

Create an ODBC Connection to a SedonaOffice Database

04/26/2024 3:06 pm EDT

Description of Issue:

I would like to use Excel to create a report using the data in my Sedona Office database.

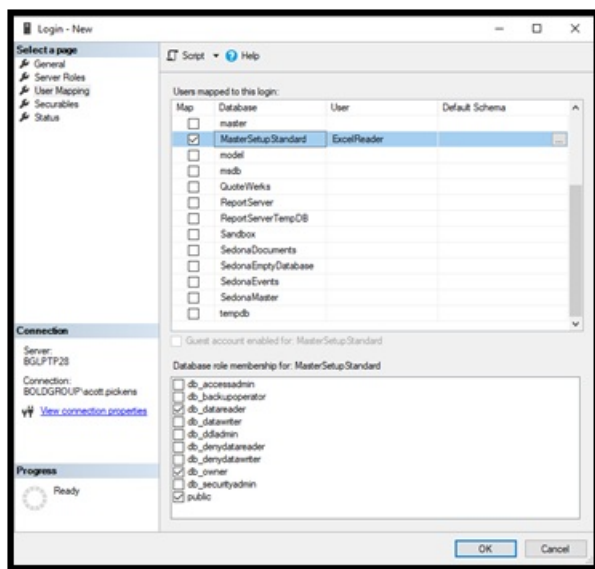
How can I access data from Sedona Office using Microsoft Excel?

Resolution:

You can use the tools in Excel to access data from a SQL Server database.

Before you can access the database in SQL, you will need to have a security login to use to access the database.

You will need to have a login with at least the DataReader role.



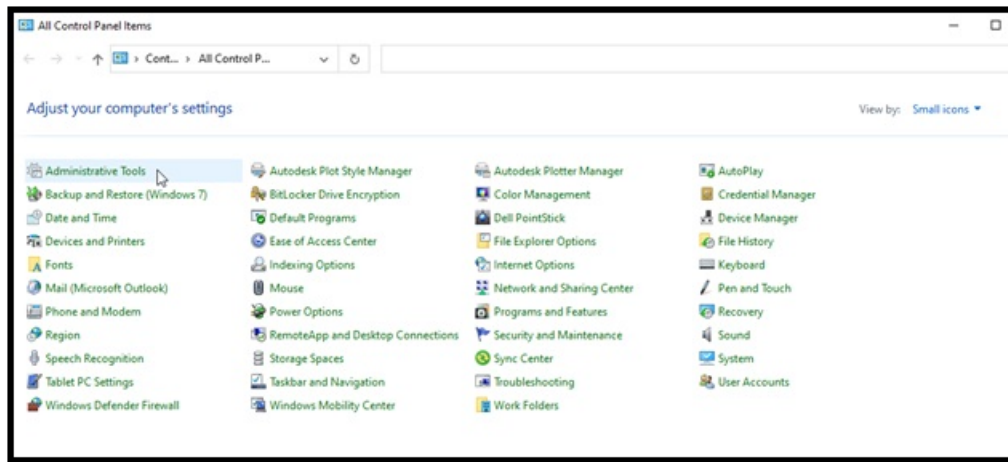
If you need instructions on creating a login, see the information in the link below.

<https://docs.microsoft.com/en-us/sql/relational-databases/security/authentication-access/create-a-login?view=sql-server-ver16>

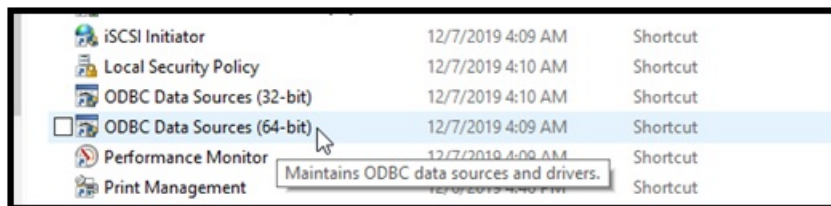
Creating a User Data Source.

On the Machine that you will use for your reports, go to Windows Control Panel.

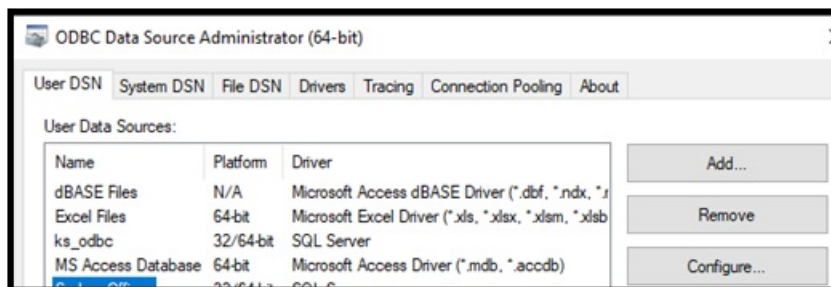
Select Administrative Tools.



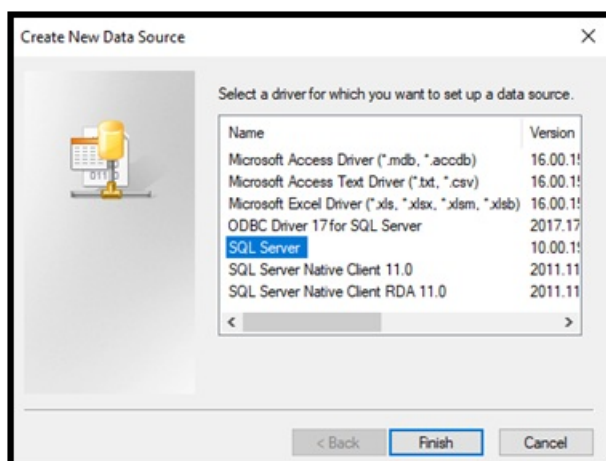
Select ODBC Data Sources.



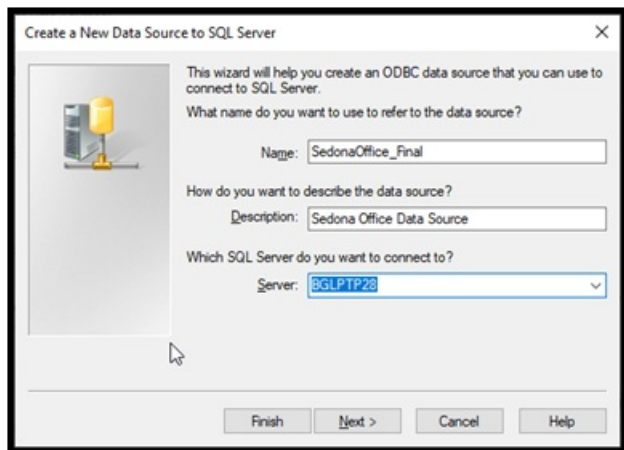
When it opens select Add under User DSN.



Select SQL Server from the list and click finish.



Enter the name, description, and server for the connection.



Create a New Data Source to SQL Server

This wizard will help you create an ODBC data source that you can use to connect to SQL Server.

What name do you want to use to refer to the data source?

Name: SedonaOffice_Final

How do you want to describe the data source?

Description: Sedona Office Data Source

Which SQL Server do you want to connect to?

Server: BGLPTP28

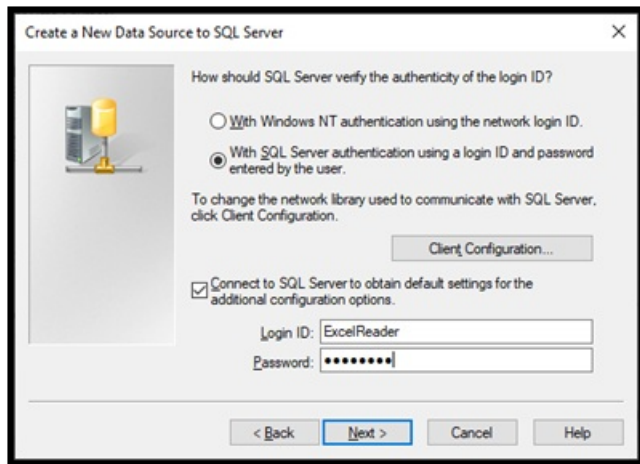
Finish Next > Cancel Help

Click Next.

Enter the user information to connect to the SQL server.

If you have access with your Windows account, you can use it.

We are using the SQL login ID created.



Create a New Data Source to SQL Server

How should SQL Server verify the authenticity of the login ID?

☐ With Windows NT authentication using the network login ID.

☒ With SQL Server authentication using a login ID and password entered by the user.

To change the network library used to communicate with SQL Server, click Client Configuration.

Client Configuration...

☒ Connect to SQL Server to obtain default settings for the additional configuration options.

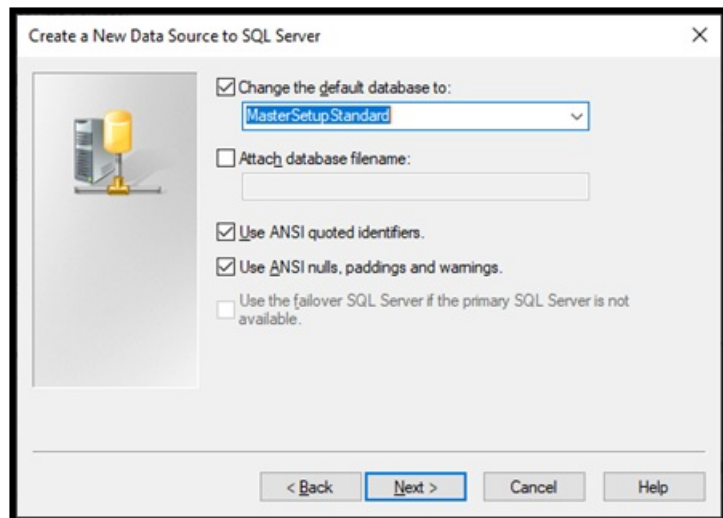
Login ID: ExcelReader

Password:

< Back Next > Cancel Help

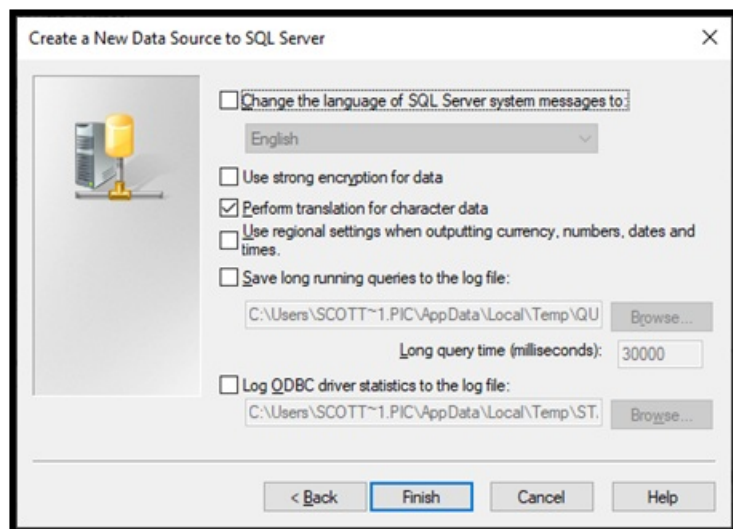
Click Next.

Select the Sedona Office database as the default database.



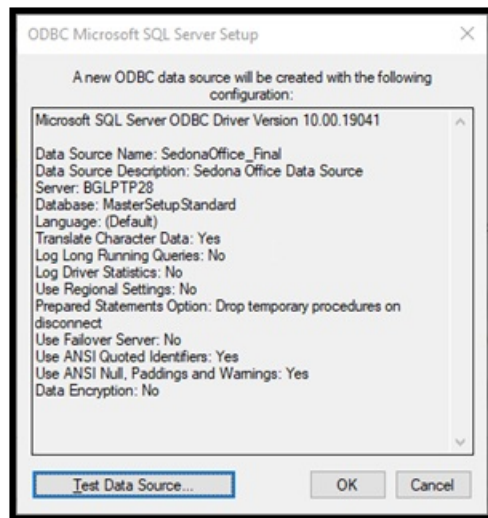
Click Next.

On the next screen, you shouldn't need to change anything.

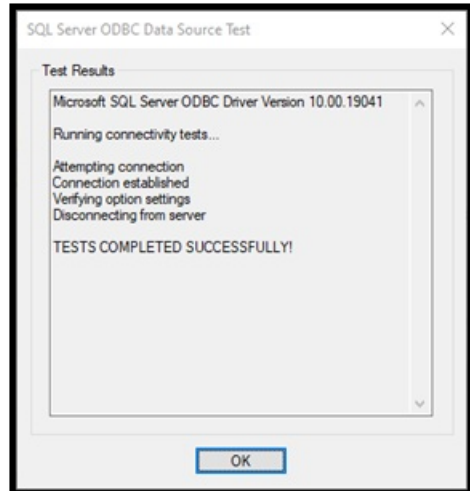


Click Finish.

On the summary screen click Test Data Source.



If the information is correct the test should succeed.



Click OK.

Using the Data Source in Excel.

Open Excel.

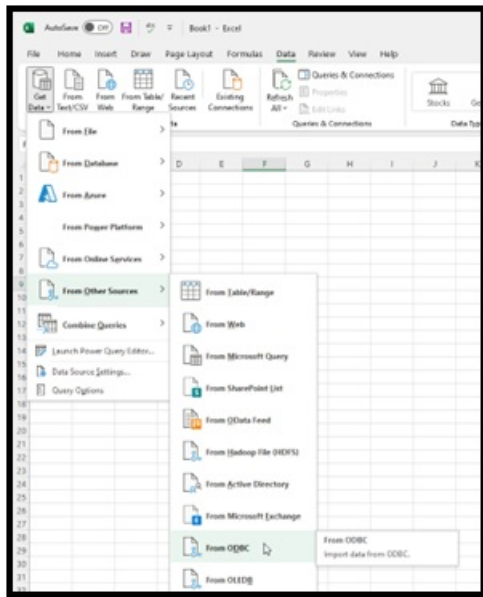
Open a new Sheet.

On the top menu select Data.

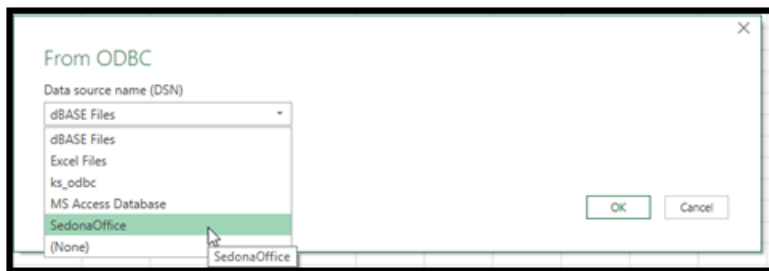
Depending on the version of Excel the screens may be slightly different.

Select the Get Data menu.

Select From other sources then select From ODBC.

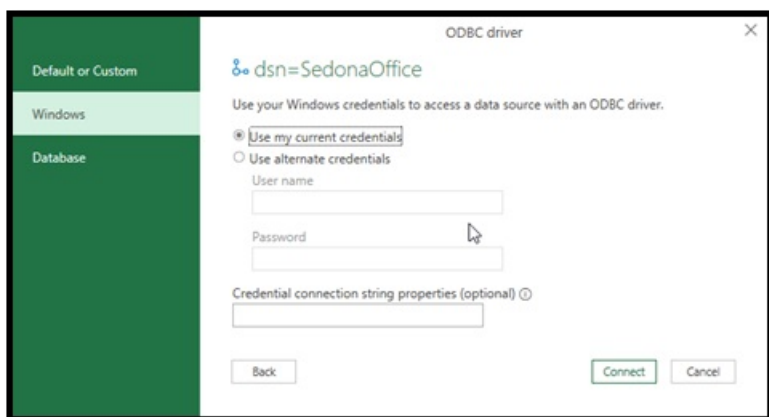


Select the name of the ODBC Data Source needed.



Click OK.

Select the Windows option on the left and select Use my current credentials.



Click Connect.

You should then see the Navigator screen to access the database and the table within it.

Navigator

Select multiple items

Display Options

- AR_Credit_Auto
- AR_Credit_Detail
- AR_Credit_Item
- AR_Credit_Item_Tax
- AR_Credit_Reason
- AR_Credit_Request
- AR_Customer**
- AR_Customer_Aging
- AR_Customer_Aging_Invoice
- AR_Customer_Aging_Retrospective
- AR_Customer_Audit
- AR_Customer_Bank
- AR_Customer_Bill
- AR_Customer_Bill_Aging
- AR_Customer_Bill_Defaults
- AR_Customer_Bill_Email
- AR_Customer_Bill_TEST_VF
- AR_Customer_Bill_Test2_JS
- AR_Customer_CC

AR_Customer

Customer_M	Customer_Number	Customer_Status_M	Customer_Type_M	Code
1	00000	2	1	
8	2002	1	2	
9	2000	1	2	
10	2001	2	2	
326	2518	2	2	
327	2519	2	2	
328	2520	2	2	
329	2521	1	2	
330	2522	2	2	
331	2523	2	2	
332	2524	2	2	
333	2525	2	2	
334	2526	2	2	

The data in the preview has been truncated due to size limits.

Select Related Tables

Load Transform Data Cancel

For more information on using functionality within the Excel application, see Microsoft Excel Help.