OPEN SYSTEMS® Accounting Software

ODBC Kit
User's Manual

September 1999, Release 6.05

This document has been prepared to conform to the current release version of OPEN SYSTEMS Accounting Software. Because of our extensive development efforts and our desire to further improve and enhance the software, inconsistencies may exist between the software and the documentation in some instances. Call your customer support representative if you encounter an inconsistency.

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Introduction 1

General Information

The OPEN SYSTEMS Accounting Software (OSAS) product line consists of several accounting applications. Each application addresses a different phase of your financial operations; together, they form a powerful accounting solution to your daily and periodic accounting needs.

The Structure of OSAS

Resource Manager

The Resource Manager application is the foundation or shell of OSAS; it provides the operating environment that holds the other applications. To use OSAS, you must run Resource Manager through an operating system based on DOS, Microsoft® Windows 95™, Windows 98®, Windows NT®, UNIX®, or Novell® NetWare®. OSAS operates on LAN systems, across a web server using the OSAS Web program, and within a single computer. After you install Resource Manager, you can use it to install other applications, modify how each application works, and specify how the overall system operates.

You can install the other applications in any order unless their user's manuals specify otherwise.

Base applications

Base applications are designed and produced with the largest possible number of industries in mind. They are most effective when you interface them with each other. Base applications are usually named after common accounting operations. Examples are Payroll, Inventory, Accounts Payable, Purchase Order, Accounts Receivable, Sales Order, and General Ledger.

ODBC Kit

The ODBC Kit provides Open Database Connectivity (ODBC) drivers which are installed in Windows. Use the drivers and the ODBC Kit's data dictionary to access your OSAS data.

ODBC Overview

To use ODBC, you must have Microsoft Windows 95/98 or Windows NT installed on machines where you install ODBC. If your OSAS data is stored on a UNIX drive, you must have the software to map those drives as DOS drives. After you install ODBC under Windows, you can use it to access your OSAS data, produce reports, and import OSAS data into other applications.

Once you have installed and configured the ODBC drivers, you can use the data source you set up to access your OSAS data. The OSAS ODBC Kit includes sample reports for Microsoft Access®, Microsoft Excel™ and Crystal Reports™. You can find instructions for getting started with these packages and others in the Appendixes to this manual.

The ODBC Kit

Use the ODBC Kit to access your OSAS company information from any ODBC-compliant application such as Microsoft Access, Excel, Query™, or Word™; Crystal Reports, and so forth. The functions available from the OSAS menu are used to manage the data dictionaries and the ODBC driver.

Menu Structure

The ODBC Kit menu structure is similar to the structure of other OSAS applications: functions appear roughly in order of use.

Edit CONFIG.TPM

Use the Edit CONFIG.TPM function to set up a database configuration file for each company installed in OSAS whose data you want to access using the ODBC drivers.

Dictionary Tools

Use the functions on the Dictionary Tools menu to set up and maintain information about your data dictionary. For example, use the Update Reserved Words function to establish and update information about reserved words for the version of SQL you use.

Dictionary Reports

Use the Dictionary Reports functions to verify that field names are not SQL reserved words, to produce a list of field and file names in the data dictionary.

Application Interaction

The ODBC Kit is an application that translates your OSAS data into fields accessible through SQL (Structured Query Language). You can use SQL to access any application included in the data dictionary that you have access rights to.

Conventions

Your manual will help you to install OSAS on any standard machine within many popular operating systems and help you with your accounting software questions. In the manual, we use the term "Conventions", or standards, to help describe complicated processes, new terms, and to help you use your OSAS applications.

Manual Conventions

This User's Manual is divided into these sections, made up of several chapters:

- The "Introduction" provides an overview of this application and the OSAS system, including installation procedures, graphical and text-based application features, and function key references.

- "Installation" explains the steps necessary to begin using this application in your company, including how to install the application on your system.

- The last part of your manual is made of several chapters, each chapter describing a function group within this application.

Mouse Conventions

The standard mouse has two buttons, left and right, each performing certain functions. In this manual, we use these terms for using the mouse: *click*, *right-click*, *double-click*, and *deselect*.

The *click* is a single press on the left mouse button. Place the cursor over the desired function, and press the left button to enable, or "select", that function.

A *right-click* is a single press of the right mouse button.

To *double-click*, move the cursor over the desired function, and quickly press the left mouse button twice. If there is too long a pause between clicks, the computer may interpret your action as two separate clicks and may not perform the desired function.

To *deselect* an object, move the cursor off the icon or folder onto a blank space within the window and press the left mouse button.

> **Note**
>
> Some mouse manufacturers allow you to change the function of the mouse buttons for those who prefer (for example) to use the mouse with their left hand. In this case, reverse the commands when you use them. For example, a click refers to a single press of the right mouse button, while the term right-click refers to a single press of the left button, and so on.

OSAS Conventions

Operations in OSAS follow conventions, or patterns. The conventions used in OSAS applications are presented below.

Running OSAS

OSAS runs in an operating system supported by 100 megabytes permanent storage and 1 MB RAM. You may need additional disk space or memory depending on the size of your data files, and the operating system you use. Consult your reseller for more information.

Starting OSAS

To start OSAS on a Windows machine, double-click the OSAS icon on the desktop or in the appropriate folder.

To start OPEN SYSTEMS Accounting Software on a non-Windows machine, enter **osas** at the operating system prompt.

The command can recognize three parameters: -t, -c, and -a.

The terminal ID (-t) is the identification code assigned to the terminal you are using to work with OSAS. On multiuser systems each terminal usually has a default ID that was assigned when the terminals were added to the system. Use the -t parameter only when you want to log on with an ID other than the default ID. The terminal parameter is valid only if you are using Resource Manager for LANs.

The company ID (-c) is the identification code assigned to a company. If your system carries two or more companies and you do not enter a company ID, the menu of the company entered by the last person who used the terminal appears.

The access code (-a) is your personal password. Refer to the chapter 3 for information about assigning access codes.

The most general expression for getting into OSAS takes all the parameters into account. For example, if you are on terminal 2, you want to work with company B, and the password is *lerxst*, specify that information to enter the system:

osas -t T2 **-c** B **-a** lerxst

For UNIX, you can enter the parameters in any order, and you can use any combination. You must leave a space between the parameter mark (-t, -c, or -a) and the parameter itself.

An example for Windows only: click on the icon's properties and, in the Target field, enter your access code and your company ID. Example, using *pratt* as your access code and *H* for your company ID:

C:\osas\progrm\osastm.exe -m4096 **-t**T00 **-n**T00 - **-a**lerxst **-c**H

For Window icon properties, the parameter marks (-m, -t, or -n) can be entered in any combination but must be before the separation dash. The access code and company ID commands (-a and -c) must be entered *after* the separation dash.

Menu Conventions

When you start OSAS, the Main menu, which presents the applications you can use, appears. If you are using the Resource Manager for UNIX, the Text menu appears. If you are using the Resource Manager for Windows, you can choose between the Text Menu, Graphical Menu, or Start Menu. In Windows, use the Workstation Configuration Defaults function (page 2-23 of the *Resource Manager User's Manual*) to select the style of menu you want displayed. The following pages describe how you use each of these types of menus.

Favorites Menu

The Favorites menu operates in the text-based format as well as in the graphical formats. The Favorites menu allows quick and easy access to the OSAS functions you use most, allowing you to add selections for entire menus or particular functions.

With the Favorites menu, you save time in no longer switching to and from commonly accessed applications. For example, if you have application entries in Transactions (Accounts Payable), Transfer Journals (Inventory), and Edit Transactions (General Ledger), rather than moving through each application menu by menu, you could set up a Favorites Menu where, with one press of the enter key or a click of a button, your function would be open for work.
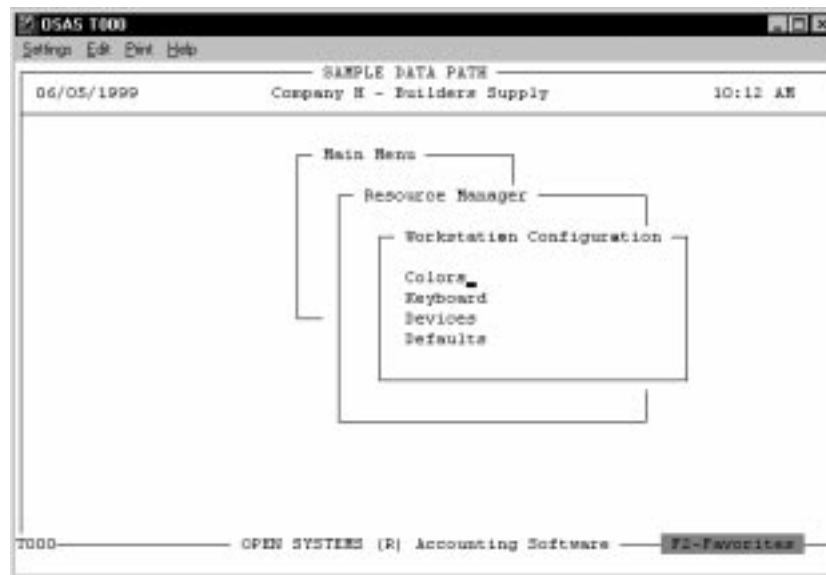
Favorites Menu: Graphical Style

For Favorites Menu setup information, see page 1-25.

Text Menu

The Text menu can be used on all OSAS compatible systems. Using text-based menus, the Text menu (shown below) offers easy access to your applications.

Text Main Menu

When you select an application, the application's menu, which presents several related functions, is superimposed over the Main menu. Selecting a function leads you to a function screen or to another menu.

You can select applications from the Main menu in these ways:

• Use the arrow keys to move the cursor up or down, highlighting the application you want to use. Then press **PgDn** or **Enter** to select it.

- Press the first letter of the application you want to use. The cursor jumps to the first application beginning with the letter, press the letter key or the down arrow until the application you want is highlighted. When your choice is highlighted, press **PgDn** or **Enter** to select it.

- Position the mouse cursor over the application and click. The application will briefly highlight and switch to the application screen.

- To jump to the first application on the menu, press **Home**. To jump to the last application on the menu, press **End**.

To select a function from an application menu, highlight and select your choices the same way you do on the Main menu—with one exception: you can press **PgDn** only when an option leads to another menu, and you must press **Enter** to select a function.

On an application menu you can press **PgUp** to move to the menu immediately above it. If you are several menu levels away from the Main menu, you can return to the Main menu by pressing **PgUp** repeatedly or by pressing the **Tab** key.

You can exit from a menu in these ways:

- Press the **PgUp** key to go to the previous menu (one menu up)
- Press the **Tab** key to go to the Main menu
- Use the **Exit** (**F7**) command to go to the operating system.

Function Keys Used in the Text menu

Most keyboards have a set of function keys (usually labeled with the letter *F* and a number). Within the menu, commands are assigned to these function keys. You can use the commands to work with data entry screens.

Except for the **Command Help** (**Esc**), the **Jump** (**Tab**) commands, and the **Enter** key, you can use the Keyboard function on the Workstation Configuration menu to reassign any function key to any command (see the Keyboard function on page 2-7 in the *Resource Manager User's Manual*).

Key	Operation
Esc (Command help)	Views the list of commands for the menu. (To close the commands window, press any key.)
F1 (Function Help)	Displays help information for this function.
F2 (Favorites Menu)	Displays the Favorites menu or changes to the regular menu from the Favorites menu.
F3 (Change Company)	Allows you to switch between companies.
F4 (Access Code)	Displays the Access Code prompt.
F4 (twice) (Other Menu)	Opens a menu of utilities. A calculator and Global Inquiry (which consolidates and presents information from other applications) are some of the utilities on the Other Commands menu. See Appendix F of the *Resource Manager User's Manual* for information about the utilities on the Other Commands menu.
F5 (Live/Sample swap)	Switches between live and sample data.
F6 (Workstation Date)	Displays the current workstation date and allows you to change it.
F7 (Exit)	Exits from OSAS.

Key	Operation
F9 (Application Setup)	Allows certain functions to be set up. Works only in certain applications. The application's user's manual will describe the function if necessary.
F10 (Add to Favorites)	Allows you to add to and delete from your Favorites menu.
Shift + F5 (Change menu style)	Switch between text and graphical menu styles without going into Defaults.
Shift + F2 (Application Info)	Displays information about the applications you have installed.
PgUp (Start over)	Move back one menu level.
Tab (Jump)	Move back to the Main menu.
Enter	Select a menu or function from a menu.
Up Arrow Down Arrow	Move the cursor up or down through the menu selections.
Ctrl + G (Bell on/off)	If the bell is turned on, it sounds at an error or when you must verify a command. To turn off the bell, use this command or the Defaults function on page 2-23 in the *Resource Manager User's Manual*. To turn the bell back on, use this command again.

Graphical-Style Menus

There are two types of graphical-style menus to choose from. The standard Graphical menu features application buttons that resemble many Windows functions. The Start Main menu is named because of its functional resemblance to the Start menu in Windows 95/98 and Windows NT. Featuring graphical displays, access buttons for your installed applications, and allowing access to OSAS functions via both the mouse and function keys, both graphical-style menus allow you a greater selection of interaction with OSAS and your data.

Both graphical-style menus are available in a Windows environment only.

Much like the Text menu, when you select an application in either graphical menu, the application's menu, presenting several related functions, is displayed beside the Main menu. Selecting a function leads you to a function screen or to another menu.

If you are using the Graphical menu, click the appropriate button with the mouse to select an application from the Graphical menu. To select a function from an application menu, click the function's button with the mouse the same way as you do for an application.

If you choose the Start menu you can select applications from the Main menu in these ways:

- Use the arrow keys and press **Enter**
- Click the selection
- Hold the mouse over the selection

From any application menu, you can select a button from the previous menu to move directly to that menu. If you are several menu levels away from the Main menu, you can return to the Main menu by clicking items on previous menus.
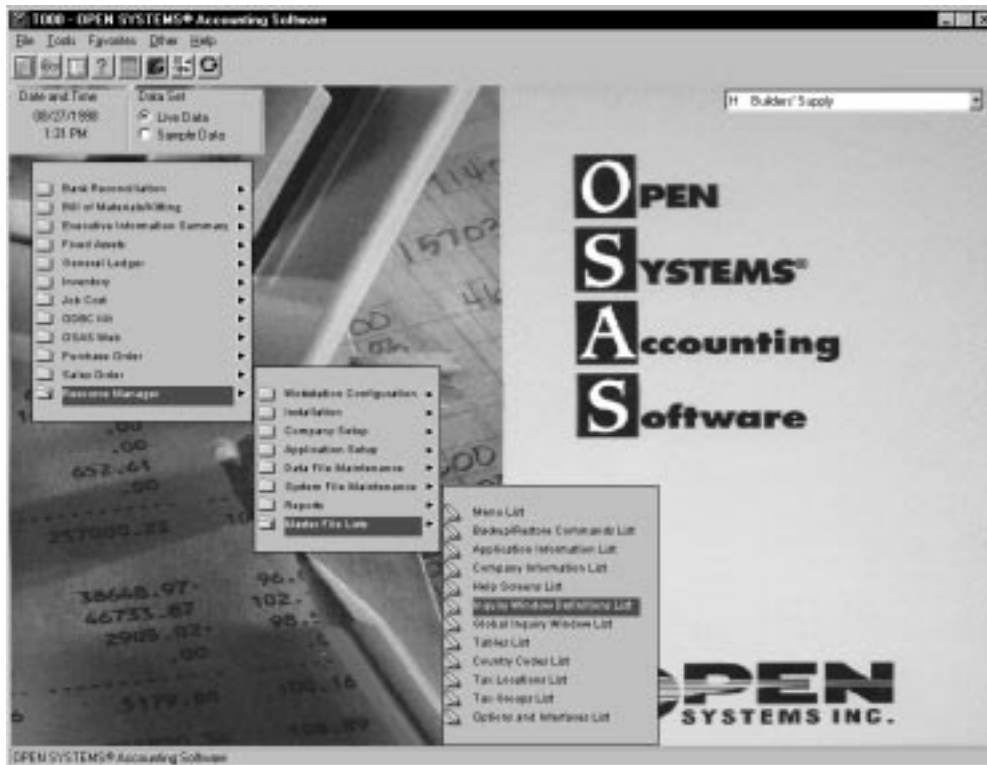
Graphical Main Menu
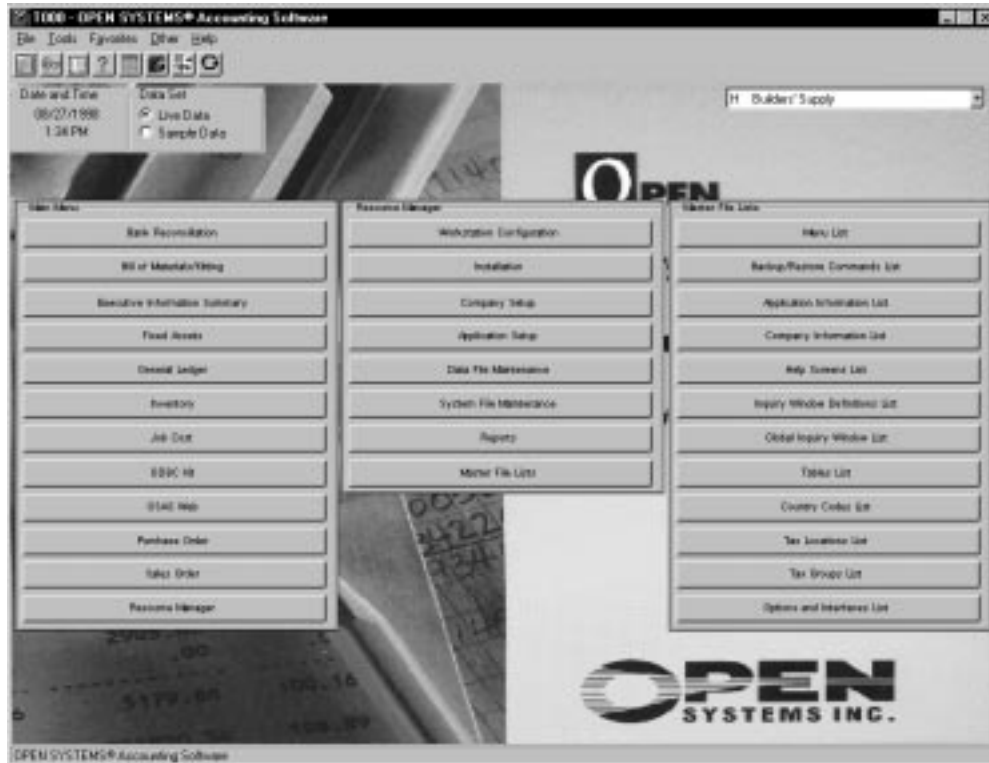
You can exit from a Graphical menu in these ways:

- select a button from a previous menu
- press the **Tab** key to go to the Main menu
- click the Close box in the upper right hand corner of the window to close OSAS
- use the Exit (F7) command to close OSAS
- select Exit from the File Menu to close OSAS

Start Main Menu

You can exit from a menu in these ways:

- press the left arrow key to go to the previous menu (one menu up)
- hold the mouse over a different menu item
- press the **Tab** key to go to the Main menu
- click the Close box in the upper right hand corner to close OSAS
- use the Exit (F7) command to close OSAS
- select Exit from the File Menu to close OSAS

Special Commands in Graphical menus

Right-click to display the Special Commands menu, which allows you to perform these special tasks:

From the standard menus:

- add a function or menu to the Favorites menu
- change to the Favorites menu
- change from live to sample data and vice versa
- display information about a function
- perform special application setup

From the Favorites menu:

- remove a function or menu
- change to the Main menu
- change from live to sample data and vice versa
- display information about a function
- perform special application setup

Menu Keys

Most keyboards have a set of function keys (usually labeled with the letter *F* and a number). In OSAS, commands are assigned to these function keys.

Key	Operation
F1 (Key Help)	Displays the list of Icons and Functions keys available to you.
F2 (Favorites Menu)	Displays the Favorites menu.
F4 (Access Code)	Displays the Access Code dialog box.
F5 (Live/Sample swap)	Switches between live and sample data.
F6 (Workstation Date)	Displays the current workstation date and allows you to change it.
F7 (Exit)	Exits from OSAS.
F9 (Application Setup)	Allows certain functions to be set up. Works only in certain applications. The application's user's manual will describe the function if necessary.
F10 (Change to Favorites)	Allows you to add to and delete from your Favorites menu. (works only with Start-style menu).
Right-click	Displays the Special Commands menu.
Shift + F5 (Change menu style)	Switch between text and graphical menu styles without going into Defaults.
Shift + F2 (Application Info)	Displays information about the applications you have installed.

Window Title Bar Menus

When working using the graphical menus, you can use the pull-down menus and tool buttons (with graphical icons) to access functions without using the function keys. While the function keys still work in the graphical menus, the menu bar and tool buttons offer you a choice in how you access certain functions.

Using the mouse, move the cursor to the menu and click once, or, click on a tool button for the function desired. Pictured below are the OSAS pull-down menu and tool buttons.

File Menu
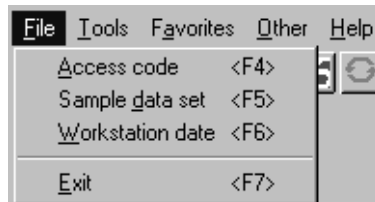
Command	Tool Button	Key	Result
Access code		F4	Displays the Access Code dialog box. See Access Code dialog box below.
Sample data set or Live data set		F5	Toggles between the sample data and the live data.
Workstation date		F6	Displays the Workstation Date dialog box. See Workstation Date dialog box below.
Exit		F7	Exits from OSAS.

Access Code dialog box

1. Enter the access code.

2. Click **OK** to save your entry and return to the Main menu or **Exit** to abandon the dialog box and return to the Main menu.

Workstation Date dialog box

1. Enter the date, or use the up/down buttons to increase or decrease the date.

2. Select **OK** to change the workstation date, **System Date** to change the workstation date to match the operating system date, **Abandon** to exit without changing the date, or **Exit** to return to the Main menu.

Tools Menu
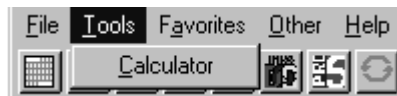
Command	Tool Button	Key	Result
Calculator			Displays the Windows calculator.

Favorites Menu
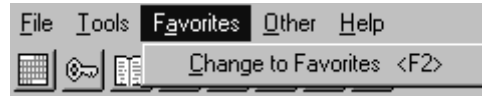
Command	Tool Button	Key	Result
Change to Favorites		F2	Toggles between the Favorites menu and the Main menu. See *Favorites Menu* on page 1-25 in the *Resource Manager User's Manual*.

Other Menu
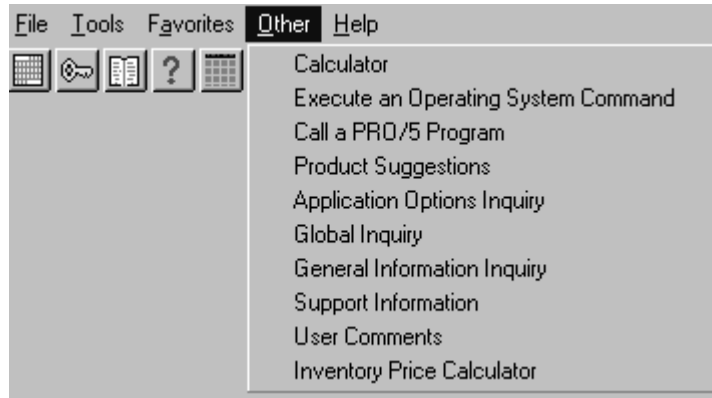
The Other menu contains a set of utilities. A calculator and Global Inquiry (which consolidates and presents data from other applications) are some of the utilities on the Other menu. See Appendix F in the *Resource Manager User's Manual* for information about the utilities on the Other menu.

Help Menu
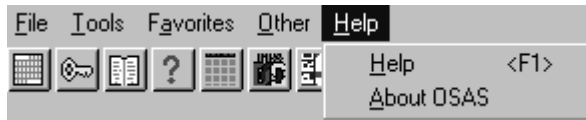
Command	Tool Button	Key	Result
Help		F1	Displays the online help.
About OSAS			Displays the About OSAS dialog box.

Tool Buttons

There are three tool buttons on the toolbar that were not described above.

| Tool Button	Key	Result
		Displays the Application Information dialog box.
		Opens an MS-DOS prompt.
		Displays a screen for calling any BBx program that does not require variables to be passed to it. See Appendix F in the *Resource Manager User's Manual*.

Other Graphical Screen Features

The graphical menus offer more than short cuts to application functions. With Resource Manager, you can, at a glance or with a mouse click, determine the date and time, switch between live and sample data, and switch between companies and their data sets.

Date and Time
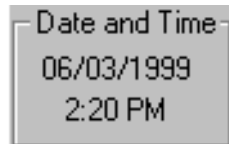
The workstation date and time are displayed.

Data Set
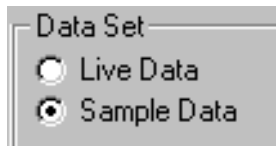
Check the Live Data radio button to work with live data. Check the Sample Data radio button to work with sample data.
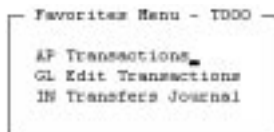
Change Company Field

Select the company you want to work with.

Favorites Menu

Your Favorites menu saves time in moving between applications, opening and closing submenus and application menus, and allows easy access to your common applications. By setting up your Favorites menu, you can access your most-used functions or submenus by pressing the **F2** key (or selecting the mouse pull-down menu).

Favorites Menu: Text Style

```
┌─ Favorites Menu - TDDO ─┐
│                         │
│  AP Transactions_       │
│  GL Edit Transactions   │
│  IN Transfers Journal   │
│                         │
│                         │
└─────────────────────────┘
```

There are two ways you can set up your Favorites menu, depending on if you use the text-style menu or the graphical-style menus.

To set up the text-style Favorites menu, follow these steps:

1. Move your cursor to the submenu or application that you want placed in the Favorites menu.

2. Press **F10**.

You can press **F2** to verify your selection was added to your Favorites menu.

To remove an application:

1. Press **F2** to display the Favorites menu.

2. Move your cursor to the submenu or application you want removed.

3. Press **F10**.

Favorites Menu: Start-Style

To set up the graphical-style display, follow these steps:

1. Position the cursor over the submenu or function you want placed into your Favorites menu.

2. Right-click on the function or submenu. The Favorites menu set up box (shown below) appears.

3. Click on Add to Favorites.

Screen Use

Screen	Description
Add to/Remove Favorites	Use the Add to/Remove Favorites menu button to add the desired submenu or function to, or remove the submenu or function from, your Favorites menu.
Change to Favorites/Main	Toggles your display menu between your Favorites menu and your Main menu.
Sample data/Live data	Switches between your sample data and your live data.
Setup	Clicking on this button or pressing **F9** sets up the selected application. Setup works only in certain applications. If an application requires a setup function, you will find instructions in that application's user's manual.
Function Information	Displays information about the selected function.

Function Commands

Once you select an OSAS application function from the menu, the function screen appears. The way that you enter data on OSAS screens is consistent from function to function. To move around the OSAS screens you use the function commands described below.

Most keyboards have a set of function keys (usually labeled with the letter *F* and a number). In OSAS, commands are assigned to these function keys. You can use the commands to work with data entry screens.

Except for the **Command Help** (**Esc**) and **Jump** (**Tab**) commands and the **Enter** key, you can use the Keyboard function on the Workstation Configuration menu to reassign any function key to any command (see the Keyboard function on page 2-7, *Resource Manager User's Manual*).

Key	Operation
Esc (Command help)	View the list of commands for the screen you are on and the field you are in. (To close the commands window, press any key.)
F1 (Help)	Get information about the field you are working on.
F2 (Inquiry)	Make a selection from a range of entries for a field if the Inquiry flag appears at the bottom of the screen.
F3 (Delete)	Delete the information on the screen. Since this command can delete an entire record, use it with caution.
F4 (Other)	Open a menu of utilities. A calculator and Global Inquiry (which consolidates and presents information from other applications) are some of the utilities on the Other Commands menu. See Appendix F for information about the utilities on the Other Commands menu.
F5 (Abandon)	Move the cursor back to the first field on the screen or to the first field after the key field. The entries and changes you made are erased.

Key	Operation
F6 (Maintenance)	Go directly to the appropriate File Maintenance function to update information about the field you are in if the Maint flag appears at the bottom of the screen.
F7 (Exit)	Exit from a screen or a window.
F8 (List)	Send the contents of the screen to a printer or a text file.
Shift + F2 (Information)	Open an Information menu. Each selection on the menu is an information window that you can access if the Info flag appears at the bottom of the screen. Each window contains a category of information about the field you are in.
PgUp (Start over)	Move the cursor back to the first field on the screen or to the first field after the key field without erasing the entries or changes you made.
PgDn (Proceed)	Approve the data on the screen, change the file accordingly, and proceed to the next spot (field or screen).
Tab (Jump)	Move the cursor to the next block of data on the screen or to the next field that requires an entry.
Enter or Down Arrow (Enter)	Move the cursor to the next field and accept the data entered.
Up Arrow	Move the cursor up (or back) one field. If you changed the information in the field you were in before you used this command, the change is lost when you move the cursor up.
Ctrl + V (Verification on/off)	If verification is turned on, you must press a key twice to verify that you want to perform that operation.
Ctrl + G (Bell on/off)	If the bell is turned on, it sounds at an error or when you must verify a command. To turn off the bell, use this command or the Defaults function on page 2-23 in the *Resource Manager User's Manual*. To turn the bell back on, use this command again.
Ctrl + F (Quick on/off)	If this option is turned off, the cursor stops at every field possible. To make the cursor skip the fields that do not require an entry, use this command to turn the option on.

Key	Operation
Ctrl + O (Show/hide function keys)	If this option is turned on, the applicable function keys are displayed on the screen. If this option is turned off, no keys are displayed.

Help Commands

When you use the **Help** (**F1**) command, three commands become available for you to use on help screens.

Key	Operation
F3 (Delete)	Delete the help screen contents.
	To recover a deleted help screen, copy the xxHELP file from the distribution media to the /PROGxx subdirectory (*xx* is the application ID). The copying process overwrites changes you made to other help screens.
F6 (Maintenance)	Edit a help screen.
F7 (Exit)	Exit from the help screen and close the window.

In-Field Editing Commands

When the cursor is in a field that contains information, you can use the following keys and commands:

Key	Operation
Right Arrow	Move the cursor to the right.
Left Arrow	Move the cursor to the left.
Del (Delete)	Delete the character the cursor is on.

Key	Operation
Ins (Insert on/off)	Switch insert mode on and off. When the Insert flag appears at the bottom of the screen, characters you type push characters after the cursor off to the side. When insert mode is turned off, characters you type write over existing ones.
Home	Move the cursor directly to the beginning of the field.
End	Move the cursor directly to the end of the field.
F9 (Undo)	Restore a field to the way it was before you changed it. You can use this command only while you are in the field; once you move past it, you must use the **Abandon** (**F5**) command to clear the field.
F10 (Delete to end of line)	Delete the characters in the field to the right of the cursor. If insert mode is turned off and you enter a character in the field's first position, everything in the field is deleted.

Inquiry Commands

When you use the **Inquiry** (**F2**) command, several other commands become available for you to use in the inquiry window.

Note

To shorten your data search, use a partial-key inquiry to cut down the size of the inquiry list. For example, if you know that the ID starts with *J*, enter **J** in the ID field before you use the **Inquiry** command. The inquiry list will start with *J* and run through the end of the list.

Key	Operation
PgUp	Display the previous page of the window.
PgDn	Display the next page of the window.
End	Move directly to the last item on file.

Key	Operation
Home	Move directly to the first item on file.
Down Arrow	Move down one item.
Up Arrow	Move up one item.
Ins (Look up)	Enter a string of information.
	If you have an idea of what you are looking for and the ID is longer than one character, you can make a partial-key inquiry to cut down the size of the inquiry list. For example, if you know that the ID starts with *J*, enter **J** in the ID field.
F7 (Exit)	Leave the Inquiry window without selecting anything.
Enter	Select the item the cursor is pointing to.
Esc (View commands)	Open a window that shows Inquiry window commands and the window ID.

Inventory Search Commands

If you use the Inventory application and the cursor is in an Item ID field, you can use any of the **Inventory Search** commands to search for information about items and select an item for entry in the field you are in.

Key	Operation
Shift + F3 (Alias Lookup)	Search for items with a specified alias listed as an alternate item. When you enter the alias, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.
Shift + F4 (Customer/Vendor Lookup)	Search for an item based on customer ID or vendor ID. When you enter the customer or vendor ID, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.

Key	Operation
Shift + F5 (Detail Lookup)	Search for detailed information about an item. You can enter search information in any of the fields that appear, using any of the following wildcard characters to restrict or widen the search: *** ? < > =**.
Shift + F6 (Lot–Item Lookup)	Search for an item based on lot number. When you enter the lot number, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.
Shift + F7 (Serial Number–Item Lookup)	Search for an item based on serial number. When you enter the serial number, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.
Shift + F8 (Item Description Lookup)	Search for an item based on item description. When you enter the description, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.

Report Commands

You can use the following commands when a report is displayed on the screen:

Key	Operation
PgUp	Move to the previous page of the report.
PgDn	Move to the next page of the report.
Home	Move directly to the top of a group of pages.
End	Move directly to the bottom of a group of pages.
F7 (Exit)	Exit to the menu from any point in the report.
Left Arrow	Move left one character.
Right Arrow	Move right one character.
Tab (Toggle)	Toggle between the left and right halves of a report.

Key	Operation
Up Arrow/Down Arrow	Move a line up and down the screen to line up information when you toggle between halves of a report.

Scroll Region Commands

When the prompt (>) is in a line-item scroll region, you can use the following commands:

Key	Operation
Down Arrow	Move down one line item.
Up Arrow	Move up one line item.
PgUp	Move to the previous screen or to the first line if you are on the first screen.
PgDn	Move to the next screen or to the last line if you are on the last screen.
Home	Move to the first line item in the entire list.
End	Move to the last line item in the entire list.
F3 (Delete)	Delete the line item at the prompt (>).
Ins (Insert)	Insert a line item at the prompt (>).
Enter (Edit)	Edit the line item at the prompt (>).

Reports

Selecting a Range of Information

To produce a report, you must specify the amount of information you want in the report.

- To produce a report that includes all the available information, leave the From-Thru fields on the report function screen blank. For example, if you want information about all the vendors to be in a report, leave the Vendor ID From and Thru fields blank.

- To limit the amount of information in the report, enter the range of information in the From-Thru fields. For example, if you want a report to include information only about vendor ACE001, enter ACE001 at both From and Thru. If you want the report to include information only about vendors that start with CO, enter CO at From and COZZZZ at Thru.

Each field where you enter information on a report function screen usually restricts the overall output of the report. For example, if you leave the Vendor ID From and Thru fields blank, the report will contain information about all the vendors. But if you enter invoice 100 in the Invoice Number From and Thru fields, and invoice 100 is assigned only to vendor ACE001, the report includes information only about vendor ACE001.

Sorting

Information for reports is sorted first by a space (_), then by characters, then by digits, then by uppercase letters, and finally by lowercase letters. No matter what you enter in the From and Thru fields, however, your entries are sorted in alphabetical order (unless the function provides an option to sort the information differently).

Sorting by alphabetical codes or IDs is easy. For example, the ID *ACL* comes before the ID *BB* because A comes before B.

But take notice when you enter codes or IDs that consist of something other than letters; the order might not be what you expect. For example, if 20 items are labeled 1 through 20 and you want all of them to be in a report, you might enter 1 at From and 20 at Thru, expecting them to be listed 1, 2, 3 . . . 19, 20. However, since OSAS sorts in alphabetical order, they are listed in a different order: 1, 10–19, 2, 20, 3–9.

To prevent that situation, pad extra spaces in codes and IDs with zeros so that numbers in alphabetical order are also in numerical order. In the example above the items would be labeled 00000000000000000001 through 00000000000000000020.

Output Device

Report functions screens offer four output options: printer, file, screen, and end.

- When you need a hard copy of a report, select **P**, and either accept the printer that appears or enter the code for the printer you want to use.

  If applicable, select **S** if you want the report to be in standard-size print or **C** if you want it to be in compressed print.

  If you want to stop printing after it has begun, press **Ctrl** + **Break**.

- If you want to save the report as a data file—for example, to include it in a word-processed report (in CR-LF format)—select **F**. The data path for the workstation, including the default drive, appears if it is specified in the Defaults function. Enter the filename and file extension, using no more than 35 characters overall.

- To preview the report—you must be using the Visual PRO/5 Interpreter and have a sysprint printer in your CONFIG.BBX file—select **R**.

  If applicable, select **S** if you want the report to be in standard-size print or **C** if you want it to be in compressed print.

  In the Printer dialog box that appears, select a sysprint printer and press **Enter**. The report is displayed on the screen. See Appendix F for toolbar and menu options.

- To view the report on the screen, select **S**. If the workstation default for compressed characters is *inactive*, the report is displayed in standard character mode. If the default is *active*, you can select standard mode or compressed mode. See your terminal documentation and the section on the termcap file in the *PRO/5 and Visual PRO/5 User's Manual*.

  If the message **End of Page** appears at the bottom of the report screen, you can press **Enter** to generate the next page of the report. If the message **End of Report** appears at the bottom of the report screen, you can press **Enter** to exit to the menu you selected the report from.

- If you need to change some selections before you produce the report, select **E** and then press **Enter**. To end the function and return to the menu without producing the report, select **E** and then use the **Exit** (**F7**) command.

Installation | 2

Introduction

This chapter will guide you through the procedures required to install and set up the OSAS ODBC Kit on your computer. Follow these steps:

1. Use Resource Manager to install the ODBC Kit on your computer. See the *Resource Managers User's Manual* for instructions on installing applications.

2. Use the Edit CONFIG.TPM function in the ODBC Kit to set up a configuration file pointing to a company's data files (see page 3-3).

3. Install the BASIS ODBC drivers and register your license(s).

   The BASIS ODBC driver is a 32-bit driver for Windows 95/98 and Windows NT that allows you to view and manipulate your OSAS data using any of the many popular Windows-compatible productivity programs.

   Installing and setting up ODBC is a three-step process. You must first install the drivers on the computer, register your license, and then configure your drivers by using the ODBC Administrator located in your Windows Control Panel (see page 2-41).

Note

If you have not installed the Windows ODBC Administrator, you may need to have the Windows installation disks or CD-ROM available. Windows prompts you for the required media if it is necessary.

ODBC License Registration

The ODBC driver included in the ODBC Kit versions 6.05 and higher contains licensing components that must be registered on your computer or network server. You can choose to install and register a license for each driver on the computer on which it runs (single-user), or you can install and register the BASIS License Manager on a server and license your ODBC drivers through the License Manager.

You can install and register the License Manager on any computer on your network running Windows, SCO UNIX (version 3.2.5 and above), Linux, UnixWare or AIX.

You cannot use the License Manager if you want to run the ODBC drivers on Windows computers that do not use TCP/IP as a network protocol, nor can you use it on SCO UNIX versions before 3.2.5 or on Novell servers. In these environments, you must install and register the driver licenses on each computer or install the License Manager on a computer running one of the supported platforms.

Single-User

Single-user installations require you to install the ODBC drivers and register a license on each computer that will be used to create reports using ODBC.

Turn to these pages for single-user license installation instructions:

License Manager

You can avoid registering each workstation's license separately on a multiuser system by installing and registering a BASIS License Manager on your network. Then, as you install the ODBC driver on each workstation, you activate it telling the driver where to locate the License Manager. Then, when you use it, the ODBC driver will request one of the multiuser licenses from the License Manager.

Turn to these pages for multiuser ODBC driver and License Manager installation instructions:

Installing the ODBC Drivers

After you install the OSAS ODBC Kit using Resource Manager and create your configuration (config.tpm) file, follow the steps below to install the ODBC driver on your computer. You must follow this process for each computer using the ODBC drivers.

Licensing Methods

If you are registering licenses for each computer using the ODBC drivers, follow the instructions below. Pay special attention to notes labelled **Single-User Installations Only.**

If you are installing the driver for use with the BASIS License Manager, follow the instructions later in this chapter to install the License Manager first, then follow the instructions below. Pay special attention to notes labelled **License Manager Installations Only.**

Installing the Drivers

1. Start Microsoft Windows 95/98 or Windows NT.

2. Insert the OSAS CD into your CD-ROM drive. The Autorun screen should appear automatically. If it does, skip to **Main Installation Screen** below; if not, follow steps 3-5.

3. Click **Start** and select **Run**.

4. Type the letter of the CD-ROM drive, a colon, and a backslash. Then type **autorun** to start the setup program. For example:

   d:\autorun

5. Click **OK**.

Main Installation Screen

The Main Installation screen appears:

6. Click **Install BASIS Products.**

7. Click **BASIS ODBC Driver**

8. The Choose Setup Language box appears. Scroll down to highlight the appropriate selection and click **OK**.

9. The BASIS Welcome screen appears. Read the text carefully and click **Next** to continue.

10. Before you proceed, locate the License Registration form you received with the ODBC Kit and keep it handy. After you read the software license terms, click on **Yes** to accept the agreement.

11. On the Setup Type screen, you have three choices on how to install your ODBC software. For new installations, select **Typical**.
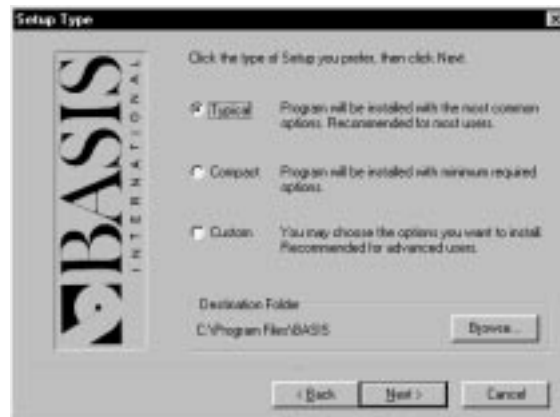
The destination folder automatically defaults to your C: drive. If you want to install ODBC on another drive select **Browse** and type in the drive letter where prompted.

If the drive is on your network, click on the **Network** button, find and highlight the desired drive and click on **OK**.

Click **Next** to continue.

Typical Setup

12. Use the Select Program Folder screen to specify the name of the folder where you want to store the shortcuts for your ODBC driver. Enter the folder name and click **Next**.

13. The setup process creates a folder using the name you specified, creates the shortcuts, and then begins copying files.

14. Next, you must either register and install your license for the ODBC driver on this computer, or tell the ODBC driver where to find the BASIS License Manager.

Single-User Installations Only: To register your license now, click **Next** and follow steps 15-21 below. If you have already registered your license, you can skip to the license installation by checking the box, and clicking **Next**. Then follow the steps under Single-User License Installation on page 2-14.

License Manager Installations Only: To direct this ODBC Driver to use the BASIS License Manager, check the box and then click **Next**. Then skip to License Manager Installation on page 2-17
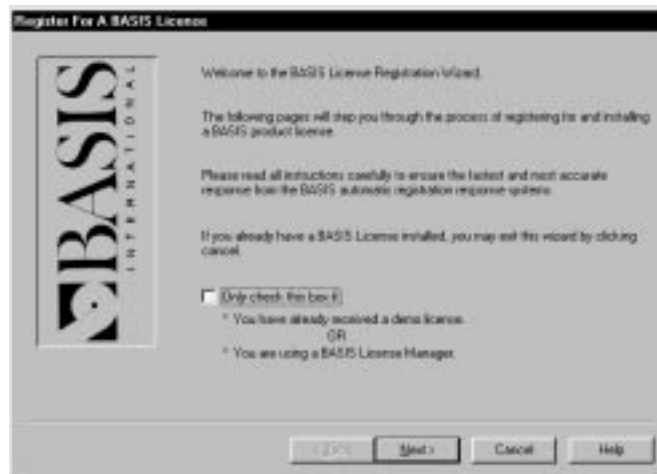
15. When this screen appears, enter the Serial Number and Authorization Number from the License Registration form. The host ID is determined automatically for you. The other fields are optional. Click **Next** to continue.

16. If the computer on which you are installing ODBC is connected to the Internet, click **Next** to use the Web Browser registration method—the fastest and easiest way to register your license. If this machine has no access to the Internet, or to use one of the other methods listed for registering your license, follow the applicable instructions in Appendix G.

17. The License Information Confirmation screen appears. Click **OK**.

Your registration information is sent using the default web browser on your
computer. When this message appears, click **OK** to continue.

Your browser will display your license file and instructions for saving it.

18. Save the page as instructed. If the C:\TEMP directory does not exist, create it and save the text file there using the name in the instructions.

19. When you are prompted to register for another license, click **No**. Then click **Next** on the Registration Notification screen.

20. The installation process should continue with the Install A BASIS License screen. If the screen appears, click **Yes** to continue. If it does not appear, click on the Windows **Start** button and select **Programs**. Then select the **BASIS ODBC Driver** folder and click on the **Install a BASIS License** icon.

21. Continue by installing the single-user license.

Single-User License Installation

1. If you have already received and installed the license file and entered a check on the BASIS Registration screen, or if you are using the BASIS License Manager, the ATTENTION! screen appears. Click **Yes**.

2. The Install A BASIS License screen appears. Select **Install a single-user BASIS ODBC Driver license on this machine** and click **Next**.

3. The Locate License File screen appears. Enter the path to the license file or click **Browse** to search for the file on your system. Click **Next** to continue.
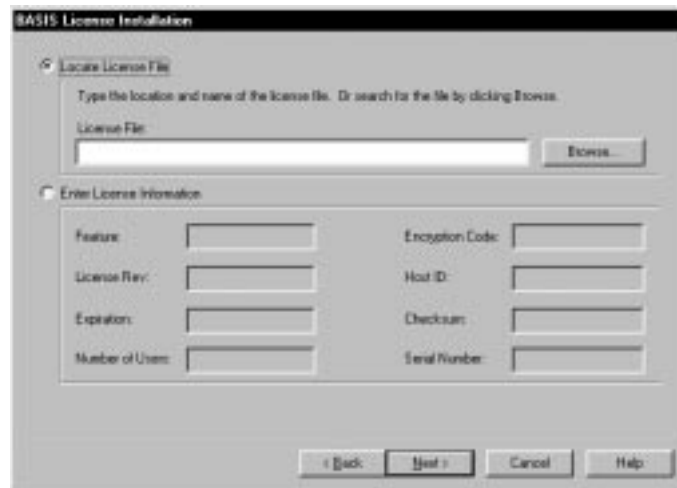
4. After you have located the license file, the Installation Successful screen appears.

When you click **Yes** and the BASIS License screen appears again, click **No** to complete the license installation.

5.   When the BASIS Data Server Connection screen appears, click **Next**.

6.   When the Installation Complete screen appears, click **Finish**.
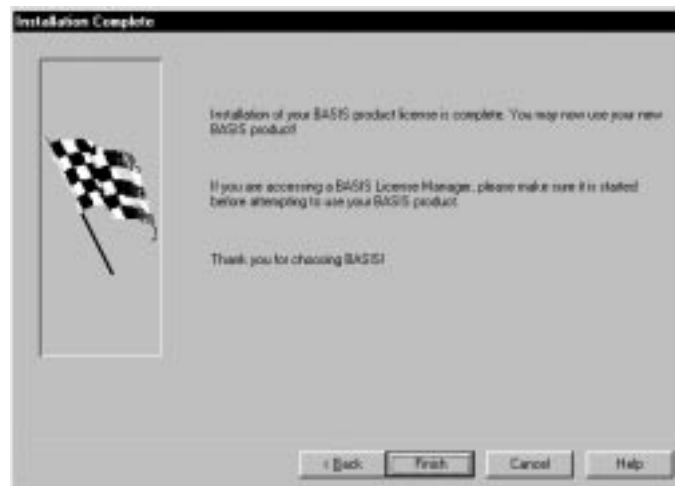
License Manager Installation

1. If you are using the BASIS License Manager, the ATTENTION! screen appears. Click **Yes**.

2. The Install A BASIS License screen appears. Select **Configure this application to use the BASIS License Manager** and click **Next**.

3. The Access A BASIS License Manager screen appears. Enter the server name where the BASIS License Manager is running. Then click **Next** to continue.

4. After you enter the server name, the Installation Successful screen appears. Click **OK** to continue.

5. After you enter the server name, the Installation Successful screen appears.
    Click **OK** to continue.
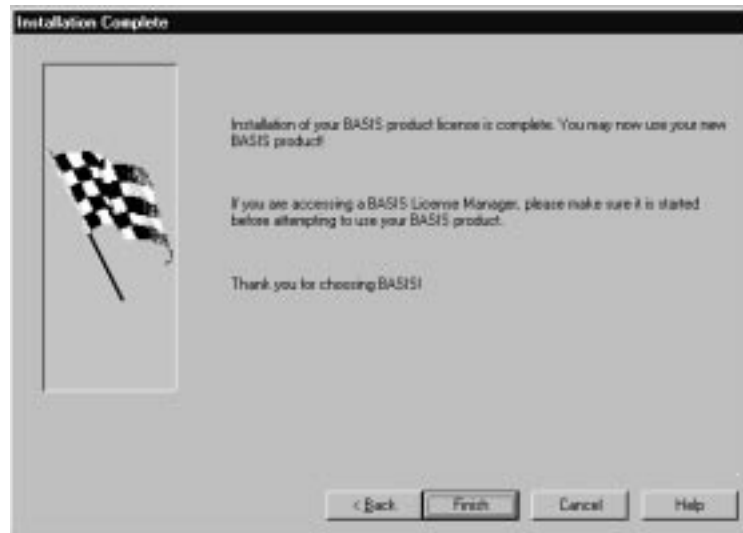
6. The ODBC driver is now configured to run with the BASIS License Manager.
    Before you can use the ODBC driver, however, you must start the License
    Server if you have not already done so.

7. The driver comes with a text file that contains technical information about this revision of the ODBC driver. If you want to view this informatiion, click **Finish**; if you want to continue without viewing the file, uncheck the box and then click **Finish**.

8. The Setup Complete screen appears. Before you can use the ODBC driver, you must restart your computer. To restart your computer now, select **Yes** and click **Finish**. To restart your computer later, select **No** and click **Finish**.

Next, follow the instructions on page 2-41 to set up and configure your ODBC drivers.

Installing License Manager for Windows

You can use the BASIS License Manager to make the installation of multiple ODBC drivers on a network easier. Rather than registering licenses for each driver on each computer, you can register a multiuser license using the License Manager, and then tell the ODBC drivers where to find the License Manager.

You can install and register the License Manager on any computer on your network running Windows, SCO UNIX 3.2.5 and above, Linux, UnixWare or AIX.

You cannot use the License Manager if you want to run the ODBC drivers on Windows computers that do not use TCP/IP as a network protocol, nor can you use it on SCO UNIX versions before 3.2.5 and Novell servers. In these cases, you must register the driver on each workstation or install the License Manager on a machine running one of the supported platforms.

Follow these steps to install and set up the BASIS License Manager and the ODBC driver on a Windows computer:

1. Start Microsoft Windows 95/98 or Windows NT.

2. Insert the OSAS CD into your CD-ROM drive. The Autorun screen should appear automatically. If it does, skip to **Main Installation Screen** below; if not, follow steps 3-5.

3. Click **Start** and select **Run**.

4. Type the letter of the CD-ROM drive, a colon, and a backslash. Then type **autorun** to start the setup program. For example:

   d:\autorun

5. Click **OK**.

Main Installation Screen

The Main Installation screen appears:

6. Click **Install BASIS Products**. The Install BASIS Products screen appears.

7. Click on the **BASIS License Manager** selection.

8. The Choose Setup Language box appears. Scroll down to highlight the appropriate selection and click **OK**.

9. The BASIS Welcome screen appears next. Read the text carefully and click **Next** to continue.

10. Before you proceed, locate the License Registration form you received with the ODBC Kit and keep it handy. After you read the software license agreement, click on **Yes** to accept the agreement.

11. The Choose Destination Location screen appears.

The destination folder defaults to your C: drive. If you want to install the
BASIS License Manager on another drive select **Browse** and type in the drive
letter where prompted.

If the drive is on your network, click on the **Network** button, find and
highlight the desired drive and click on **OK**.

Click **Next** to continue.

12. Use the Select Program Folder screen to specify the name of the folder where you want to store the shortcuts for your BASIS License Manager. Enter the folder name and click **Next**.

13. The setup process creates the folder using the name you specified, creates the shortcuts, and then begins copying files.

14. Next, you must register and install your license to use the ODBC driver. The information you need to register your license is included on the License Registration form you received with the ODBC Kit.

To register your license now, click **Next**. If you have already registered your license, you can skip to the license installation. To do so, check the box, click **Next**, and follow the steps beginning on page 2-30.

15. When the License Registration Information screen appears, enter the Serial Number and Authorization Number from the License Registration form. The host ID is determined automatically for this hardware. The other fields are optional. Click **Next** to continue.

Web Browser

16. If the computer on which you are installing the BASIS License Manager is connected to the Internet, you should use the Web Browser registration method. This is the easiest and fastest way to register your license. To use the Web Browser method, click **Next**.

    If this machine does not have access to the Internet, or if you prefer one of the other methods listed for sending your request or receiving your license, follow the associated instructions in Appendix G.

17. The License Information Confirmation screen appears. Verify the information and click **OK**.
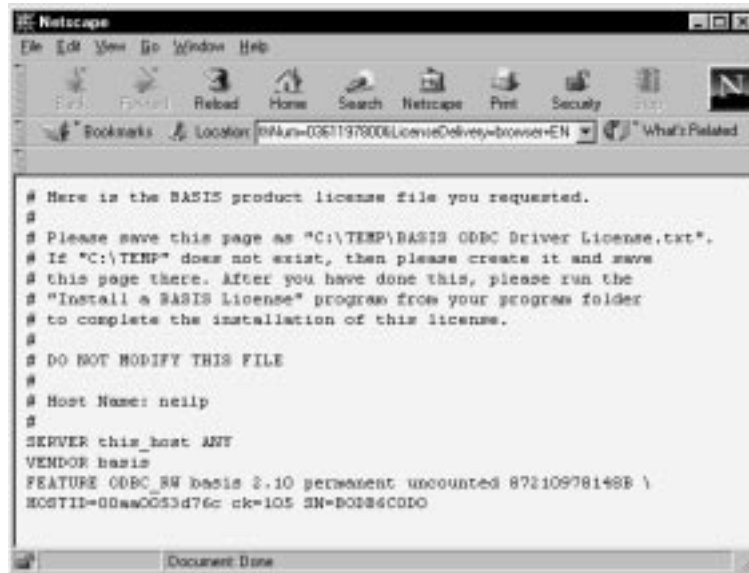
Your registration information is sent using the default web browser on your computer, and this message appears. Click **OK** to continue.

Your browser will show a screen showing your registered license information
and instructions for saving the information.

18.   Save the page as instructed. If the C:\TEMP directory does not exist, create it
      and save the text file there using the name in the instructions.

19.   When you are prompted to register for another license, click **No**. Then click
      Next on the Registration Notification screen.

20.   The installation process should continue with the Install A BASIS License
      screen. If this screen does not appear, click on the Windows **Start** button and
      select **Programs**. Then select the **BASIS ODBC Driver** folder and click on
      the **Install a BASIS License** icon.

      Continue by installing the license.

License Installation

1. The Locate License File screen appears. Enter the path to the license file or click **Browse** to search for the file on your system. Click **Next** to continue.
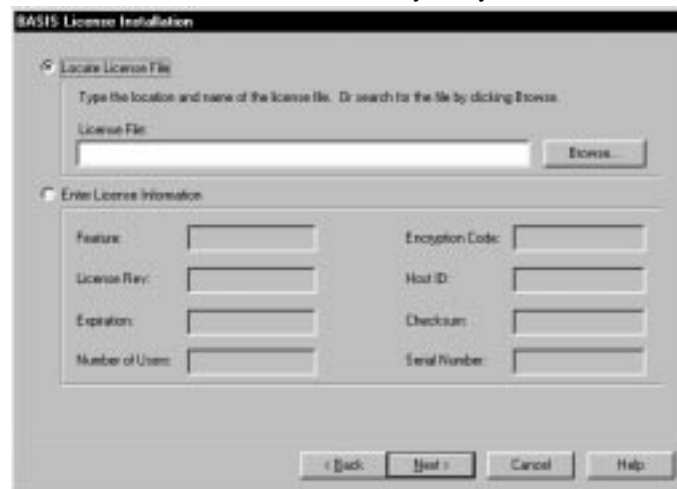
2. After you have located the license.txt file, the Installation Successful screen appears.

When you click **Yes** and the BASIS License screen appears again, click **No** to complete the license installation.

3. When the Installation Complete screen appears, click **Finish** to complete the license installation.
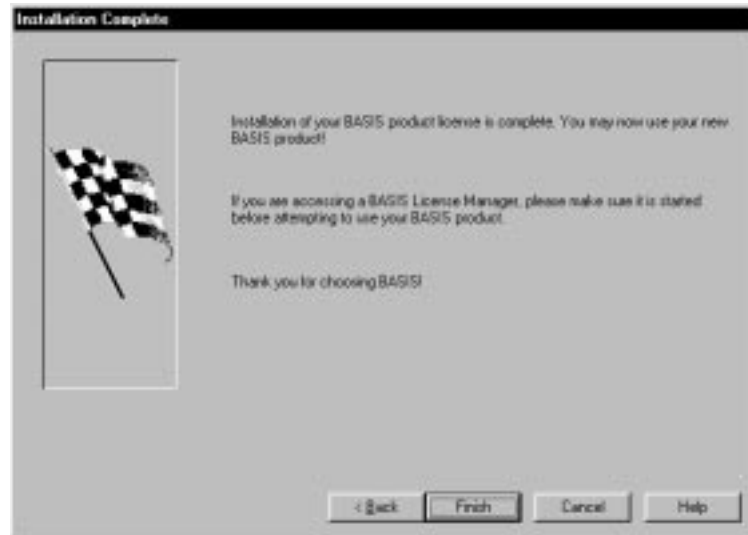
4. If you are instructed to do so, you may need to reboot your computer after the installation is complete. For now, click **OK.**

5.   The driver comes with a text file that contains technical information about this revision of the ODBC driver. If you want to view this informatiion, click **Finish**; if you want to continue without viewing the file, uncheck the box and then click **Finish**.

6.   The Setup Complete screen appears. Before you can use the License Manager, you must restart your computer. To restart your computer now, select **Yes** and click **Finish**. To restart your computer later, select **No** and click **Finish**.

Starting the Windows License Server

Before you can user the License Manager with your ODBC drivers, you must start
the License Server. To start the License Server, follow these steps:

1. Select **BASIS License Manager** from the BASIS License Manager folder on
    the Windows Start menu.

2. The **FLEXlm License Manager** screen appears:
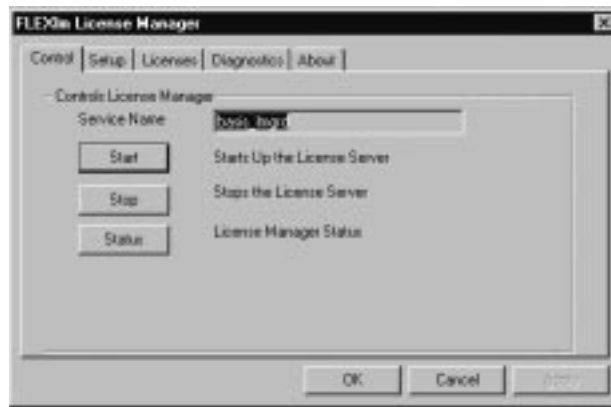
3. Click **Start** to start the License Server. Then click **OK**.

Now you can install your ODBC drivers. Follow the instructions on page 2-5 to
install the drivers.

Installing License Manager for UNIX/Linux

You can use the BASIS License Manager to make the installation of multiple ODBC drivers on a network easier. Rather than registering licenses for each driver on each computer, you can register a multiuser license using the License Manager, and then "point" the ODBC drivers to the License Manager when you use them.

You can install and register the License Manager on any computer on your network running Windows, SCO UNIX 3.2.5 and above, Linux, UnixWare or AIX. You cannot use the License Manager if you want to run the ODBC drivers on Windows computers that do not use TCP/IP as a network protocol, nor can you use it on SCO UNIX versions before 3.2.5 and Novell servers. In these cases, you must register the driver on each workstation or install the License Manager on a machine running one of the supported platforms.

Follow the steps below to install the License Manager on a UNIX- or Linux-based system. You can install the License Manager on computers with these operating systems:

- SCO UNIX version 3.2.5 and above
- Redhat Linux version 5.0 and above
- Slackware Linux version 3.6 and above
- AIX version 4.1 and above
- UnixWare

Note

 The License Manager for Linux is available on CD only.

The installation steps that follow are organized in three parts:

- Installing and setting up the BASIS License Manager
- Requesting the BASIS Product License
- Installing the BASIS Product License

1. At the main terminal, log in as the root user (in multiuser mode):

    Login: **root**
    Password:

2. Create a directory for the BASIS License Manager. For example,

    # mkdir /usr/basis

3. If you are installing from a CD, start with steps 4-8, then skip to step 12. If you are installing from diskette, skip to step 9, below.

 CD·ROM

4. Insert the OSAS CD into the drive. Mount the CD-ROM drive for your system. For example,

    # **umask 0**
    # **mount /dev/cdrom /mnt/cdrom**

5. Then enter the following command to change to the CD-ROM directory:

    # **cd /mnt/cdrom**

6. Change to the appropriate directory:

    Slackware Linux: **# cd BASIS/LM/LINUX/SLAKWARE**

    Redhat Linux: **# cd BASIS/LM/LINUX/REDHAT**

    SCO5 UNIX: **# cd BASIS/LM/SCO5**

7. Copy the untarred file into the directory you created.

    # cp BLMGR61F.Z /usr/basis

8. Change to the directory you created. For example,

    # cd /usr/basis

DISKETTE

9. Insert the License Manager distribution media into the drive.

10. Change to the directory you created in step 2. For example,

    # cd /usr/basis

11. To copy the files, enter the appropriate command for your operating system and the installation device you defined. If this command does not work, consult the system operating manual:

    tar xvf /dev/fd0135ds18

12. Uncompress the file using this command:

    # uncompress BLMGR61F.Z

13. Extract the files and create the subdirectories that contain the License Manager:

    # tar xvf BLMGR61F

14. From the operating system prompt, start the installation:

    # ./install

    The BASIS Install Main Menu appears.

15. Enter **BLM** to bring up the BASIS License Manager screen. Press **Enter** to continue.

16. Enter **CREATE** to create the script that will start the BASIS License Manager.

    This step will create a script called BasisRunLM in the directory /usr/basis/blmgr.

17. Enter **ADD** to add the License Server to your system startup file.

   NOTE: You must be logged in under the system administrator to perform this step.

Requesting the BASIS Product License

Next, you must register and then install your license to use the ODBC driver. The information you need to register your license is included on the License Registration form you received with the ODBC Kit.

1. Locate your BASIS serial and authorization numbers. Enter **REG** on the BASIS License Manager Install menu.

2. On the screen that appears, you will be prompted for several pieces of information. The Company Name, First Name, Last Name and Phone Number fields are optional. You can skip them by pressing **Enter**.

   Enter the serial number and authorization number exactly as they appear on the License Registration form you received with your ODBC Kit. The Host Name is determined automatically for your hardware. Press **Enter** to accept it.

3. Next, specify how you want to send the license information. You can choose from these options:

   E-mail: To use the E-mail sending option, your server must support outgoing Internet E-mail. If it doesn't, choose another method.

   Phone: Dial 1-505-338-4171 and use the automatic license registration system. The voice system will prompt you for your serial number, authorization number, and a fax number. The license information will be faxed to you using the fax number you specified.

   Fax: The Fax sending method saves the license request information in a text file that you can print on a laser printer and fax to BASIS at 1-505-338-4178. To use this method, your printer must produce a clear printout in 16-point type without using more than one page or printing the text outside the margins.

Other: The *Other* method should be used only if the E-mail, telephone and fax methods are all unavailable. This method produces a file containing the license registration information. You can then take the file to a system that has E-mail access to register the license.

4. Specify the method you want to use to receive the license information. Choose from these options:

E-mail: To use the E-mail receiving option, your server must support incoming Internet E-mail. If it doesn't, choose another method. If you select the E-mail option, you will receive E-mail at the address you specify that contains the license information. Follow the instructions in the E-mail to save the information in a file on your system.

Fax: The license information will be sent to the fax number you specify. In the steps below, you can enter the information that appears on the fax to install the license.

Installing the BASIS Product License

When you receive the license information, you must install the license before you can start the License Server. Follow these steps:

1. From the BASIS License Manager menu, enter **INSTALL**.

    E-mail: If you received the permanent license file by e-mail, enter the full path and filename of the file you saved on your system in the License File field.

    Fax: If you received the license information on a fax, press **Enter** at the License File field and enter the license information in each field exactly as it appears on the fax.

2. Verify the information you entered. If it is correct, press **Enter** to continue.

3. Start the License Manager by entering **START** at the BASIS License Manager menu to start the License Server. Type **exit** to end the installation.

Next, follow the instructions on page 2-5 to install your ODBC drivers.

Configuring the ODBC Drivers

After you install and register your ODBC drivers, you must set up your ODBC data sources. Each ODBC data source points to a specific configuration (config.tpm) file that tells the ODBC driver where to locate the data files and dictionaries and the company ID to use when looking for files. You can set up a data source for each company you want to access files for.

1. From the Control Panel, select **32bit ODBC Administrator**.

2. On the Administrator screen, select the **File DSN** tab and click **Add**.

3. Highlight **BASIS ODBC Driver** and click **Next**.
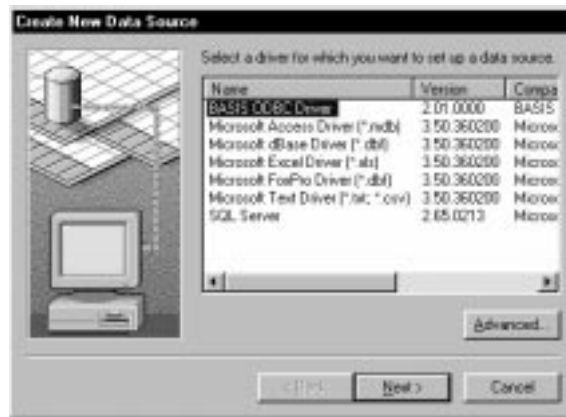
4. Enter the name for this ODBC data source, then click **Next.**

5. The next screen displays the information you entered. Verify that the information is correct and click **Finish**. If it is not correct, click **Back** and reenter the information as needed.

6. The Driver Data Source Configuration screen appears:

7. Enter the path for your configuration (config.tpm) file in the Database field.
    To locate the file, click **Browse**. Then click the **Pad variable length column
    with spaces** box, and enter **DATE** in the Column Suffix(es) field in the Dates
    box.

8. To allow this driver read-only access to your files, click on the **Read Only
    Access** box.

9. Click **OK** to continue.

10. Finally, click **OK** to finish the ODBC setup procedure.

The appendixes to this User's Manual contain examples and instructions for using
the ODBC driver with these popular productivity packages:

Microsoft Access	Appendix A
Microsoft Excel	Appendix B
Microsoft Query	Appendix C
Microsoft Word	Appendix D
Crystal Reports	Appendix E

Edit CONFIG.TPM 3

Introduction

Use the Edit CONFIG.TPM function in this chapter to set up and maintain database configuration files for the BASIS ODBC drivers.

Edit CONFIG.TPM

Features

Use the Edit CONFIG.TPM function to create and edit database configuration files for the BASIS ODBC driver. You must create a database configuration file for each company you want to access with the ODBC driver. Name each configuration file with some variation of the company ID and the TPM file extension. For example, name the configuration file CONFGHHH.TPM for the company whose ID is HHH.

Enter the file path and database configuration filename in the Database Configuration field in the BASIS ODBC Driver Data Source Setup dialog box when you install the BASIS ODBC driver or when you access OSAS data using the BASIS ODBC driver.

Reports

No report is associated with this function.

Screen Use

Screen	Description
Edit CONFIG.TPM	Use the Edit CONFIG.TPM screen to create and edit database configuration files.

Edit CONFIG.TPM Screen
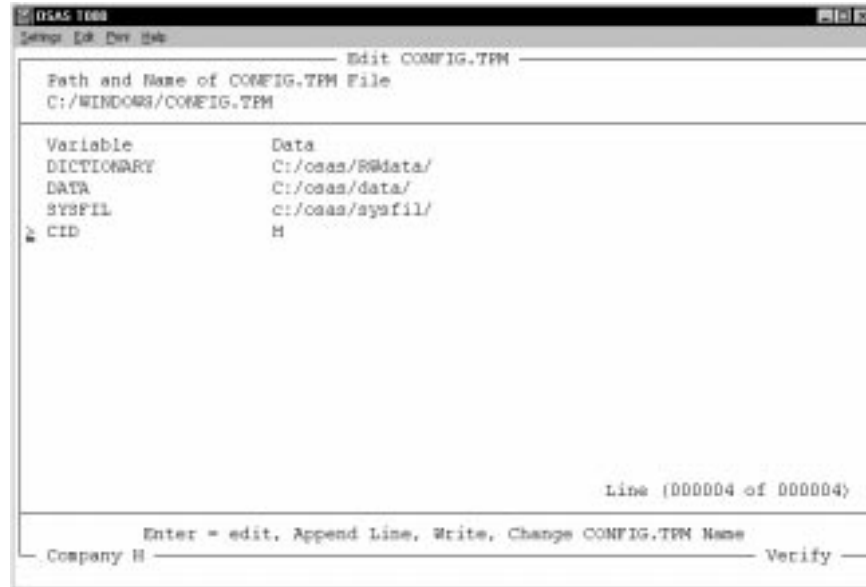
Field Definitions

Field Name	Description
Path and Name of CONFIG.TPM File	Enter the file path and name of the database configuration file you want to work with. If you enter a new path or database configuration file name, a skeleton file is built.
DICTIONARY	Enter the file path to the data dictionary files. Enter a / at the end of a directory path.
DATA	Enter the file path to the company data. Enter a / at the end of a directory path.
SYSFIL	Enter the file path to the OSAS system files. Enter a / at the end of a directory path.
CID	Enter the company ID for the database configuration file.

Command Bar Definitions

Command	Description
Enter = edit	Move the prompt (>) to the line to edit and press **Enter**.
Append Line	Press **A** to add a line.
Write	Press **W** to save your changes.
Change CONFIG.TPM Names	Press **C** to save your changes to a new configuration file.

Saving and Exiting

To save your entries and exit to the Main menu, press **W** and use the **Proceed** (**PgDn**) command.

Dictionary Tools **4**

Introduction

Use the functions in this chapter to set up and maintain files, fields, and indexes in the main data dictionary for the companies installed in OSAS, to delete unnecessary file definitions, and to maintain the list of reserved SQL words.

Copy File(s) To Dictionary

Features

Use the Copy File(s) To Dictionary function to copy file, field, and index definitions from one data dictionary to another.

Reports

No report is associated with this function.

Screen Use

Screen	Description
Copy File(s) To Dictionary	Use the Copy File(s) To Dictionary screen to copy file, field, and index definitions from one file to another.

Copy File(s) To Dictionary Screen

Field Definitions

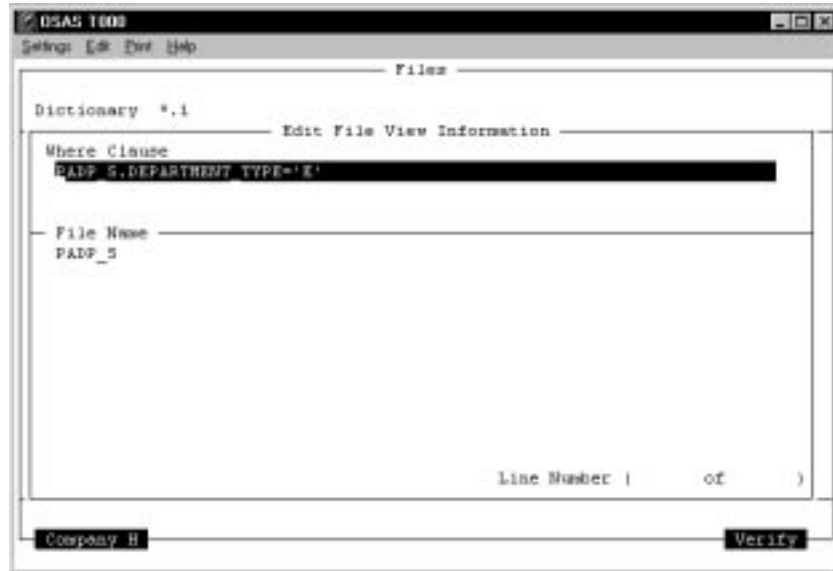|	Field Name	Description
Inquiry	From Dictionary	Enter the extension of the data dictionary to copy from.
Inquiry	To Dictionary	Enter the extension of the data dictionary to copy to.
	Copy	To copy all application files, enter **1**; to copy a specific file, enter **2**; to copy base dictionary tables, enter **3**.
	Application ID	If you entered **1**, enter the application you want to copy file information from.
	File Name/To Name	If you entered **2**, enter name of the file to copy file information from and the name to copy to.

Command Bar Definitions

This screen has no command bar.

Saving and Exiting

To save your entries and exit to the Main menu, use the **Proceed** (**PgDn**) command.

Files

Features

Use the Files function to set up and maintain data dictionary information about the data files used in OSAS programs, to construct views of the OSAS data files, and to delete unnecessary file definitions from the data dictionary. Back up data dictionary files—files with .1 as the file extension—before you delete, modify, or create files in case you make mistakes.

A *view* is a structured query language (SQL) term that represents a glimpse at the data contained in your files. The fields in a view can be from more than one file. Views can also have criteria applied. For example, a view can include vendor names and mailing addresses for a form letter, but include only vendors in a selected state. You should be familiar with SQL or become familiar with the predefined views in the data dictionary before you create new views.

You should be familiar with BB^x field and file types in order to append files to the data dictionary. Back up your data dictionary files before you create files; then you can restore the dictionaries if problems occur.

Use the Files function to delete unnecessary file definitions from your data dictionary to increase performance.

Reports

No report is associated with this function.

Screen Use

Screen	Description
Files	Use the Files screen to set up and maintain information about the OSAS data files in the data dictionary.

Screen	Description
Edit/Append Files	Use the Edit/Append File screen to add and edit the OSAS data file information in the data dictionary.
Edit File View Information	Use the Edit File View Information screen to add and edit the WHERE clause and files included in the view.

Files Screen

Field Definitions

Field Name	Description
File Name	Enter the file name.
Description	Enter the file description.
Type	Enter the file type.

Field Name	Description
RecLen	Enter the file record length.
Recs	Enter the number of records in the file.
Key	Enter the number of keys in the file.

Command Bar Definitions

Command	Description
Enter = edit	Move the prompt (>) to the line you want to edit and press **Enter**.
Append	Press **A** to add a file.
Goto	Press **G** to go to a specific file.

Saving and Exiting

To save your entries and exit to the Main menu, use the **Proceed** (**PgDn**) command.

Edit File Screen

Field Definitions

Field Name	Description
Dictionary	The dictionary file extension is displayed.
File Name	Enter the file name.
Description	Enter the file description.
View Definition	If the file is a view, enter **YES**; if not, enter **NO**.

Field Name	Description
Type	Enter the file type:
	I = Indexed
	L = Serial
	K = Keyed
	S = String
	P = Program
	D = Directory
	M = Mkeyed
Record Length	Enter the file record length.
Key Size	Enter the key size if the file is a single-keyed or Mkeyed file.
File Index	Enter the file index that the file is usually opened on.
RW Topic	Enter the Report Writer topic number within OSAS software.
Long File Name	Enter the long file name for the file.
ODBC Path	Enter the path ODBC will use to see the file. Use the variables (DATA) to specify the data path, (SYSFIL) to specify the system files path, and (CID) to specify a company-specific file. These variables are defined in the CONFIG.TPM file.
Application ID	Enter the application ID for the file.

Inquiry

Command Bar Definitions

This screen does not have a command bar.

Saving and Exiting

To save your entries and exit to the Files screen, use the **Proceed** (**PgDn**) command.

Edit File View Information Screen

Field Definitions

Field Name	Description
Dictionary	The dictionary extension is displayed.
Where Clause	Enter the SQL WHERE clause selection criteria. Use single quotation marks around strings. For example, APVE.VENDORID = 'ACE001'.
File Name	Enter the file names.

Command Bar Definitions

Command	Description
Append	Press **A** to add a file to link to from the current view file.
Write	Press **W** to save your changes.
Select Statement	Press **S** to edit the WHERE clause.

Saving and Exiting

To save your entries and exit to the Main menu, press **W** and use the **Proceed** (**PgDn**) command.

Fields

Features

Use the Fields function to define and edit the fields in the data dictionary files.

Unless you are working with views, you must be familiar with BB^x field types and the file's layout in order to define fields. If you are working with a view, build the field definitions from existing files with the **Build view from file** command.

Reports

No report is associated with this function.

Screen Use

Screen	Description
Fields	Use the Fields screen to define fields in the data dictionary files.
Edit/Append Fields	Use the Edit/Append Fields screen to edit and add fields in the data dictionary files.
Fields View	Use the Fields View screen to define and build fields in view files.
Build View From File	Use the Build View From File screen to import field definitions into a view.
Update Fields	Use the Update Fields screen to update identical fields in the data dictionary files.

Fields Screen
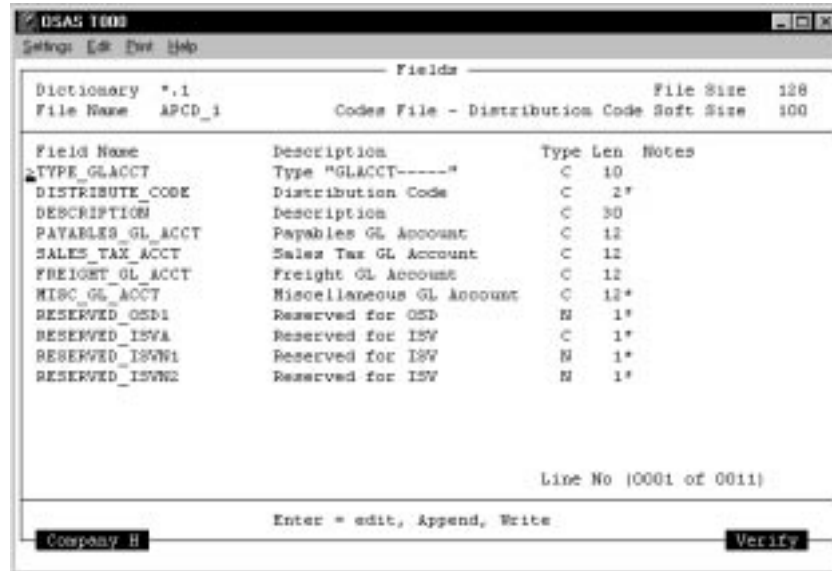
Field Definitions

Field Name	Description
Dictionary	The dictionary file extension is displayed.
File Name	Enter the file name to edit.
	The file description is displayed.
File Size	The file size is displayed.
Soft Size	The file soft size—the total of all field lengths added together plus the total number of fields in the file—is displayed.
Description	The field description is displayed.
Type	The field type is displayed.
Len	The field length is displayed.

Inquiry

Field Name	Description
Notes	The field notes are displayed.

Command Bar Definitions

Command	Description
Enter = edit	Move the prompt (>) to the line you want to edit and press **Enter**.
Append	Press **A** to add a file.
Write	Press **W** to save your changes.
Build view from file	Press **B** to build fields from a file. This option is available only when the file selected is a view.
	Enter the filename to build the fields from in the screen that appears.
Goto	Press **G** to go to a specific file.

Saving and Exiting

To save your entries and exit to the Main menu, press **W** and use the **Proceed** (**PgDn**) command.

Edit/Append Fields Screen

Field Definitions

Field Name	Description
Field Number	The field number is displayed.
Field ID	Enter the field ID. Any word you enter is checked against the reserved word file, and warning appears if you enter a reserved word. A reserved word is a key word from a third-party ODBC and SQL language that should not be used for field names.
Description	Enter the field description.

Inquiry

Field Name	Description
Field Type	Enter one of these characters to describe the data in the field: C = Character N = Numeric U = Unsigned Integer I = Signed Integer F = IEEE Float D = BCD Float B = Business Math X = 'C' Float Y = 'C' Double
Numeric Type	If the numeric is a Boolean, enter **B**. If the numeric is a julian date, enter **J**. If the numeric is any other numeric, enter **O**. If the field type is non-numeric, this field is not available.
Variable Length?	If the field is of variable length and requires a field terminator, enter **Y**; if not, enter **N**.
Field Terminator	Enter the decimal code that is used to represent a field terminator in your file. All OSAS standard files use **10** for their field terminator.
Field Length	Enter the length of the field in bytes.
Array Elements	This field is set to 1 and cannot be changed.
RW Name	Enter the name to be used in the GENERAL Report Writer.
Variable	Enter the variable ID used to represent the field. If this application uses string templates, leave the field blank.
Template	Enter the string template ID.
Notes	Enter any descriptive notes.

Saving and Exiting

To save your entries, use the **Proceed (PgDn)** command. The other fields are scanned for matching field names. If data changes have been made, the Update Fields screen appears to update other fields with the changed data.

Fields View Screen

Field Definitions

Field Name	Description
Dictionary	The dictionary file extension is displayed.
File Name	Enter the file name to edit.
(Description)	The file description is displayed.
File Size	The file size is displayed.
Soft Size	The file soft size—the total of all field lengths added together plus the total number of fields in the file—is displayed.

Field Name	Description
Field Number	Enter the field ID. Any word you enter is checked against the reserved word file, and warning appears if you enter a reserved word. A reserved word is a key word from a third party ODBC and SQL language that cannot be used for field names.
Description	The field description for view files is View Column.
Orig. Field	Enter the actual field name that this view field is based upon using the FILE.FIELD format. For example, if the view field is based on the CUSTOMER_ID field in the ARCU file, enter **ARCU.CUSTOMER_ID.**
Field Type	Enter one of these characters to describe the data in the field:

C = Character
N = Numeric
U = Unsigned Integer
I = Signed Integer
F = IEEE Float
D = BCD Float
B = Business Math
X = 'C' Float
Y = 'C' Double

Numeric Type	If the numeric is a Boolean, enter **B**. If the numeric is a julian date, enter **J**. If the numeric is any other numeric, enter **O**. If the field type is non-numeric, this field is not available.
Variable Length?	If the field is of variable length and requires a field terminator, enter **Y**; if not, enter **N**.
Field Terminator	Enter the decimal code that is used to represent a field terminator in your file. All OSAS standard files use **10** for their field terminator.
Field Length	Enter the length of the field in bytes.
Array Elements	This field is set to 1 and cannot be changed.
RW Name	Enter the name to be used in the GENERAL Report Writer.

Field Name	Description
Variable	Enter the variable ID used to represent the field. If this application uses string templates, leave the field blank.
Notes	Enter any descriptive notes.

Command Bar Definitions

Command	Description
Enter = edit	Move the prompt (>) to the line you want to edit and press **Enter**.
Append	Press **A** to add a file.
Write	Press **W** to save your changes.
Build view from file	Press **B** to build fields from a file. This option is available only when the file selected is a view.
	Enter the file name to build the fields from in the screen that appears.

Saving and Exiting

To save your entries and exit to the Main menu, press **W** and use the **Proceed** (**PgDn**) command. The other fields are scanned for matching field names. If data changes have been made, the Update Fields screen appears to update other fields with the changed data.

Update Fields Screen

Field Definitions

1. Enter **Automatic** to have fields updated by the system; enter **Prompt** if you want to be prompted for every field to be appended or changed.

2. If you want to update the description with changes, enter **Y**; if not, enter **N**.

3. If you want to update the field type with changes, enter **Y**; if not, enter **N**.

4. If you want to update the field length with changes, enter **Y**; if not, enter **N**.

5. If you want to update the GENERAL Report Writer name with changes, enter **Y**; if not, enter **N**.

6. If you want to update the notes with changes, enter **Y**; if not, enter **N**.

Command Bar Definitions

This screen has no command bar.

Saving and Exiting

To save your entries and return to the Fields screen, press **P** or **A** and use the **Proceed** (**PgDn**) command. If you select **P**, enter your options for each changed or appended field.

Indexes

Features

Use the Indexes function to define the keys used in OSAS Mkeyed data files.

You must be familiar with BB^x field and file types in order to use this function.

Reports

No report is associated with this function.

Screen Use

Screen	Description
Indexes	Use the Indexes screen to add and edit data dictionary information about the keys used in OSAS MKeyed data files.

Indexes Screen
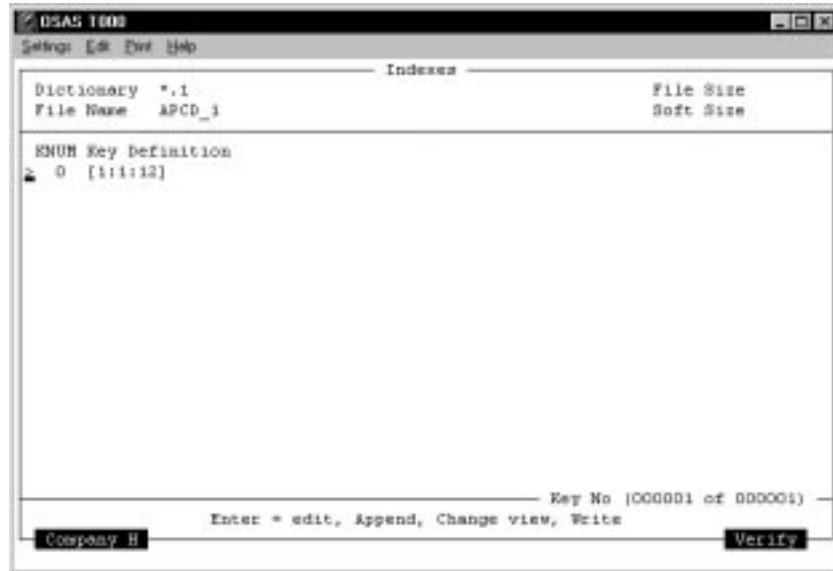
Field Definitions

Field Name	Description
Dictionary	The current data dictionary extension is displayed.
File Name	Enter the name of the file to work with.
File Size	The file size is displayed.
Soft Size	The file soft size—the total of all field lengths added together plus the total number of fields in the file—is displayed.
KNUM	The key order number is displayed.
Key	The key name is displayed.
Definition	The key definition is displayed.

Inquiry

Command Bar Definitions

Command	Description
Enter = edit	Move the prompt (>) to the line to edit and press **Enter**.
Append	Press **A** to add an index.
Change View	Press **C** to switch between the field view and key segment view of the file.
Write	Press **W** to save your changes.

Saving and Exiting

To save your entries and exit to the Main menu, press **W** and use the **Proceed** (**PgDn**) command.

Append/Edit Indexes Screen

Field Definitions

	Field Name	Description
Inquiry	Index ID	Enter an ID to identify the key.
	Seq	The sequence number is displayed.
Inquiry	Field	Enter the field name to use in the segment, or leave the field blank if the segment consists of more than one field. If you enter a field name, the description, type, field, position, and length are displayed.
	Description	Enter the description for the segment.
	Type	The field type is displayed: **C** for character, **N** for numeric.
	Fld	Enter the field number.

Field Name	Description
Pos	Enter the starting position of the field in a string.
Len	Enter the total length of the field.
Dsc	Enter **Y** if the field is in descending sort order; if not, enter **N**.
Uniq	Enter **Y** if the field is a unique field; if not, enter **N**. Enter **N** for standard OSAS files.
Bus	Enter **Y** if the field is a business math type and must be sorted as such; if not, enter **N**. Enter **N** for standard OSAS files.

Command Bar Definitions

Command	Description
Enter = edit	Move the prompt (>) to the line to edit and press **Enter**.
Append	Press **A** to add an index.
Description	Press **D** to edit the index ID description.

Saving and Exiting

To save your entries and exit to the Main menu, use the **Proceed** (**PgDn**) command.

Add/Change Reserved Words

Features

Use the Add/Change Reserved Words function to add or update the file of reserved Structured Query Language (SQL) words or to other words you want flagged as reserved.

Reports

No report is associated with this function.

Screen Use

Screen	Description
Add/Change Reserved Words	Use the Add/Change Reserved Words screen to update the reserved words file.

Add/Change Reserved Words Screen
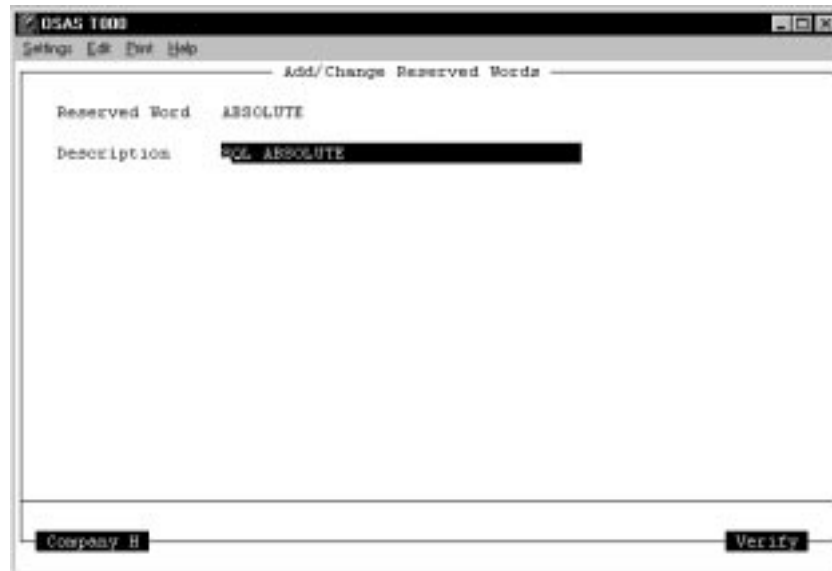
Field Definitions

Field Name	Description
Reserved Word	Enter the reserved word.
Description	Enter a description for the reserved word.

Inquiry

Command Bar Definitions

This screen has no command bar.

Saving and Exiting

To save your entries and exit to the Main menu, use the **Proceed** (**PgDn**) command.

Tables

Use the Tables function to set up and maintain the ODBC Kit table.

Tables store information about the system, data, options, and default settings for other applications.

The following tables are related to the ODBC Kit:

*   OPT

*   ODEXTxxx

For more information about the ODEXTxxx table, see its individual description in this section.

The OPT (Options) tables store options and interfaces settings. Maintain the information stored in this table through Resource Manager functions, not through the table itself.

Screen Use

Screen	Description
Tables Screen	Use the Tables screen to edit table fields.
ODEXTxxx Tables Screen	Use the ODEXTxxx Tables screen to edit the data dictionary file extension used by your terminal.

Tables Screen

Inquiry

1. To add or change a table, enter the table ID (A8). To set up a company-specific table, enter the table ID plus the one- to three-character company ID. To set up a terminal-specific table, enter the table ID plus the three-character terminal ID. To delete the table, use the **Delete (F3)** command.

Inquiry

2. If you entered a new table ID, the Copy From field appears (A8). To copy a company- or terminal-specific table, enter the table ID plus the company ID and terminal ID.

   A set of tables comes with the sample company, Builders' Supply. You can copy the sample tables for a company and then change the appropriate fields. To copy a sample table, enter the table ID.

3. Accept the displayed description of the table, or enter a different description (A40).

The number of columns, the length of the columns, and the type of characters you can enter—alphanumeric (A), numeric (N), or numeric with one to four decimal places—are displayed.

ODEXTxxx Table

The ODEXT table stores the data dictionary file extension in use for the current terminal, where xxx is the current terminal ID.

When you enter the table ID, the rest of the ODEXT table appears.

Field	Description
Dic (A3)	Enter the data dictionary file extension for the current terminal.

Dictionary Reports 5

Introduction

Use the functions in this chapter to verify that file and field names are not SQL reserved words and print a report of file and field names that are SQL reserved words, to print a list of reserved SQL words, and to print a list of the field names used in files.

Dictionary Field List

Features

Use the Dictionary Field List function to produce a printout by field name across files. Use the list to verify the consistency of field names in related files.

Reports

A sample Dictionary Field List is on page 5-6.

Screen Use

Screen	Description
Dictionary Field List	Use the Dictionary Field List screen to select the field and files names to list.

Dictionary Field List Screen

Field Definitions

The current data dictionary extension is displayed.

1. Enter the range of field IDs to include in the list.

2. Enter the range of file names to include in the list.

3. Select the option by which to organize the list.

4. Select the output device.

Command Bar Definitions

Command	Description
Printer	Select **P** to send the list to a printer.
File	Select **F** to send the list to a file.
Screen	Select **S** to send the list to the screen.
End	Select **E** to change your selections or exit to the Data Dictionary menu.

Saving and Exiting

After the list is produced, the Dictionary Reports menu appears.

Dictionary Field List

Audit Field Names For Reserved Words

Features

Use the Audit Field Names for Reserved Words function to validate an application for reserved words or check all applications for reserved words.

Reports

A sample Audit Field Names For Reserved Words List is on page 5-10.

Screen Use

Screen	Description
Audit Field Names For Reserved Words	Use the Audit Field Names For Reserved Words screen select the application and files to validate.

Audit Field Names For Reserved Words Screen

Field Definitions

The current data dictionary extension is displayed.

1. Enter the ID of the application to create files for, or leave this field blank to verify all applications for reserved words.

2. Enter the range of file names to verify.

3. Enter the output device.

Command Bar Definitions

Command	Description
Printer	Select **P** to send the report to a printer.
File	Select **F** to send the report to a file.
Screen	Select **S** to send the report to the screen.
End	Select **E** to change your selections or exit to the Data Dictionary menu.

Saving and Exiting

After the report is produced, the Dictionary Reports menu appears.

Audit Field Names For Reserved Words List

```
10/27/1995                    Builders Supply                    Page    1
3:47 PM              Audit Field Names for Reserved Words

File ID           Field Name      Description of Reserved Word
------------------------------------------------------------------

APHS_1            YEAR            SQL YEAR
APHS_2            YEAR            SQL YEAR
APHS_3            YEAR            SQL YEAR
APHS_COMP_RECORD  YEAR            SQL YEAR
APHS_ITEM_RECORD  YEAR            SQL YEAR
APHS_VEND_RECORD  YEAR            SQL YEAR
APUC              DATE            SQL DATE

End of Report
```

Reserved Words List

Features

Use the Reserved Words List function to printout a list of all the reserved SQL words.

Reports

A sample Reserved Words List is on page 5-14.

Screen Use

Screen	Description
Reserved Words List	Use the Reserved Words List screen to select the reserved words to include in the list.

Reserved Words List Screen

Field Definitions

1.   Enter the range of reserved words to include in the list.

2.   Enter the output device.

Command Bar Definitions

Command	Description
Printer	Select **P** to send the list to a printer.
File	Select **F** to send the list to a file.
Screen	Select **S** to send the list to the screen.
End	Select **E** to change your selections or exit to the Data Dictionary menu.

Saving and Exiting

After the list is produced, the Dictionary Reports menu appears.

Reserved Words List

```
10/22/1995                      Builders Supply                    Page    1
3:36 PM                         Reserved Words List

Reserved Word       Description
-----------------------------------------------------------

ABSOLUTE            SQL ABSOLUTE
ACTION              SQL ACTION
ADD                 SQL ADD
ALL                 SQL ALL
ALLOCATE            SQL ALLOCATE
ALTER               SQL ALTER
AND                 SQL AND
ANY                 SQL ANY
ARE                 SQL ARE
AS                  SQL AS
ASC                 SQL ASC
ASSERTION           SQL ASSERTION
AT                  SQL AT
AUTHORIZATION       SQL AUTHORIZATION
AVG                 SQL AVG
BEGIN               SQL BEGIN
BETWEEN             SQL BETWEEN
BOTH                SQL BOTH
BREAK               SQL BREAK
BROWSE              SQL BROWSE
BULK                SQL BULK
BY                  SQL BY
CASCADE             SQL CASCADE
CASCADED            SQL CASCADED
CASE                SQL CASE
CAST                SQL CAST
CATALOG             SQL CATALOG
CHARACTER           SQL CHARACTER
CHARACTER_LENGTH    SQL CHARACTER_LENGTH
CHAR_LENGTH         SQL CHAR_LENGTH
CHECK               SQL CHECK
CHECKPOINT          SQL CHECKPOINT
CLOSE               SQL CLOSE
CLUSTERED           SQL CLUSTERED
COALESCE            SQL COALESCE
COLLATE             SQL COLLATE
COLLATION           SQL COLLATION
COLUMN              SQL COLUMN
COMMIT              SQL COMMIT
COMMITTED           SQL COMMITTED
COMPUTE             SQL COMPUTE
CONFIRM             SQL CONFIRM
CONNECT             SQL CONNECT
CONNECTION          SQL CONNECTION
CONSTRAINT          SQL CONSTRAINT
CONSTRAINTS         SQL CONSTRAINTS
CONTINUE            SQL CONTINUE
CONTROLROW          SQL CONTROLROW
CONVERT             SQL CONVERT
```

Microsoft Access $\boxed{\textbf{A}}$

This appendix walks you through opening a simple form using the ODBC Kit and Microsoft Access 97. If you require more information about Microsoft Access, consult the Microsoft Access User's Guide or Online Help.

Before you can create this report, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Access 97.

The Microsoft Access example—ACCEXAMP.MDB—which contains two reports and two inquiry forms is included in the ODBC Kit.

You can find additional information about using ODBC with Microsoft Access on the Open Systems web page on the Internet at http:\\www.osas.com.

To Work With a Sample Form

1. Start Microsoft Access. If you have security set up, enter your user name and password.

    The Microsoft Access dialog box appears.

2. Select the sample database, ACCEXAMP.MDB. Select More Files to locate the database if necessary.

3. The database container is displayed.
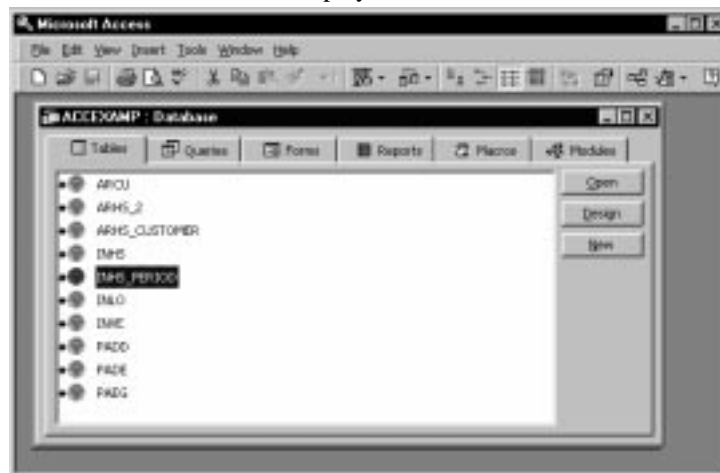
To Link Tables to Microsoft Access

If you encounter problems with the existing table links in the sample data base, delete them and follow these steps:

1. Select **Get External Data** and **Link Tables** from the File menu, or right-click the database container and select Link Tables.

   The Link dialog box appears.
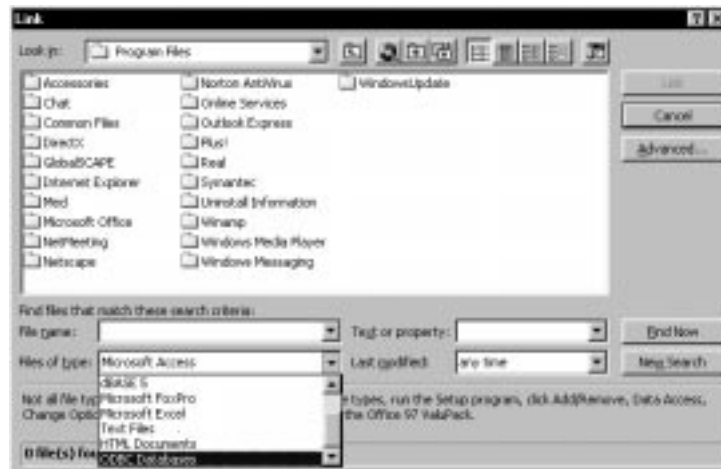
2. Select ODBC Database in the Files of type field. Select the **Machine Data Source** tab.

    The Machine Data Source tab is displayed.

3. If you have set up an OSAS ODBC machine data source, select it and click **OK**; otherwise, click **New**.

    Clicking on **New** starts a data source creation wizard that will guide you through the process for setting up a new data source. Refer to chapter 2 for instructions for creating a new data source.

The BASIS ODBC Driver Data Source Setup screen appears.

4. Enter a name and description for the data source. Click **Browse** to locate the configuration file you set up using the Edit CONFIG.TPM function in OSAS.

When you set up the data source, you must click to check the **Pad variable length columns with spaces** box, so that any updates you make to the OSAS files will be padded correctly. Then, in the Dates section of the window, enter **DATE** in the **Column Suffix(es):** field so that dates will be displayed in the correct format.

Note

If you are using OSAS[CS] and you use the data server to access your data, enter your login name in the User ID field.

---

5. Click **OK** to connect to the data source.

The Link Tables screen appears.

6. Select the following tables for the samples in the sample database:

- ARCU
- ARHS_2
- ARHS_CUSTOMER
- INHS
- INHS_PERIOD
- INLO
- INVE
- PADD
- PADE
- PAEG

7. Select **OK**.

As the OSAS files are linked to the Microsoft Access database, you are prompted for keyed fields in the OSAS files. Selected the keyed fields in the dialog box that is displayed.

You are returned to Microsoft Access. The linked tables are displayed.

8. Select the **Forms** tab.

9. Select **frmCustHistLookup** on the Forms tab.

The Customer History Form is displayed.
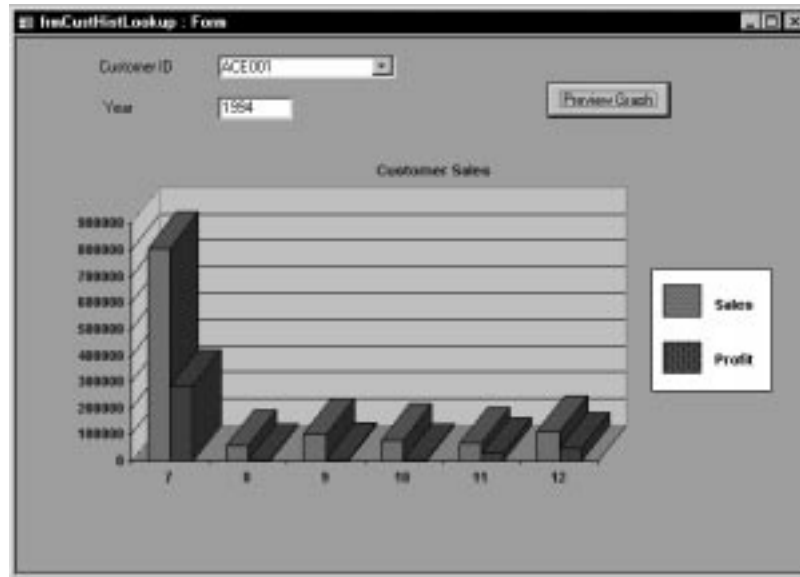
10.   Select a Customer ID and enter a year. Then click **Preview Graph**.

To Work With Sample Queries

To work with sample queries in the Microsoft Access database, select the
Queries tab and select the query you want to work with.

To Work With Sample Reports

To work with sample reports in the Microsoft Access database, select the
Reports tab and select the report you want to work with.

Microsoft Excel B

This appendix walks you through creating a pivot table using the ODBC Kit and Microsoft Excel 97. If you require more information about Microsoft Excel, consult the Microsoft Excel User's Guide or Online Help.

Before you can create this report, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC driver.
- Install Microsoft Excel 97 and Microsoft Query 97.

The following Microsoft Excel examples are included in the ODBC Kit. They are installed in the ProgOD directory:

- GLACCT.XLS—GL Account Number Lookup

- PIVOT.DOC—Microsoft Word instructions for setting up an Excel Pivot table

- SOORDERS.XLS—Sales Orders Pivot Table Lookup

- ARCUST.XLS—Customer History Lookup and Graphs

Note

This appendix includes instructions for using Microsoft Query with Microsoft Excel. If necessary, you can install Microsoft Query from the Microsoft Office 97 media. You may also need to create a shortcut to Query manually.

You can find additional information about using ODBC with Microsoft Excel on the Open Systems web page on the Internet at http:\\www.osas.com.

Building a Query For a Pivot Table

1. Start Microsoft Query. Under the **File** menu, select **New**.

   The Choose Data Source screen appears.

2. Select **New Data Source**, and click **OK**.

   The Create New Data Source screen appears.
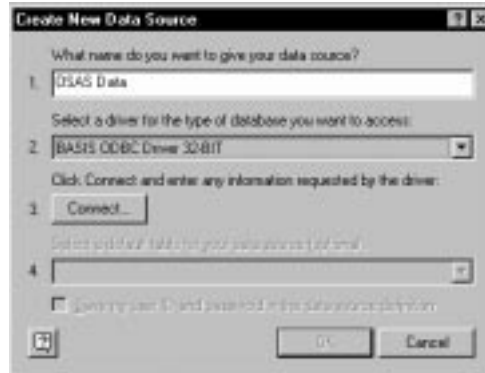
3. Enter a name you want to give the data source in field 1. You can use the same source again.

4. Select the **BASIS ODBC Driver** in field 2.

5. Click **Connect**.

   The BASIS ODBC Driver Data Source Setup box appears.
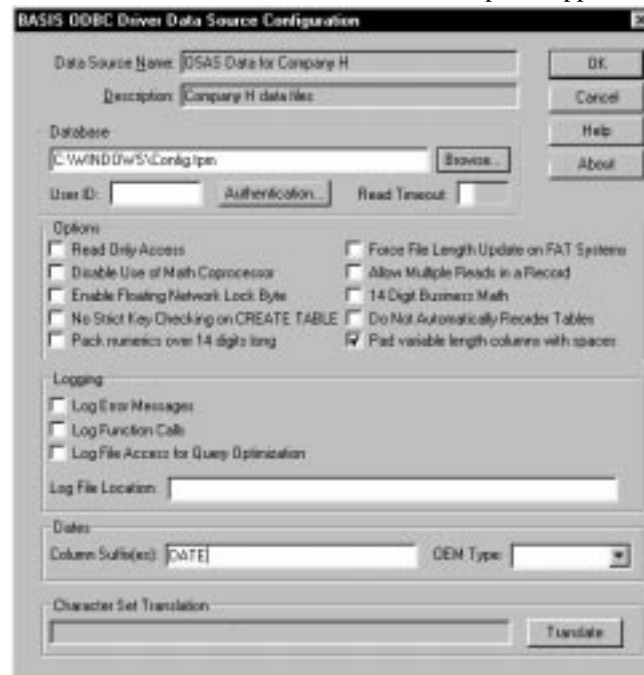
6. Enter a name and description for the data source. Click **Browse** to locate the
   configuration file you set up using the Edit CONFIG.TPM function in OSAS.

   When you set up the data source, you must click to check the **Pad variable
   length columns with spaces** box, so that any updates you make to the OSAS
   files will be padded correctly. Then, in the Dates section of the window, enter
   DATE in the **Column Suffix(es):** field so that dates will be displayed in the
   correct format.

Note

If you are using OSAS^{CS} and you use the data server to access your data, enter your login name in the User ID field.

---

7. Click **OK** to connect to the data source.

    You are returned to the Create New Data Source screen.

8. Select a table in field 4 if you want to select a default table source; otherwise, leave field 4 blank and select any table when you develop the query. (If you select a table, the list of tables always starts at that table; otherwise the list of tables starts at the beginning of the list.)

    The Choose Data Source box appears.

9. Select the data source you set up in the previous steps.

The Choose Columns screen appears.
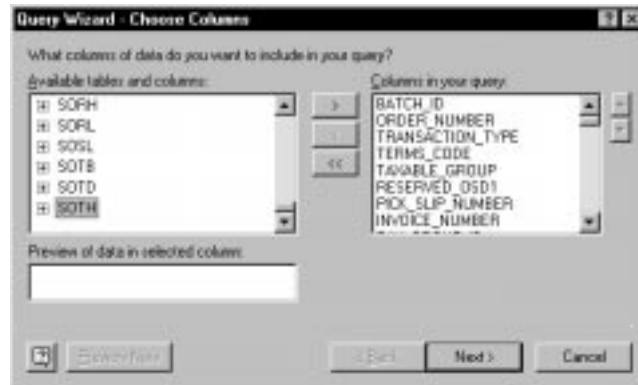
10. Select a table you want to use in your Excel spreadsheet. For this example, start with one table and add a second table later. Select the SOTH table, select the columns for the spreadsheet, and click **Next**.

The Filter Data box appears.

Use the Filter Data dialog box to select specific records from the table. In most cases, you do not need to choose anything in the Filter Data dialog box. For example, to filter out credit memos, select the field named TRANSACTION_TYPE, select **does not equal**, and then enter **4** for a value. (TRANSACTION_TYPE 4 is a credit memo.)

11. Click **Next**.

The Sort Order box appears.
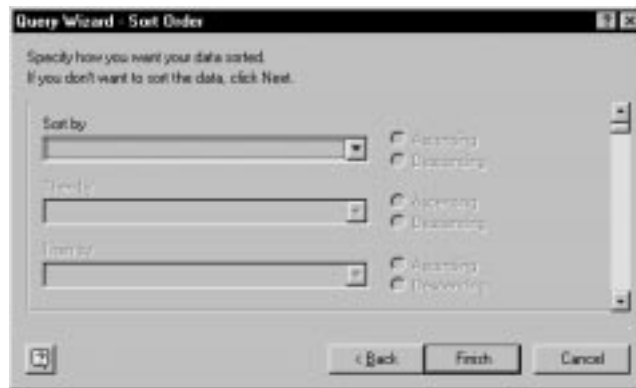
Use the Sort Order dialog box to select how the data is sorted in a query. For example, select a field in the Sort by field and check Ascending or Descending for the sort order. Select subsequent fields and sort orders for hierarchical sorts. For now, do not enter any sort fields.

12. Click **Finish**.

You are returned to the Microsoft Query screen.

The data in your query is displayed. You can delete columns by selecting a column and pressing the **Delete** key. You can also add a column by double-clicking on the field name (in the SOTH file).

NOTE: You can also select which fields you want in your query in step 6 above. Instead of selecting the entire table, you can click the + box next to the table you want and select the given fields from the list.

13. Modify your query so that only the fields listed below are used:

- BATCH_ID
- ORDER_NUMBER
- TRANSACTION_TYPE
- INVOICE_NUMBER
- INVOICE_DATE
- CUSTOMER_ID
- SUBTOTAL
- SALES_TAX
- TOTAL_COST

14. Select **Table** from the main menu, and choose **Add tables**.

The Add Table dialog box appears.
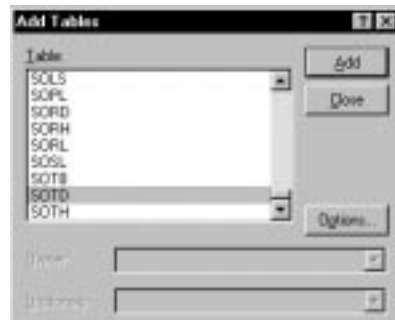
15. A list of all the tables is displayed. Select the **SOTD** table, and click **Close**.

Joining Fields

16. Locate BATCH_ID in the SOTD and SOTH tables; then click and hold the left mouse button down on BATCH_ID in the SOTH table

    The BATCH_ID and ORDER_NUMBER fields should be joined between the SOTHx and SOTDx files. If they are, skip to step 20; if not, follow steps 18-19 to join them together.

17. Drag the field over to the **BATCH_ID** field in the SOTD table and release the mouse button.

    A line appears between the two BATCH_ID fields, joining the two fields.

18. Follow steps 17 through 18 with the ORDER_NUMBER field.

    Note

    You may get the following message. For now, click **Yes** to ignore the message and join the fields together.

    ---
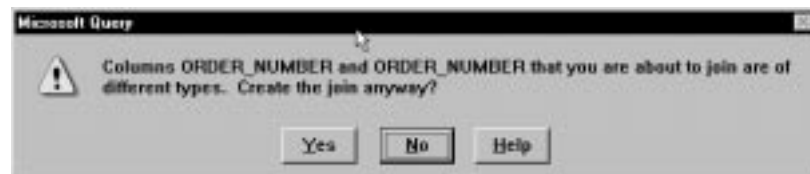
19. Select the following fields from the SOTD table:

    • ENTRY_NUMBER
    • UNIT_COST_COMPNT
    • UNIT_PRICE
    • ORDERED_QTY
    • SHIPPED_QTY_SELL
    • BACKORDERED_QTY.

20. Select **Save** from the **File** menu to save the query.

Using the Query in Microsoft Excel

1. Start Excel and open a new worksheet.
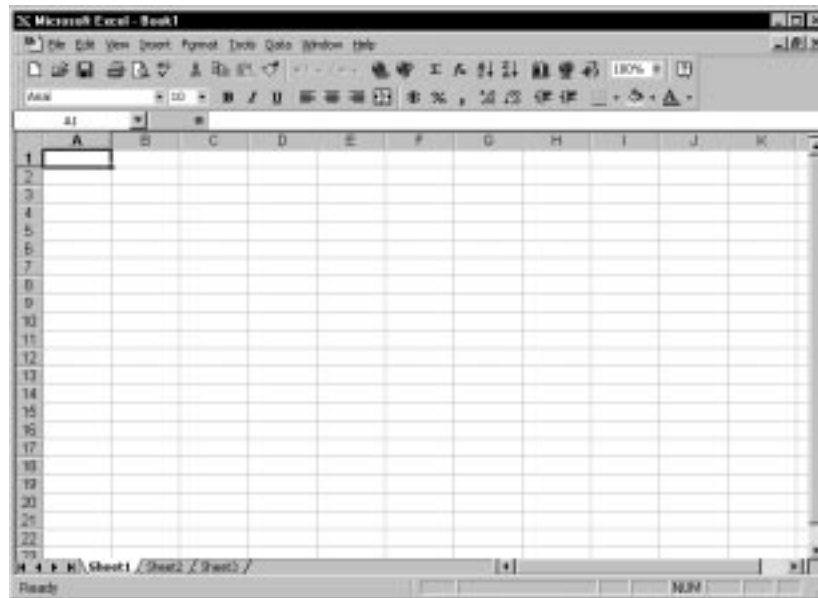
2. Select the **Data** menu; then select **Pivot Table Report**.

The Pivot Table Wizard appears.
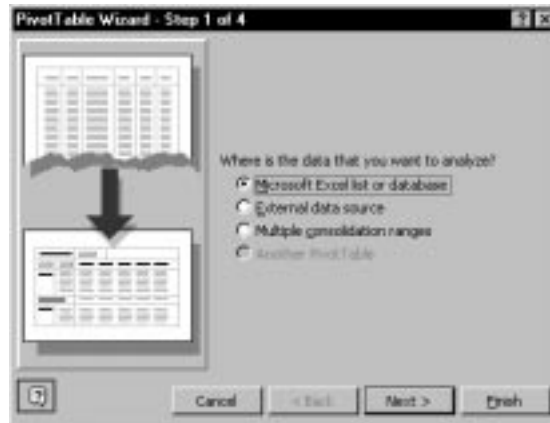
3. In step 1 of the Wizard, a list of options is displayed where you can choose your data source to be used in your Pivot Table. Select **External Data Source**, and click **Next**.

   The Pivot Table Wizard Step 2 dialog box appears.

4. In step 2 of the Wizard, click **Get Data**.

The Choose Data Source box from Microsoft Query appears.

5. Click the **Queries** tab, and select the query you saved under Microsoft Query.

The Choose Columns box under Query appears.
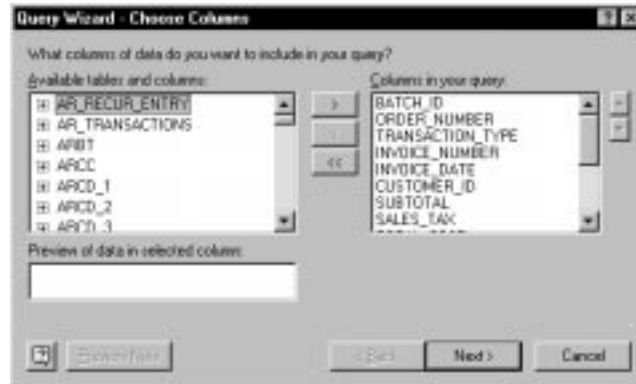
6. Click **Next**. The query columns are displayed.

7. Click **Next** to pass by **Filter Data** and **Sort Order** options.

The Query Wizard - Finish dialog box appears.

8. Select **Return Data to Microsoft Excel,** and click **Finish**.

You are returned to the Pivot Table Wizard Step 2 dialog box.

9. Click **Next**.

The Pivot Table Wizard Step 3 dialog box appears.

The selected fields and four areas—**Page**, **Row**, **Column**, and **Data**—to put fields are displayed. Drag and drop the fields to use in this report into the respective areas. (To display the full field name, hold the cursor on the button, and a tool tip displays the full field name.)

10. Drag and drop the following fields:

   •   TRANSACTION_TYPE into **Page**

   •   INVOICE_NUMBER, INVOICE_DATE, and ENTRY_NUM into **Row**

   •   BATCH_ID into **Column**

   •   ORDERED_QTY, SHIPPED_QTY_SELL, UNIT_COST_COMPNT and UNIT_PRICE into **Data**.

The fields are displayed on the screen. Numeric fields dropped into the Data section become summary fields.

11. Click **Next**.

The Pivot Table Wizard Step 4 dialog box appears.

12. The last step lets you create the pivot table either in the existing worksheet or in a different worksheet. Accept the given options and click **Finish**.

The pivot table is displayed.
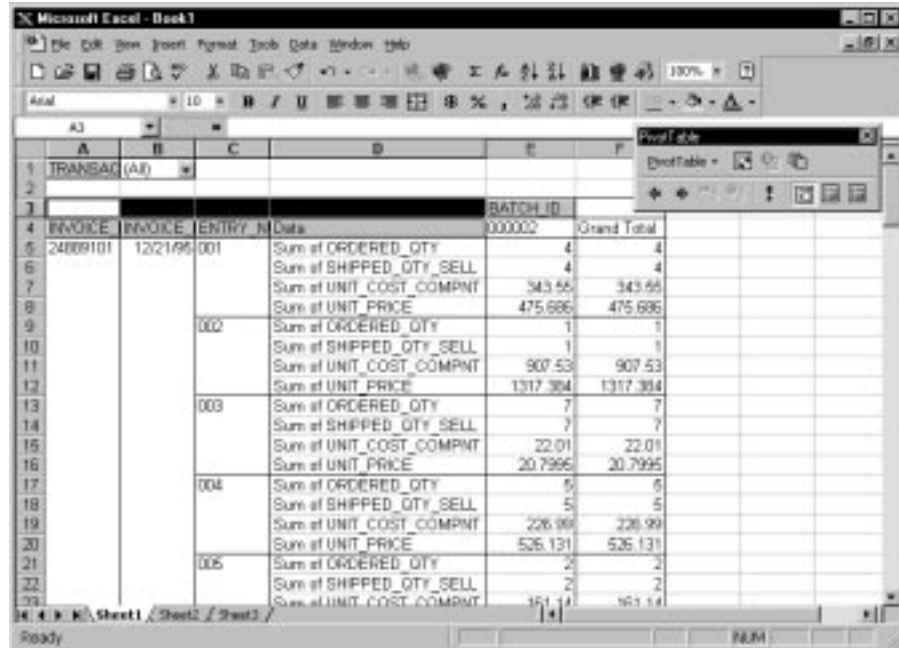
Highlight rows and columns to shift them around. To display only invoices, change Transaction Type from **All** to **3** . Change it to **4** and credit memos are displayed. Totals per type are also displayed.

Adding a Calculated Field

You can also add new fields, like profit, to the data area. To add profit to the data area, follow these steps:

1. Highlight the last row in your data area, **Sum of UNIT_PRICE**, right-click, and select **Insert**.

The Insert Calculated Field dialog box appears.
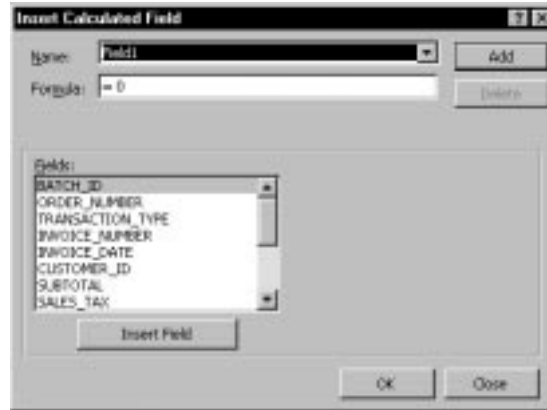
2. Enter the following information about the inserted field:

    •   Enter **Profit Dollars** in the Name field.

    •   Enter **=(SHIPPED_QTY_SELL* UNIT_PRICE) -
        (SHIPPED_QTY_SELL* UNIT_COST_COMPNT)** in the Formula
        field.

3. Click **Add**.

4. Click **OK**.

The pivot table is displayed with the Sum of Profit Dollars field.

For more information about pivot tables, see the Microsoft Excel documentation or online help.

Microsoft Query $\boxed{\text{C}}$

This appendix walks you through creating a query using the ODBC Kit and Microsoft Query 97. If you require more information about Microsoft Query, consult the Microsoft Query User's Guide or Online Help.

Before you can create this report, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Query 97.

Information about using Microsoft Query is contained in appendixes B and D. See those appendixes for specific examples.

Microsoft Word | D

This appendix walks you through creating a dunning letter using the ODBC Kit, Microsoft Query 97, and Microsoft Word 97. If you require more information about Microsoft Word, consult the Microsoft Word User's Guide or Online Help.

Before you can create this form letter, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Query 97 and Microsoft Word 97.

Note

This appendix includes instructions for using Microsoft Query with Microsoft Word. If necessary, you can install Microsoft Query from the Microsoft Office 97 media. You may also need to create a shortcut to Query manually.

To create a form letter, create a query for the form letter, and merge the letter and query, follow these steps:

1. Start Microsoft Word.

The Word main screen appears.
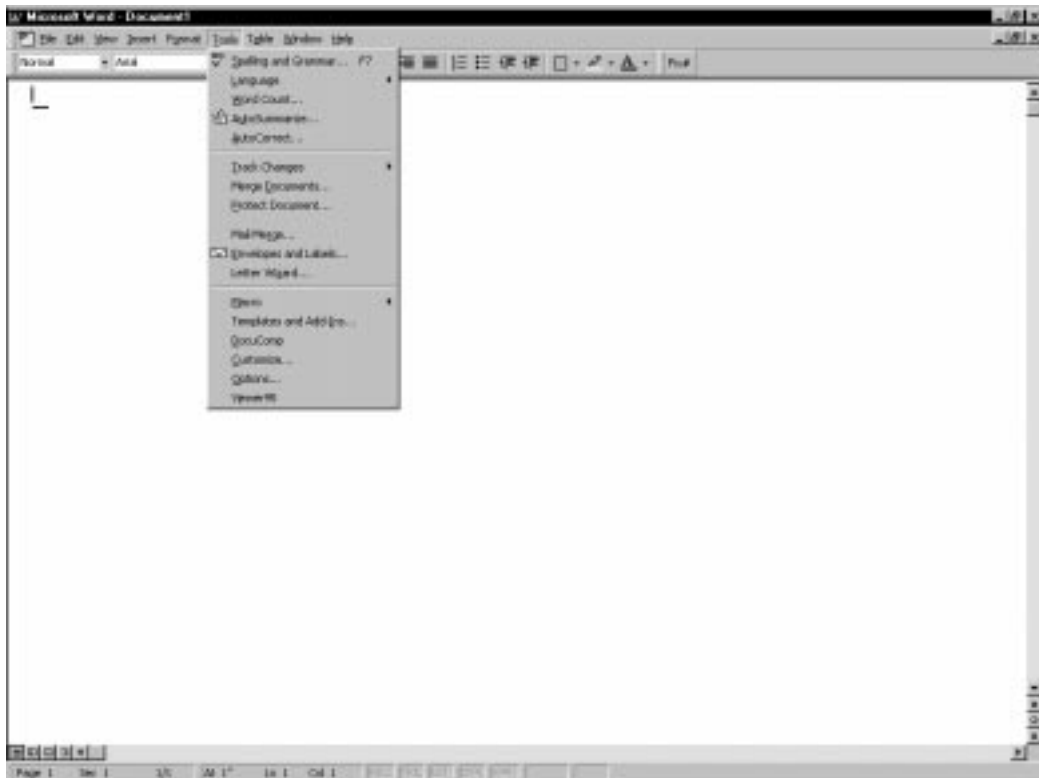
2. Select **Mail Merge** from the **Tools** menu.

The Mail Merge Helper dialog box appears.

3. Select **Create**.

4. Select **Form Letter** from the **Create** options.

    A Microsoft Word message box appears.
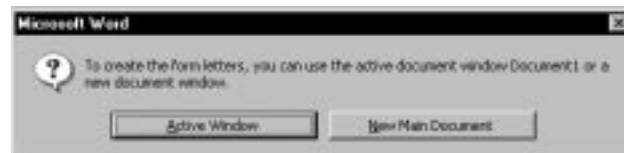
5. Select **Active Window**. You are returned to the Mail Merge Helper dialog box. The **Edit** button appears. Use it to edit or enter text in the document.

6. Select **Get Data** to connect to the OSAS data. If you have defined a query, select **Open Data Source** and select the query in the dialog box that appears. If you have not defined a query, select **Create Data Source**.

7. Select **MS Query**.

The Choose Data Source screen appears.

8. Select **New Data Source**, and click **OK**.

The Create New Data Source screen appears.

9. Enter a name you want to give the data source in field 1. You can use the same source again.

10. Select the **BASIS ODBC Driver** in field 2.

11. Click **Connect**.

The BASIS ODBC Driver Data Source Setup box appears.
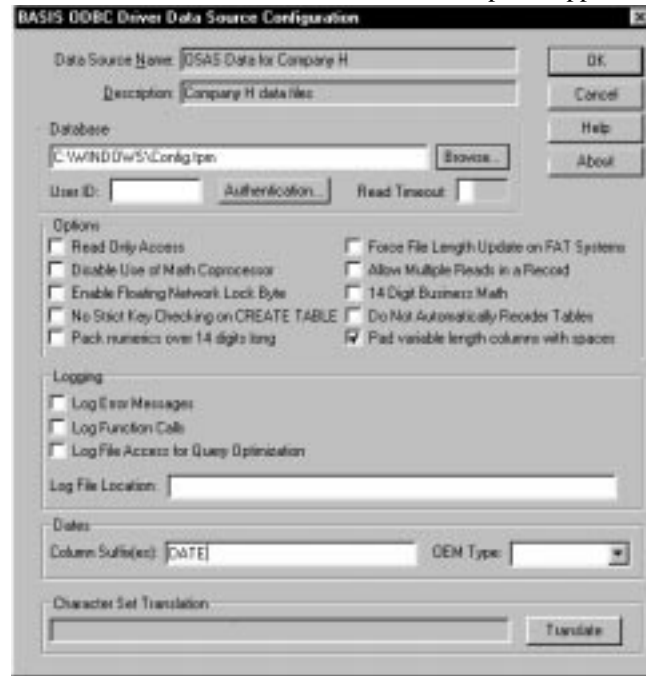
12. Enter a name and description for the data source. Click **Browse** to locate the configuration file you set up using the Edit CONFIG.TPM function in OSAS.

When you set up the data source, you must click to check the **Pad variable length columns with spaces** box, so that any updates you make to the OSAS files will be padded correctly. Then, in the Dates section of the window, enter **DATE** in the **Column Suffix(es):** field so that dates will be displayed in the correct format.

Note

If you are using OSAS^{CS} and you use the data server to access your data, enter your login name in the "Network User ID" field.

13. Click **OK** to connect to the data source.

     You are returned to the Create New Data Source screen.

14. Select a table in field 4 if you want to select a default table source; otherwise, leave field 4 blank and select any table when you develop the query. (If you select a table, the list of tables always starts at that table; otherwise the list of tables starts at the beginning of the list.)

     The Choose Data Source box appears.

15. Select the data source you set up in the previous steps.

     The Choose Columns screen appears.

16. Select the tables you want to use in your Word form letter. For this example, select ARCU.

17. Select the following fields:

    - CUSTOMER_ID
    - CUSTOMER_NAME
    - ADDRESS_LINE_1
    - ADDRESS_LINE_2
    - ADDRESS_LINE_3
    - CITY
    - STATE
    - ZIP_CODE
    - ATTENTION
    - BALANCE_31_60
    - BALANCE_61_90
    - BALANCE_91_120
    - UNAPPLIED_CREDIT

18. Click **Next**.

    The Filter Data box appears.

19. Use the Filter Data dialog box to select specific records from the table. Select the BALANCE_31_60 field, select **is greater than**, and enter **0**. The query will return only those customers whose BALANCE_31_60 field is greater than 0.

20. Click **Next**.

    The Sort Order box appears.
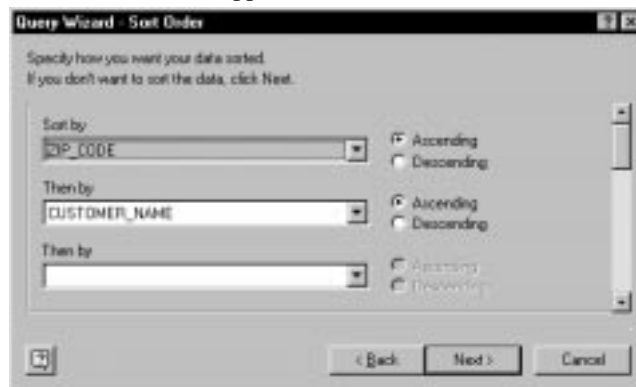
21. Select ZIP_CODE in the Sort by field, and check Ascending as the sort order. Select CUSTOMER_NAME in the first Then by field, and check Ascending as the sort order. The results of the query will sort first by the customer's zip code and then by the customer's name.

22. Click **Next**.

The Query Wizard - Finish dialog box appears.

23.   Select **View data or edit query** in Microsoft Query**,** and click **Finish**.

You are returned to Microsoft Query.
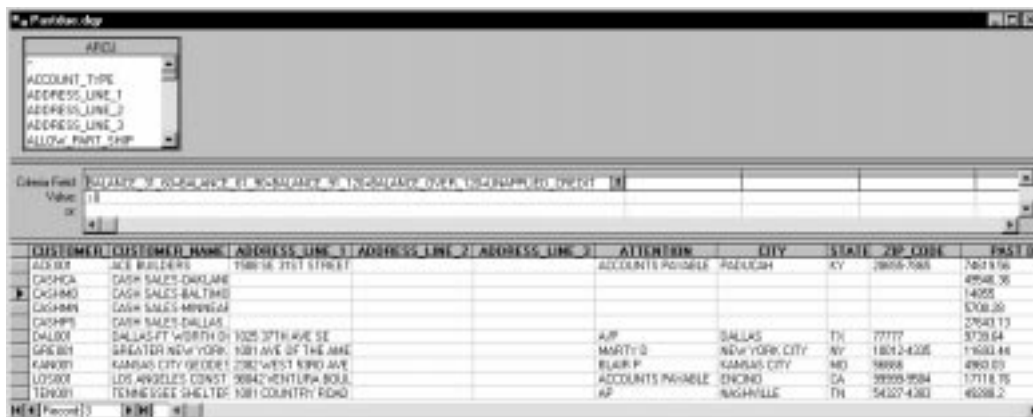
24.   Enter the following in the Criteria Field:

BALANCE_31_60+BALANCE_61_90+BALANCE_91_120+

BALANCE_OVER_120+UNAPPLIED_CREDIT

25. Highlight the field you just entered in the Criteria Field and copy it to the clipboard (**Ctrl-C**).

26. Select **Add Column** from the **Records** menu.

The Add Column dialog box appears.

27. Paste the clipboard (**Ctrl-V**) Criteria Fields into Field:; enter PAST_DUE in the Column heading field; click **Add**; and then click **Close**.

28. You are returned to Microsoft Query. The PAST_DUE column is added to the query.

29. Select **Save** from the **File** menu to save the query.

30. Select **Return Data to Microsoft Word** from the **File** menu.

You are returned to Microsoft Word. If you have no merge fields defined in the document, a Microsoft Word message box appears.
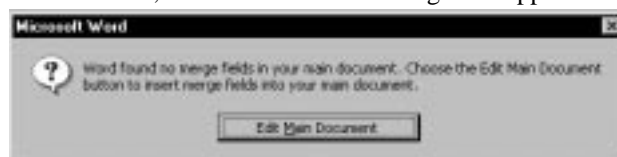
31. Select **Edit Main Document**.

The Mail Merge Helper dialog box closes and you are returned to the document.

32. Use the **Insert Merge Field** button to insert the fields (such as the CUSTOMER_NAME) from the query into the form letter. Use the **Insert Word Field** button to insert Word fields (such as the current date) into the form letter. When you are finished with the letter, select **Mail Merge** from the **Tools** menu.

33. The Mail Merge Helper dialog box appears.

34. Select **Merge** to create the form letters.

35. The Merge dialog box appears.

36. Select the merge options: New document, Printer, or Electronic mail. Select
     Check Errors if you want to proof the interaction between Microsoft Word
     and the query; otherwise, select **Merge** to produce the letters.

37. If you select Check Errors, the Checking and Reporting Errors dialog box appears.
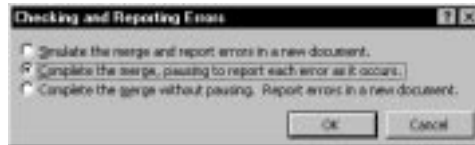
38. Select the option, and click **OK**.

39. You are returned to Microsoft Word.

Note

The form letter does not format decimal numbers that end in zero correctly. For example, $49288.20 is formatted as $49288.2.

Sample Word Form Letter

```
Builder's Supply
7626 Golden Triangle Drive
Eden Prairie, MN 55344-3732

{MERGEFIELD ATTENTION}
{MERGEFIELD CUSTOMER NAME}
{MERGEFIELD ADDRESS_LINE_1}
{MERGEFIELD ADDRESS_LINE_2}
{MERGEFIELD ADDRESS_LINE_3}
{MERGEFIELD CITY}{MERGEFIELD STATE}{MERGEFIELD ZIP_CODE}
{time\@ "D mmmm, yyyy"}

Dear {MERGEFIELD ATTENTION},
Our records indicate that a balance of ${MERGEFIELD PAST_DUE} is outstanding and past due on
your account. Please remit this amount immediately, or call our offices at (612) 555-0011 to
make other arrangements at your earliest convenience.
If you have already sent payment, please accept our apologies for this letter.


Sincerely,


Carol Johnson
Account Collection Dept.
Builders' Supply, Inc.


CRJ/fsd
```

Crystal Reports | E

This appendix walks you through creating a simple report using the ODBC Kit and Crystal Reports for Windows. If you require more information about Crystal Reports, consult the Crystal Reports User's Guide or Online Help.

Before you can create this report, complete these tasks:

*   Install and set up the ODBC Kit.
*   Install and set up the BASIS ODBC drivers.
*   Install Seagate Crystal Reports for Windows.

The following Crystal Reports examples are included:

*   ARLABEL.RPT—Customer Labels

*   CRYSTAL.DOC—Microsoft Word instructions for setting up the customer list in Crystal Reports

*   ARCUST1.RPT— Customer List

*   ARCUST2.RPT—Customer List with Graph

*   BRRECON.RPT—Bank Reconciliation Report

You can find additional information about using ODBC with Crystal Reports on the Open Systems web page on the Internet at http:\\www.osas.com.

Crystal Reports Customer List

To create a customer list using Crystal Reports for Windows, follow these steps:

1. Start Crystal Reports.

   The Crystal Reports screen appears.

2. Select **New** from the **File** menu.

   The Report Gallery screen appears.

3. Select **Standard** report format.

The Create Report Expert screen appears.

4. Select **SQL/ODBC** as your source on the **Data** tab.

The **Log On Server** dialog box appears.
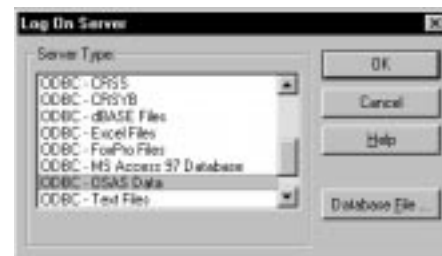
5. Select the data source you set up for OSAS ODBC data under the Windows ODBC Administrator.

The Choose SQL Table dialog box appears.

6. Select the **ARCU** file, **Add**, and then click **Done**.

    You are returned to the Create Report Expert screen.

7. Select the **Fields** tab or click **Next >>**.

    The Fields tab appears.
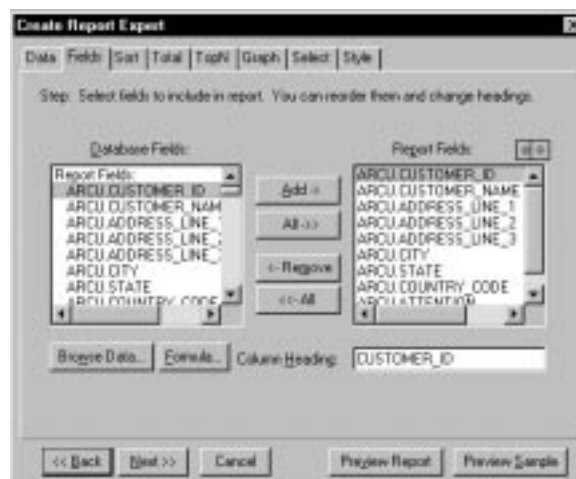
8.   Select the following fields for the report:

     •   CUSTOMER_ID
     •   CUSTOMER_NAME
     •   ADDRESS_LINE_1
     •   ADDRESS_LINE_2
     •   ADDRESS_LINE_3
     •   CITY
     •   STATE
     •   COUNTRY_CODE
     •   ATTENTION

9.   Select the **Sort** tab or click **Next >>**.

     The Sort tab appears.
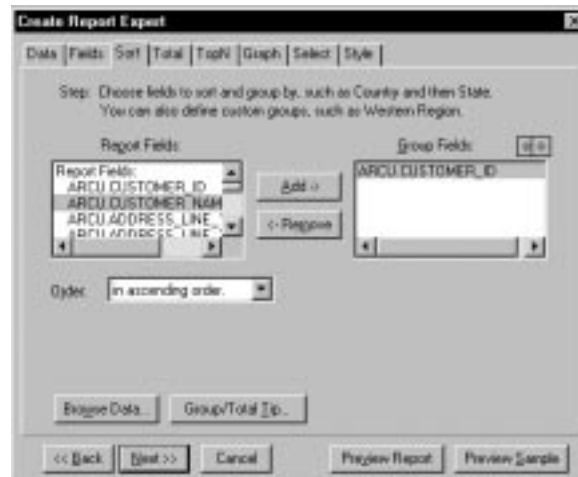
10. Select **CUSTOMER_ID** to sort the report by.

11. Select the **Style** tab.

The Style tab appears.
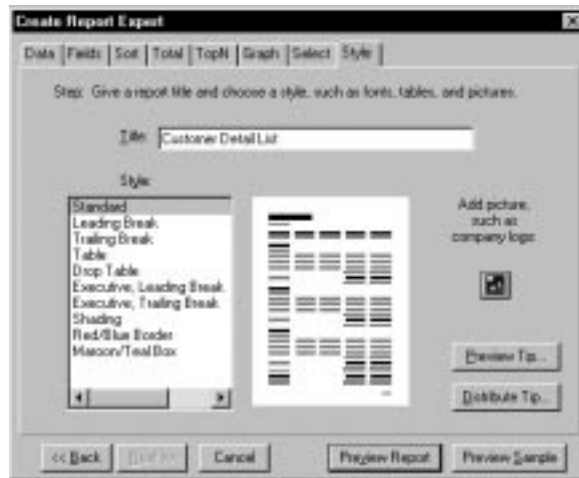
12. Enter **Customer Detail List** for the title.

13. Select **Standard** for the report style.

14. Select **Preview Report**.

The report is displayed.

The example report included with the OSAS ODBC package resembles the AR Customer Detail List. You can move the fields by dragging and dropping them. (Column titles on the sample report have been deleted.)

To insert text fields on the report, follow these steps:

1. Select **Text Object** under the **Insert** menu to add text fields.

2. Move the cursor to where you want to add text to the report.

3. Type in the text.

Common Questions $\boxed{\textbf{F}}$

These are commonly asked questions about the ODBC Kit.

I get a message that the user count is exceed.

Wait a few seconds for memory to cache out the last activation of the ODBC Driver. The message usually appears if you try to access a second data source soon after you finished using the same connection with a different source.

What is DDBUILDER?

DDBUILDER is the BASIS tool used to create the data dictionary. You can use the DDBUILDER or the OSAS functions on the Dictionary Tools menu to create the data dictionaries needed to work with ODBC.

What is the best way to access data from each of my companies using the ODBC Kit?

The best way to access data from different companies is to create a configuration (CONFIG.TPM) file for each company. Include the company ID as part of the naming of the configuration file. For example, CONFIG*H*.TPM where *H* is the company ID. You must create a unique data source using the ODBC icon in your Windows Control Panel to correspond to each configuration file.

NOTE: Make sure the name of the configuration file conforms to the DOS short file-naming convention (maximum of 8 characters). If your company ID is 3 characters in length, you may want to use CONFG*XXX*.TPM, where *XXX* is the company ID.

Why are all of my dates being returned as numbers?

> OSAS uses the Julian method of storing dates. To translate the Julian date format into the standard (MM-DD-YY or MM-DD-YYYY) date format you must enter **DATE** in the Column Suffix(es) field in the Data Source Configuration screen (see page 2-43).

Data returned from ODBC doesn't seem to line up and the justification seems inconsistent.

> When you defined your data source, you did not check the box labeled "Pad variable length columns w/ spaces". You must always check this box when you define any data source.

I'm using multiple data paths through OSAS because my history files for Accounts Receivable (ARHIxxx) are so large, and my other data files are stored on another drive. How can I access both my history files and the rest of my OSAS data files using the ODBC Kit?

> Open the Files function in the Dictionary Tools menu of the ODBC Kit. Locate the ARHI file and press **Enter** to edit the information related to that file name. In the Edit screen that appears, find the field labeled ODBC Path. The defaulted path is DATA, which coincides with the data path you specified in the configuration file you created for your data. Change the default to DATA2 on this screen and then append DATA2 (defining your data path to ARHIxxx) to your configuration file to access your history files.
>
> You must edit the data dictionary file and your configuration file to reflect the pathing change. See page 4-7 for more information on editing the configuration file.

Note

If you have multiple companies (i.e. 1, 2, 3, etc.), you must add the new DATA2 line to the configuration files for all companies, even if the files are stored in a different directory.

Registration and Delivery $\boxed{\text{G}}$

If your computer is not or cannot be connected to the Internet, you have several other alternative methods for sending and receiving the license registration information.

This appendix is divided into two sections, Sending and Receiving. Within the Sending section you'll find instructions for sending your registration request using these alternative methods:

In the Receiving section you'll find instructions for these alternative methods of receiving the registration verification information:

Sending

E-mail

Note

To send the license information via E-mail, you first need an E-mail account.

Follow these instructions to request your license registration via E-Mail. Start on the License Registration and Delivery Methods screen:

1. In the Registration Method box, click on the **E-mail** button.

2. In the License Delivery Method box, click on the receiving method you will use. You can choose to receive your license registration information by E-mail or by fax.

3. Click **Next**.

4. The License Information Confirmation screen appears. Confirm all the displayed information and, if it is correct, click **OK**. If you made a mistake, click **Cancel** and correct your entries.

5. The Success screen appears when the E-mail has been sent. Click **OK** to continue.
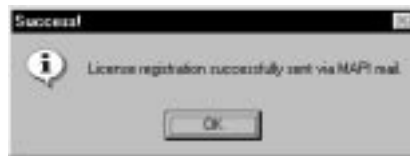
6. The Register Another screen appears. Generally, you will require only one license for this computer. Click **No** and the Registration Notification screen (see step 8) appears.

If you use other BASIS products aside from the ODBC Kit, you can continue to request licenses for those products by clicking **Yes.** When you do, the License and Registration screen (see step 1) appears.
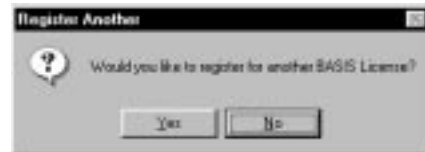
7. Within a short period of time, you should receive an E-mail message or a fax (depending on your receiving choice) containing your license information. Follow the instructions on this screen and click **Next**.

8. The Install A BASIS License screen appears.
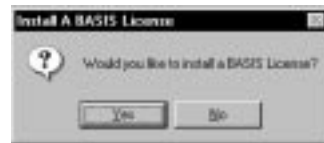
Telephone

Follow these instructions to request your license registration via telephone. Begin on the License Registration and Delivery Methods screen:

1. In the Registration Method box, click the **Telephone** button.

2. When you send your request via telephone, you can receive your license information by fax only.

3. Click **Next** to continue.

4. The Telephone License Request screen appears. Confirm that the displayed information is correct. You can call the number on the screen to request the license registration, or you can print the information and use it to place the call from another location. If you do not want to print the information, click **Close** after you call; otherwise click **Print**.

5. The Print screen appears. Click **OK** to print the information you need to send to request your license.

Here is an example of the document that prints:

```
TELEPHONE LICENSE REQUEST

Inside the United States:      1 505 338 4171
Outside the United States:   +1 505 338 4171

To receive your license, please call the appropriate phone
number above and be prepared to enter the following information:

              Serial Number: DOH100200
         Authorization Number: 1234567890
    Telephone Registration ID: 300*1*0099*123*2
              Your Fax Number: 612-403-5700

If your Faxed license has not arrived within 5 minutes, please
try again or contact BASIS Technical Support at (505) 345-5021
for assistance. If there is a delay receiving your permanent
license,  you may install the temporary license located at the
bottom of your "License Registration Form."
```

6. To complete the installation of your driver, call the phone number on the screen or printout. Follow the instructions on the voice recording to enter the information on the screen or printout.

7. Within a short period of time, you should receive a fax containing your license information. Follow the instructions on this screen and click **Next**.

Fax

1. In the Registration Methods box, click on the **Fax** button

2. In the License Delivery Method box, click on the receiving method you will use. You can choose to receive your license information by E-mail or by fax.

3. Click **Next** to continue.

4. The License Information Confirmation screen appears. Confirm all the information and, if it is correct, click **OK**. If the information is incorrect, click on **Cancel** and reenter the information.

5. In the Emergency Contact Information screen, enter a contact name and phone number in case your fax cannot be sent. Click **OK**.

6. The Print screen appears. Click **OK** to print the registration information you must send by fax to receive your license.

Here is an example of the document that prints:

7. To complete the registration, use your fax machine to send the document to the phone number on the printout.

8. Within a short period of time, you should receive an E-mail message or a fax (depending on your receiving choice) containing your license information. Follow the instructions on this screen and click **Next**.
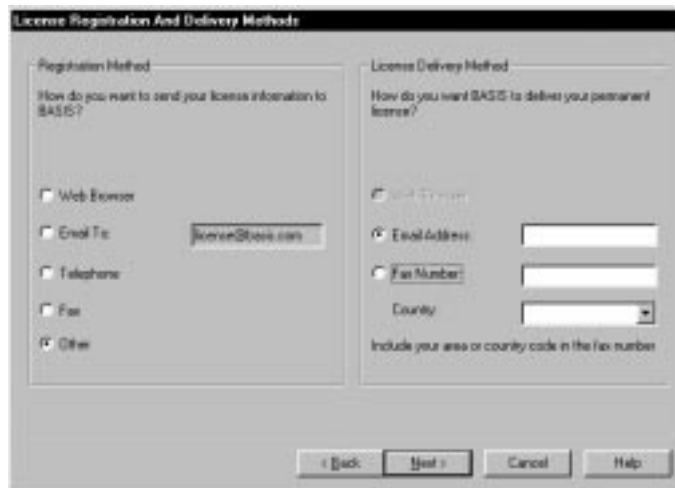
9. The Install A BASIS License screen appears.
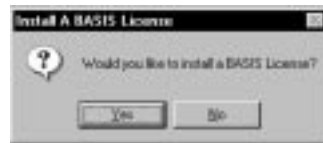
Other

The Other option is useful for installing your license if the computer you are installing on does not have E-mail or Internet access and you cannot use a fax machine to send and receive license information.

1. In the Registration Method box, click on the **Other** button.

2. In the License Delivery Method box, click on the receiving method you will use. You can choose to receive your license information by E-mail or by fax.

3. Click **Next** to continue.

4. Read the Warning screen's instructions carefully. Click **OK** to proceed.

5. The License Information Confirmation screen appears. Confirm all the
   displayed information and, if it is correct, click **OK**. If it is not correct, click
   on **Cancel** and reenter the information.

6. The Save As screen appears. Save the license file on a diskette or a network drive. Click **Save**.

7. Insert the diskette in (or access the registration file from a network drive on) a computer with E-mail access.

8. Send the file via E-mail.

9. An E-mail message or fax is sent to you. Follow the instructions on page G-17 to register the license information on the original computer.

Receiving

In the License Delivery Method box, you have three choices on how you will receive the license information once the registration is complete. If you are sending the information using your web browser, you will receive the information back through the browser. The instructions for the web browser method can be found in chapter 2.

When you send your license request using the E-mail, Fax or Other methods, you can receive your license information via E-mail or fax. When you send the request using the Telephone method, you can receive your license information by fax only. Follow the instructions below if you receive your license information by E-mail. For instructions on Fax licenses, turn to page G-18.

E-mail

1. Follow the installation steps for the Sending method you choose and click the E-mail button in the License Delivery Method box.

2. When you receive a return E-Mail containing your license registration information, follow the instructions in the E-mail to save the information to a file.

3. Continue the installation by installing the license as described on page 2-14.

Fax

1. To receive the license by fax, click the **Fax Number** radio button.

2. Enter a 10-digit fax number that you want to use to receive the license file.

3. Click the **Fax Number** button and enter the fax number at which you will receive the license file information. In the **Country** list box, select the appropriate country and click **Next**.

4. Click **Next** to continue with the installation process using the Sending method you chose.

When the fax arrives, follow the steps below to install the license information.

1. The Install A BASIS License screen appears. If you do not see the Install a BASIS License screen, you can start the license installation by selecting the Install a BASIS License icon in the BASIS ODBC Driver folder on the Windows Start Menu.
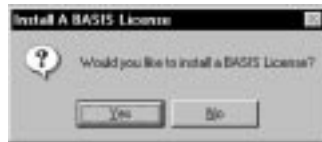
2. To install the license, click **Yes**. This screen appears:

3. When you click **Next** to install a single-user license on this machine, the BASIS License Information screen appears:
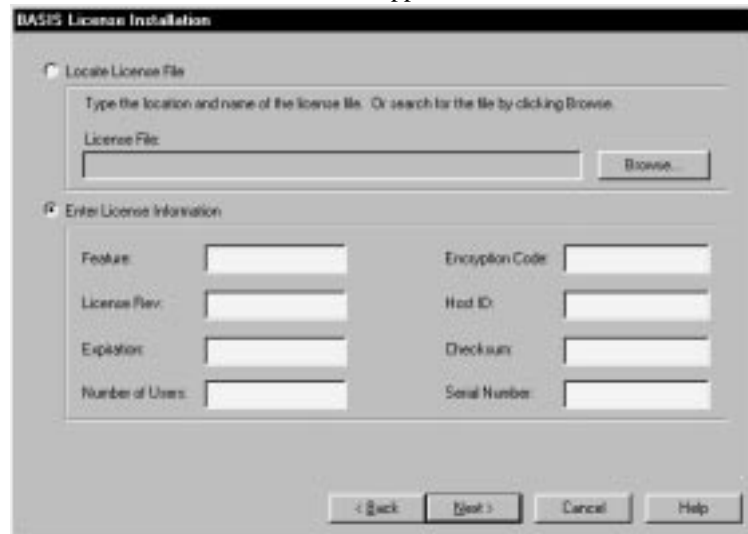
4. Click the Enter License Information button and enter the information from the bottom of the fax you received into the eight fields shown. Enter the information exactly as it is printed on the fax. Pay special attention to the upper- and lowercase letters.

5. When you finish, click **Next**. The Installation Successful screen appears.

Click **Yes** and the BASIS License screen appears again. Then click **No** to continue.

6. When the BASIS Data Server Connection screen appears, click **Next**.

7. Click **Finish**.
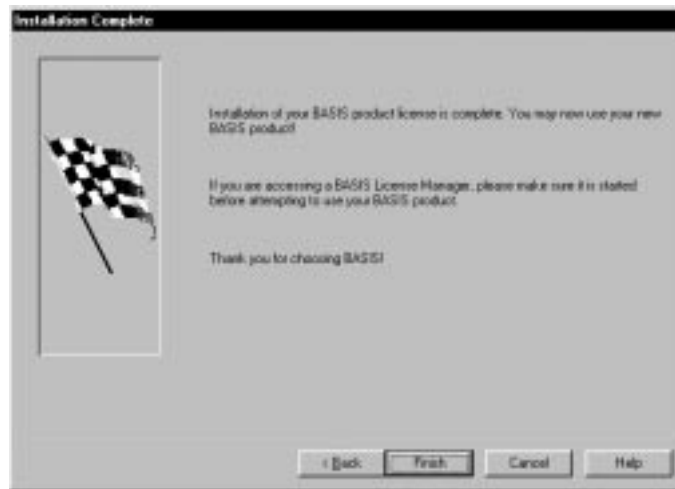
8. If you do not want to view the readme.txt file, uncheck the box. In any case, click **Finish** to continue.

9. The Setup Complete screen appears. If you do not want to restart your computer now, select **No**. If you want to restart your computer now, be certain that all other programs are closed and click **Finish**.

Next, follow the instructions on page 2-41 to configure your ODBC drivers.

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