

## ODBC on PASS-hosting

In order to use ODBC on the hosted system, any existing reports will need to be uploaded to the hosted server, this is detailed in a separate document.

## **Updating existing ODBC Spreadsheets**

Once the documents have been uploaded you will need to change some details in the connection strings on the reports.

1. In excel, go to the Data tab and then Queries and connections

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2. Then you'll need to right click on the connection that will appear on the right-hand side of the window, then select properties.

Queries & Connections	•	×
Queries Connections		
1 connection		
Query from PASS		<b>B</b>

3. In the window that appears you'll need to click on the definition tab. Then you can change the SQL server name\instance in the connection string and then amend any PassMain references in the command text.



Connection Properties ?							
Connection <u>n</u> ame: ( Descr <u>i</u> ption:	Query from PASS						
Usa <u>q</u> e <u>D</u> efinitio	n <u>U</u> sed In						
Connection type:	Database Query						
Connection <u>f</u> ile:		Brows	e				
Connection <u>s</u> tring:	Always use connection file DRIVER=SQL Server;SERVER=SQLSERVER UNSTANCE;UID=PassUser;;APP=Microsoft Office;V TECL03	VSID=GLA	-				
	Save pass <u>w</u> ord						
Command type:	SQL		$\sim$				
Co <u>m</u> mand text:	JM_NL_ACTS.ACCOUNT_CODE, JM_NL_ACCTS.ACCOUNT_DESCRIPTION, JM_NL_ACCTS.ACCOUNT_ID, JM_NL_ACCTS.BUDGE FROM_PassMain202110.dbo,JM_NL_ACCTS JM_NL_	T1_PER_0 ACCTS	2				
Excel Services:	A <u>u</u> thentication Settings						
<u>E</u> dit Query	Parameters Export Connection File						
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- 4. Replace the values that may look similar to above with the ones we provide you which will be in the following format, replacing xx with numbers.
  - a. SQL server name\instance: SQLXX\CUSTOMERXX
  - b. Passmain Database name: CXXPassMain
- 5. When asked to login please choose the trusted connection option.
- 6. When you have finished making changes ensure you saved the Excel Workbook, not saving will mean you have to repeat the process.

## Setting up an ODBC Data Source

1. Go to Excel and go to the Data tab and then Get Data then From Other Sources and then From Microsoft Query.

← C බ ⊡ https:// <b>pass.wcbscloud.co.uk</b> /software/html5.html										
File Home Insert Pag	ge Layout Formulas Data Review View	w Help								
Get From From Table/ Recent Existing Data Text/CSV Web Range Sources Connections										
From <u>F</u> ile	Queries & Connections									
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From <u>O</u> ther Sources	From Table/Range									
Combine Queries	From Web									
Launch Power Query Editor	From Microsoft Query									
<ul> <li>Data Source Settings</li> <li>Query Options</li> </ul>	From SharePoint List									



2. Select "New Data Source" and click OK.

Choose Data Source	×
Databases, Queries OLAP Cubes	ОК
<new data="" source=""> dBASE Files*</new>	Cancel
Excel Files* MS Access Database*	Browse
	Options
	Delete
Use the Query Wizard to create/edit queries	

- 3. Create the Data Source, by providing a name, select the SQL Server driver and click connect.
- 4. Type in the Server we provide you which will be in the format of SQLXX\CUSTOMERXX then tick the box for "Use Trusted Connection" and then select the database name we provide you with e.g. CxxPassMain.
- 5. Then click OK

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	Cr	eate New	Data Sour	ce					×		
	1. 2.	What name do you want to give your data source?  1. PASS Data Select a driver for the type of database you want to access:  2. SQL Server									
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6. You'll be returned to the previous window with the database name. Click ok.



Create New Data Source	<							
What name do you want to give your data source?								
1. PASS Data								
Select a driver for the type of database you want to access:								
2. SQL Server								
Click Connect and enter any information requested by the driver: 3. Connect PassTest								
Select a default table for your data source (optional):								
4.								
Save my user ID and password in the data source definition								
OK Cancel								

7. You will then be returned to the data source selection screen, double click on the new data source

Choose Data Source	×
Databases Queries OLAP Cubes	ОК
<new data="" source=""> dBASE Files*</new>	Cancel
Excel Files* MS Access Database* BASS Data	Browse
PASS Data	Options
	Delete
Use the Query Wizard to create/edit queries	]

8. You can then continue with creating a new ODBC enabled spreadsheet



Query Wizard - Choose Columns		×
What columns of data do you want to ind Available tables and columns:	Columns in your query:	4 >
Preview Now Options	< Back Next > Cancel	

If you have any further questions please contact WCBS Support by calling 01458 833055 or emailing support@wcbs.co.uk.