

ConnectPlus Getting Started User Guide



Introduction

ConnectPlus is for integrating the powerful capabilities of Arbutus with core applications such as Excel and Power BI. It uses ODBC connectivity to seamlessly load data from selected Arbutus projects and tables directly into these familiar tools. ConnectPlus can be deployed on a desktop or server.

Arbutus excels in advanced analytics, as well as in combining and cleansing data from multiple, disparate sources. With ConnectPlus, these capabilities can be easily extended into the standard applications that users already know and rely on, enhancing both accessibility and productivity.

ConnectPlus has to be configured first before you can make use of it. Simply configure the Arbutus ConnectPlus driver in the System DSN tab of the 32-bit or 64-bit ODBC Data Source Administrator to point to the desired Arbutus project to expose the desired data to your ODBC compliant application(s). More information on this can be obtained by downloading and referencing the ConnectPlus Install Guide found on the [Support](#) page (under the Resources tab) of the Arbutus website.

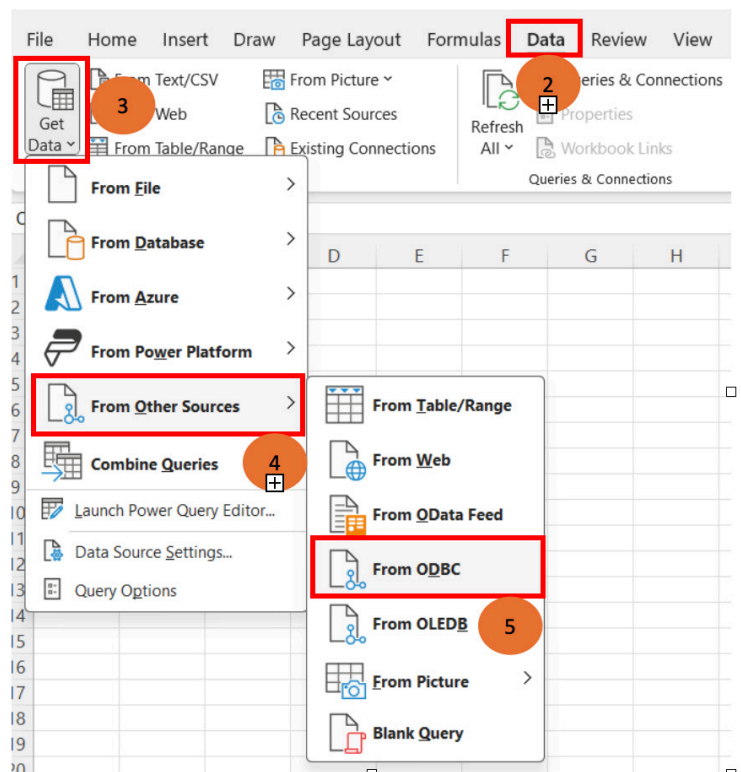
Using ConnectPlus to import tables

To illustrate the use of ConnectPlus, consider this scenario:

- You have some tables from an Arbutus project.
- You would like to load the data from these tables into an Excel tab/worksheet so that you can analyze the data in Excel and use the functionality within to perform other tasks.

The following steps are based on the scenario described above – using Excel as the ODBC-compliant application into which you will be importing tables/data from an Arbutus project.

1. Open Excel to create a new workbook.
2. Click the **Data** menu.
3. Click the **Get Data** dropdown. A menu appears with different data import options.
4. From that menu, select **From Other Sources**. Another menu appears with different data source options.
5. From that sub-menu, select **From ODBC**.



The **From ODBC** dialog is displayed.



6. Click the **Data Source Name (DSN)** dropdown, locate the **ConnectPlus** data source, and select it. If you do not see it listed, then it is possible that you may not have installed ConnectPlus and/or it may not have been configured properly.

A starting point could be the **ODBC Data Source Administrator** dialog.

- a. On your PC, click **Start**, and type **ODBC**.
 - b. Select either **ODBC Data Sources (64-bit)** or **ODBC Data Sources (32-bit)** based on your system or application requirements.
 - c. On the dialog displayed, click the **System DSN** tab to verify if the ConnectPlus data source is listed.
 - d. If it is not listed, you can try clicking the **Drivers** tab to see if the ConnectPlus driver is listed.
 - e. If it is listed, you can go back to the **System DSN** tab to try adding a new data source (ConnectPlus) by clicking the **Add** button and then selecting the ConnectPlus driver.
 - f. Once added, you will need to configure it by clicking the **Configure** button.
 - g. In the Database area of the **ConnectPlus ODBC Setup** dialog, enter the path and name for the Arbutus project file (if other than the installed default).
 - h. Click **OK** repeatedly to exit this area.
7. Once you have selected the ConnectPlus data source, the **Navigator** dialog is displayed. On this dialog, you should also see a list of tables from the Arbutus project that was specified in the **Database** selection box of the **ConnectPlus ODBC Setup** dialog.

On the **System DSN** tab of the **ODBC Data Source Administrator** dialog, if you click once on the ConnectPlus data source and then click on the **Configure** button, you will be able to see the Arbutus project being referenced in the Database selection box.

8. Select the table you are interested in. To select multiple tables, check the **Select multiple items** checkbox.

9. On the bottom-right of the **Navigator** dialog, you should see three buttons:
 - a. **Load** – there are two options available:
 - ii. **Load** – select this to load the data from the table(s) selected into a newly created tab of the Excel workbook.
 - iii. **Load To** – select this to specify how you want to view the data of the selected table in your workbook and where you want to put the data, e.g., in a new worksheet.
 - b. **Transform Data** – select this if you want to use **Power Query Editor** to perform certain data transformation tasks. Knowing how to use the functionality in Power Query Editor would be useful.
 - c. **Cancel** – select this to cancel the task.

Access to refreshed source data

Using Excel as an example, once the selected table data from your Arbutus project has been loaded into a tab/sheet, you can make use of the **Refresh** functionality in Excel to obtain a refreshed version of the source data from the Arbutus table.

You can find the **Refresh button** under the **Table Design** or **Data** menus.

To refresh the data, simply click **Refresh**.

Any updates that you may have made in Arbutus to the table that is currently in use in Excel, those updates would also be reflected in Excel upon doing a refresh.

You can even test this out by doing the following:

1. Suppose that you already have a table from Arbutus that is currently in use in Excel.
2. In Arbutus, open this same table.
3. To make a small update, you can create a simple computed field.
4. Save the computed field.
5. Go back to Excel, where this same table is currently in use.
6. Click **Refresh**.
7. You should see the newly created computed field that you created earlier in Arbutus included as one of the new columns in Excel.

Note:

While the above steps demonstrate a table from Arbutus that is currently in use in Excel, you do not necessarily need to have this table opened or in use in Excel. Even if this table is not currently in use, you can still make updates to the same table in Arbutus. However, once you have completed those updates in Arbutus, you would need to reload the data into Excel through ConnectPlus connectivity to verify the updates to the table that were made in Arbutus.

Refresh Connection Properties

Depending on the core application used to load table data from your Arbutus project, e.g., Excel or PowerBI, the **Refresh** button in those respective applications offer different options to specify and control the refresh connection properties. For example, in Excel, the **Refresh** button item has a dropdown menu, where one of the options is **Connections Properties**. You can use this option to control various settings for connections to external data sources (such as your Arbutus table), and to use, reuse, or switch connection files.

Managing table fields in Arbutus

Computed fields

Even computed fields that are in your Arbutus table(s) are made available when loading data into a core application.

Excluding fields from being loaded

However, you do have the option in Arbutus to exclude any field(s) from being loaded. To do this:

1. With a table currently open in Arbutus Analyzer, select **Edit Table Layout**.
2. In the **Edit Fields/Expression** tab, double click the field you wish to exclude.
3. When the field definition opens, click the **Advanced** button.
4. Select the **Hidden** checkbox.
5. Click **OK**.

Fields from related child tables

By default, any fields from related child tables are not included for loading into a core application. This also includes related child fields that are currently displayed in the table's view in Arbutus.

However, in Arbutus, you can convert these fields to physical fields by extracting them to a new table, where they will then be included for loading.

Default Arbutus project created when installing ConnectPlus

When installing ConnectPlus, a sample ConnectPlus project (**Sample Data.ASI**) is automatically created and placed in the default project folder. By default, ConnectPlus is configured to read all table layouts defined using Arbutus for this ConnectPlus project.

To verify the location of this project:

1. Open the **ODBC Data Source Administrator**
2. Click the **System DSN** tab
3. Locate the **ConnectPlus** data source and select it
4. Click the **Configure** button

You will see the full path to this Arbutus project in the **Database** section.

Using the default **Sample Data.ASI** project is useful when evaluating ConnectPlus. In all other situations you should create a new Arbutus project and then select this as your ConnectPlus project. Use the **Configure** option to point to the new Arbutus project.

Creating Table Layouts to make data accessible in the end-user's ODBC-compliant applications

To make data accessible in the end-user's ODBC-compliant applications, follow these steps:

1. Start Arbutus.
2. Create a new Arbutus project.
3. Alternatively, you can open the supplied sample Arbutus project (**Sample Data.ASI**) that is located in your **My Documents\Arbutus\Sample** folder as your initial Arbutus project.
4. Use Analyzer's Data Definition Wizard (DDW) to walk you through the process of accessing the necessary data files and creating the Arbutus table layouts necessary to make the data accessible to the end-user's ODBC-compliant applications via ConnectPlus.
By default, the table layouts created when you define data files using Arbutus are written to the location where the Arbutus project resides.

Auto-running Procedures and Workflows

ConnectPlus can be enhanced by taking advantage of auto-running procedures and workflows.

Auto-running procedures and workflows automatically run when a table is opened via ConnectPlus. They are used for the regenerating or refreshing an input table before loading into an application. For example, when you are in an application such as Excel and open a table using ConnectPlus, it automatically executes an associated procedure in ConnectPlus before bringing the table into your spreadsheet.

Analyzer is needed to setup an auto-running procedure/workflow, but it is not needed to run it. To configure, give the procedure or workflow the same name as the table followed by a trailing underscore character "_". For example 'Report1.fil would need a procedure named 'Report1_.pro'

The auto-run procedure/workflow can be simple, such as "REFRESH tablename", or an advanced analytic.

For more information on this capability, please see **Auto-running Procedures and Workflows** in the Analyzer **HELP** documentation.

Specifying other Arbutus projects to use with ConnectPlus

ConnectPlus can only refer to one project at a time. You therefore need to specify the appropriate project for ConnectPlus to access.

To point ConnectPlus at more than one project, a separate instance of the ConnectPlus driver will need to be established in the ODBC Data Source Administrator, with each instance pointed at a unique project. Creating a separate instance of the driver can be done by clicking the **Add** button in the ODBC Data Source Administrator and going through the configuration process, thus enabling you to specify a new (secondary) name for the second instance of the ConnectPlus driver.



Other questions and/or requests 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.

Arbutus Analytics

Arbutus delivers the very best in purpose-built audit analytics technology to meet the exacting demands of today's business environment. Auditors, business analysts, and fraud investigators rely on Arbutus to enhance their testing, analysis and compliance capabilities.

Toll free: 877.333.6336

Phone: 604.437.7873

Sales Inquiries

info@ArbutusSoftware.com

Technical Support

support@ArbutusSoftware.com

