**Process Documentation**

**ODBC Set-up**

**What is ODBC?**

* The ODBC / DSN establishment is the system-to-system connection which enables Alteryx, Excel, PBI and Snowflake to communicate to one another. ODBC is an open-source protocol that facilitates connections between files.

**Downloading ODBC**

1. Download the Snowflake DSSIDriver 64 bit or 32 bit driver with this link - [ODBC - Snowflake Developers](https://developers.snowflake.com/odbc/)
2. Select the version for your OS (e.g., ODBC for Windows) – Make sure to download the version that aligns with your version of Alteryx

**Create/Get Access to the Snowflake Project**

1. Create a Snowflake instance through the [AFP - Snowflake Access Management Form](https://forms.office.com/pages/responsepage.aspx?id=mT-XW99360uyfaoMcLhILE1fL2kr4XhKrueodIVb5t5UNDFBQlRBVFJOSjBCN081QjVZWk9MSklOMyQlQCN0PWcu)
   * This form enables:
     + Adding users to Snowflake (one-time, infrequent)
     + Creating databases (project or bootcamp, semi frequent / once per project)
     + A screenshot of a black screen

       Description automatically generatedGranting access to project databases as team members roll on (semi frequent, multiple times per project
2. To create your user, click on User Management 🡪 Create User 🡪 Yes to create a Bootcamp database (Personal use, you won’t need a code).
3. To create a database for your project, click on Database Management 🡪 Create Database 🡪 Project Database 🡪 Add your users/admins according to your project 🡪 Add a database and project names 🡪 Tag it to a PPMD
4. Upon completion, you will receive a confirmation email with the following subject line, *“Automated Mail : AFP Snowflake – Role Management – Grant Database Access – Successfully Processed”*
5. Reference the following section from the confirmation email for creating an ODBC Driver Instance in the next steps

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**Create an ODBC Driver Instance**

1. Open the Windows app menu and search for “ODBC Data Source Administrator (64 bit)
2. Under the User DSN tab, select “Add”
3. In the pop-up menu, select “Snowflake DSII Driver”
4. Select “Finish”
5. Select the User Data Source you just created, and select “Configure”
6. In the second pop-up menu, configure the rows with the information received from the confirmation email. See example:
7. Select “Test” to test your configuration
8. Upon receiving a successful message, select “OK”
9. Ensure your database and username are correct, as the test may be successful even though you may not be able to use the connection
10. Select “OK” again from main dialog box

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Description automatically generated**Creating a Connection in Alteryx with ODBC/Snowflake**

1. Open the “Step 1 – InDB Tech Enabler – Data Cleanse” Alteryx workflow
2. At the K. Snowflake Output container, under Connection Name, select “Manage Connections” from the dropdown menu (Opens the “Manage InDB Connections dialog box”)
3. Data Source: select “Snowflake”
4. Connection Type: select “User”
5. Connections: Select the “New” button
6. Connection Name: Copy and paste directly from the “Data Source” section from the confirmation email
7. Uncheck “Use Data Connection Manager (DCM)”
8. Under the Read tab, select “Snowflake ODBC”
9. Connection String: select "New Database Connection”
10. For User Name, input your email address

**A screenshot of a computer

Description automatically generatedCreating a Connection in Alteryx with ODBC/Snowflake (cont.)**

1. Under the Write tab, select “Snowflake Bulk Loader”
2. Connection string: select "New Database Connection” (This will open the “Snowflake Bulk Connection” dialog box)
3. Under the Local tab: select “User Stage”
4. Select “OK”
5. Under the Write tab, Chunk Size: 255
6. Under the Write tab, Number of Threads: 12
7. Select “Apply”
8. Select “OK”

**To Check Process:**

1. Open a blank workflow
2. A diagram of a system

   Description automatically generatedNavigate to the In-Database section in your toolbar
3. Insert a “Connect InDB tool”
4. Connection Name: Select the project your just created
5. Browser pop-up will confirm your connection to Snowflake
6. Insert a “Browse InDB tool”
7. Select “Run”
8. Upon successful completion, you should see your data in the browse tool

**Update your ODBC Connection in Excel**

1. A screen shot of a computer

   Description automatically generatedIn the Excel template (Lite or Advanced), click Edit on the Snowflake Project Name Parameter
2. Add your ODBC connection name. Make sure the name is identical (Case sensitive)
3. Review your tables before loading. If you see the warning in Yellow to the left, click Edit Credentials 🡪 Default or Custom 🡪 Connect
4. Once the connection is updated, refresh your tables. For larger data sets (3M+records in total), its recommended to refresh one by one.

**Update your ODBC Connection in PBI**

1. In PBI, click on transform data, and find the Snowflake Project Name
2. Add your ODBC connection name. Make sure the name is identical (Case sensitive)
3. A yellow rectangle with black text

   Description automatically generatedReview your tables before loading. If you see the warning in Yellow to the left, click Edit Credentials 🡪 Default or Custom 🡪 Connect
4. Once the connection is updated, refresh your tables