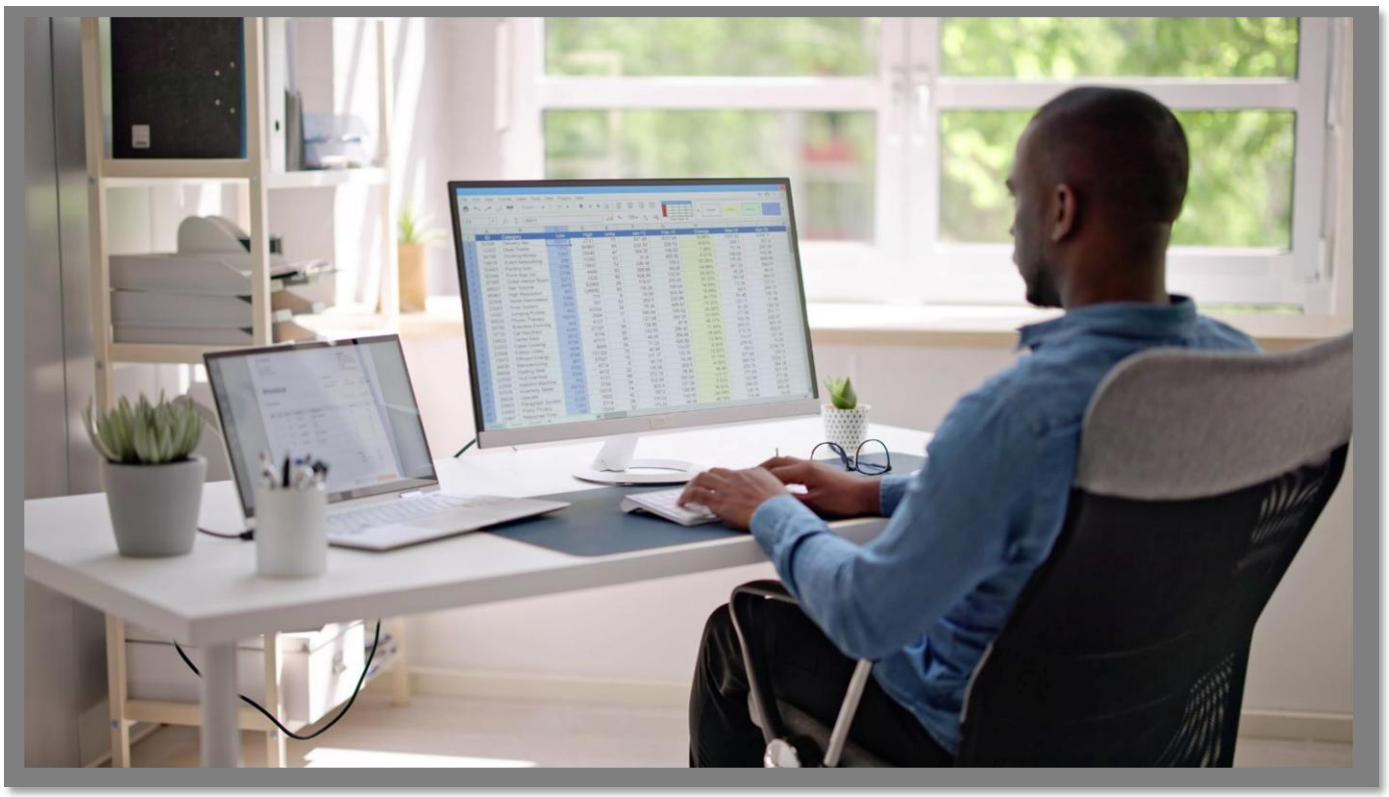
Arbutus Connectors

Epicor Kinetic ERP
CONFIGURATION GUIDE



ARBUTUS
Powerful Analytics Simplified

Arbutus Connectors

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Arbutus Connector – Epicor Kinetic ERP

A. Introduction

The purpose of this Guide is to provide assistance with configuring the Arbutus Epicor ERP Connector using the ODBC Data Source Administrator. The configuration process can involve several technical steps that require a good understanding of IT systems and database management.

To make the most of this guide, it's advisable to have a good understanding of database connectivity, driver installation, and system settings. The ODBC Data Source Administrator, which is used as part of the configuration process, allows for the setup and management of data sources, enabling applications to access data from various database systems.

Due to the complexity and potential impact of these configurations, it is recommended that only those individuals with IT or database expertise undertake this task. In addition, it should also be understood that each client's network environment is different. A one-size-fits-all approach is rarely effective, as what works well in one environment may not be suitable in another.

B. About Epicor Kinetic ERP

Epicor Kinetic is essentially the latest version of Epicor ERP, which is the older branding for Epicor's enterprise resource planning software. Epicor Kinetic is the modern, cloud-first version of Epicor ERP, redesigned with a more user-friendly interface and advanced features.

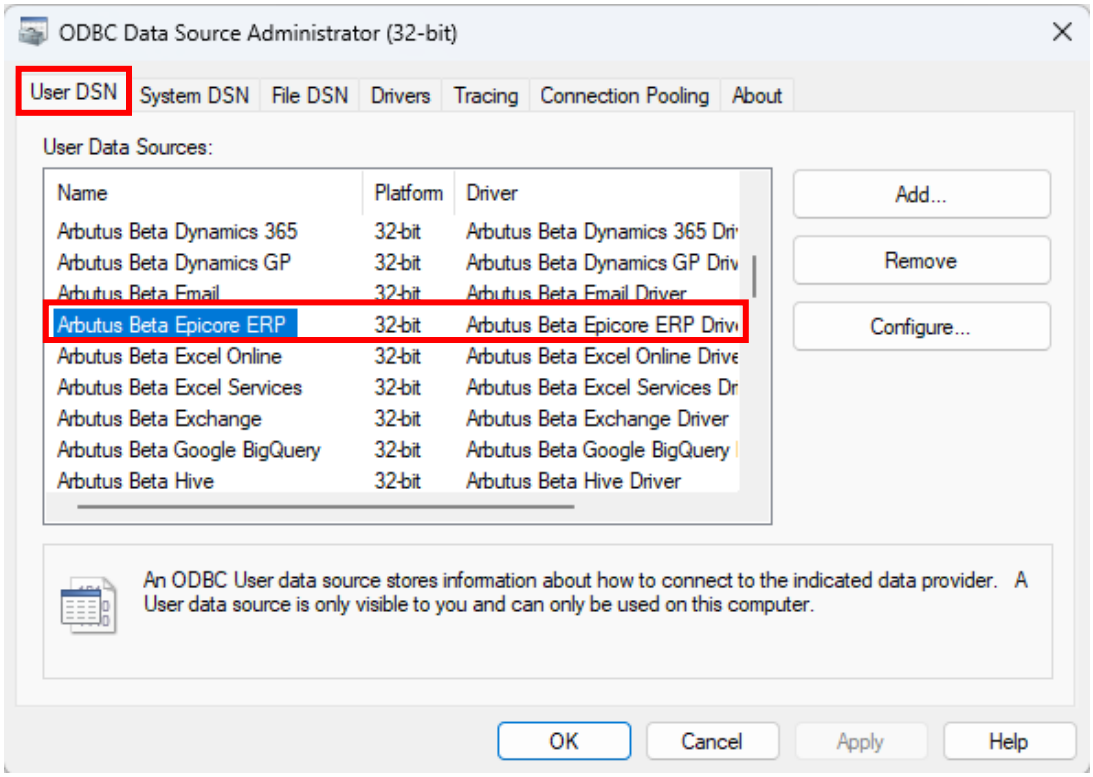
Epicor Kinetic ERP primarily utilizes cloud-based data storage, leveraging the robust infrastructure of Microsoft Azure. Data is organized within the ERP system to support various business functions, including financial management, production, supply chain, and customer relationship management. The cloud environment allows for scalable and flexible data management, making it easier for businesses to expand and adapt their storage needs as they grow.

C. Determining if the Connector exists prior to configuring

Installation of the Arbutus Epicor ERP Connector is done at the time of installing the Arbutus software. For more information on this, please see the **Overview Guide Document**.

Once the Connector has been installed, the next step is to configure it.

Prior to configuring it, you can check to see if the Connector has been installed by opening the **32-bit ODBC Data Source Administrator**, pictured below, and clicking the **User DSN** tab. Included below is information on how you can access the **ODBC Data Source Administrator**.



- If the Arbutus Epicor ERP Connector appears in the list, it can be considered as installed.
- If it is not listed, it is likely that you did not select it during the installation or modification of the Arbutus software. In this case, it is recommended to reinstall the Arbutus software and choose the **Modify** option when prompted. For more details, please refer to the **Overview Guide Document**.

Below is the file path to access and run the **ODBC Data Source Administrator** application:

C:\Windows\SysWOW64\odbcad32.exe

Alternative, you can also try locating and opening the **ODBC Data Source Administrator** application by doing a search on your desktop application.

D. Configuring the Connector after it has been installed

Once you have verified that the Arbutus Connector has been installed, it is time to configure it.

This process is done using the **ODBC Data Source Administrator**. It can be described as "**editing the DSN configuration"**.

DSN, Drivers, and Data Sources
What is a DSN? DSN stands for Data Source Name, and is a unique name used to create a data connection to a database using open database connectivity (ODBC). A DSN is a data structure that contains the information required to connect to a database. It is essentially a string that identifies the source database, including the driver details, the database name, and often authentication credentials and other necessary connection parameters. DSNs facilitate a standardized method for applications to access databases without needing hard-coded connection details, enhancing flexibility and scalability in database management.

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- ***Drivers*** are the components that process ODBC requests and return data to the application. If necessary, drivers modify an application's request into a form that is understood by the data source. The **Drivers** tab in the **ODBC Data Source Administrator** dialog box lists all drivers installed on your computer, including the name, version, company, file name, and file creation date of each driver.

- ***Data sources*** are the databases of files accessed by a driver and are identified by a data source name (DSN). You use the ODBC Data Source Administrator to add, configure, and delete data sources from your system.

All ODBC connections require that a DSN be configured to support the connection. When a client application wants to access an ODBC-compliant database, it references the database using the DSN.

The types of DSNs are:

- **User DSN** – User DSNs are local to a computer and can be used only by the current user. They are registered in the HKEY_Current_USER registry subtree.

- **System DSN** – System DSNs are local to a computer rather than dedicated to a user. The system or any user with privileges can use a data source set up with a system DSN. System DSNs are registered in the HKEY_LOCAL_MACHINE registry subtree.

- **File DSN** – File DSNs are file-based sources that can be shared among all users who have the same drivers installed and therefore have access to the database. These data sources need not be dedicated to a user nor be local to a computer. File data source names are identified by a file name with a .dsn extension.

User and system data sources are collectively known as *machine* data sources because they are local to a computer.

Each of these DSNs has a tab in the **ODBC Data Source Administrator** dialog.

The Arbutus ODBC Driver for Epicor Kinetic enables real-time access to Epicor ERP data, directly from any applications that support ODBC connectivity, the most widely supported interface for connecting applications with data.

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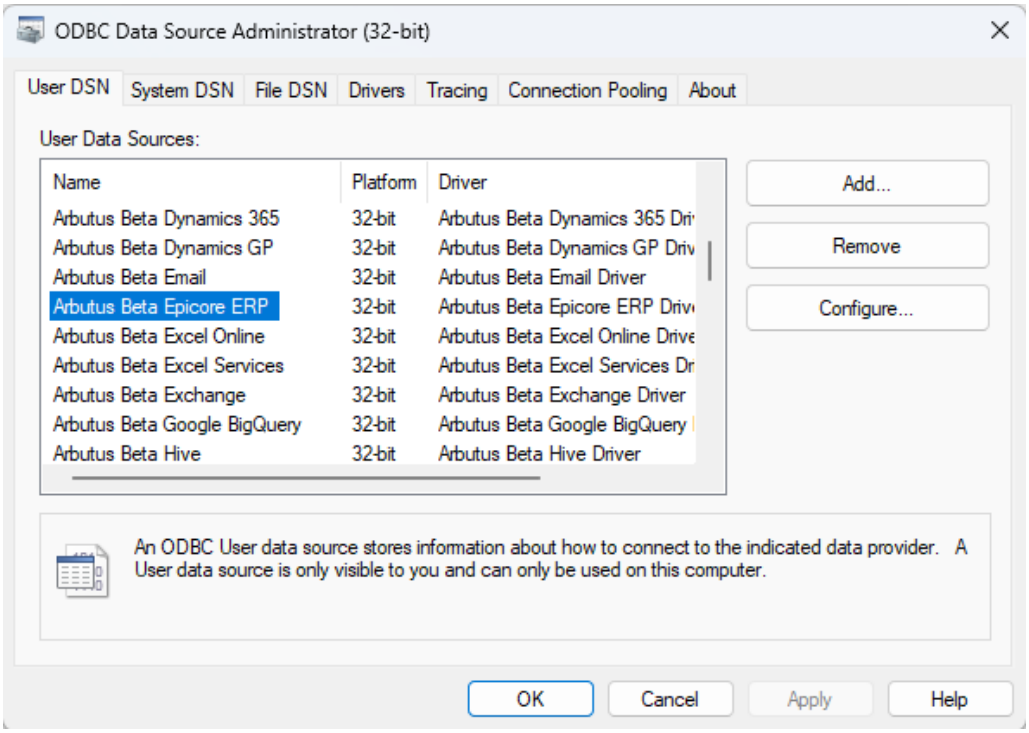
Follow these steps to edit the DSN configuration and configure the Connector.

1. First open the **ODBC Data Source Administrator**.



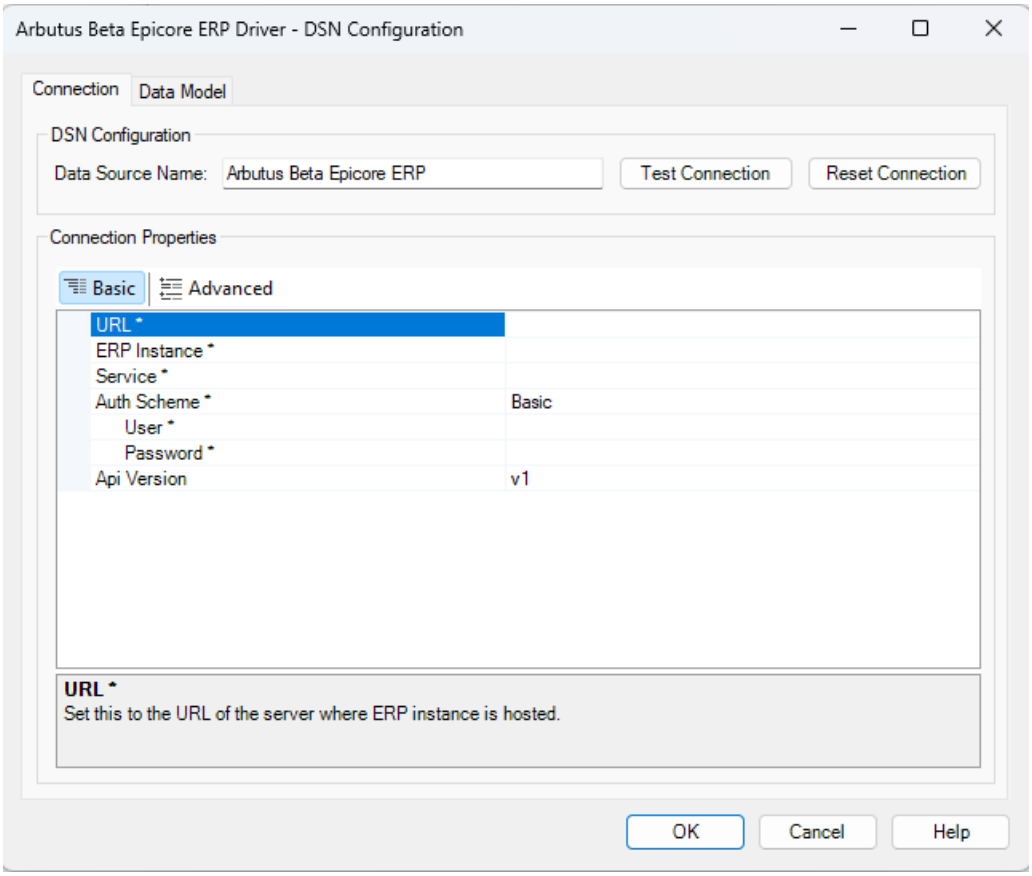
2. Click the **User DSN** tab.

   Selected data connectors are installed as **User DSN's** in Window's 32 Bit **ODBC Data Source Administrator**.

   Also, each of the data connector's names is prefaced with Arbutus, for example, **Arbutus Epicor ERP.**

3. Select the Arbutus Connector, in this case it is **Arbutus Epicor ERP**.
4. Click **Configure**.

This opens the **Arbutus Epicor ERP Driver – DSN Configuration** dialog.



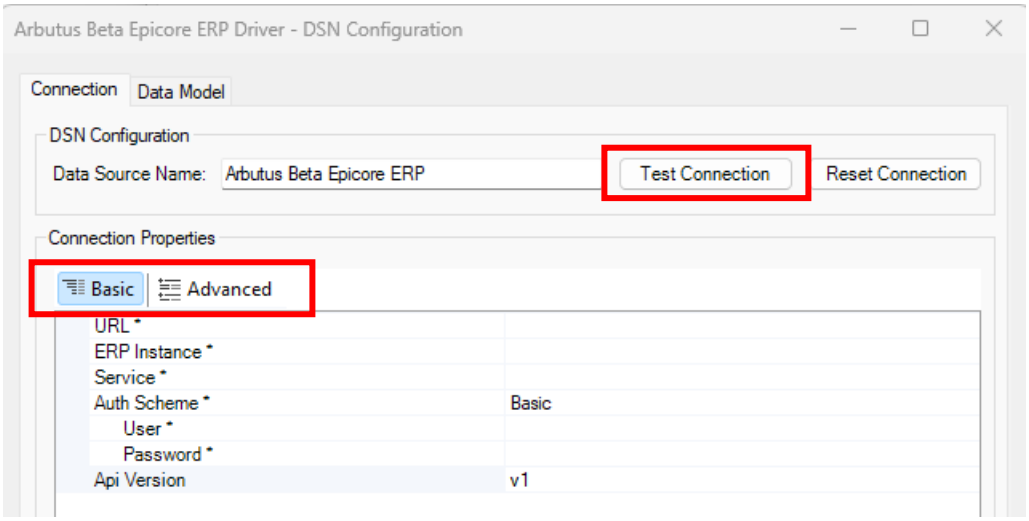
E. Editing the DSN properties – the Basic and Advanced tabs

With the DSN Configuration dialog open, the next step is to edit the DSN properties, where necessary, in the **Basic** and **Advanced** tabs. For example, editing the **Api Version** property (per screenshot below) to specify the version of Epicor Kinetic API.

E1. Editing the DSN properties in the Basic tab

The properties listed in the **Basic** tab are typically the ones that are most commonly used, and as such are designed to be more user-friendly and straightforward, allowing you to quickly make changes without needing in-depth technical knowledge.

Once you have completed editing the properties in the **Basic** tab, you can go ahead and try testing the connection to the Epicor ERP system by clicking the **Test Connection** button, as highlighted in the screenshot below.



In the **Basic** tab, there are **five** main properties to review:

1. **URL** – this is the URL of the server where the ERP instance is hosted.

2. **ERP Instance** – this is the name of the installed ERP application.

3. **Service** – specify the service you want to retrieve data from.

4. **Auth Scheme** – this is a dropdown selection containing the following two possible values to specify the type of authentication to use when connecting to Epicor Kinetic ERP.

   - Basic – select this when you want to use **basic authentication**. This method requires you to enter a username and password to authenticate the user. It's a straightforward approach and is typically used when you don't need more advanced authentication mechanisms like OAuth or SSO (Single Sign-On) with services like Azure Active Directory.

     The default value is **Basic**.

     Selecting **Basic** requires you to specify the User and Password.
     - User – this is the Epicor Kinetic user account used to authenticate.

       The authenticating server requires both **User** and **Password** (see below) to validate the user's identity.

     - Password – this is the password used to authenticate the user.

       The authenticating server requires both **User** (see above) and **Password** to validate the user's identity.

   - AzureADOpenID – select this when you want to use **Azure Active Directory (Azure AD) OpenID Connect** for authentication. This method is beneficial if your organization uses Azure AD for identity management, as it allows for seamless integration with your existing Azure AD infrastructure. It provides enhanced security features, such as multi-factor authentication (MFA) and single sign-on (SSO), making it a more secure and convenient option compared to basic authentication.

Selecting **AzureADOpenID** requires you to specify the following:

- Azure Tenant – this is the Microsoft Online tenant being used to access data. If not specified, your default tenant is used.

  A tenant is a digital representation of your organization, primarily associated with a domain, for example, Microsoft.com. The tenant is managed through a Tenant ID also known as the directory ID, which is specified whenever you assign users permissions to access or manage Azure resources.

  To locate the directory ID in the Azure Portal, navigate to **Azure Active Directory > Properties**.

- OAuth Client ID – this is the client Id assigned when you register your application with an OAuth authorization server.

  OAuth Client Id is one of a handful of connection parameters that need to be set before users can authenticate via OAuth.

- OAuth Client Secret – this is the client secret assigned when you register your application with an OAuth authorization server.

  OAuth Client Secret is one of a handful of connection parameters that need to be set before users can authenticate via OAuth.

- Callback URL – this is the OAuth callback URL to return to when authenticating. This value must match the callback URL you specify in your app settings.

  During the authentication process, the OAuth authorization server redirects the user to this URL. This value must match the callback URL you specified when you created your custom OAuth application.

5. **Api Version** – specify the version of Epicor Kinetic API. This is a dropdown selection consisting of two possible values:
   - v1 – select this option if you are using the **first version of the Epicor Kinetic API**. This is typically necessary if your system or application is designed to interact with the initial version of the API, ensuring compatibility and proper functionality. Using "v1" can also be important if there are specific features or behaviors in the first version that are not present in later versions.

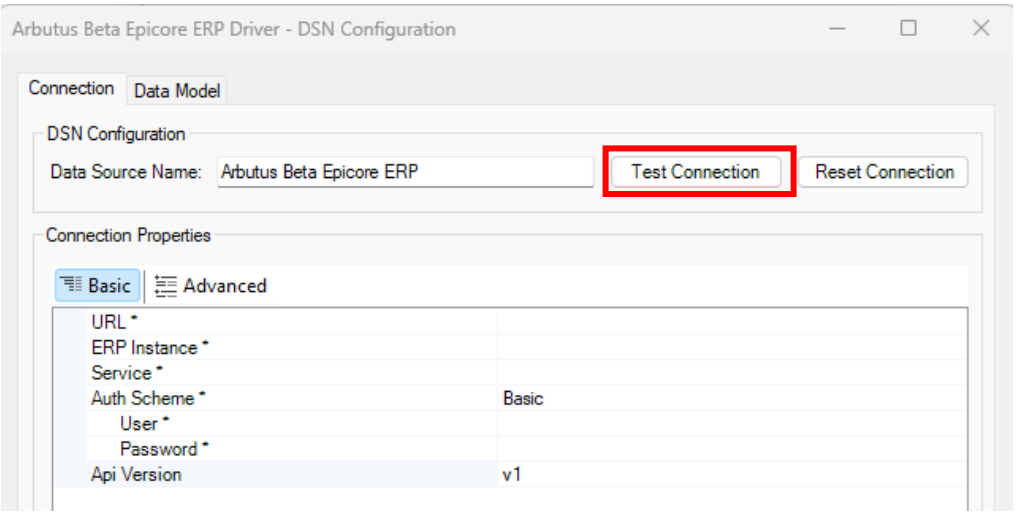
   - v2 – select this option if you are using the **second version of the Epicor Kinetic API**. This is necessary if your system or application is designed to interact with the updated version of the API, which may include new features, improvements, or changes not present in the first version. Additionally, some functionalities or data structures might only be available in "v2"

   The default value is **v1**.

E2. Editing the DSN properties in the Advanced tab

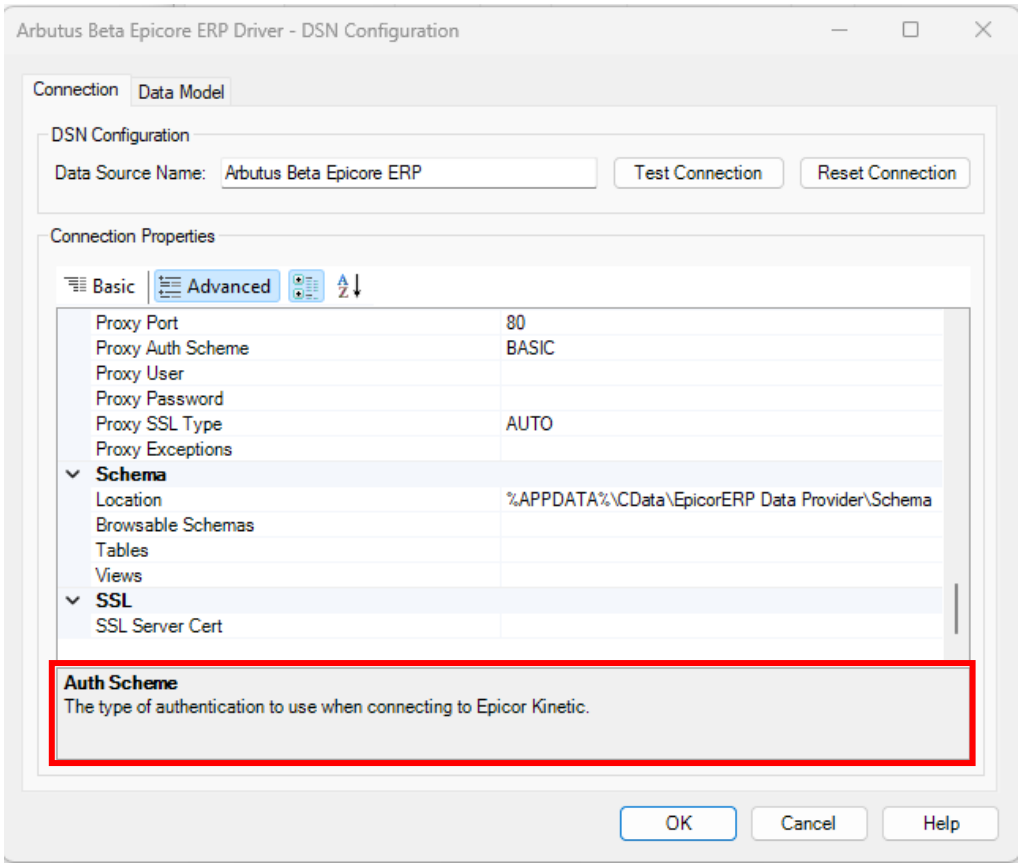
This tab includes more detailed and technical properties. It is intended for those users who need more control over the configuration and are comfortable with more complex options. The **Advanced** tab often includes properties that can fine-tune the behaviour of the system feature.

If you have already completed editing the properties in the **Basic** tab, as required, you do not necessarily need to also complete editing the properties in the **Advanced** tab. Instead, once you have completed editing the properties in the **Basic** tab, you may opt to proceed to testing the connection to the Epicor Kinetic ERP system by clicking the **Test Connection** button.



There are a lot more properties included for editing in the **Advanced** tab.

However, it is useful to know that each property does provide a short description of it and as such serves as a guide in terms of what to edit and/or enter. This short description can be seen at the bottom of the **DSN Configuration** dialog box, as seen in the screenshot below.



If it is deemed necessary to complete some/all the properties in the **Advanced** tab, it is recommended that you refer to the description shown for any of the properties being edited and/or entered.

If required, more information on the properties listed in the **Advanced** tab can also be provided.

F. Other questions and/or request for assistance

There may be times when you need to consult with the technical support team at Arbutus Software. If so, please send an email request to support@ArbutusSoftware.com.

For more information, please refer to the CONTACT US page on our website.