

The Salesforce ODBC Connector

This document aims to provide an overview of the Salesforce ODBC Connector and provide install and setup instructions. This document focuses on the Workstation (full client QlikView Developer) install only.

Data Direct Information:

http://media.datadirect.com/download/docs/openaccess/sf/oa_sf_v150_doc_inst.pdf

Download

You can download the ODBC Drivers from the QlikView site (<http://global.qlikview.com/download/>).

File Function?	Which Product?
<input checked="" type="checkbox"/> Installation program	<input type="checkbox"/> QlikView Desktop
<input type="checkbox"/> Release notes	<input type="checkbox"/> QlikView Server
	<input type="checkbox"/> QlikView Publisher
	<input type="checkbox"/> QlikView SAP Connector
	<input type="checkbox"/> QlikView WorkBench
	<input type="checkbox"/> QlikView WebParts
	<input type="checkbox"/> QlikView IE Plug-in
	<input type="checkbox"/> QlikView OCX
	<input type="checkbox"/> QlikView PDF Writer
	<input type="checkbox"/> QlikView Java Mobile
	<input checked="" type="checkbox"/> QlikView Salesforce Connector

There are 3 install packages available. These basically cover two different ODBC connections.

The first is a workstation ODBC driver (Qvc_WS_sfdc.zip). This version establishes a single connection directly from the client machine where it is installed to the Salesforce.com database (via the SFDC web service). This should be installed to enable QlikView developers to connect to their Salesforce data and run queries.

The second version is a client server version (Qvc_CLI_sfdc.zip & Qvc_SRV_sfdc.zip). In this version all installed clients talk to a central ODBC server which plays traffic cop and manages all the connections back to the Salesforce.com server. With the client server version there are two separate installers one to be run on the client machines and one to be run on the machine that will act as the Salesforce ODBC server.

Installing the Driver 32bit OS

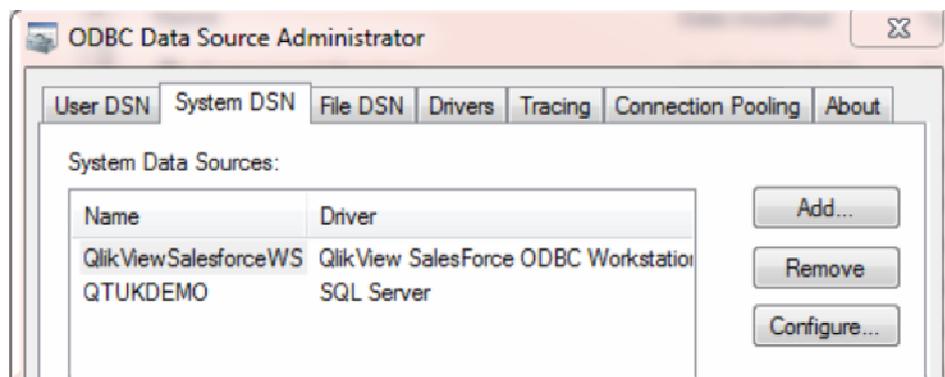
After you have downloaded the driver from the download site, you should firstly unzip it and save to an appropriate location.

Navigate to your selected location and find the Setup.exe file. This should be `...\Qvc_WS_sfcd\Workstation\setup.exe`. Double click this file to begin the install.

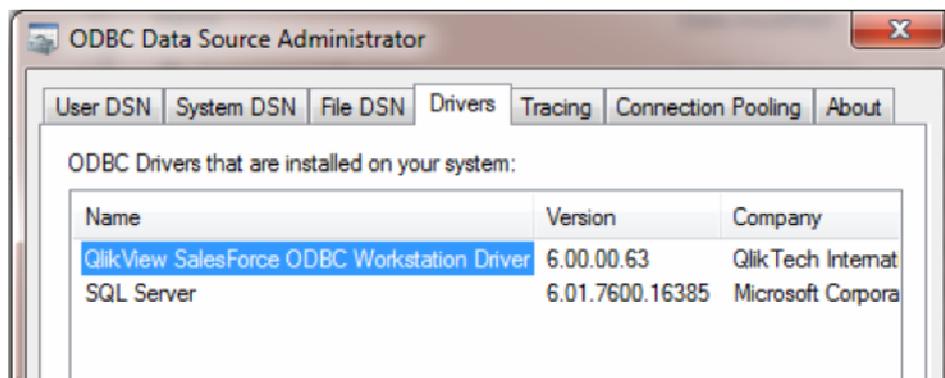
You can follow a straight forward install and should not have to change any of the default settings.

32bit OS ODBC Driver

Once the install has finished, you can open the ODBC administrator console and view you new driver. The install process will have already set up a DSN for you....



You can also see the driver in the Drivers tab....



Installing the Driver 64bit OS (32bit QV)

If you are installing on a 64bit Operating System, as the software is currently 32bit only, follow the install instruction as per the 32bit Operating System **BUT** ensure (for best practice reasons) that you install in the "Program Files (x86)" program tree. The default during the install will try to install in to the straight forward "Program Files".

Once the install has completed, you will need to run a registry edit to ensure that the ODBC driver is correctly installed.

BEWARE - Incorrect use of the Windows registry editor may prevent the operating system from functioning properly. Great care should be taken when making changes to a Windows registry. Registry modifications should only be carried-

QlikView

out by persons experienced in the use of the registry editor application. It is recommended that a complete backup of the registry and workstation be made prior to making any registry changes.

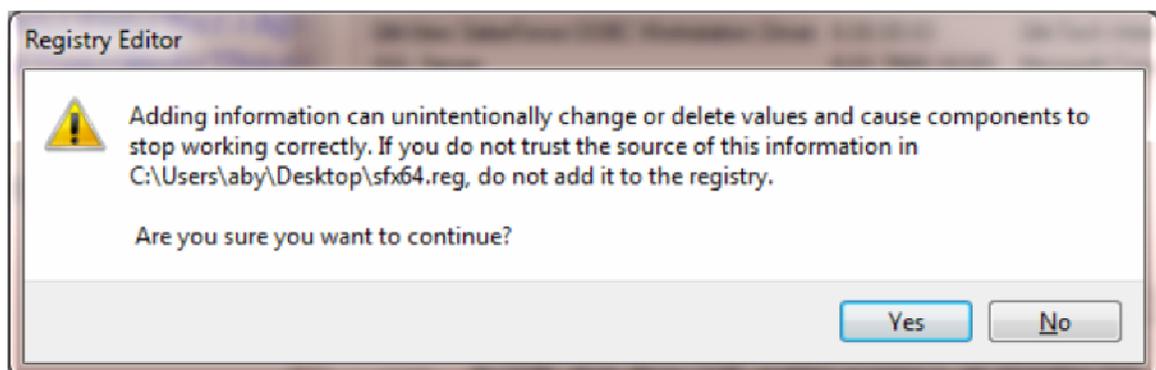
Place the text below in to a notepad file and save the file with a .reg extension.

```
Windows Registry Editor Version 5.00
[HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ODBC\ODBC.INI\QlikView SalesForce ODBC Workstation Driver]
"APILevel"="1"
"CPTimeout"="60"
"ConnectFunctions"="YYN"
"Description"=""
"Driver"="C:\Program Files (x86)\Common Files\QlikTech\Connectivity\SF\bin\ivoal22.dll"
"DriverODBCVer"="3.52"
"FileUsage"="0"
"SQLLevel"="1"
"Setup"="C:\Program Files (x86)\Common Files\QlikTech\Connectivity\SF\bin\ivoals22.dll"
"InstallDir"="C:\Program Files (x86)\Common Files\QlikTech\Connectivity\SF\"

[HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ODBC\ODBCINST.INI\QlikView SalesForce ODBC Workstation Driver]
"APILevel"="1"
"CPTimeout"="60"
"ConnectFunctions"="YYN"
"Description"=""
"Driver"="C:\Program Files (x86)\Common Files\QlikTech\Connectivity\SF\bin\ivoal22.dll"
"DriverODBCVer"="3.52"
"FileUsage"="0"
"SQLLevel"="1"
"Setup"="C:\Program Files (x86)\Common Files\QlikTech\Connectivity\SF\bin\ivoals22.dll"
"InstallDir"="C:\Program Files (x86)\Common Files\QlikTech\Connectivity\SF\"

[HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ODBC\ODBCINST.INI\ODBC Drivers]
"QlikView SalesForce ODBC Workstation Driver"="Installed"
```

You can then double click the saved file and it will prompt you with the message below...

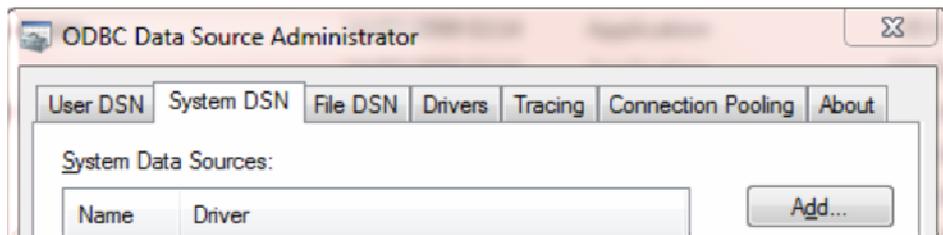


Click "Yes" and the registry will be updated.

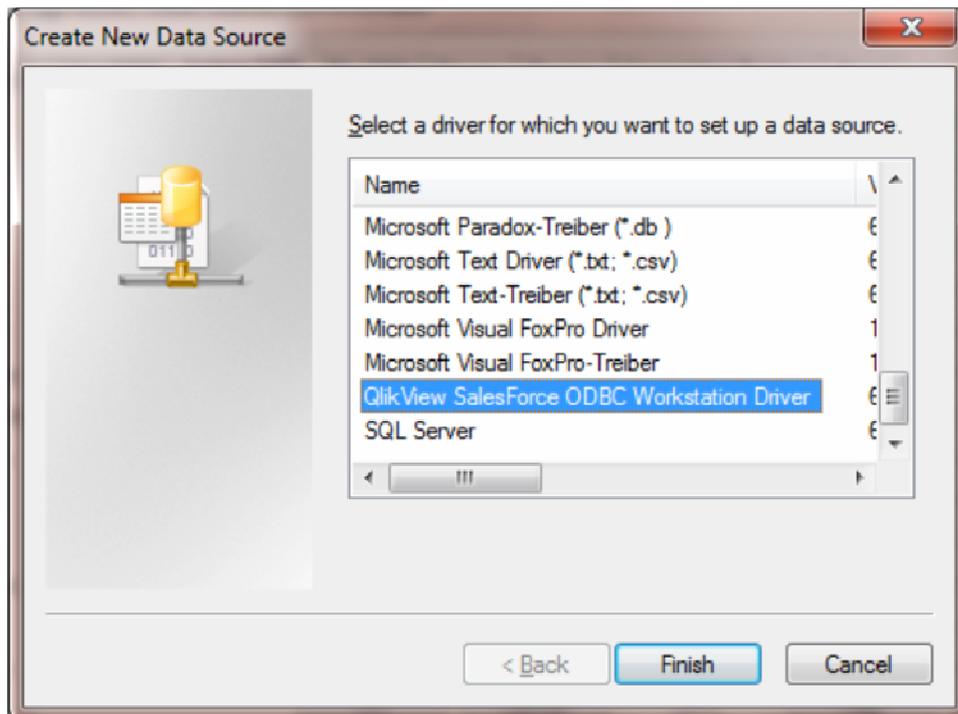
64bit OS ODBC Driver

If the connector is installed in a 64bit OS you will have to set up the ODBC driver manually. You will have to navigate to the 32bit ODBC Management Console (C:\Windows\SysWOW64\odbcad32.exe). When the console has opened, you will see that the driver description will be present in the Drivers tab, however, there will be no connection set up in the System DSN tab. This will need creating manually.

Select the System DSN Tab, press the add button...

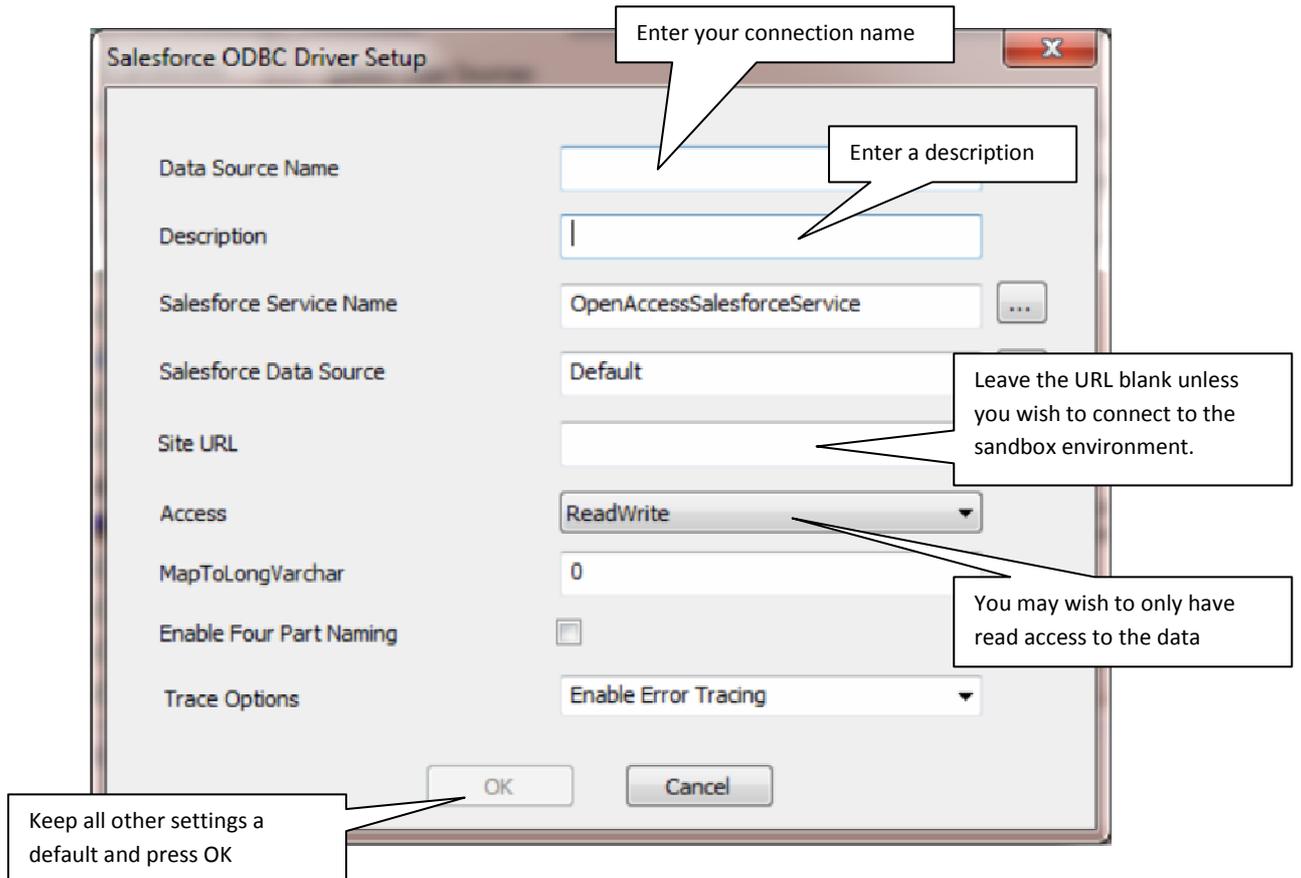


In the resultant window, scroll down to the Salesforce driver option...

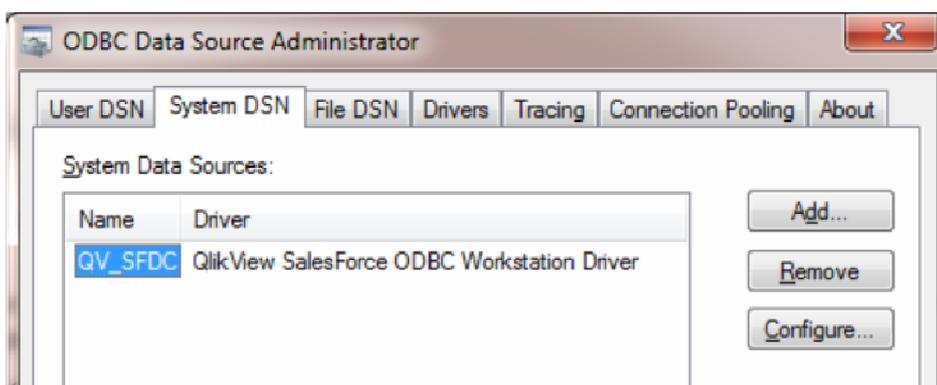


Click Finish.

In the resultant window, you will have to give your connector a name and a description.



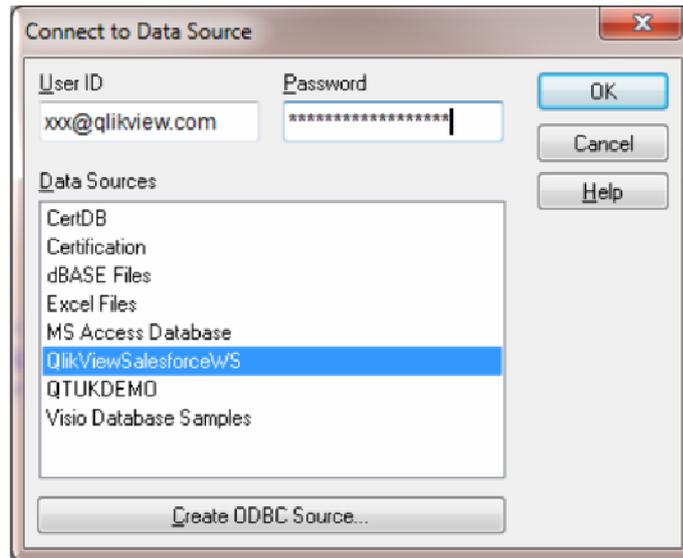
Your new driver will then appear in your System DSN window.



Your QlikView Connection

You can now open QlikView and begin to connect to your data source (remember....if you are in a 64bit environment, you will have to install 32bit QlikView). Open your script editor window as per usual and select ODBC Data Source as a connection type Select Connect.

You will see that QlikView has picked up the names of your ODBC connections and Salesforce will be in the list as an option.



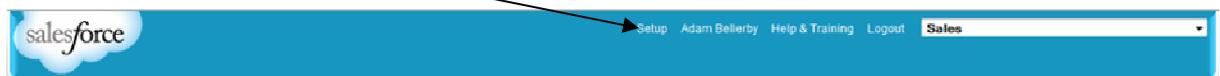
Enter your credentials in to the User ID and Password boxes.

NOTE: When connecting to Salesforce, you will need to append your Security Token provided by Salesforce themselves to your Password. For example....

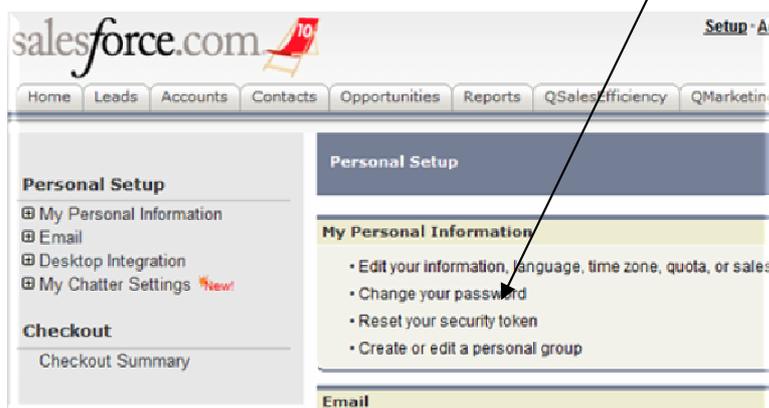
UserID: 123@qlikview.com

Password: mypassword Z7u1t2k1B2ZB2CW36kwuxS4y7

You can request a security token from your Salesforce homepage.....Login to Salesforce and click the setup link at the top of the screen....



In the resultant screen you will see the link to reset your security token...



Follow the process to reset your token and you will be sent it via email.

Once you receive this token, you can append on to your password in the QlikView connection.