

Using Microsoft Excel to access CONNX data sources

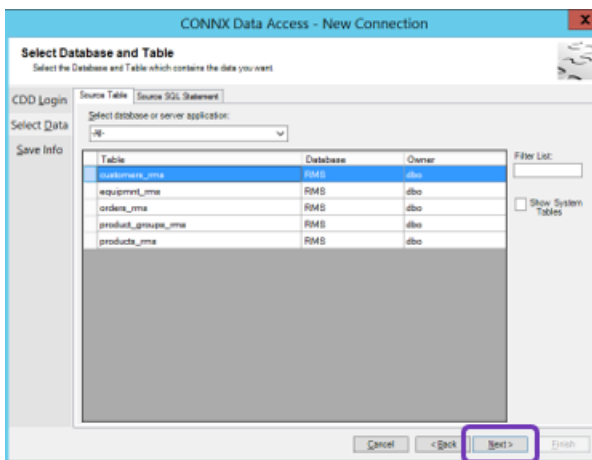
The easiest way to access CONNX data sources through MS Excel is to install the CONNX Excel add-in. This will install a new ribbon in Excel – the CONNX ribbon, that will enable you to directly create connectors within Excel to access CONNX CDD's.

1. Make sure the Excel add-in is installed on the system where you would like to use CONNX within Excel. Make sure you can see the CONNX menu ribbon
2. Select the CONNX ribbon and you will see 3 options as shown below.
 - a. "Use Existing Connection" – this will enable to use an existing connection that has already been created.
 - b. "Create a New Connection Wizard" – this will allow the user to create a new connection to a CONNX data source.
 - c. "CONNX Data Pane" – This will open a menu on the right side of the application that will give the user the additional options not covered in this quick reference



3. Select "Create a new Connection Wizard" to create a new connector for Excel. You will see a popup screen as shown below.
 - a. Enter the fully qualified path and name of the CDD the user wishes to use for this connection
 - b. Enter the username and password to connect to the CDD.
 - c. Select "Next"

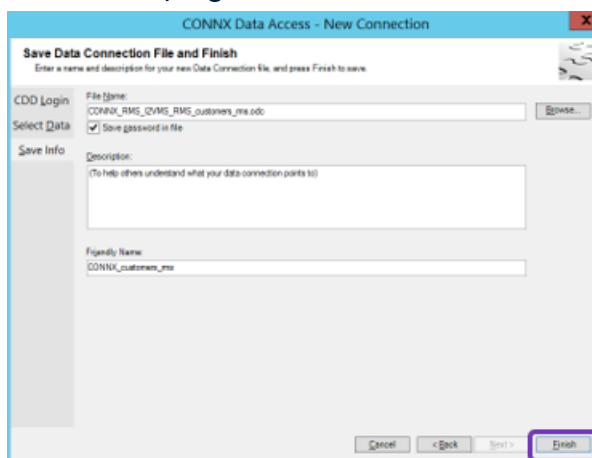
4. This will bring you to the area where you can create the query the user wishes to run. The user can select a single table from the "Source Table" tab, or the user can choose to write a query against the CDD using the "Source SQL Statement" tab.
 - a. Using the "Source Table" tab, select a table from the list. A "Select *" on the selected table will be the specified query. All tables and CONNX Views within the CDD will be listed under the "Source Table" tab. The user will just need to select the table to use and then select the "next" button.



- b. Using the "Source SQL Statement" tab will allow you to either manually input the query you wish to run against the CDD, or to use the Query Builder. This can be any query within the ANSI92 standards. As you can see in the example below – The query is a 3 table join. Select the "Next" button once the query has been created.



5. Once the “next” button is selected – you will get to the “Save info” section. This is where you can specify information about the connector file that will be saved. This connector file can then be reused throughout an organization, enabling users to create connectors once, and then reuse them on other CONNX client systems.
 - a. The “File Name” is the actual file name for the connector. We default to saving this connector file on the local system; however, the user can choose to select a network location, which can then be accessed by other CONNX client systems that wish to use this connector file.
 - b. In the screenshot below the “save password in file” checkbox is selected. This will save the CDD password from the first setup screen in the connector file and the user will not have to enter a password to access the data. This can be unchecked and then **all** users using this connector file will be prompted for a username and password to access the underlying CDD.
 - c. The description is **not required** however it can be used to allow the creator of this connector file to put in a short description of what this file will do.
 - d. The “Friendly Name” is the name of the connector that will be visible when selecting the “Use Existing Connection” button.
 - e. Once the user has configured everything as desired select the “Finish” button. This will save the connector file in the location specified and will make the connection to the underlying database and run the requested query.



CONNX Data Access - New Connection

Save Data Connection File and Finish
Enter a name and description for your new Data Connection file, and press Finish to save.

CDD Login: File Name: CONNX_RMG_QVMS_RMG_customers_rmg.odo [Browse...]

Select Data: Save password in file

Save Info: Description: (To help others understand what your data connection points to)

Friendly Name: CONNX_customers_rmg

[Cancel] [Back] [Next >] [Finish]

	A	B	C	D	E	F	G	H
1	customer	customername	customeraddress	customercity	customersta	customer	customercount	customerpho
2	ALWAO	Always Open Quick Mart	77 Overpass Ave.	Provo	UT	84604	USA	(801) 555-7424
3	ANDRC	Andre's Continental Food Market	P.O. Box 209	Bellingham	WA	98226	USA	(206) 555-9574
4	ANTHB	Anthony's Beer and Ale	33 Neptune Circle	Clifton Forge	WA	24422	USA	(509) 555-8647
5	BABUJ	Babu Ji's Exports	Box 29938	London		WX1 5LT	UK	(71) 555-8248
6	BERGS	Bergstad's Scandinavian Grocery	41 S. Marlon St.	Seattle	WA	98104	USA	(206) 555-3453
7	BLUEL	Blue Lake Deli & Grocery	210 Main St.	Port Townsend	WA	98368	USA	(206) 555-3044
8	BLUMG	Blum's Goods	143 Blum Rd.	London		NW1 2BP	UK	(71) 555-3013
9	BOTTOM	Bottom-Dollar Markets	23 Tsawassen Blvd.	Tsawassen	BC	T2F 8M4	Canada	(604) 555-4729
10	BSBEV	B's Beverages	Fauntleroy Circus	London		EC2 5NT	UK	(71) 555-1212
11	CONSH	Consolidated Holdings	12 Berkeley Gardens	London		WX1 6LT	UK	(71) 555-2282
12	DDDDD	Zippys Deli	12344 Happy Lane	Zepher	ZZ	zzzz9	ZM	
13	DDDDQ	Zippys Deli	12344 Happy Lane	Zepher	ZZ	zzzz9	ZM	
14	DDDDW	Zippys Deli	12344 Happy Lane	Zepher	ZZ	zzzz9	ZM	
15	EASTC	Eastern Connection	35 King George	London		WX3 6FW	UK	(71) 555-0297
16	EMPIT	Empire Trading	7 Baxter Hill	London		SW2 1HJ	UK	(71) 555-3838
17	FITZD	Fitzgerald's Deli and Video	14 E. Eastway Dr.	Bellevue	WA	98006	USA	(206) 555-5575
18	FOODI	Foodmongers, Inc.	418 - 6th Ave.	Walla Walla	WA	99362	USA	(509) 555-7689

- To access a previously created connector. Select the "CONNX" ribbon. Select the "Use Existing Connection" button. The user will see the below pop-up box. The user can then select the "CONNX_Customers_rms" connector that was just created using the above steps, or the user can browse to a network location to use another connector created and saved out on the network. Once the user selects "OK" the connector will be run.

