CONFIGURING AN ODBC CONNECTION

If you want to import from or publish data to a SQL or ODBC-compliant data source, you'll need to set up a Database connection for each source.

These options are available in the Data Chameleon Edition.

ODBC DRIVERS

For an ODBC connection you must set up a driver to enable your computer to access the source.
The following table describes what you'll need depending on the data source and platform.

Data Source	Windows	Macintosh
Access (ODBC)	DSN	Actual ODBC Driver for Microsoft Access
dBASE (ODBC)	DSN	N/A
MySql	Driver is included	Driver is included
ODBC (Other source not specifically listed)	DSN	N/A
Oracle (ODBC)	DSN	Actual ODBC Driver for Oracle
PostgreSql	DSN	Actual ODBC Driver for PostgreSql
SqlServer (ODBC)	DSN	Actual ODBC Driver for Sql Server and Sybase
Sybase (ODBC)	DSN	Actual ODBC Driver for Sql Server and Sybase

DATA SOURCE NAMES (DSN)

If your data source is an ODBC source (database, spreadsheet, etc.) running on Windows, you will need to set up a **User Data Source Name** (DSN). If you do not already have one set up, following are basic instructions.

ODBC is a Microsoft protocol, so it's built in to the Windows operating system. As an example of the configuration process, we will take you through the steps for configuring ODBC on Windows 2000. If you are using a different operating system, the actual steps might be a bit different. Please consult your database or systems administrator for assistance if necessary.
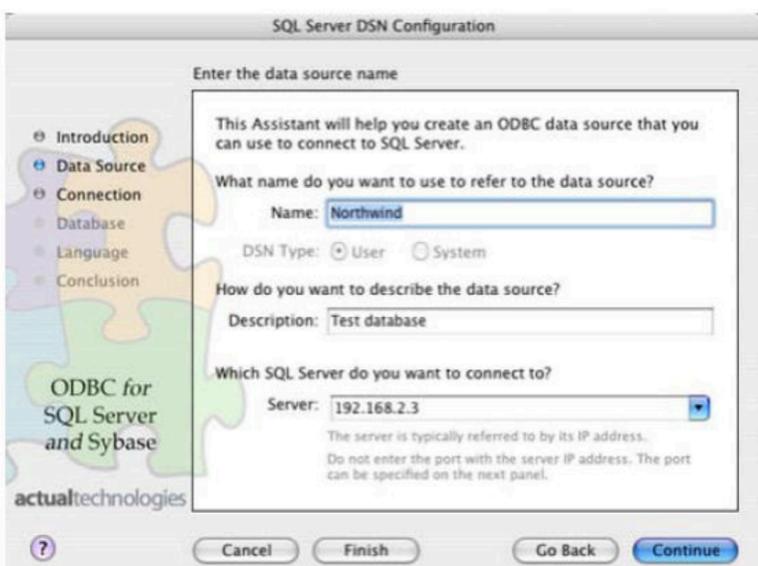
CONFIGURING A DSN ON WINDOWS 2000

THE ODBC CONTROL PANEL

1. Go to **Start**->**Settings**->**Control Panel**.
2. Double-click on **Administrative Tools**.
3. Double-click the **Data Sources (ODBC) icon**.
4. In the **User DSN** tab, click the **Add ...** button.
5. In the **Create New Data Source** dialogue, select the appropriate driver for the data source (e.g., Microsoft Access Driver).
6. Click on Finish.
7. In the **Setup** dialogue, enter a Data Source Name and Description.
8. In the **Database** area, click on **Select**.
9. Locate the object you want to open (database, spreadsheet, etc.) and select it.
10. Select any appropriate options, such as Read Only.
11. Click on **OK**.
12. Click on **Advanced Options**.
13. Enter a Login Name and Password and click **OK**.
14. Click **OK** again to save your new DSN.

ODBC DRIVERS FOR MACINTOSH USERS

In order to access an ODBC source from a Mac, you must first install an ODBC driver - these do not come as standard with the Mac OS operating system. We recommend the drivers offered by Actual Technologies. The following instructions assume that you are using an Actual Technologies driver.

Install the ODBC driver and set up a DSN as instructed in the Read Me file. For example, the following screen shot shows a DSN that has been set up to access the example Northwind database running on MS Sql Server:

The most important item here is the Server address - make sure that you enter the correct IP address for the server that's running the database.

CREATING A DATABASE CONNECTION

Once you've set up your DSN and ODBC driver, or if you are going to connect to a MySql database, your next step is to create a Database Connection in CatBase.

See the Database Connection Tutorial for detailed information.

PUBLISHING DATA TO AN ODBC CONNECTION

Once you've set up a driver and a Database Connection, you can upload data from your CatBase database directly to your remote database. To do this:
1. Select the table that you want to upload the data from.
2. Create a Publishing Stylesheet
3. In the **Preferences** tab of your Publishing Stylesheet, select the appropriate **Default Publishing Destination**.
4. Select the table in the remote database that you want to upload the data to.
5. Map the CatBase fields to the fields in the remote database.

IMPORTING DATA FROM AN ODBC CONNECTION

You can import data from your ODBC-connected database directly into CatBase.
1. Select the table that you want to import the data into.
2. Create an Import Stylesheet
3. Choose the appropriate connection type in the **Format/Source** popup menu.
4. Select your database connection.
5. Select the table in the remote database that you want to import data from.
6. Map the fields in the remote database to your CatBase fields.

Automating the process

Import and Publishing Projects

Sometimes your import or publishing projects require more than a simple data upload or download. You may need to import or publish data from several related tables, or to select a certain set of records to publish. You can set up an Import Project or a Publishing Project to create a one-click solution.

Scheduled Events

Do you need to run your project according to a set schedule - maybe every night, or once a week? Use the Event Scheduler to manage this!

ANY QUESTIONS?

If you need help setting up your Database Connection, please contact us!