Using Corptax ODBC Driver with Alteryx Designer

Alteryx Designer is a third party tool that unlocks your data sources using a repeatable drag-and-drop workflow to quickly profile, prepare, and blend all of your data without complicated SQL code or customized scripts. You can use Corptax Open Database Connectivity (ODBC) to access Corptax data from Alteryx Designer and create dynamic ODBC connections allowing the data context to easily change based on your input.

Licensing. To use features associated with ODBC and Alteryx, you must license Alteryx Designer and Corptax ODBC Driver.

Security. You must be a member of a security group that has functional access permissions to Corptax data. See *Viewing Your Access Rights* to determine your current rights.

> **Prerequisite:** You must have ODBC installed, configured, and working before downloading and installing Alteryx Designer (see *Installation of Corptax ODBC Driver*). You must also download and install Alteryx Designer from *Alteryx*.
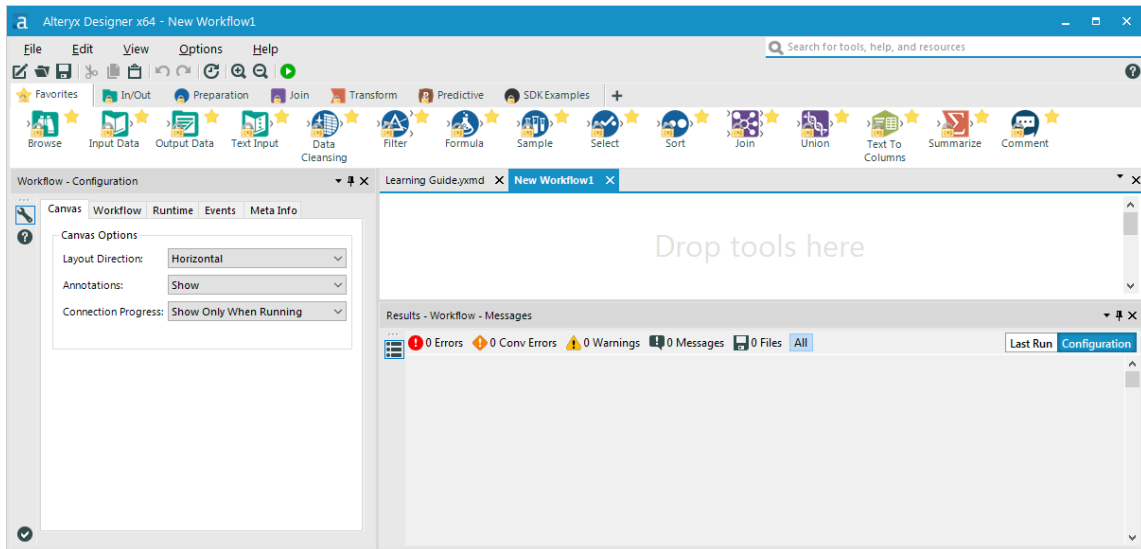
> **Note:** The instructions and screenshots in this section are for version 2018.1 x64 or above of Alteryx Designer.

> **Warning:** If you are experiencing issues connecting with Corptax ODBC Driver, you may need to contact the application vender for assistance.
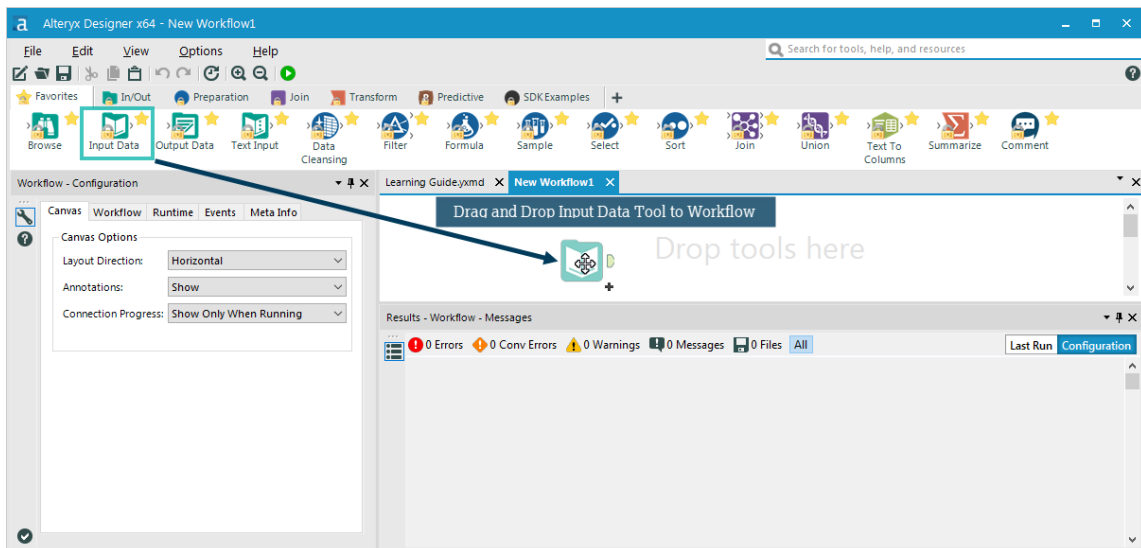
To connect to Corptax using Corptax ODBC Driver with Alteryx Designer:

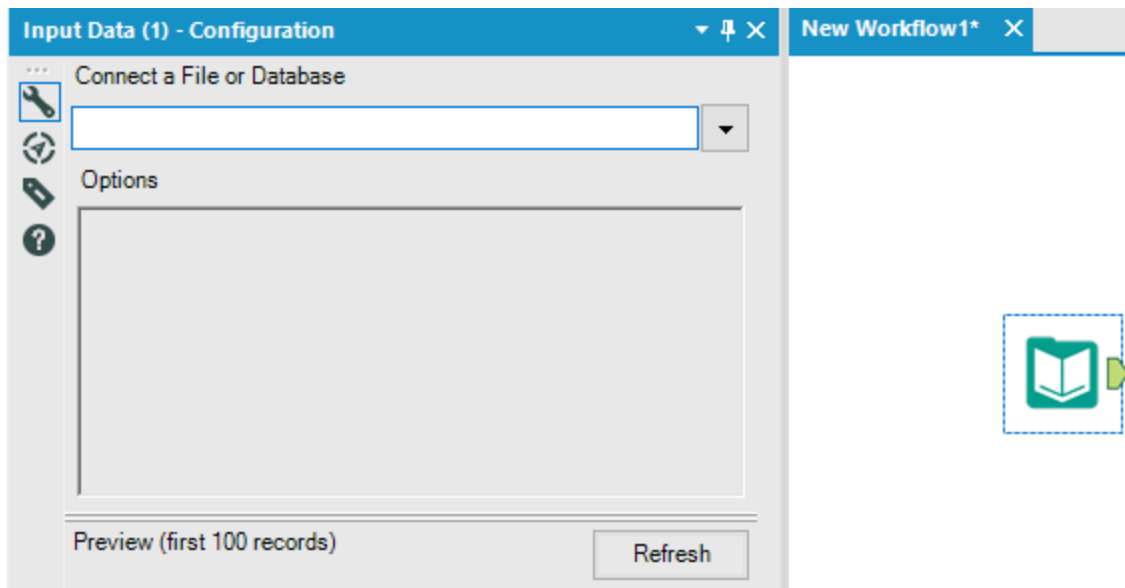1. Open Alteryx Designer.
   Alteryx Designer opens.

Alteryx Designer (Showing the Workflow-Configuration WIndow)

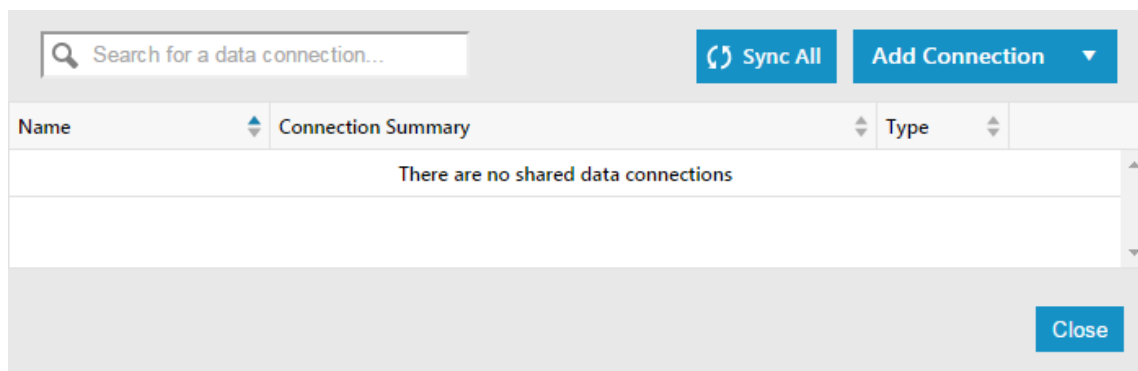2. Click the **Input Data** tool and drag and drop it to the Workflow window.

Alteryx Designer (Showing Dragging and Dropping Input Data Tool)

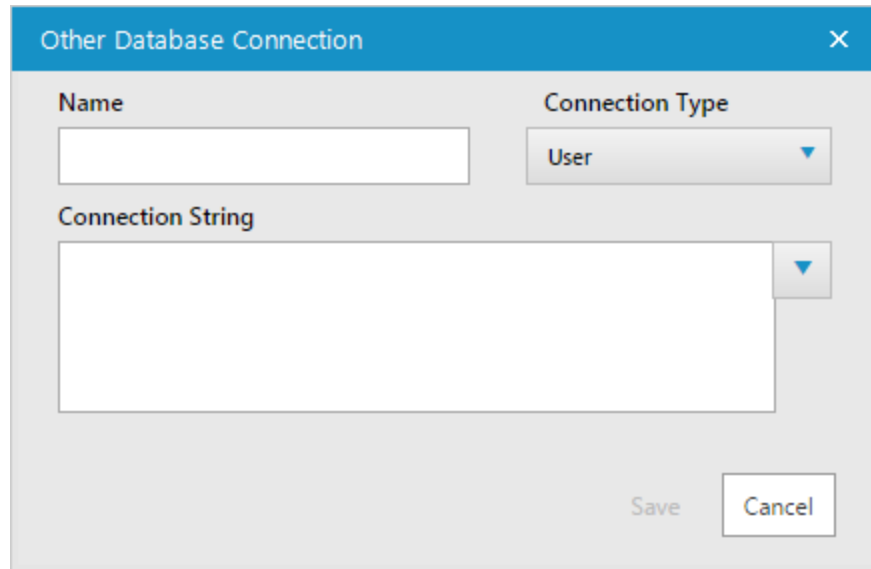3. Click **Arrow** [▾] in the **Connect a File or Database** list.

Input Data-Configuration Window (Showing Connect a File or Database List)

4. Click **Saved Data Connections, All Connections, Manage.**
   The Manage Data Connections window displays.

Manage Data Connections Window

5. Click **Add Connection, Other**
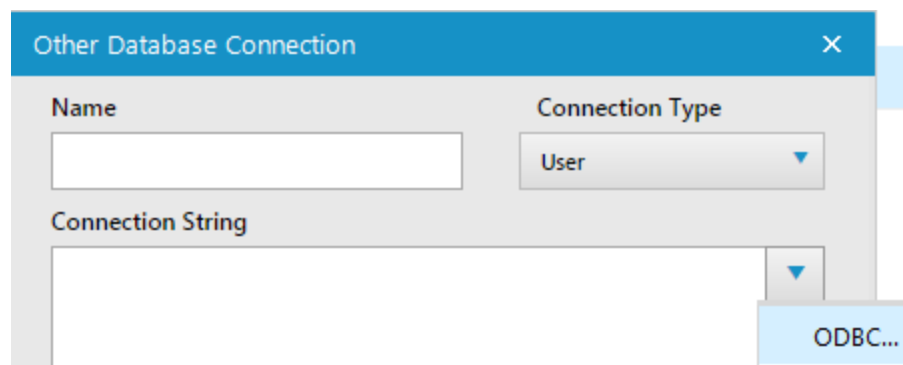   The Other Database Connection window displays.

Other Database Connection Window

6. Click **Arrow** [▼] in the **Connection String** list and select **ODBC**.
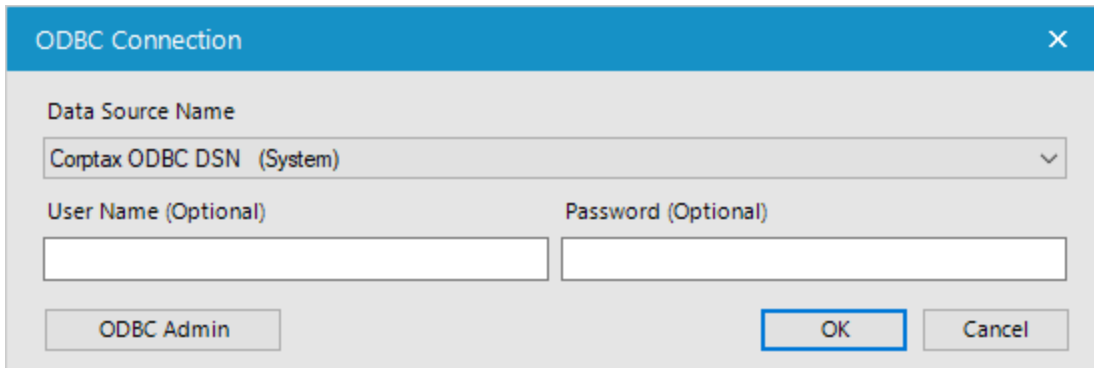
> 📝 **Note:** In some cases, you might see the default value for the connection type as **System** because of the version of Alteryx you are using where the connection type is available on an enterprise level. Choose **User** as the connection type.

Other Database Connection Window (Showing ODBC Connection String Choice)
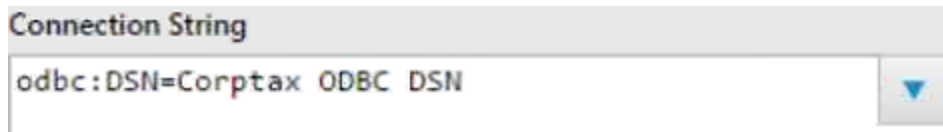
The ODBC Connection window displays.

ODBC Connection Window

7. Select **Corptax ODBC DSN (System)**.

> 📝 **Note:** If you do not see the **Corptax ODBC DSN (System)** connection string, you may not have installed and configured ODBC properly (see *Installation of Corptax ODBC Driver*).

The connection string displays in the **Connection String** field.

Connection String Window (Showing ODBC Connection String)

8. Click **OK**.

9. Enter a name for the connection string in the **Name** field.

> 📝 **Note:** You need to extend the end of this connection string with the Corptax string using Corptax Web.

> 🎯 **Best Practice:** Create one connection for each data type catalog. For example, you could have three connection strings: Report, Table & Query. Then the Context part of the connection string would be updated through user input.

10. (Optional) If you want to create a connection string to any of the other data catalogs (see *Corptax ODBC Catalogs*) other than the default catalog of **DataSource**, follow the steps below:

a. Type a semicolon after *odbc:DSN=Corptax ODBC DSN*.
b. Type *catalog=* and the type of data catalog (*Table*, *Query*, or *Report*) after the equal sign.
c. Select a table.
d. Type a semicolon after the type of data catalog (this is where you will paste the extended Corptax string you create in step 14 after the last semicolon).

> **Example:** If you want a connection to a table data catalog, your connection string should resemble something like this before pasting the extended Corptax connection string:
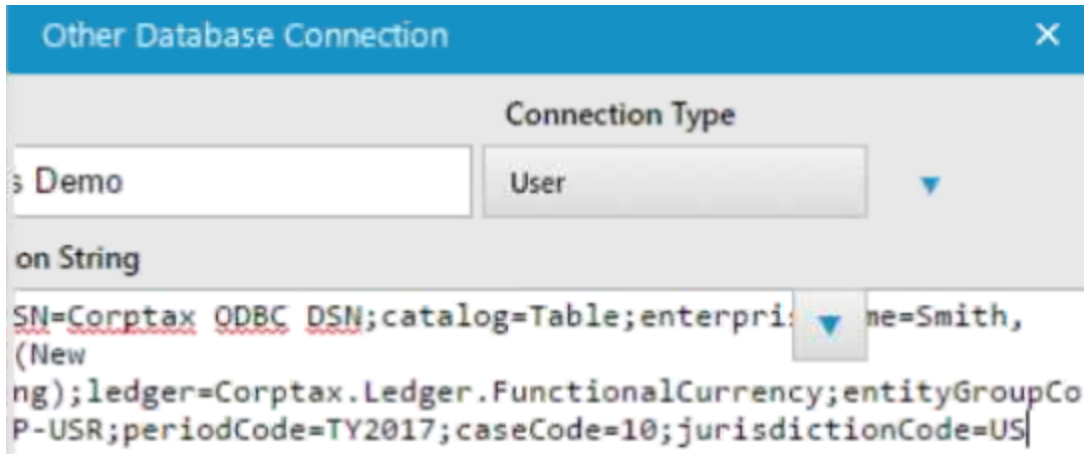>
> *odbc:DSN=Corptax ODBC DSN; catalog=Table;*

11. Log in to Corptax Web by clicking **Home**, **Corptax Web** in Corptax or by browsing to your office's web URL.
12. Click **Admin, Settings**.
    The General Settings window displays.
13. Click **Connection Strings** on the dashboard.
    The ODBC Settings window displays.
14. Extend the end of the connection string in Alteryx with the Corptax connection string in the ODBC Settings window. See *ODBC Connection String* for more information on ODBC connection strings.

> **Prerequisite:** You must set the context. The best practice is to use *contextName* and specify the name of a context to be used for the connection. You can specify an enterprise other than your default enterprise using the *enterpriseName* attribute. See *ODBC Settings page in Corptax Portal* to construct a valid ODBC connection string.
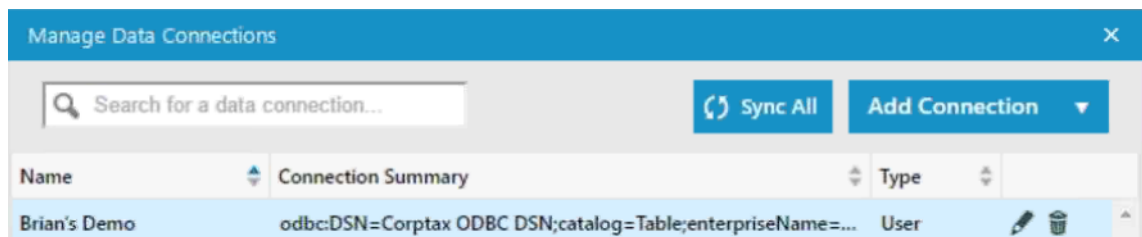
15. Click **Copy to Clipboard** to copy the connection string.
16. In the Other Database Connection window in Alteryx Designer, paste the Corptax connection string after the last semicolon in step 10c.
    The connection string should look something like this:

Other Database Connection Window (Showing Data Connection String You Just Created with Data Catalog Table as an Example)

17. Click **Save**.

The connection string you just created displays in the Manage Data Connections window.
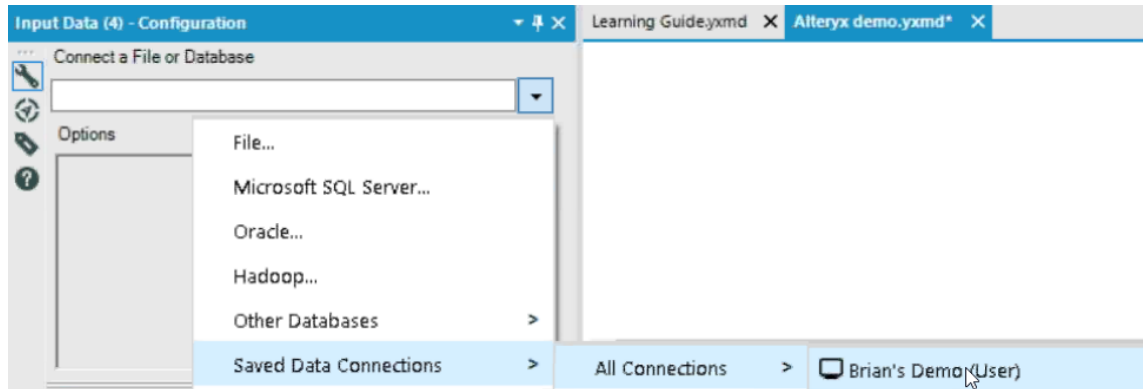

Manage Data Connections Window (Showing the Data Connection String You Just Created)
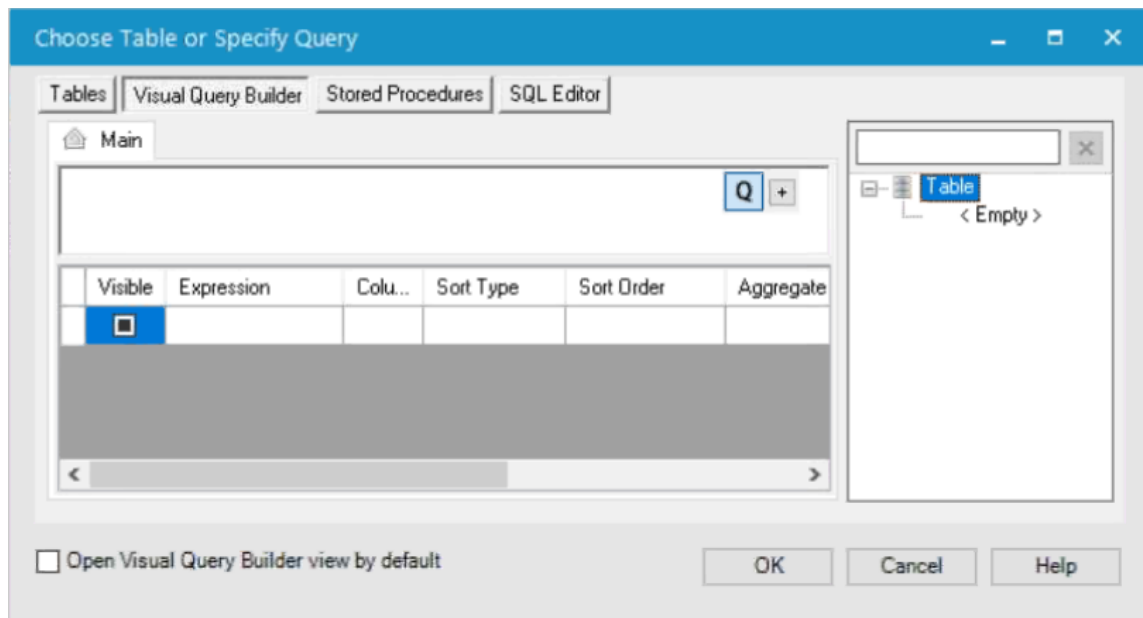
18. Close the Manage Data Connections window.

19. Click the **Arrow** [▾] on the Input Data-Configuration window.

20. Select **Saved Data Connections**, **All Connections**, and then the data connection you just created.

Input Data-Configuration Window (Showing the Data Connection You Just Created)
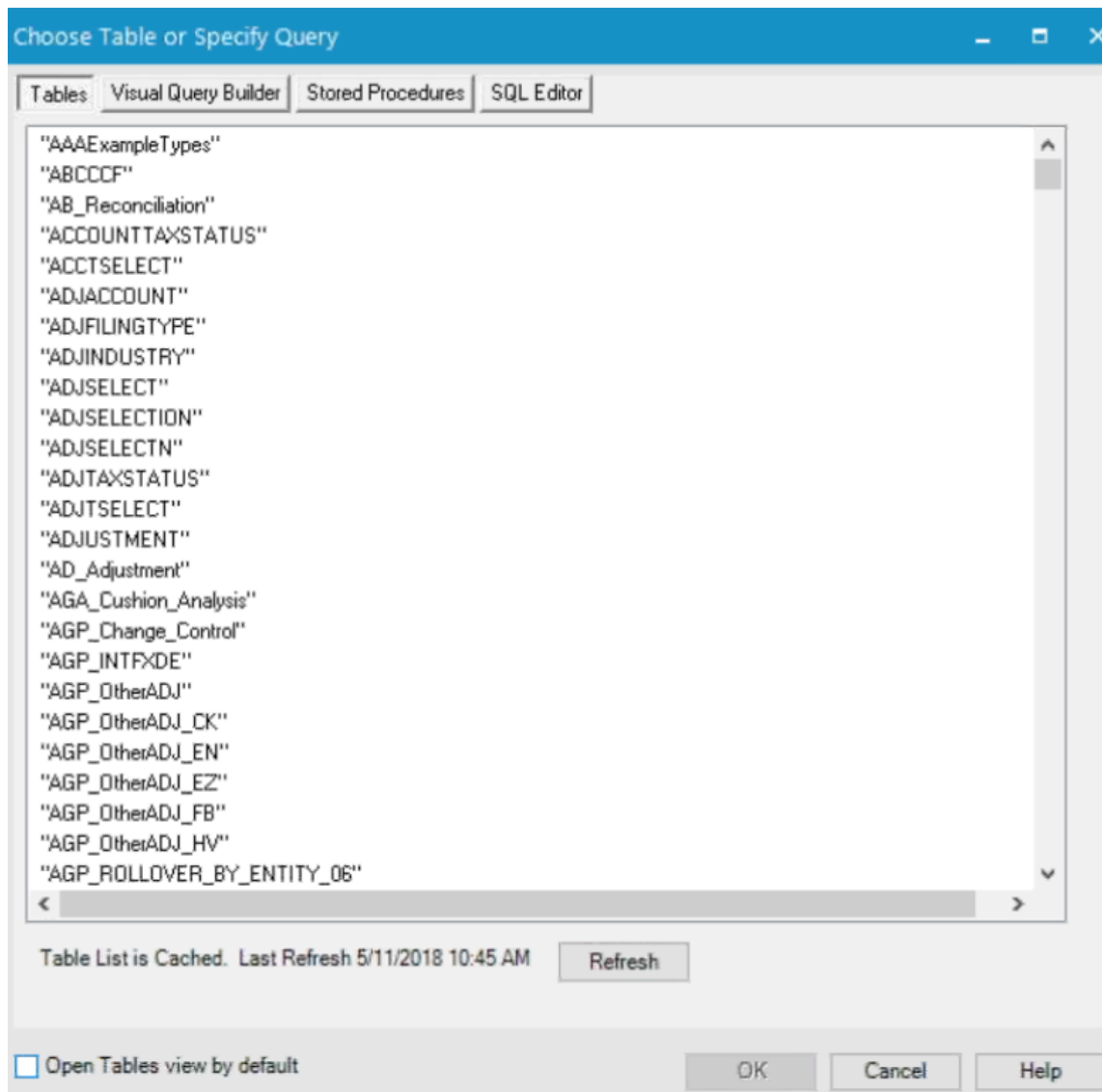
21. If you are set up for Single Sign On (SSO), you are automatically signed in to Corptax; if not, you will be prompted for your credentials at each step of the log in and other processes. In this step Alteryx is pulling data from Corptax.
The Choose Table or Specify Query window displays (since a Table Data Catalog is used in this example).

Choose Table or Specify Query Window

22. Click the **Tables** tab.

    The tables from Corptax display, based on the environment, connection string, and other parameters you entered.
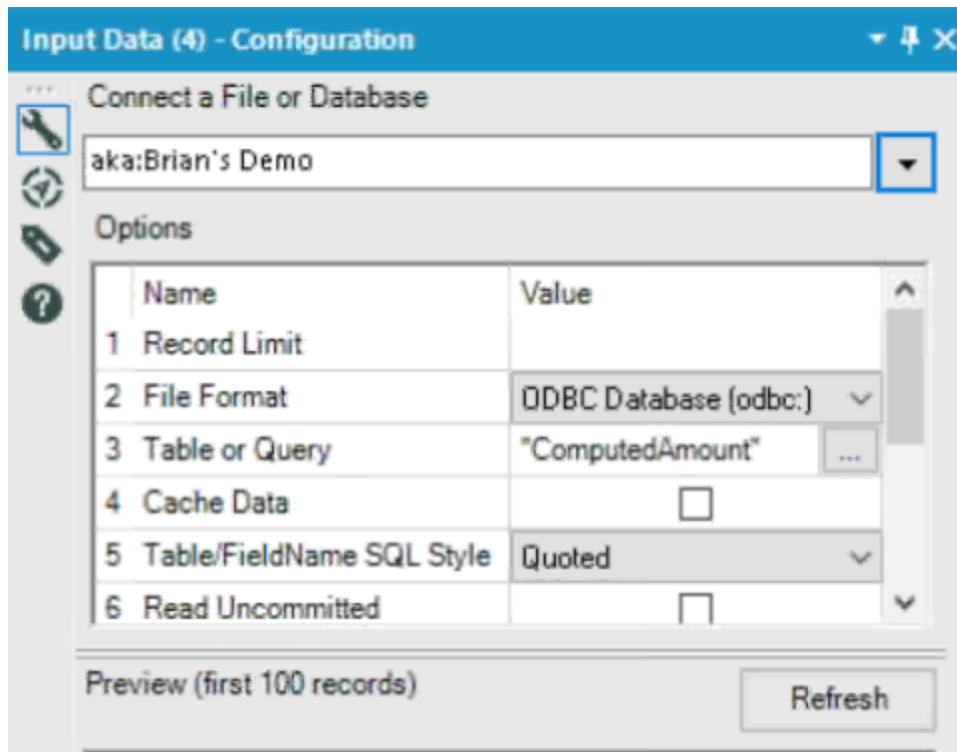

    Choose Table or Specify Query (Showing Tables from Corptax)

23. Select a table (depending on what data catalog you chose, you will see a different list). In this example we are using the **ComputedAmount** table.
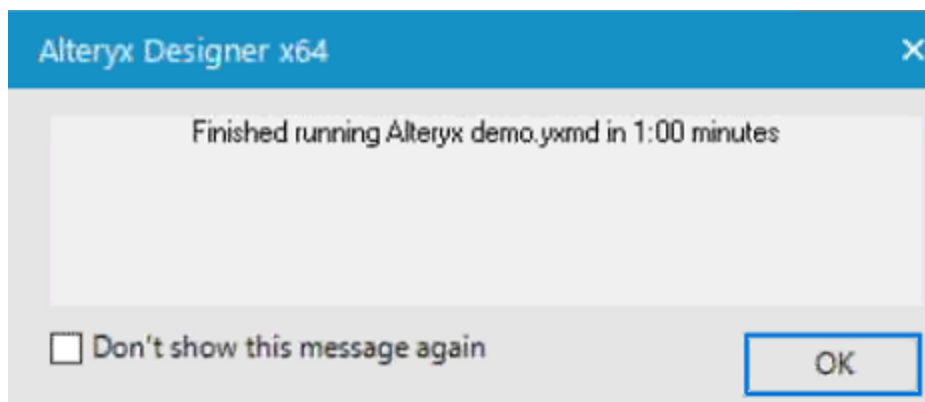
24. Click **OK**.

    The Input Data-Configuration window displays the input with the ODBC connection for the selected table.

Input Data-Configuration Window (Showing Input with ODBC Connection for ComputedAmount Table)

25. Click **Run Workflow** ▶ or press **<CTRL+R>** to run the workflow.
The Alteryx Designer dialog displays the amount of time it took to successfully retrieve data from Corptax.

Alteryx Designer Dialog (Showing Amount of Time to Successfully Retrieve Data from Corptax)

Alteryx pulls in the data for all input data sources and displays the results in the Results-

Input Data-Output window.

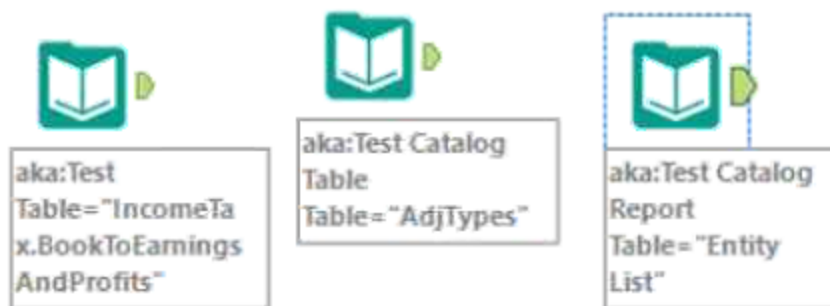| Record #	Entity.DCORP	Entity.DNAME	Entity.DID	Entity.DDOM	Entity.PrincipalPlaceOfBusiness	Entity.
1	04NIND	FOREIGN INDICATORS	[Null]	Domestic	[Null]	USD
2	AMTCO	AMT TAX ENTITY	[Null]	Domestic	United States	USD
3	F	WASHINGTON INC AND SUBS	36-5555555	Domestic	[Null]	USD
4	FD	DOMESTIC CONSOLIDATED COMPANIES	36-5555555	Domestic	[Null]	USD
5	FD0P	WASHINGTON INC AND SUBSIDIARIES	36-5555555	Domestic	United States	USD
6	FD1000	VALUE TOOL PRODUCTS, INC.	36-1111111	Domestic	United States	USD
7	FD1000A	VTP AMERICAN DIVISION	[Null]	Domestic	United States	USD
8	FD1000M	VTP MEDITERRANEAN DIVISION	[Null]	Domestic	United States	USD
9	FD1010	BRITISH IMPORTS, INC.	36-2222222	Domestic	United States	USD

Results-Input Data-Output Window (Showing Results from Corptax)

26. Click **OK** on the Alteryx Designer dialog.

> **Note:** If there are thousands of records returned, the Results-InputData-Output window only displays a preview (partial results) of all the records.

27. (Optional) To view the results from other input data sources, click an input data tool in the Workflow window.

aka:Test Table="IncomeTax.BookToEarningsAndProfits"

aka:Test Catalog Table Table="AdjTypes"

aka:Test Catalog Report Table="Entity List"

Workflow Window (Showing Input Data Tools)

> **Note:** The green arrows indicate the flow of data. An arrow pointing away form an input data source indicates an output; an arrow pointing towards an input data source indicates an input.

Tip: We recommend you set one of your input data sources to the **Entity List** report. This report allows you to blend or join data from multiple sources. The entity code is the unique identifier for creating relationships between different sets of data.

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