efalia ecm

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Quick Guide
Local ODBC



efalia
smart content suite on a human scale

Obere Kaiserswerther Straße 17, 47249 Duisburg, Germany
T: +49 203 60 888 0 / info.de@efalia.com

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Africa, Asia, Australia, Europe and USA

Efalia GmbH
Obere Kaiserswerther Str. 17
D-47249 Duisburg
Germany

Email: info.de@efalia.com
Web: www.efalia.com

UK and Eire

Efalia Ltd
Becket House
1 Lambeth Palace Road
London, SE1 7EU
United Kingdom

Email: info.uk@efalia.com
Web: www.efalia.com

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WinClient Plug-Ins

Plug-ins are additional features which can be added to the WinClient to perform specific functions that are not part of the standard WinClient, and that are not required by every installation, or workstation within an installation. Customized functions can also be developed to make the system more versatile for specific business requirements.

Installation of Plug-ins

To install a plug-in, the corresponding files have to be copied into the plug-ins directory of the WinClient application directory:

C:\Program files (x86)\Efalia GmbH\Efalia ECM WinClient\PlugIns

Enable Plug-ins Toolbar

To use the plug-ins after installation, the features may need to be added to the toolbar. This can be done with the customization menu. If the user does not have rights to change the menu's the administrator must activate the plug-ins with the Client Configuration in Efalia ECM Enterprise Manager.

Plug-in Manager



Using the Plug-in manager, the installed plugins can be enabled or disabled. When disabled, they will not be available on the toolbar.

To open the manager, click on the toolbar icon. The installed plug-ins will be listed, with a tickbox beside each plug-in name showing whether it is enabled or not. When the box is ticked, the plug-in is enabled, and will be available on the toolbar.

You can enable or disable any of the listed plug-ins. Once changes have been made, press the ***OK*** button to save them. If any changes have been made you will be prompted to restart the WinClient for the changes to take effect.

Note

You may not have permissions to change the plug-ins settings, as these may have been configured by an administrator using Client Configuration. If this is the case, any plug-ins must be enabled or disabled by and administrator using Enterprise Manager

LocalODBC

Overview



ODBC is an abbreviation for ***Open Database Connectivity*** and allows connecting via a standard interface to different data sources. Such data sources can be other databases, Excel tables or text files.

After connecting an Efalia ECM index field with a field from the data source, additional index can automatically be read from the database in order to complete the Efalia ECM index.

Note

The following characters cannot be used in the column names of an ODBC source:

, . , ; + - # * ? = : blank < >

Setup User-DSN in Windows

To link a data source, select on the respective client: ***Start*** ⇨ ***Control panel*** ⇨ ***Windows Administrative Tools*** ⇨ ***ODBC Data Sources (32-bit)***, then select the tab ***User DSN***.

Important:

The ***User-DSN*** used for ***LocalODBC*** must be a ***32-bit User-DSN***.

Click ***Add*** and select the type of data and click ***Finish***. Now the relevant data source can be selected.

Ensure that the Windows user account has access rights for the ODBC source, if a driver is used that does not request user name and password.

Note

This is a generalised description of the configuration of several ODBC-Drivers, because the drivers are third party products and not included in Efalia ECM.

If you have problems with these drivers, please contact the driver-manufacturer.

Install LocalODBC

The complete folder must be copied to the plugin folder of Efalia ECM WinClient. The default path on a 64bit client OS is:

C:\Program files (x86)\Efalia GmbH\Efalia ECM WinClient\PlugIns

Configure LocalODBC

If the data source is configured, it can be used for indexing in Efalia ECM WinClient, using the plug-in ***Efalia ECM LocalODBC***.

Select the ***LocalODBC*** icon from ***Plug-ins*** and the plug-in opens in a separate window.



ODBC source

The drop-down menu ***ODBC source*** lists all ***User-DSN***, existing on the respective client.

Under ***ODBC table*** specify the name of the database table from where index data should be read. The table names cannot be selected from a list, they must be known during configuration. If the table name is specified correctly, the field names of these tables are listed after hitting ***Return,*** in the section ***ODBC Column***.

Connection string

In this line enter the connection string of the selected ODBC source.

Example

DSN=value;

Mapping

Now the entries from the ODBC table can be connected with the relevant Efalia ECM index fields.

Mappings:

ODBC column	Index field	Search
Vendor	Vendor name	☐
Order_No	Order number	☐
Customer_No	Customer number	☐

Search column

In this column ***ODBC AND*** queries are set up.

Note that this is a trigger field, and is AND connected.

ODBC Link for Excel

To create an ODBC link in Excel you need a table (table1) which might be structured as follows:

1	Vendor.	Order_No	Customer_No
2	Spielberg	12345	112233

Create an ODBC source, select the ODBC driver for Excel and specify an ODBC Source name. Select *.xls file in this driver, which contains ***table1***.

Configure the LocalODBC plug-in, as described above and specify the following settings in order to link the table:

ODBC-Source = ODBC-Source name

ODBC-Table = [table1$]

After hitting ***Return*** the columns of the Excel table should appear and can then be assigned.

Important

Using Excel it is important to specify the table name with the **$** character in brackets.

ODBC link for a *.csv- file

A *.csv-file is in principle a text file containing index data, separated by a semicolon. A *.csv-file can be exported e.g. from an Excel table. This would be similar to the following table. The first line contains the column name and the following ones contain the index data:

1	Client No.	Name	Location
2	12345	Spielberg	Duisburg

Please generate an ODBC source in the ***User-DSN*** first, as described earlier in this chapter.

Select the ODBC Microsoft text driver that can be used for CSV files and choose the folder which contains the CSV file. Open ***Options >>*** and remove the check before ***Default (*.*)***.

Click on ***Define text format*** and choose the required file.

Now you can define different options as, for example the separators or whether the name of a column does exist in the first line.

After finishing the configuration of the ODBC Source of the *.csv –file configure the ***LocalODBC*** plug-in in Efalia ECM WinClient.

Assign the ODBC-Source and as a table the file name of the *.csv -file.

ODBC-Source = ODBC-Source name

ODBC-Table = odbc.csv

Confirming with ***Return***, the columns of the *.csv –file will be shown and should be assignable.

Additional information for ODBC settings

3rd party ODBC driver

It is not guaranteed that Efalia ECM LocalODBC can work with every existing 3rd party ODBC driver and access the accordant data source. Efalia ECM uses the Microsoft standard and accesses the ODBC sources via it. Efalia ECM has no stake in the configuration of these ODBC drivers.