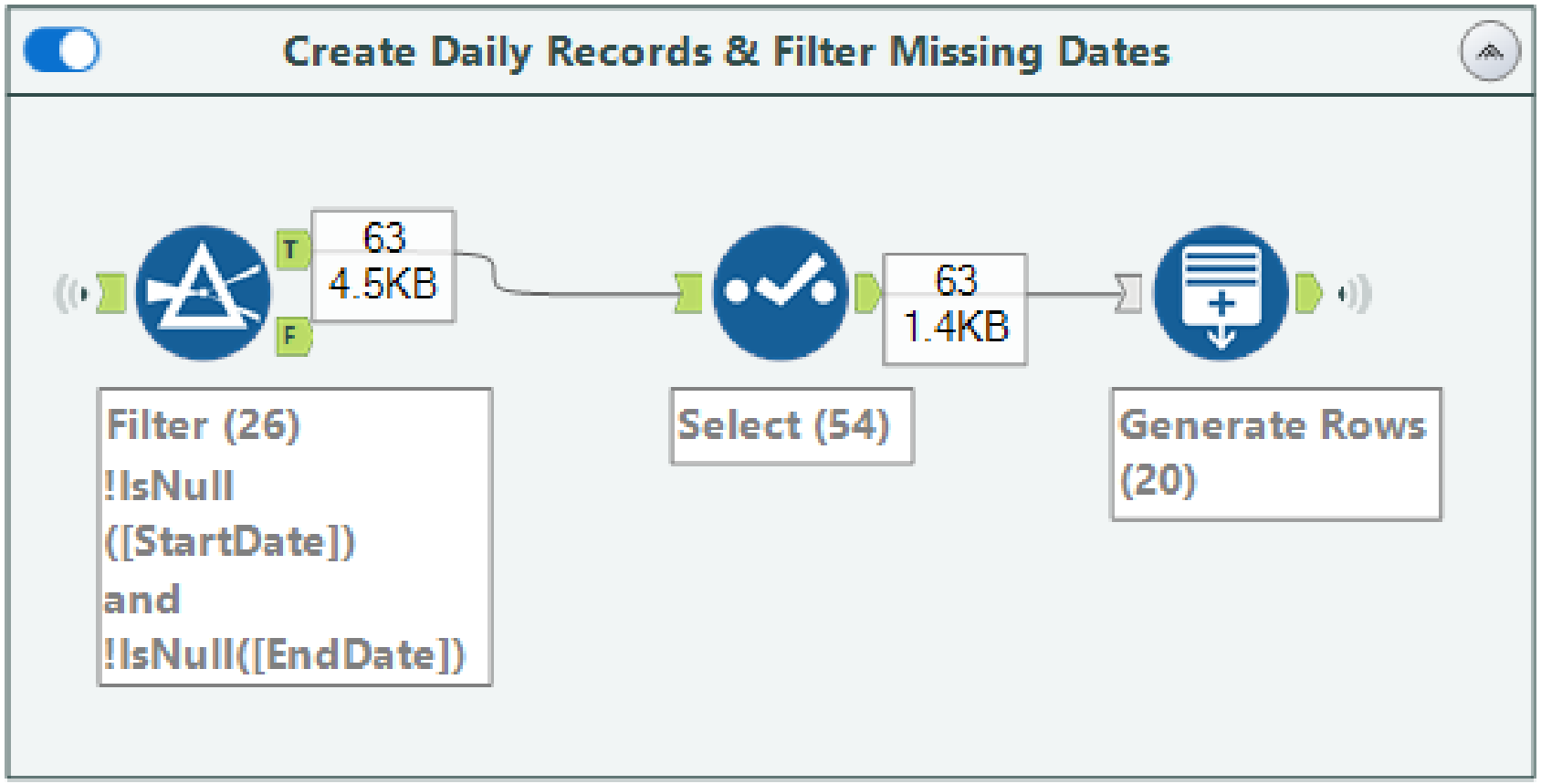
```
IF IsEmpty([Start_Date_Time]) THEN NULL() ELSE [Start_Date_Time] ENDIF
```

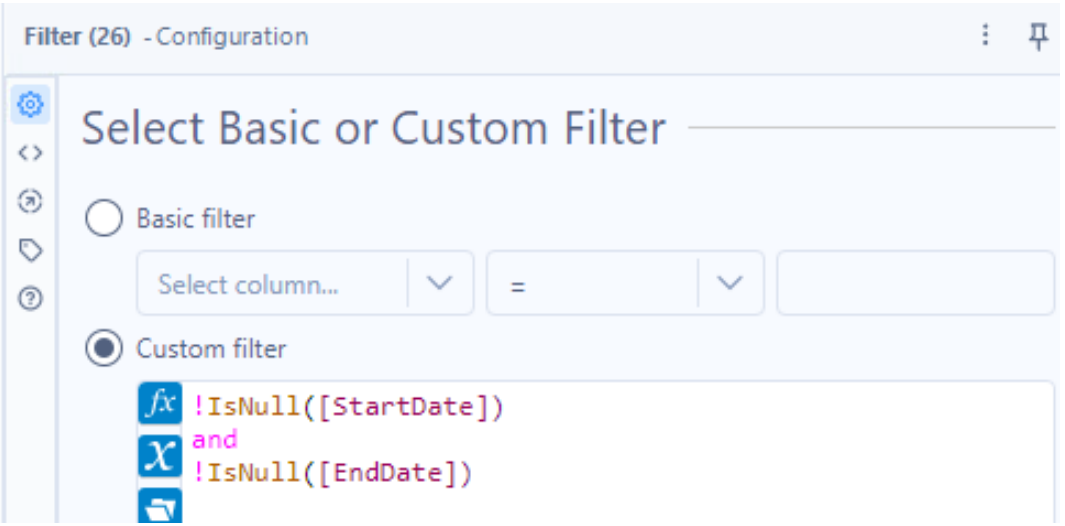
Data type: Date Size: 10

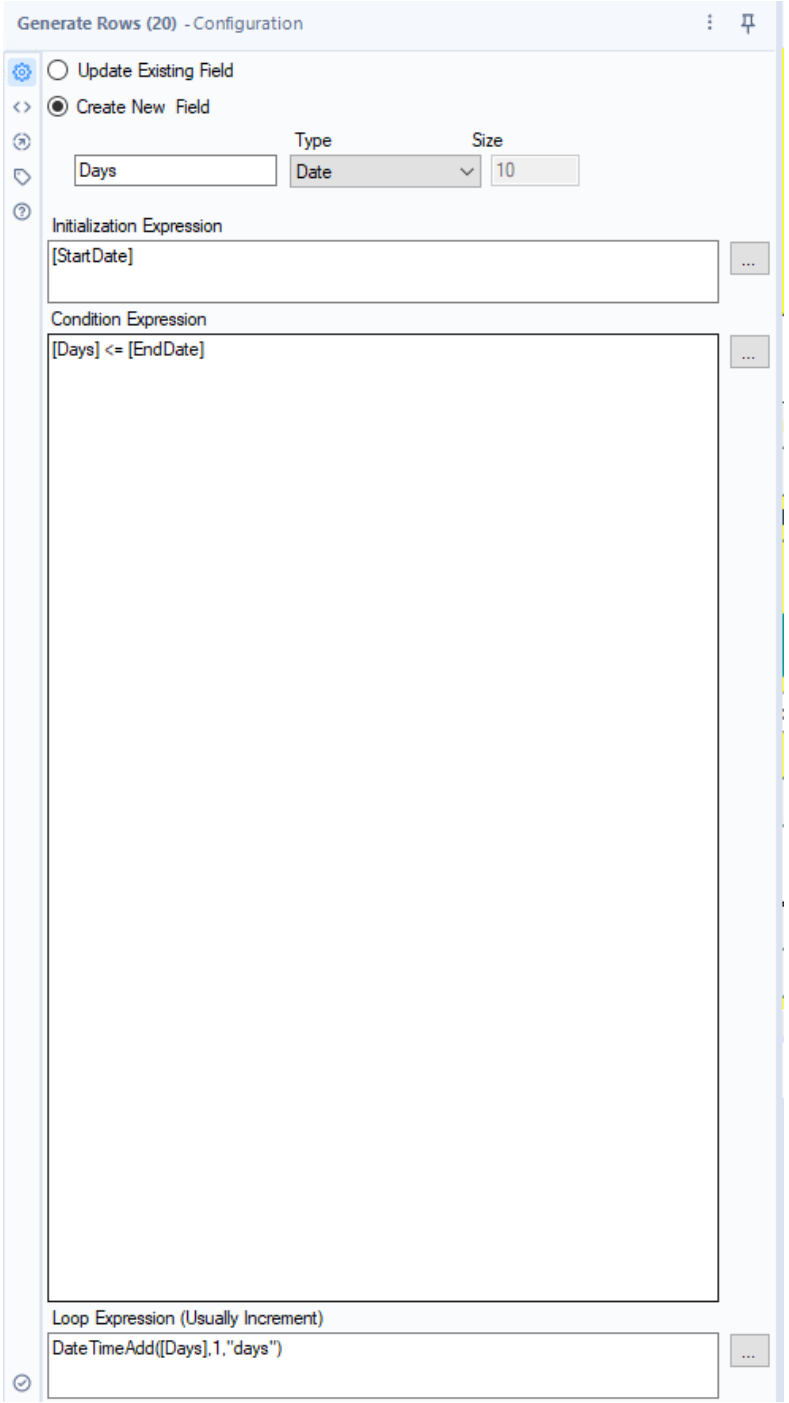
4	EndDate	2024-12-02

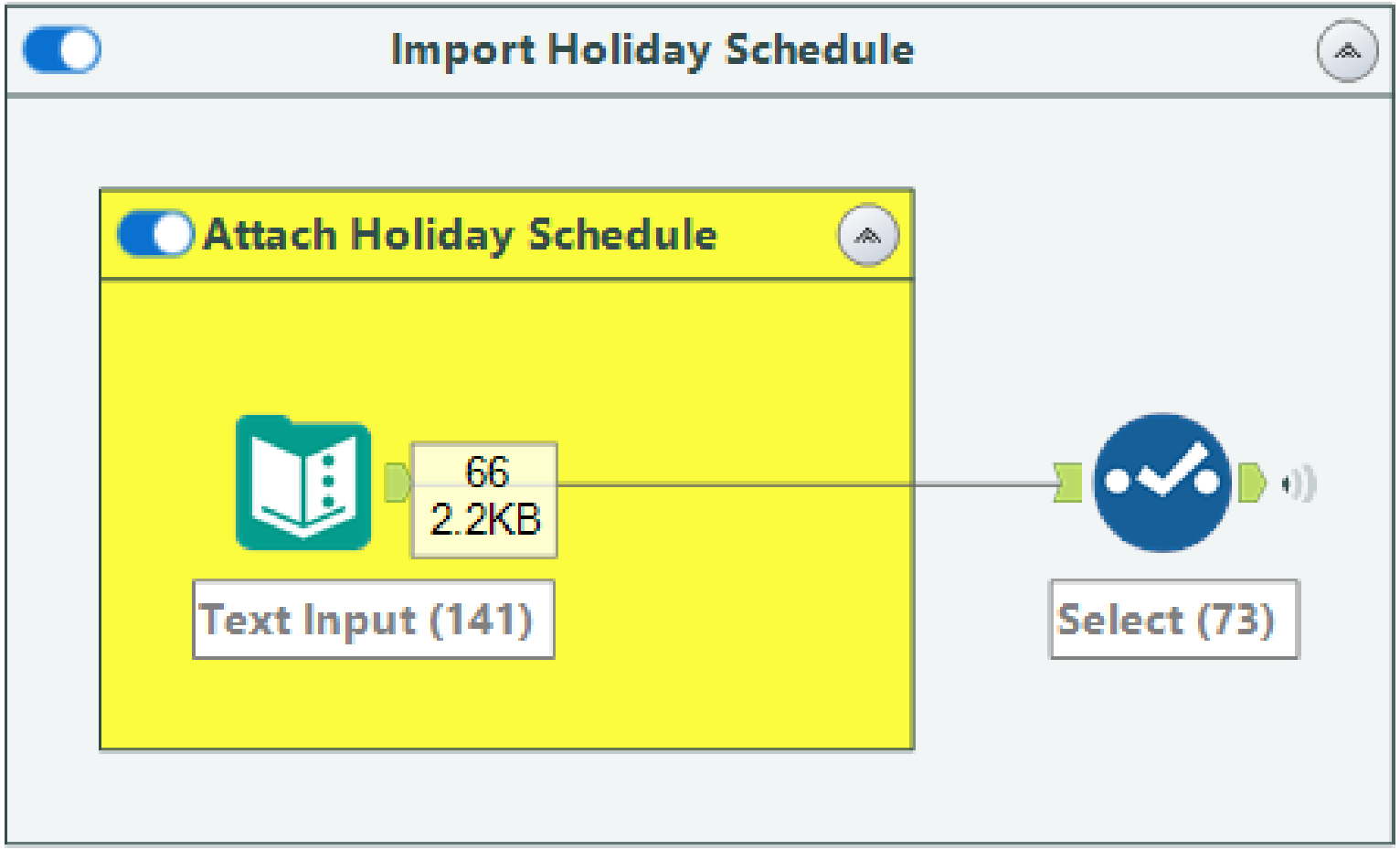
```
IF IsEmpty([End_Date_Time]) THEN NULL() ELSE [End_Date_Time] ENDIF
```

Data type: Date Size: 10


Create Daily Records & Filter Missing Dates
T
F
63
4.5KB
63
1.4KB
Filter (26)
!IsNull
([StartDate])
and
!IsNull([EndDate])
Select (54)
Generate Rows
(20)


Filter (26) - Configuration
Select Basic or Custom Filter
Basic filter
Select column...
=
Custom filter
!IsNull([StartDate])
and
!IsNull([EndDate])

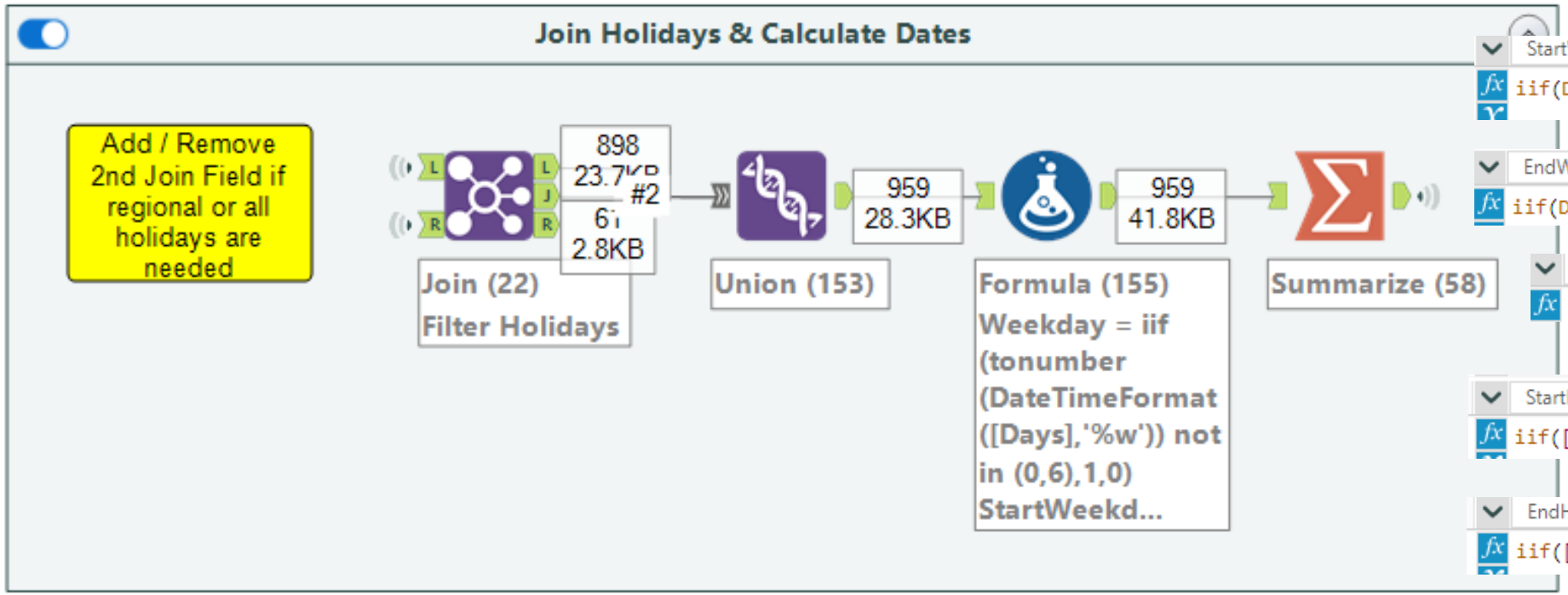

Generate Rows (20) - Configuration
Update Existing Field
Create New Field
Type
Size
Days
Date
10
Initialization Expression
[StartDate]
Condition Expression
[Days] <= [EndDate]
Loop Expression (Usually Increment)
DateTimeAdd([Days],1,"days")

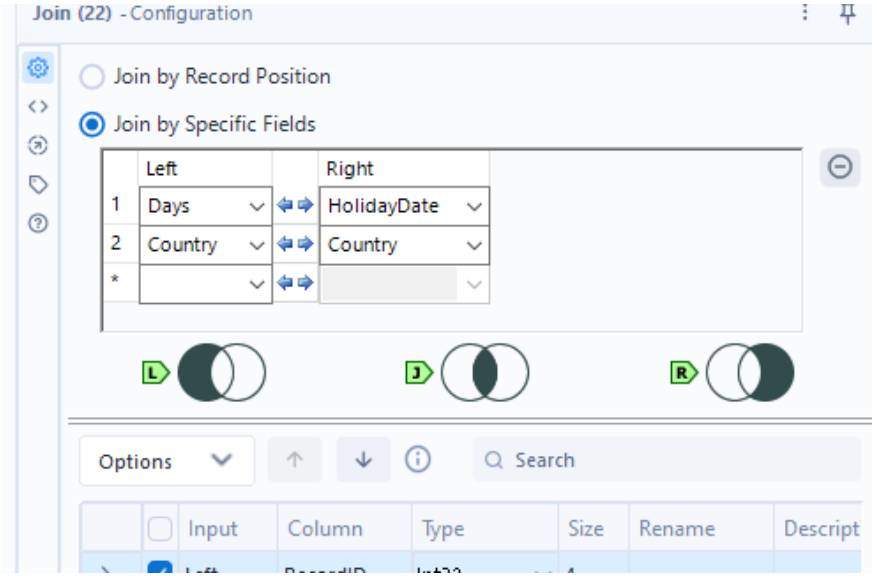


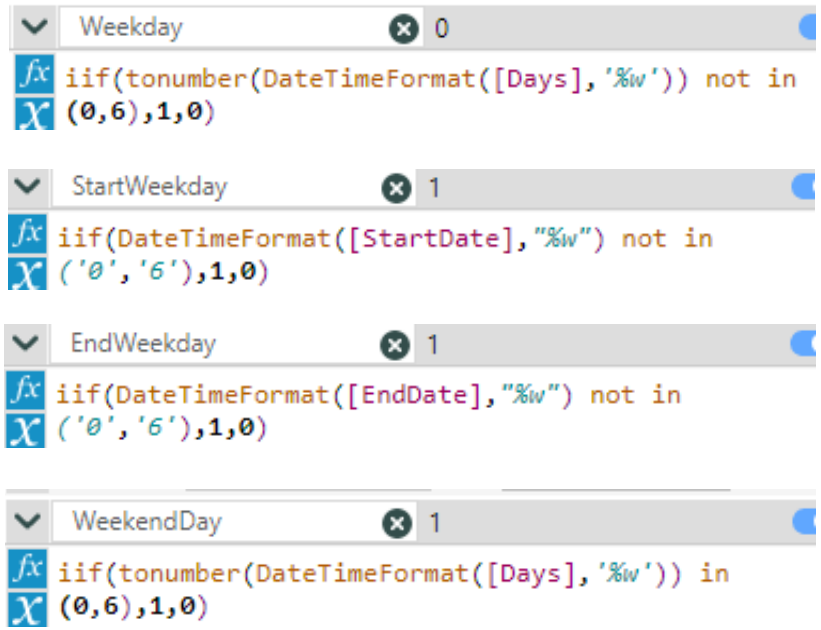
Text Input (141) - Configuration

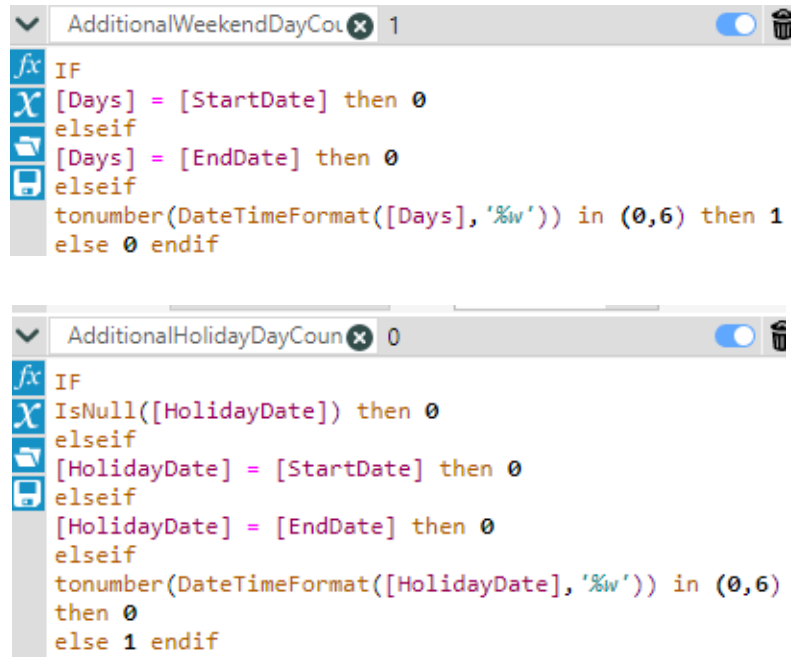
Delete Insert

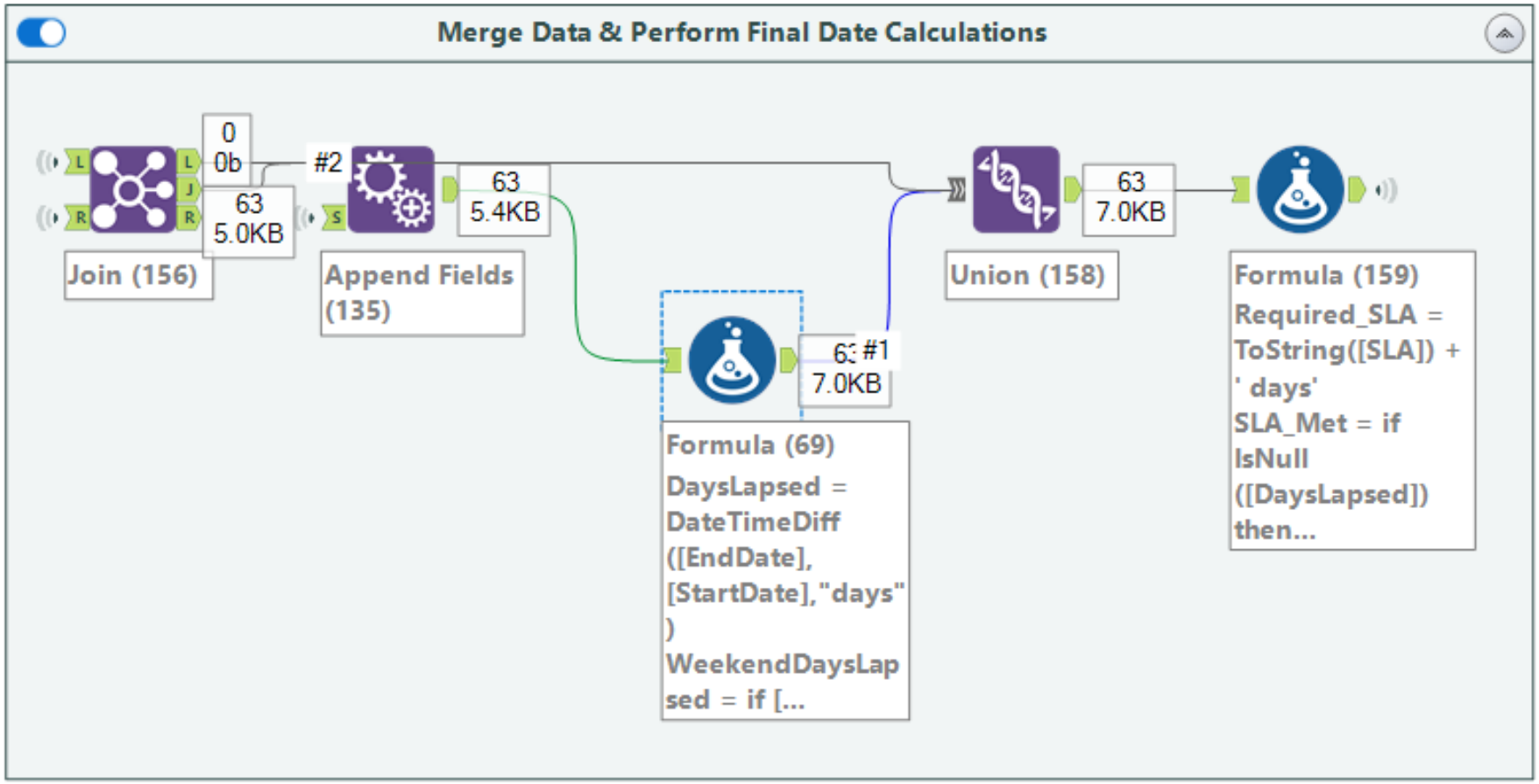
	Country	HolidayName	HolidayDate
1	Germany	New Year's Day	2024-01-01
2	Germany	Good Friday	2024-03-29
3	Germany	Easter Monday	2024-04-01
4	Germany	Labour Day	2024-05-01
5	Germany	Ascension Day	2024-05-09
6	Germany	Whit Monday	2024-05-20
7	Germany	German Unity Day	2024-10-03
8	Germany	Christmas Day	2024-12-25
9	Germany	Second Day of Christmas	2024-12-26
10	India	Republic Day	2024-01-26
11	India	Holi	2024-03-25
12	India	Good Friday	2024-03-29
13	India	Id-ul-Fitr	2024-04-11
14	India	Ram Navami	2024-04-17
15	India	Mahavir Jayanti	2024-04-21
16	India	Buddha Purnima	2024-05-23
17	India	Id-ul-Zuha (Bakrid)	2024-06-17
18	India	Muharram	2024-07-17
19	India	Independence Day	2024-08-15
20	India	Janmashtami (Vaishnava)	2024-08-26
21	India	Milad-un-Nabi / Id-e-Milad	2024-09-16
22	India	Mahatma Gandhi's Birthday	2024-10-02
23	India	Dussehra	2024-10-12
24	India	Diwali (Deepavali)	2024-10-31
25	India	Guru Nanak's Birthday	2024-11-15
26	India	Christmas Day	2024-12-25
27	Japan	New Year's Day	2024-01-01
28	Japan	Coming of Age Day	2024-01-08


Join Holidays & Calculate Dates
Add / Remove 2nd Join Field if regional or all holidays are needed
898
23.7KB
#2
61
2.8KB
Join (22)
Filter Holidays
959
28.3KB
Union (153)
959
41.8KB
Formula (155)
Weekday = iif (tonumber (DateTimeFormat ([Days],'%w')) not in (0,6),1,0)
StartWeekd...
Summarize (58)
StartWeekendDay 0
iif(DateTimeFormat([StartDate],"%w") in ('0','6'),1,0)
EndWeekendDay 0
iif(DateTimeFormat([EndDate],"%w") in ('0','6'),1,0)
Holiday 1
iif([HolidayDate] = [Days],1,0)
StartHolidayDay 0
iif([HolidayDate] = [StartDate],1,0)
EndHolidayDay 0
iif([HolidayDate] = [EndDate],1,0)


Join (22) - Configuration
Join by Record Position
Join by Specific Fields
Left
Right
1 Days HolidayDate
2 Country Country
Options
Search
Input
Column
Type
Size
Rename
Descript


Weekday 0
iif(tonumber(DateTimeFormat([Days],'%w')) not in (0,6),1,0)
StartWeekday 1
iif(DateTimeFormat([StartDate],"%w") not in ('0','6'),1,0)
EndWeekday 1
iif(DateTimeFormat([EndDate],"%w") not in ('0','6'),1,0)
WeekendDay 1
iif(tonumber(DateTimeFormat([Days],'%w')) in (0,6),1,0)


AdditionalWeekendDayCou 1
IF
[Days] = [StartDate] then 0
elseif
[Days] = [EndDate] then 0
elseif
tonumber(DateTimeFormat([Days],'%w')) in (0,6) then 1
else 0 endif
AdditionalHolidayDayCoun 0
IF
IsNull([HolidayDate]) then 0
elseif
[HolidayDate] = [StartDate] then 0
elseif
[HolidayDate] = [EndDate] then 0
elseif
tonumber(DateTimeFormat([HolidayDate],'%w')) in (0,6)
then 0
else 1 endif



Total_Days_Excluded 2

```
if
[Exclude_Weekends] = 'N' and [Exclude_Holidays] = 'N'
then 0

elseif
[DaysLapsed] = 0 then 0

elseif
[Exclude_Weekends] = 'Y' and [Exclude_Holidays] = 'Y'
then
iif([WeekendDaysLapsed] + [HolidayDaysLapsed] >=
[DaysLapsed],[DaysLapsed],[WeekendDaysLapsed] +
[HolidayDaysLapsed])

elseif
[Exclude_Weekends] = 'Y' and [Exclude_Holidays] = 'N'
then
iif([WeekendDaysLapsed] >= [DaysLapsed], [DaysLapsed],
[WeekendDaysLapsed])

elseif
[Exclude_Weekends] = 'N' and [Exclude_Holidays] = 'Y'
then
iif([HolidayDaysLapsed] >= [DaysLapsed], [DaysLapsed],
[HolidayDaysLapsed])

else 0 endif
```

Days_Lapsed_Net 0

```
[DaysLapsed] - [Total_Days_Excluded]
```

DaysLapsed 2

```
DateTimeDiff([EndDate],[StartDate],"days")
```

WeekendDaysLapsed 2

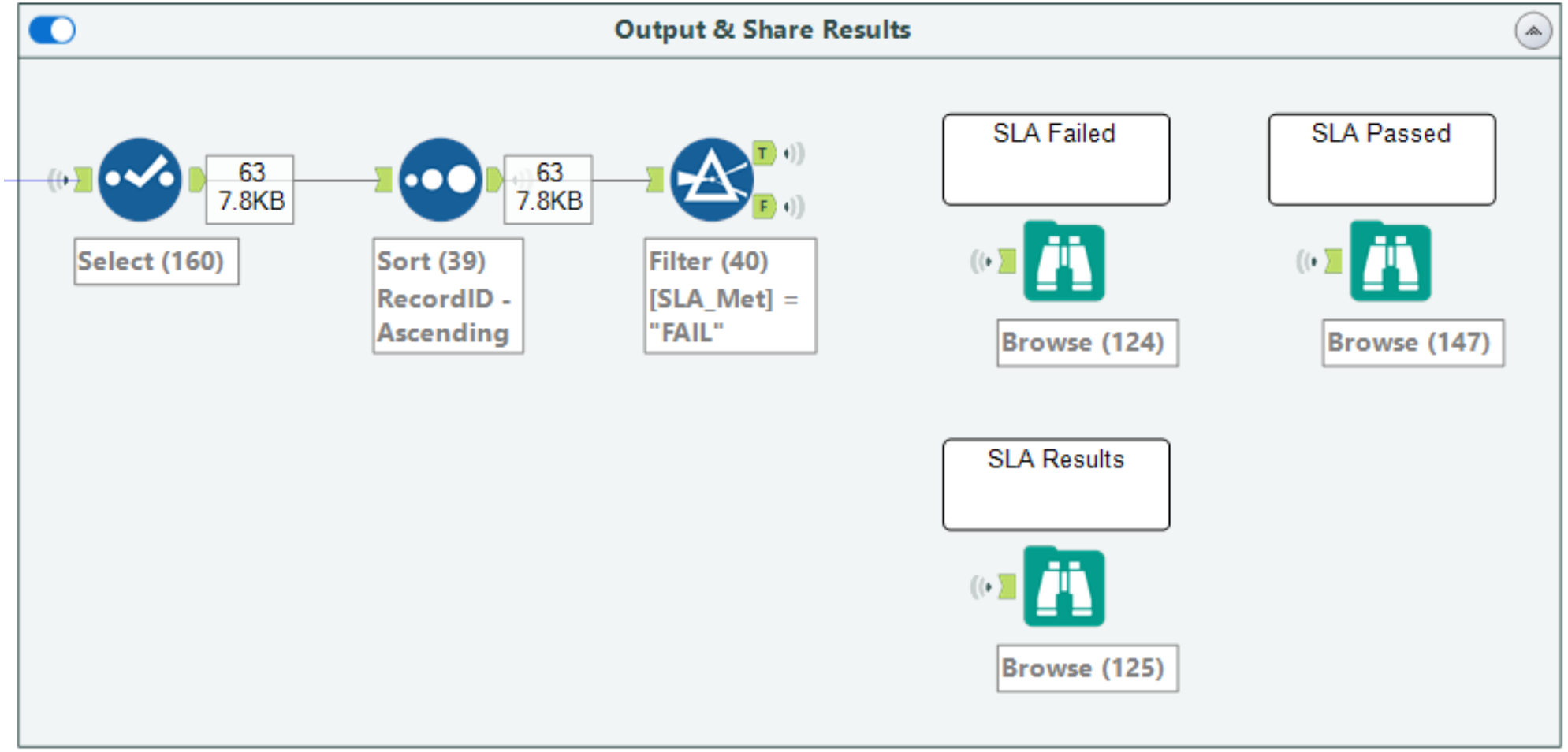
```
if [DaysLapsed] = 0 then 0

else

iif([StartWeekendDay] = 1,1,0)
+
iif([EndWeekendDay] = 1,1,0)
+
[AdditionalWeekendDayCount]

endif
```

HolidayDaysLapsed 0

```
if [DaysLapsed] = 0 then 0

else

iif([StartHolidayDay] = 1,1,0)
+
iif([EndHolidayDay] = 1,1,0)
+
[AdditionalHolidayDayCount]

endif
```

Days_Lapsed_Net_Grouped Same Day

```
if [Days_Lapsed_Net] >= 1 and [Days_Lapsed_Net] <= 3
then '1-3 Days'
elseif
[Days_Lapsed_Net] >= 4 and [Days_Lapsed_Net] <= 10
then '4-10 Days'
elseif
[Days_Lapsed_Net] >= 11 and [Days_Lapsed_Net] <= 20
then '11-20 Days'
elseif
[Days_Lapsed_Net] >= 21 and [Days_Lapsed_Net] <= 30
then '21-30 Days'
elseif
[Days_Lapsed_Net] = 0 then 'Same Day'
else '30+ Days' endif
```



Results - Browse (125) - Input

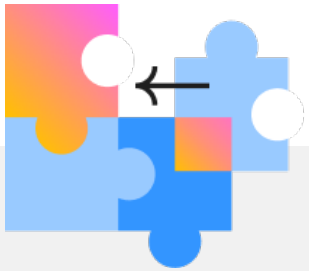
28 of 28 Fields | Cell Viewer | 63 records displayed, 7,756 bytes | Search | Data | Metadata | Actions

Record	StartDateTime	EndDateTime	Country	Amount	Extra_Notes	ExampleType	Start_Date_Time	End_Date_Time	StartDate	EndDate	Sta
1	2024-12-02 13:55:00	2024-12-02 17:22:00	Japan	2811	Y	same_day_weekday	2024-12-02 13:55:00	2024-12-02 17:22:00	2024-12-02	2024-12-02	0
2	2024-02-08 13:28:00	2024-02-08 21:15:00	Japan	4256	Y	same_day_weekday	2024-02-08 13:28:00	2024-02-08 21:15:00	2024-02-08	2024-02-08	0

Act 4: Scaling with Advanced Capabilities

Introduced advanced workflow capabilities like macros

Established standards for scalable reuse



Embedded best practices into repeatable workflows

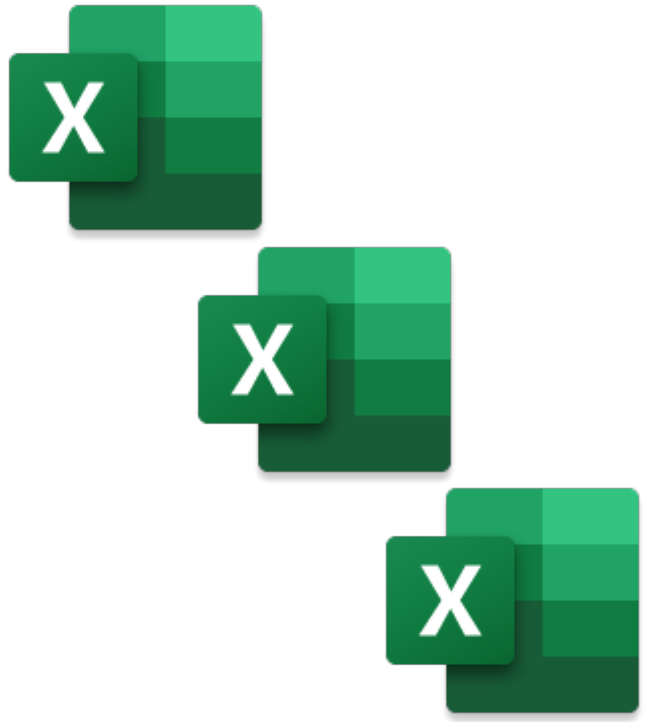
Improved consistency and accelerated delivery

Marked a pivotal shift from executing analytics to building solutions

Actively building, refining, and innovating

Import Multiple Files & Tabs

Let’s import multiple Excel files each with multiple sheets!



Challenges of Multiple File Imports

1. Schema has changed errors
2. Field counts do not match
3. Silent Failures
    I. Not adding all columns
    II. Not adding all records from all files
    III. Not adding all records from all tabs in a file
4. Need to combine and analyze data from all files as a single record set

sample_workbook_1.xlsx – 2 Sheets, 9 Columns Each

Sheet1

RecordID	Category	StartDate	EndDate	Amount	Extra_1_A	Extra_1_B	Extra_1_C	New_Column
1	CAT2	2025-05-21 00:00:00	2025-09-27 00:00:00	960	No	62	0.1	A
2	CAT3	2025-05-06 00:00:00	2025-05-12 00:00:00	3872	No	62	0.66	D

Sheet2

RecordID	Category	StartDate	EndDate	Amount	Extra_2_A	Extra_2_B	Extra_2_C	Added_Column
1	CAT2	2025-05-31 00:00:00	2025-07-23 00:00:00	1600	No	12	-1.39	A
2	CAT4	2025-11-18 00:00:00	2026-01-25 00:00:00	4898	Yes	34	-2.62	D

sample_workbook_2.xlsx – 2 Sheets, 7 Columns Each

Sheet1

RecordID	Category	StartDate	EndDate	Amount	Extra_1_A	Extra_1_B
1	CAT4	2025-08-05 00:00:00	2025-12-11 00:00:00	2775	No	38
2	CAT1	2025-11-02 00:00:00	2025-12-17 00:00:00	1382	No	24

Sheet2

RecordID	Category	StartDate	EndDate	Amount	Extra_2_A	Extra_2_B
1	CAT1	2025-10-29 00:00:00	2026-03-09 00:00:00	1943	Yes	3
2	CAT4	2025-10-11 00:00:00	2025-12-10 00:00:00	588	No	20

Only 4 columns match?

sample_workbook_3.xlsx – 3 Sheets, 7-8 Columns Each

Sheet1

RecordID	Category	StartDate	EndDate	Amount	Extra_1_A	Extra_1_B
1	CAT1	2025-07-14 00:00:00	2025-08-04 00:00:00	4286	No	31
2	CAT4	2025-12-13 00:00:00	2026-02-23 00:00:00	813	No	1

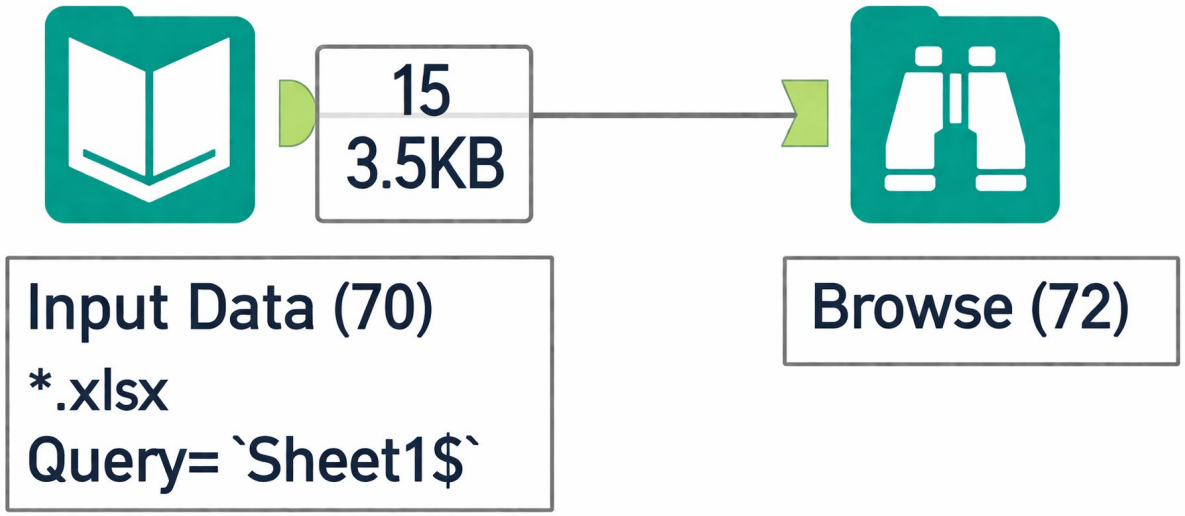
Sheet2

RecordID	Category	StartDate	EndDate	Amount	Extra_2_A	Extra_2_B	Extra_2_C
1	CAT4	2025-05-07 00:00:00	2025-06-14 00:00:00	2879	Yes	99	-0.74
2	CAT1	2025-11-23 00:00:00	2026-01-21 00:00:00	4236	No	1	-0.65

Sheet3

RecordID	Category	StartDate	EndDate	Amount	Extra_3_A	Extra_3_B	Extra_3_C
1	CAT1	2025-03-07 00:00:00	2025-06-01 00:00:00	1458	No	96	0.24
2	CAT5	2025-11-15 00:00:00	2026-02-20 00:00:00	2582	Yes	67	-1.22

Method 1 – Silent Failure - First File, First Tab Only

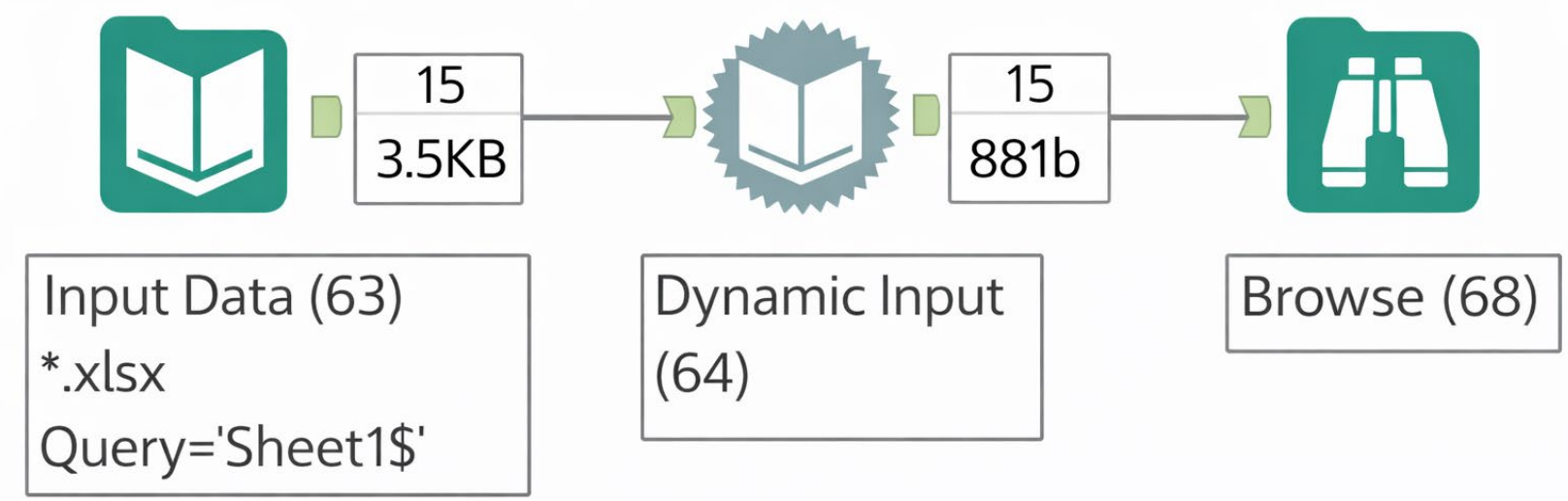


Results - Browse (72) - Input

10 of 10 Fields | Cell Viewer | 15 records displayed, 3,289 bytes | Search | Data

Record	RecordID	Category	StartDate	EndDate	Amount	Extra_1_A	Extra_1_B	Extra_1_C	New_Column	FileName
1	1	CAT2	2025-05-21	2025-09-27	960	No	62	0.1	A	\\Alteryx T
2	2	CAT3	2025-05-06	2025-05-12	3872	No	62	0.66	D	\\Alteryx T

Method 2 – Silent Failure - First File, First Tab Only, No Filename

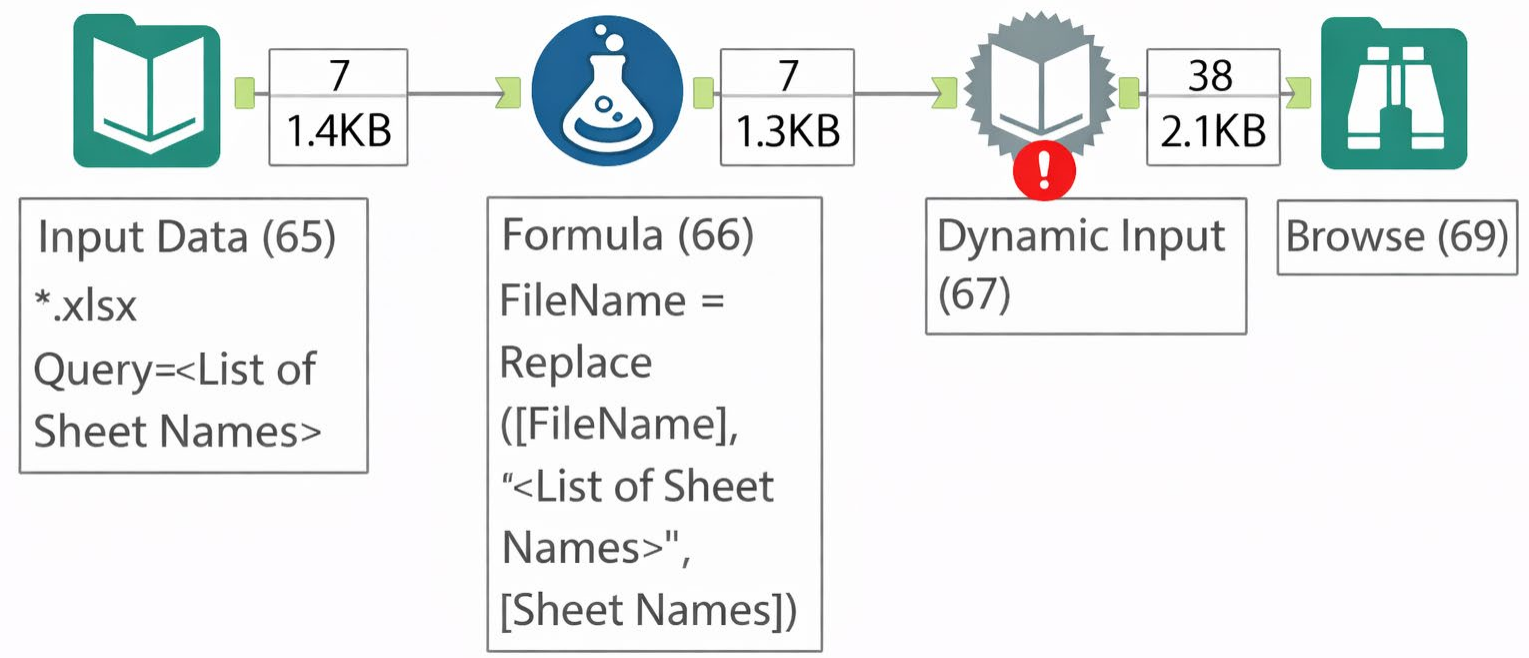


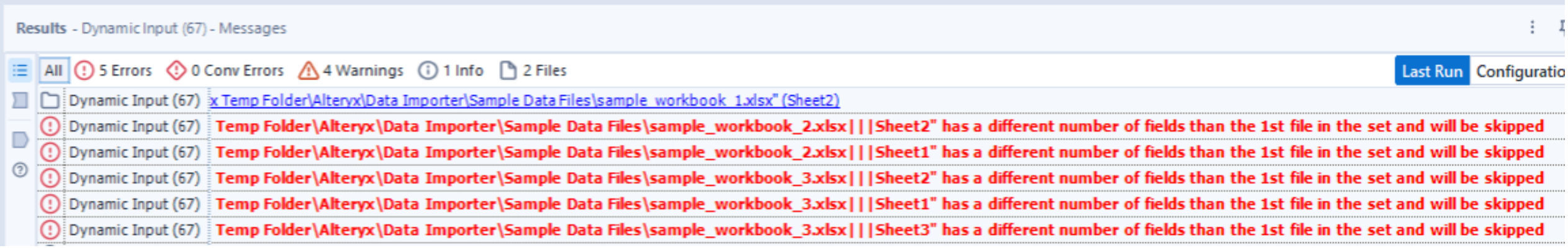
Results - Browse (68) - Input

9 of 9 Fields | Cell Viewer | 15 records displayed, 2,913 bytes | Search

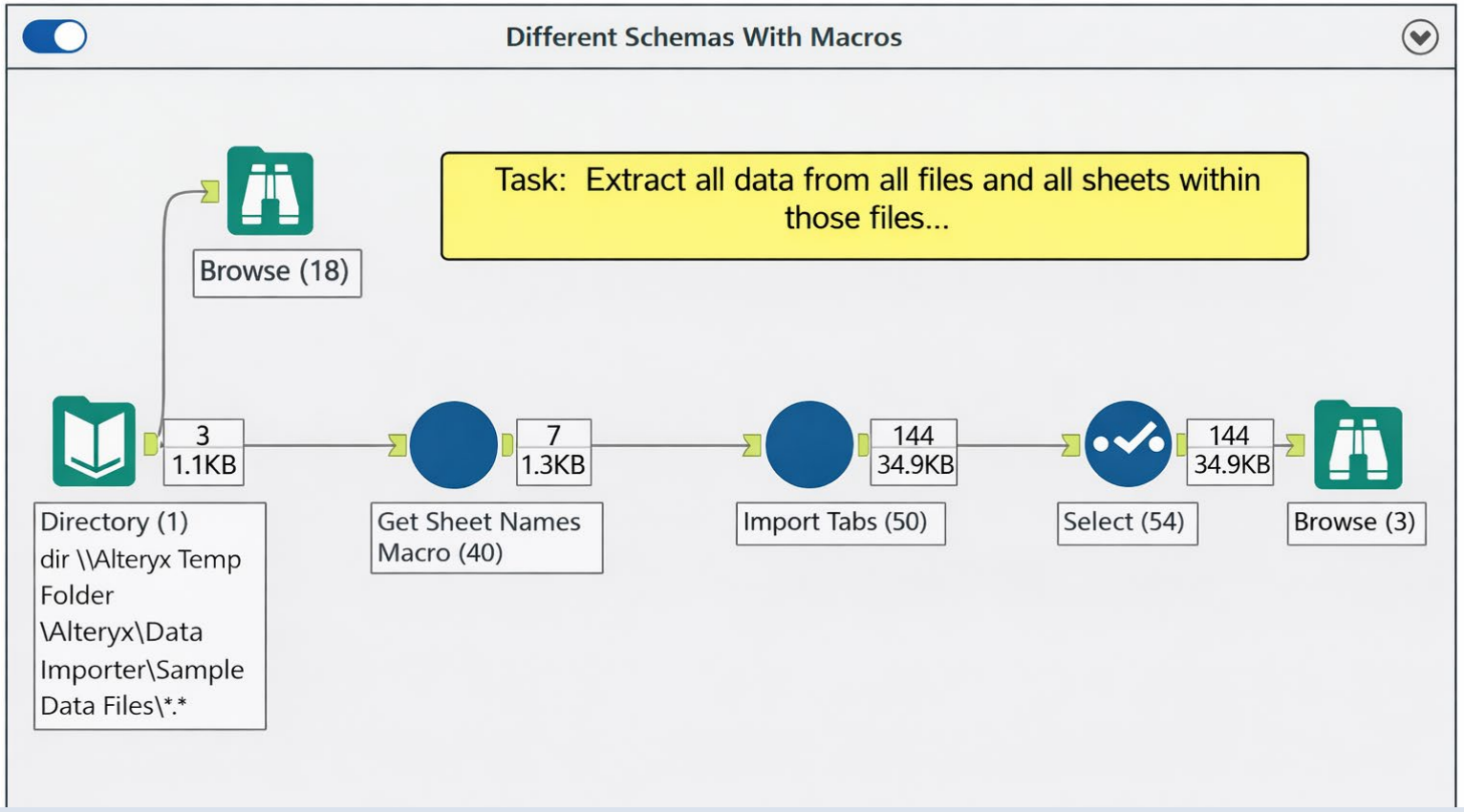
Record	RecordID	Category	StartDate	EndDate	Amount	Extra_1_A	Extra_1_B	Extra_1_C	New_Column
1	1	CAT2	2025-05-21	2025-09-27	960	No	62	0.1	A
2	2	CAT3	2025-05-06	2025-05-12	3872	No	62	0.66	D

Method 3 – Workflow Error- First File, Both Tabs, No Filename, No Data Output





Method 4 – Workflow Success – All Tabs, Filenames Included

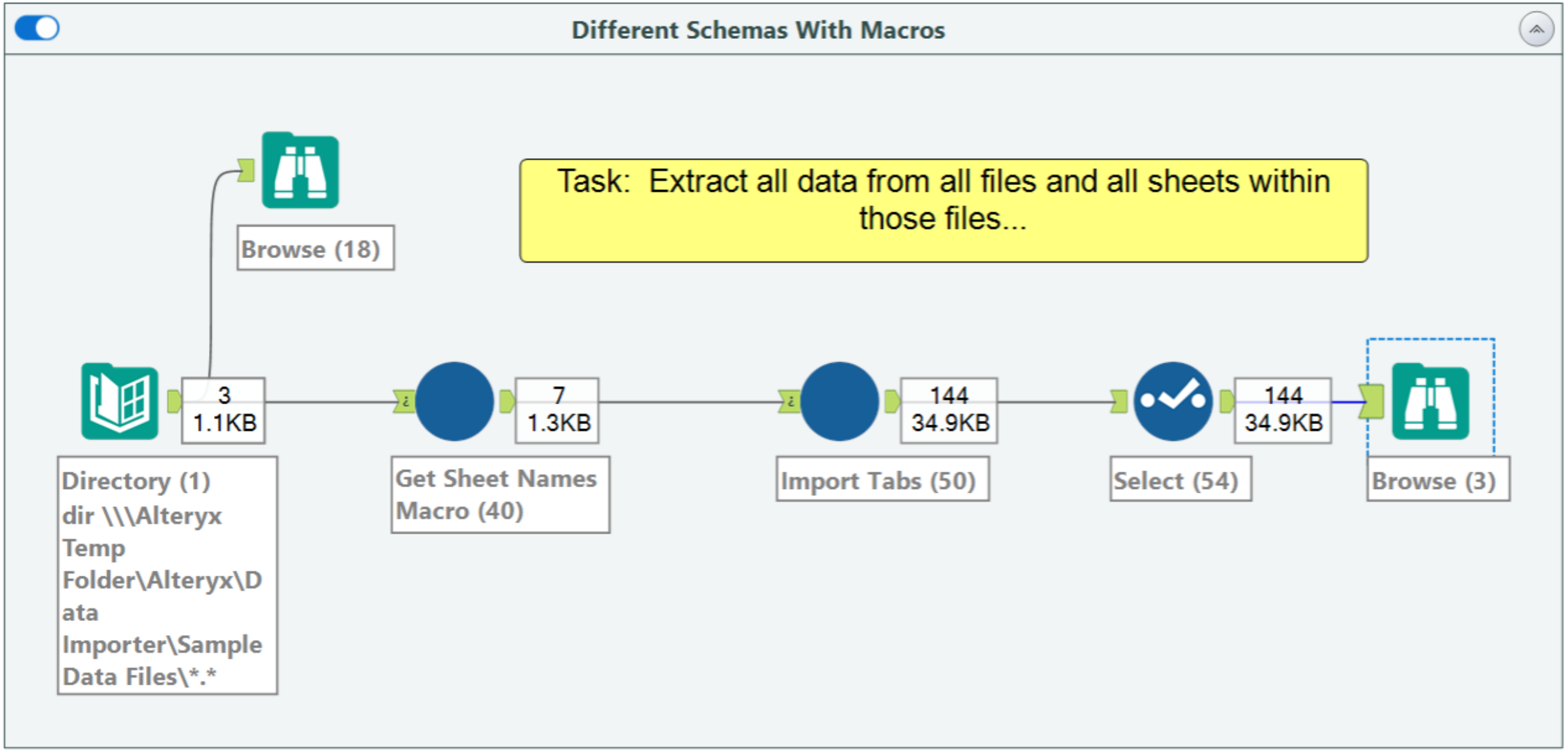


Results - Browse (3) - Input

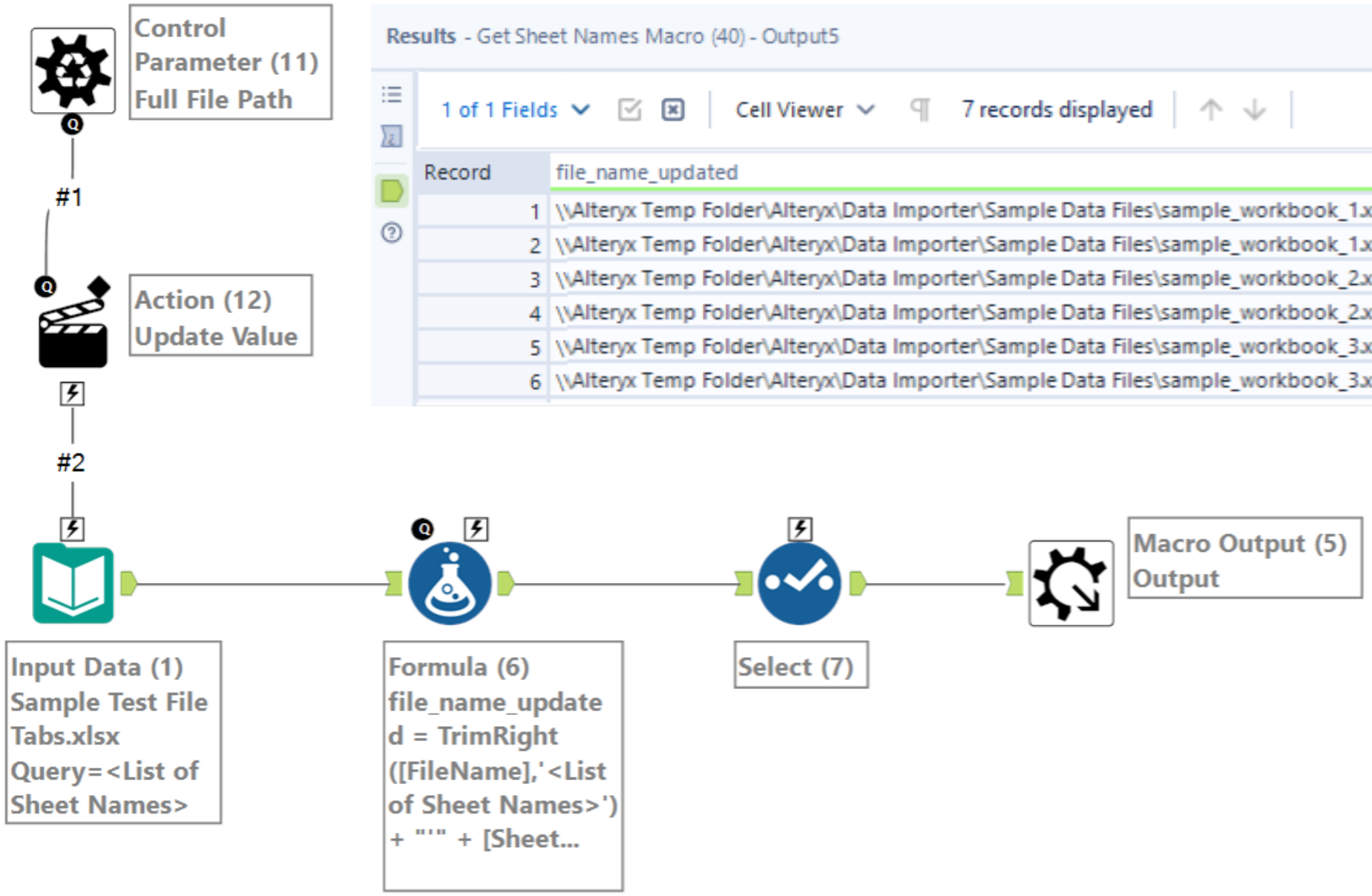
17 of 17 Fields | Cell Viewer | 144 records displayed, 8,183 bytes | Search | Data | Metadata | Actio

Record	RecordID	Category	StartDate	EndDate	Amount	Extra_1_A	Extra_1_B	Extra_1_C	Extra_2_A	Extra_2_B	Extra_2_C	Extra_3_A	Extra_3_B	Extra_3_C	New_Column	Added_Column	FileName
1	1	CAT2	2025-05-21	2025-09-27	960	No	62	0.1	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	A	[Null]	\\Alteryx
2	2	CAT3	2025-05-06	2025-05-12	3872	No	62	0.66	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	D	[Null]	\\Alteryx

Workflow with 2 Batch Macros



Workflow with 2 Batch Macros: Get Sheet Names Macros

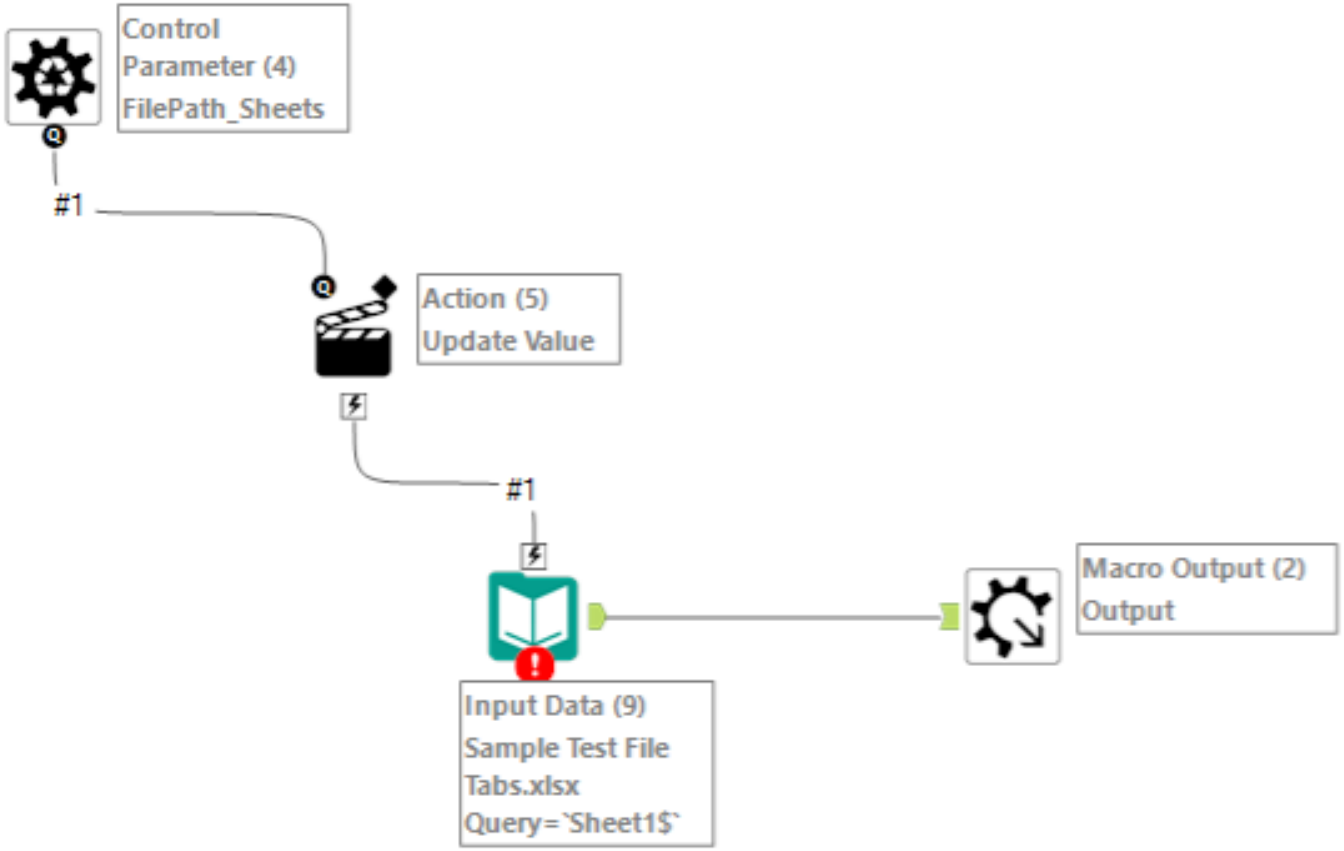


Results - Get Sheet Names Macro (40) - Output5

1 of 1 Fields | Cell Viewer | 7 records displayed

Record	file_name_updated
1	\\Alteryx Temp Folder\Alteryx\Data Importer\Sample Data Files\sample_workbook_1.xlsx|||'Sheet1$'
2	\\Alteryx Temp Folder\Alteryx\Data Importer\Sample Data Files\sample_workbook_1.xlsx|||'Sheet2$'
3	\\Alteryx Temp Folder\Alteryx\Data Importer\Sample Data Files\sample_workbook_2.xlsx|||'Sheet1$'
4	\\Alteryx Temp Folder\Alteryx\Data Importer\Sample Data Files\sample_workbook_2.xlsx|||'Sheet2$'
5	\\Alteryx Temp Folder\Alteryx\Data Importer\Sample Data Files\sample_workbook_3.xlsx|||'Sheet1$'
6	\\Alteryx Temp Folder\Alteryx\Data Importer\Sample Data Files\sample_workbook_3.xlsx|||'Sheet2$'

Workflow with 2 Batch Macros: Import Tabs Macro



Results - Import Tabs (50) - Output5

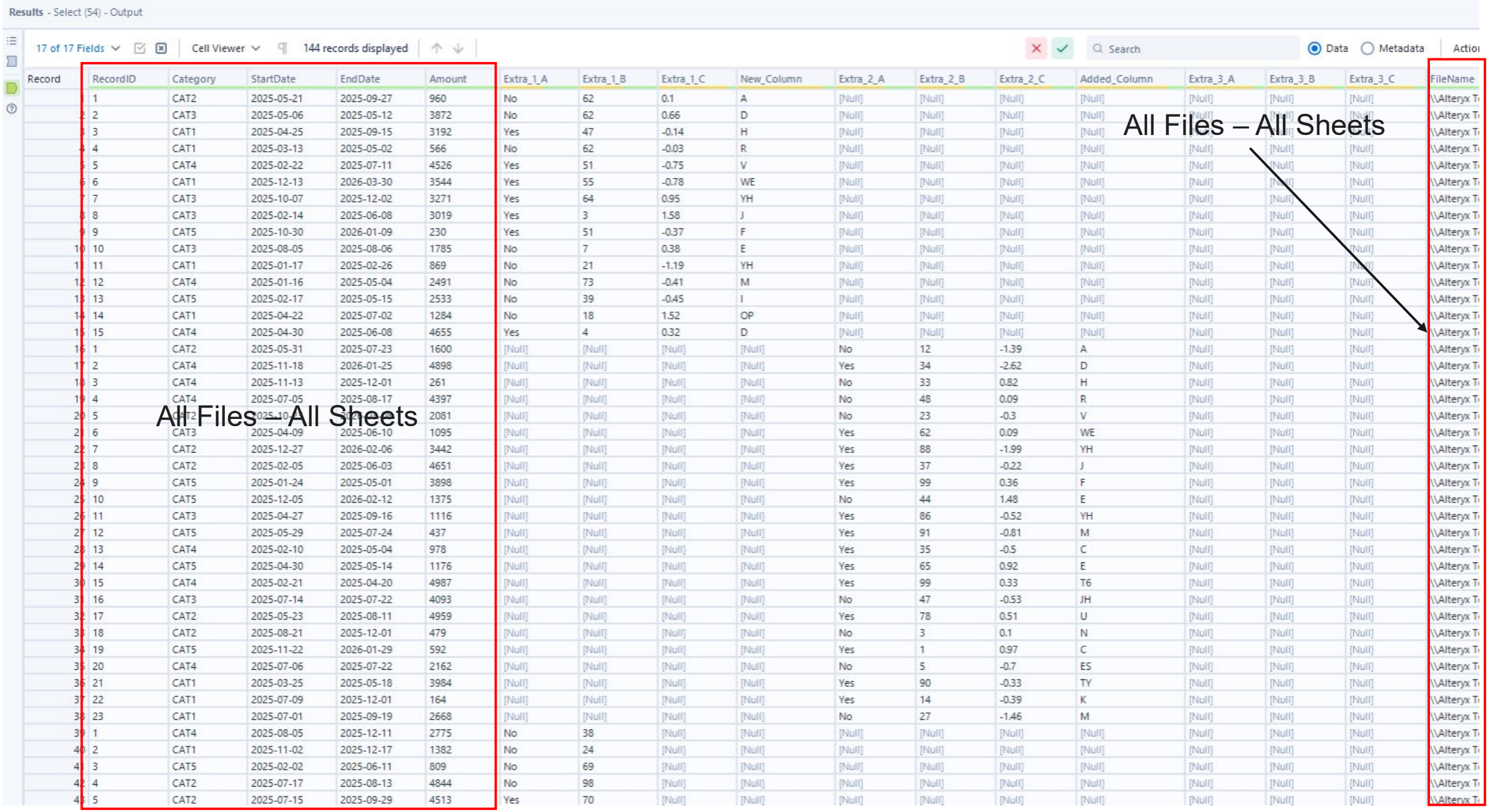
17 of 17 Fields | Cell Viewer | 144 records displayed | Search | Data | Metadata | Actions

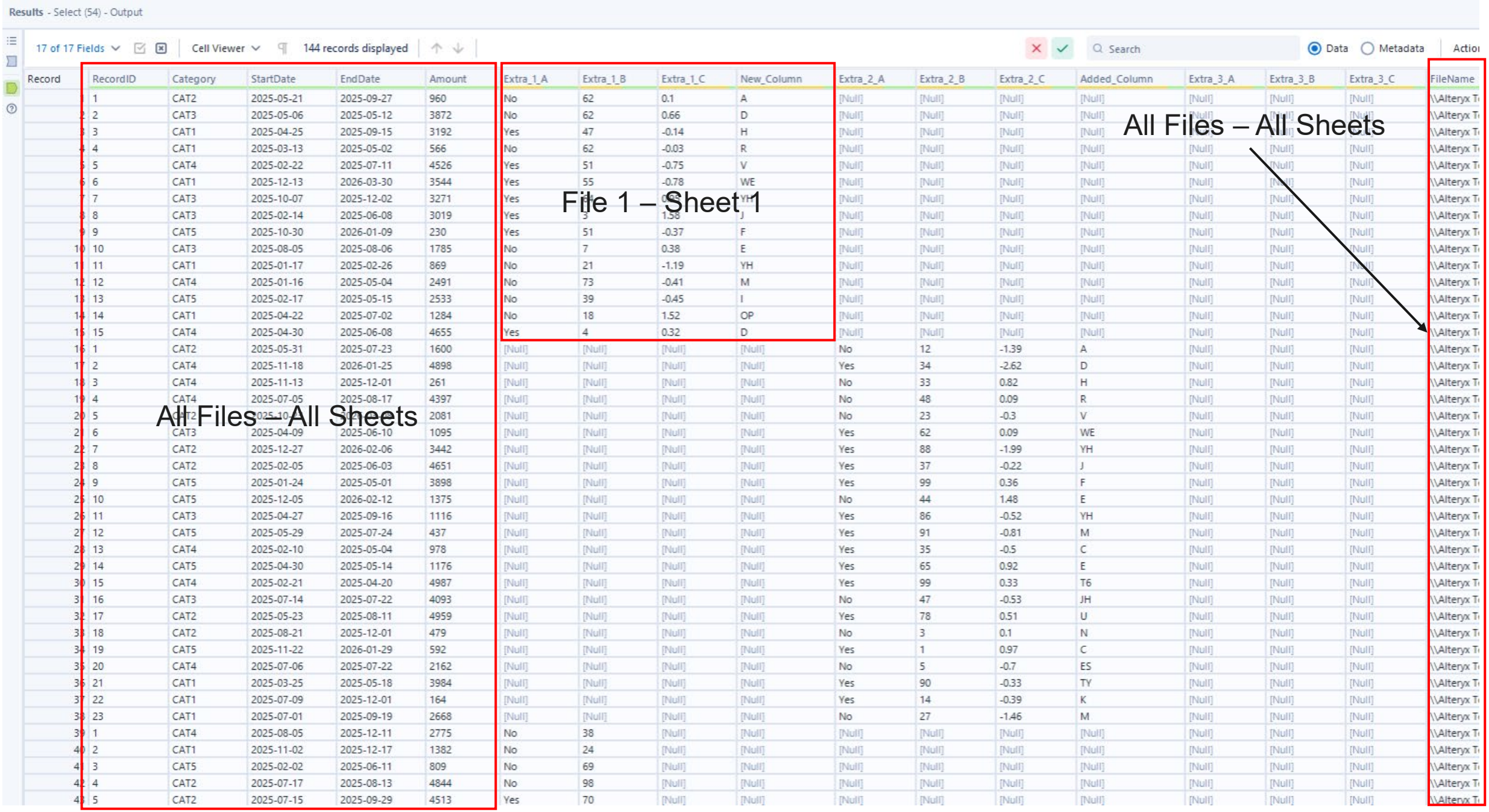
Record	RecordID	Category	StartDate	EndDate	Amount	Extra_1_A	Extra_1_B	Extra_1_C	New_Column	FileName	Extra_2_A	Extra_2_B	Extra_2_C	Added_Column	Extra_3_A	Extra_3_B	Extra_3_C
1	1	CAT2	2025-05-21	2025-09-27	960	No	62	0.1	A	\\vAlteryx Temp Folder\Alteryx\Data Im...	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]
2	2	CAT3	2025-05-06	2025-05-12	3872	No	62	0.66	D	\\vAlteryx Temp Folder\Alteryx\Data Im...	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]
3	3	CAT1	2025-04-25	2025-09-15	3192	Yes	47	-0.14	H	\\vAlteryx Temp Folder\Alteryx\Data Im...	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]
4	4	CAT1	2025-03-13	2025-05-02	566	No	62	-0.03	R	\\vAlteryx Temp Folder\Alteryx\Data Im...	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]
5	5	CAT4	2025-02-22	2025-07-11	4526	Yes	51	-0.75	V	\\vAlteryx Temp Folder\Alteryx\Data Im...	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]
6	6	CAT1	2025-12-13	2026-03-30	3544	Yes	55	-0.78	WE	\\vAlteryx Temp Folder\Alteryx\Data Im...	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]

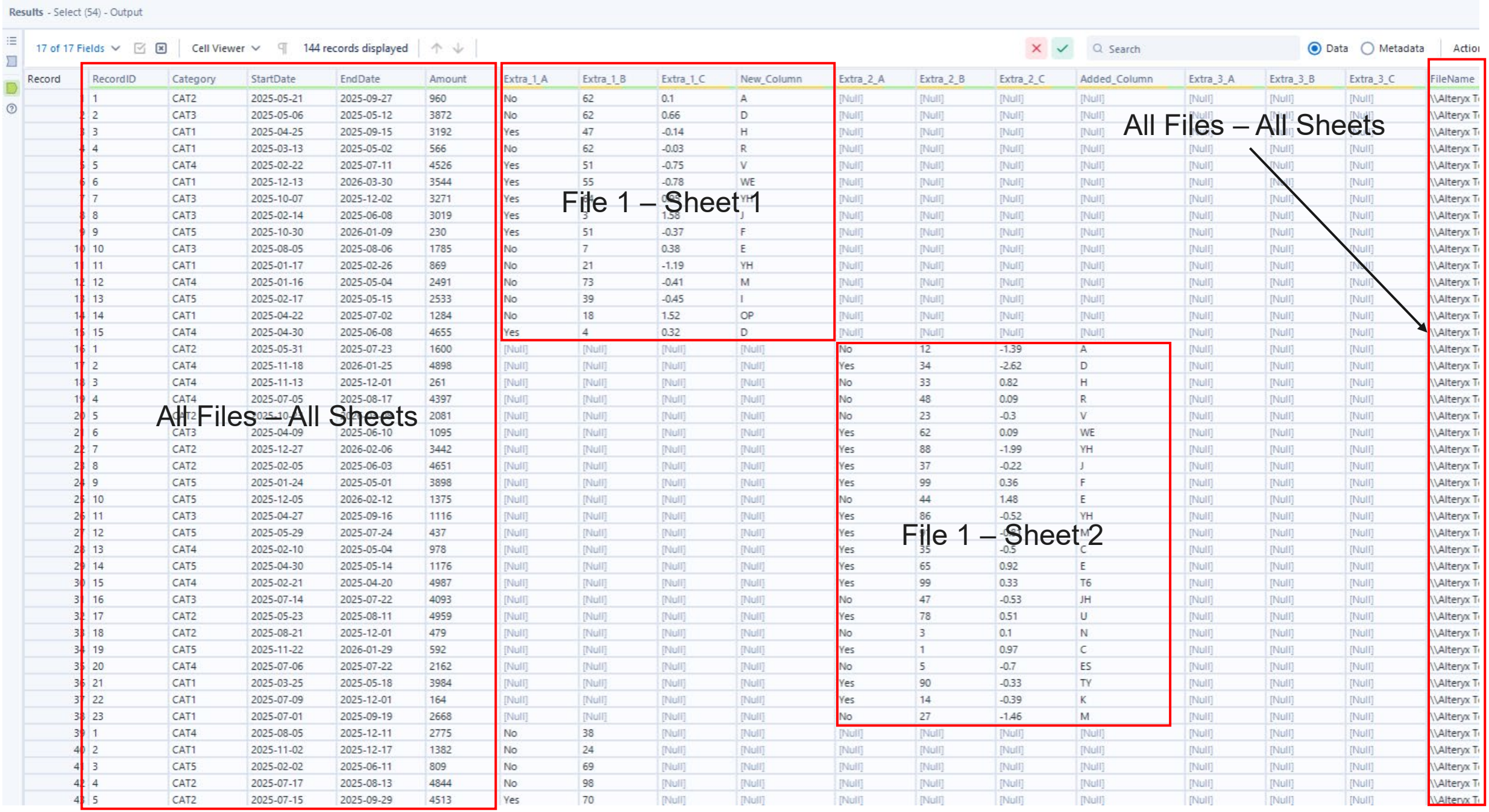
Results - Select (54) - Output

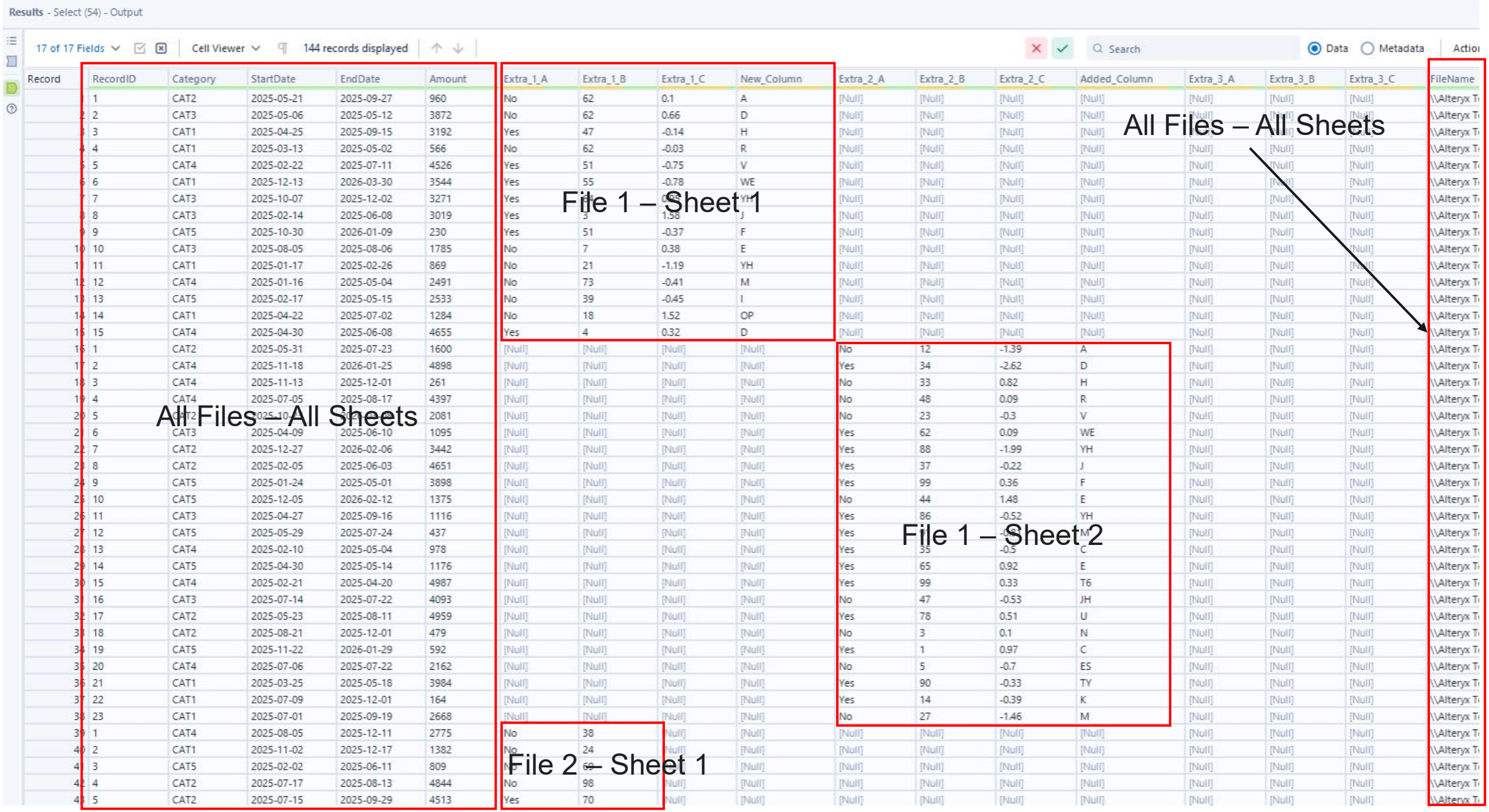
17 of 17 Fields | Cell Viewer | 144 records displayed | Search | Data | Metadata | Actio

Record	RecordID	Category	StartDate	EndDate	Amount	Extra_1_A	Extra_1_B	Extra_1_C	New_Column	Extra_2_A	Extra_2_B	Extra_2_C	Added_Column	Extra_3_A	Extra_3_B	Extra_3_C	FileName
1	1	CAT2	2025-05-21	2025-09-27	960	No	62	0.1	A	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
2	2	CAT3	2025-05-06	2025-05-12	3872	No	62	0.66	D	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
3	3	CAT1	2025-04-25	2025-09-15	3192	Yes	47	-0.14	H	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
4	4	CAT1	2025-03-13	2025-05-02	566	No	62	-0.03	R	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
5	5	CAT4	2025-02-22	2025-07-11	4526	Yes	51	-0.75	V	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
6	6	CAT1	2025-12-13	2026-03-30	3544	Yes	55	-0.78	WE	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
7	7	CAT3	2025-10-07	2025-12-02	3271	Yes	64	0.95	YH	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
8	8	CAT3	2025-02-14	2025-06-08	3019	Yes	3	1.58	J	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
9	9	CAT5	2025-10-30	2026-01-09	230	Yes	51	-0.37	F	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
10	10	CAT3	2025-08-05	2025-08-06	1785	No	7	0.38	E	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
11	11	CAT1	2025-01-17	2025-02-26	869	No	21	-1.19	YH	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
12	12	CAT4	2025-01-16	2025-05-04	2491	No	73	-0.41	M	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
13	13	CAT5	2025-02-17	2025-05-15	2533	No	39	-0.45	I	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
14	14	CAT1	2025-04-22	2025-07-02	1284	No	18	1.52	OP	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
15	15	CAT4	2025-04-30	2025-06-08	4655	Yes	4	0.32	D	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
16	1	CAT2	2025-05-31	2025-07-23	1600	[Null]	[Null]	[Null]	[Null]	No	12	-1.39	A	[Null]	[Null]	[Null]	\\Alteryx T
17	2	CAT4	2025-11-18	2026-01-25	4898	[Null]	[Null]	[Null]	[Null]	Yes	34	-2.62	D	[Null]	[Null]	[Null]	\\Alteryx T
18	3	CAT4	2025-11-13	2025-12-01	261	[Null]	[Null]	[Null]	[Null]	No	33	0.82	H	[Null]	[Null]	[Null]	\\Alteryx T
19	4	CAT4	2025-07-05	2025-08-17	4397	[Null]	[Null]	[Null]	[Null]	No	48	0.09	R	[Null]	[Null]	[Null]	\\Alteryx T
20	5	CAT2	2025-10-23	2026-03-08	2081	[Null]	[Null]	[Null]	[Null]	No	23	-0.3	V	[Null]	[Null]	[Null]	\\Alteryx T
21	6	CAT3	2025-04-09	2025-06-10	1095	[Null]	[Null]	[Null]	[Null]	Yes	62	0.09	WE	[Null]	[Null]	[Null]	\\Alteryx T
22	7	CAT2	2025-12-27	2026-02-06	3442	[Null]	[Null]	[Null]	[Null]	Yes	88	-1.99	YH	[Null]	[Null]	[Null]	\\Alteryx T
23	8	CAT2	2025-02-05	2025-06-03	4651	[Null]	[Null]	[Null]	[Null]	Yes	37	-0.22	J	[Null]	[Null]	[Null]	\\Alteryx T
24	9	CAT5	2025-01-24	2025-05-01	3898	[Null]	[Null]	[Null]	[Null]	Yes	99	0.36	F	[Null]	[Null]	[Null]	\\Alteryx T
25	10	CAT5	2025-12-05	2026-02-12	1375	[Null]	[Null]	[Null]	[Null]	No	44	1.48	E	[Null]	[Null]	[Null]	\\Alteryx T
26	11	CAT3	2025-04-27	2025-09-16	1116	[Null]	[Null]	[Null]	[Null]	Yes	86	-0.52	YH	[Null]	[Null]	[Null]	\\Alteryx T
27	12	CAT5	2025-05-29	2025-07-24	437	[Null]	[Null]	[Null]	[Null]	Yes	91	-0.81	M	[Null]	[Null]	[Null]	\\Alteryx T
28	13	CAT4	2025-02-10	2025-05-04	978	[Null]	[Null]	[Null]	[Null]	Yes	35	-0.5	C	[Null]	[Null]	[Null]	\\Alteryx T
29	14	CAT5	2025-04-30	2025-05-14	1176	[Null]	[Null]	[Null]	[Null]	Yes	65	0.92	E	[Null]	[Null]	[Null]	\\Alteryx T
30	15	CAT4	2025-02-21	2025-04-20	4987	[Null]	[Null]	[Null]	[Null]	Yes	99	0.33	T6	[Null]	[Null]	[Null]	\\Alteryx T
31	16	CAT3	2025-07-14	2025-07-22	4093	[Null]	[Null]	[Null]	[Null]	No	47	-0.53	JH	[Null]	[Null]	[Null]	\\Alteryx T
32	17	CAT2	2025-05-23	2025-08-11	4959	[Null]	[Null]	[Null]	[Null]	Yes	78	0.51	U	[Null]	[Null]	[Null]	\\Alteryx T
33	18	CAT2	2025-08-21	2025-12-01	479	[Null]	[Null]	[Null]	[Null]	No	3	0.1	N	[Null]	[Null]	[Null]	\\Alteryx T
34	19	CAT5	2025-11-22	2026-01-29	592	[Null]	[Null]	[Null]	[Null]	Yes	1	0.97	C	[Null]	[Null]	[Null]	\\Alteryx T
35	20	CAT4	2025-07-06	2025-07-22	2162	[Null]	[Null]	[Null]	[Null]	No	5	-0.7	ES	[Null]	[Null]	[Null]	\\Alteryx T
36	21	CAT1	2025-03-25	2025-05-18	3984	[Null]	[Null]	[Null]	[Null]	Yes	90	-0.33	TY	[Null]	[Null]	[Null]	\\Alteryx T
37	22	CAT1	2025-07-09	2025-12-01	164	[Null]	[Null]	[Null]	[Null]	Yes	14	-0.39	K	[Null]	[Null]	[Null]	\\Alteryx T
38	23	CAT1	2025-07-01	2025-09-19	2668	[Null]	[Null]	[Null]	[Null]	No	27	-1.46	M	[Null]	[Null]	[Null]	\\Alteryx T
39	1	CAT4	2025-08-05	2025-12-11	2775	No	38	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
40	2	CAT1	2025-11-02	2025-12-17	1382	No	24	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
41	3	CAT5	2025-02-02	2025-06-11	809	No	69	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
42	4	CAT2	2025-07-17	2025-08-13	4844	No	98	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T
43	5	CAT2	2025-07-15	2025-09-29	4513	Yes	70	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	\\Alteryx T


Results - Select (54) - Output
17 of 17 Fields
Cell Viewer
144 records displayed
Search
Data
Metadata
Record
RecordID
Category
StartDate
EndDate
Amount
Extra_1_A
Extra_1_B
Extra_1_C
New_Column
Extra_2_A
Extra_2_B
Extra_2_C
Added_Column
Extra_3_A
Extra_3_B
Extra_3_C
FileName
All Files – All Sheets
All Files – All Sheets


Results - Select (54) - Output
17 of 17 Fields
Cell Viewer
144 records displayed
Search
Data
Metadata
Record
RecordID
Category
StartDate
EndDate
Amount
Extra_1_A
Extra_1_B
Extra_1_C
New_Column
Extra_2_A
Extra_2_B
Extra_2_C
Added_Column
Extra_3_A
Extra_3_B
Extra_3_C
FileName
File 1 – Sheet 1
All Files – All Sheets
All Files – All Sheets


Results - Select (54) - Output
17 of 17 Fields
Cell Viewer
144 records displayed
Search
Data
Metadata
Record
RecordID
Category
StartDate
EndDate
Amount
Extra_1_A
Extra_1_B
Extra_1_C
New_Column
Extra_2_A
Extra_2_B
Extra_2_C
Added_Column
Extra_3_A
Extra_3_B
Extra_3_C
FileName
File 1 – Sheet 1
File 1 – Sheet 2
All Files – All Sheets
All Files – All Sheets


Results - Select (54) - Output
17 of 17 Fields
Cell Viewer
144 records displayed
Search
Data
Metadata
Record
RecordID
Category
StartDate
EndDate
Amount
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Extra_1_B
Extra_1_C
New_Column
Extra_2_A
Extra_2_B
Extra_2_C
Added_Column
Extra_3_A
Extra_3_B
Extra_3_C
FileName
All Files – All Sheets
File 1 – Sheet 1
File 1 – Sheet 2
File 2 – Sheet 1
All Files – All Sheets

The Outcome: The Auditor of the Future

Analytics-enabled by design

Data-first mindset from day one

Deeper, faster insights

Near real-time visibility into risk

Automated, repeatable testing

Standardized, always-on audit processes

Innovation as standard practice

Culture of continuous improvement

IN LOVING MEMORY

ANH THI TRUONG

AUGUST 8, 1934

MARCH 15, 2026

Thank You!
Any Questions?

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