ETL Procedure

Introduction

This document will show how to import data from a Microsoft Excel (.xslx) spreadsheet using the SQL Server Import and Export Wizard. We will be importing data into the pre-existing Pooch Parlor tables in Microsoft SQL Server Management Studio (SSMS) in order to describe the ETL (Export, Transfer, Load) procedure.

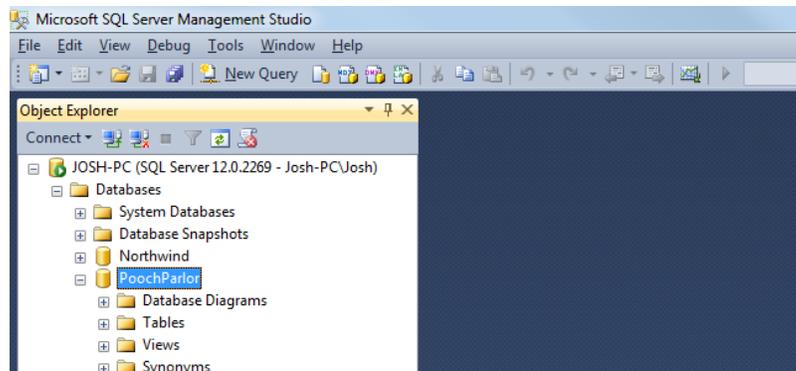1. **Open SQL Server Import and Export Wizard**

   The wizard can be opened either through the start menu or the SSMS GUI

   - **Option #1:** On the Start menu, navigate to All Programs, Microsoft SQL Server, Import and Export Data.

     Note: There is a 32-bit and a 64-bit option for the wizard. Open the wizard based on the computer's version.
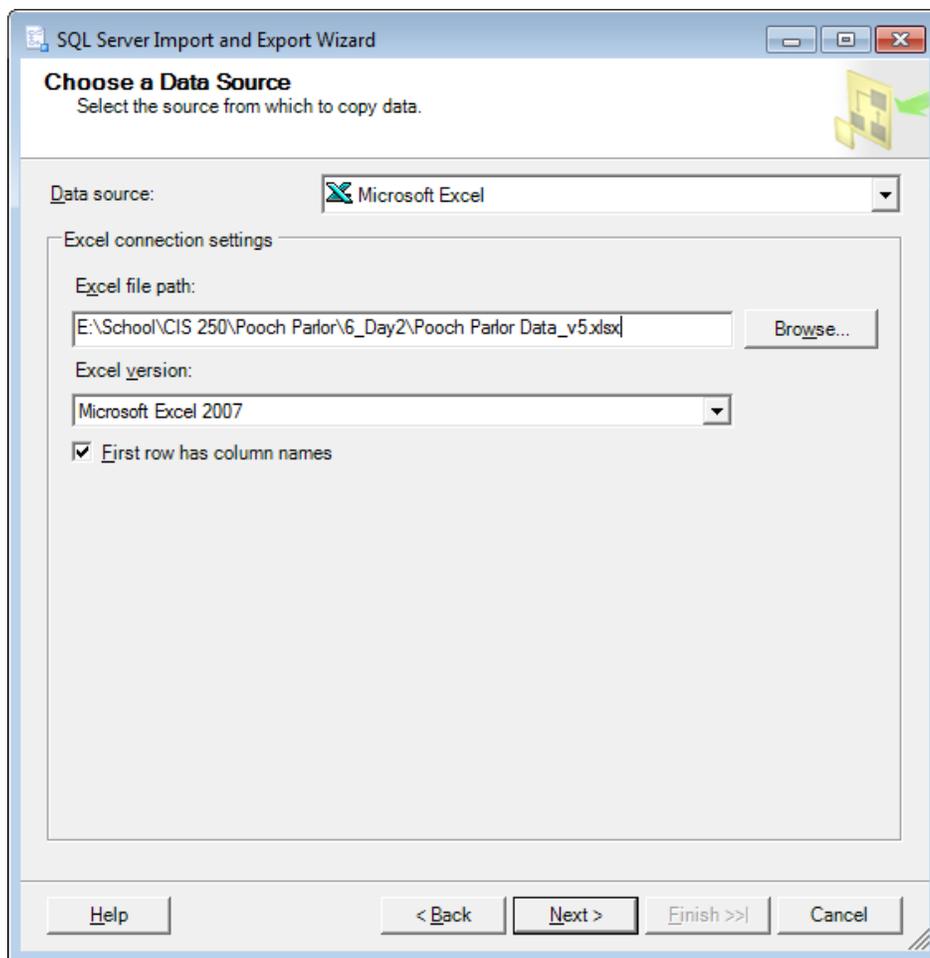
     - OR -

   - **Option #2:** Open SQL Server Management Studio and in the Object Explorer window, expand the Databases folder. Right-click on the database that the imported data will go into (in this case, PoochParlor). Then, select *Tasks*, and click *Import Data.*

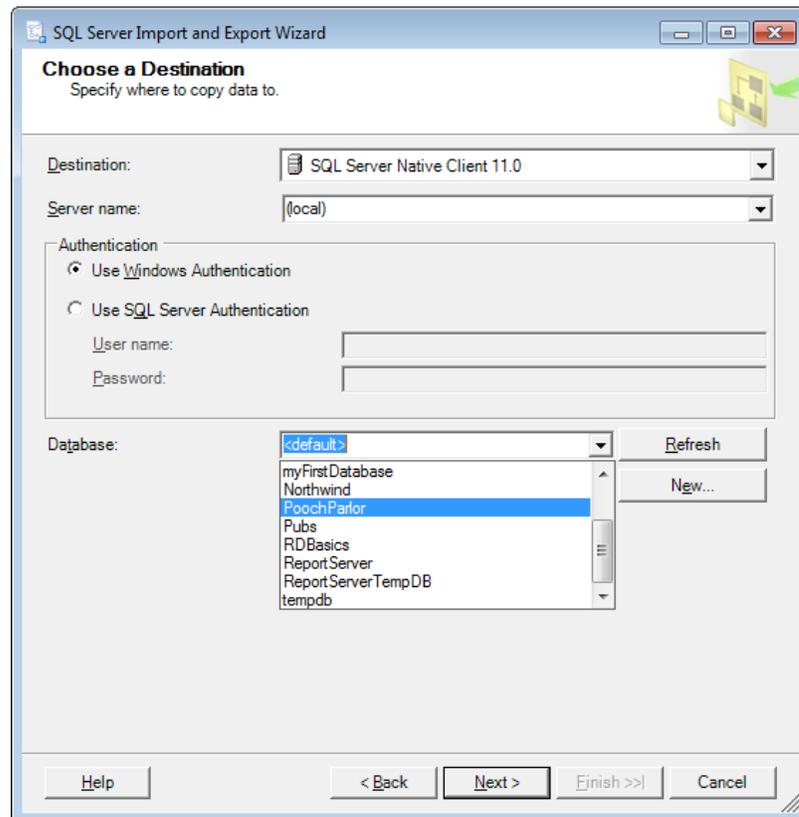   - Once the wizard has started, click the *Next* button

2. Choose a Data Source:

- From the Data source dropdown list choose Microsoft Excel.
- Click the *Browse* button
    - Navigate to the location of the Microsoft Excel spreadsheet you will be using (in this case, Pooch Parlor Data_v5.xlsx).
    - Click *Open* button
- Choose Excel version: Microsoft Excel 2007
- If the spreadsheet has column names in the first row, be sure to check the checkbox: *First row has column names*
- Click *Next* button

3. Choose a Destination:

- From the Destination dropdown list choose SQL Server Native Client 11.0
- If there is more than one instance installed on SSMS choose the appropriate server name from the dropdown. (If only one instance is installed, leave server name as is)
- For Authentication: Choose *Use Windows Authentication*
- From the Database dropdown list, select the database the data will be imported into (in this example, select PoochParlor).
- Click *Next* button

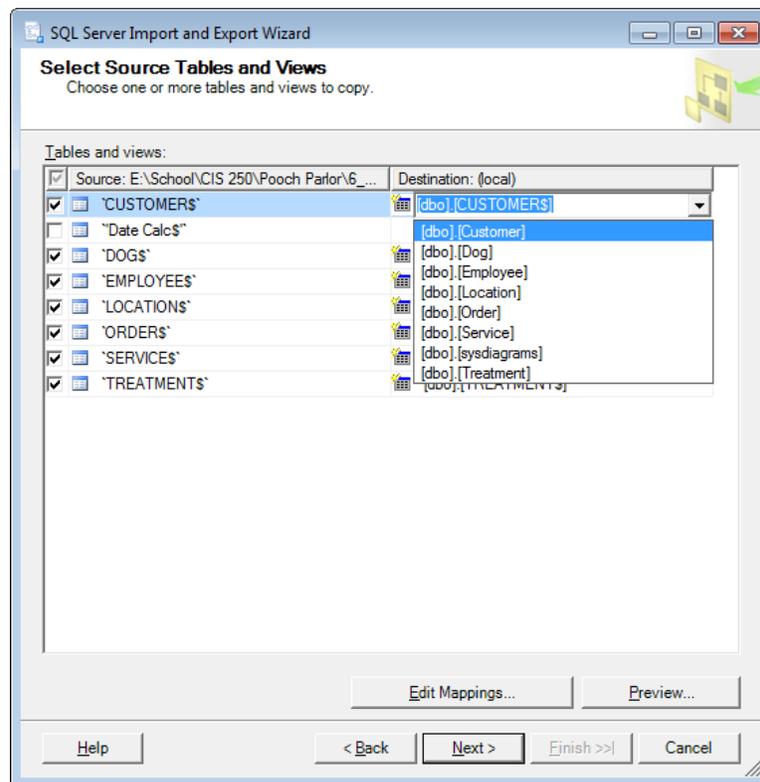
4. Specify Table Copy or Query:

- Click radio button: *Copy data from one or more tables or views.*
- Click *Next* button

5. Select Source Tables and Views:

- Under the Source column
    - Check the checkbox next to the table name to be imported.
      (For the Pooch Parlor example, check all the tables except for "Date Calc".)

- Under the Destination column
    - Click on the corresponding cell for the table name.
    - Using the dropdown list, select the equivalent table in the database.*
       (For this example, we will change [dbo].[CUSTOMER$] to [dbo].[Customer]. See
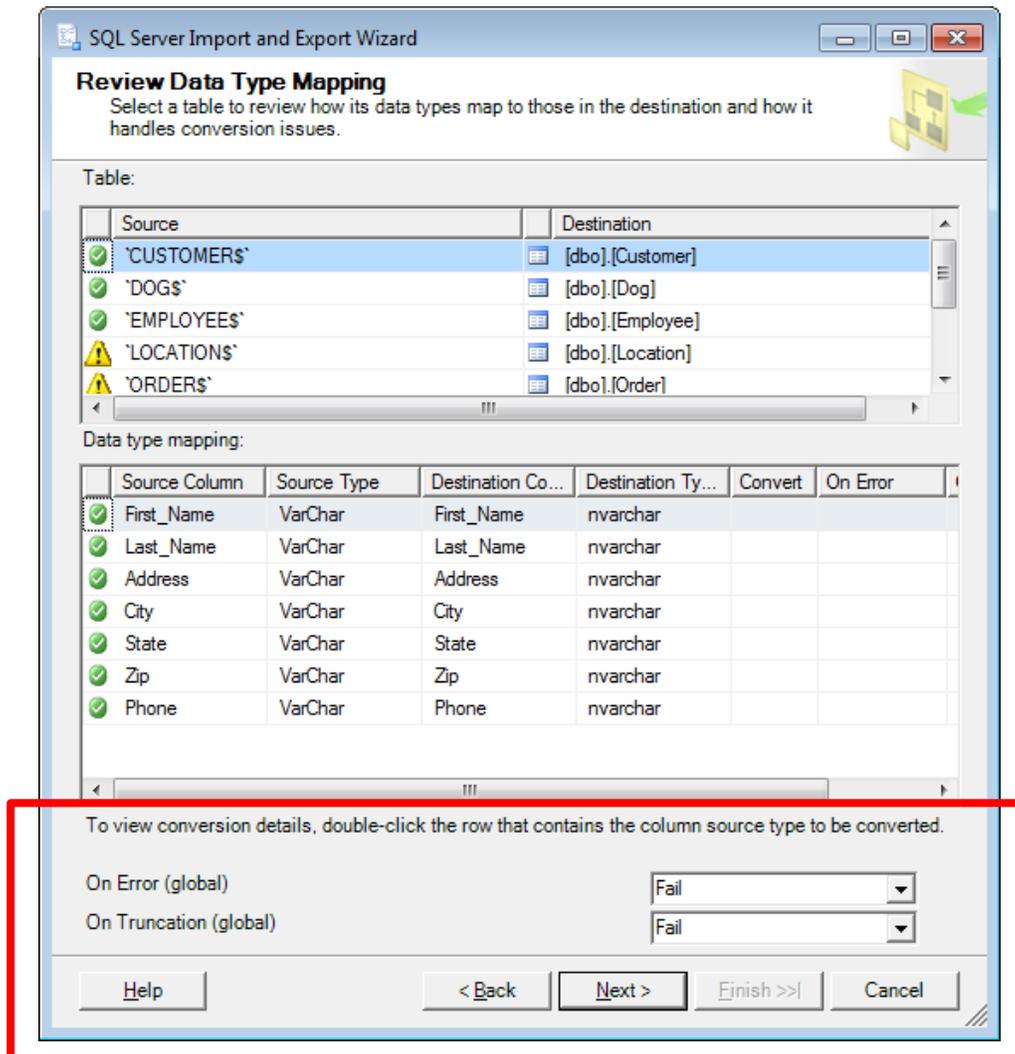   screenshot below as example).

      * Note: If the destinations of the selected tables are not changed, a new table (with the
      same name as the source table) will be created in the database with the imported data.

    - Click the *Preview* button to ensure that the correct data is being imported
    - Repeat this step for each of the tables being imported.

- Click *Next* button

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6. Review Data Type Mapping:

- At the bottom of the window (See screenshot below as example).
  - ○ Change *On Error (global)* from Fail to Ignore.
  - ○ Change *On Truncation (global)* from Fail to Ignore.
- Click *Next* button.

6. **Save and Run Package:**
   - Ensure that the checkbox for *Run immediately* is checked
   - Click *Next* button

7. **Complete the Wizard:**
   - Review the actions to be completed.
   - If all is correct, click the *Finish* button.
   - If the import was successful, click the *Close* button to exit the wizard.

8. **Check to ensure the data was imported properly into SSMS**
   - Open a New Query window
   - In the window, type the SQL code:

     ```
     USE PoochParlor
     GO

     SELECT * FROM Customer
     ```

   - Click the Execute or F5 button to view the result set.
   - Repeat for each table, if necessary.