Overview
CONFIGURATION GUIDE

ARBUTUS
Powerful Analytics Simplified

Contents

Arbutus Connectors – An Overview

A. Introduction

The purpose of this guide is to provide you with information on the following:
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The process to configure the Arbutus Connector, which can also be described as **"editing the Data Source Name (DSN) configuration"**, can involve several technical steps that require a good understanding of IT systems and database management.

To make the most of this guide, it is 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 users with IT or databases 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.

As such, the intention of this overview document is mainly to serve as a guide to using Arbutus Connectors.

B. What are Connectors?

In simple terms, Data connectors are tools or software that help different systems, applications, or databases communicate with each other by transferring data between them. This enables seamless and automated data transfer between different systems, applications, or databases and ensuring data flows smoothly and efficiently from source to destination without manual intervention.

For example, a data connector could link a customer relationship management (CRM) system to an email marketing platform, so customer details automatically update in both places.

Data connectors are critical for bridging the gap between data systems as they facilitate the transfer of data between different databases, applications and services.

C. How to access Connectors for use in Arbutus Analyzer?

At the time of installing the Arbutus Analyzer software, the installer will be provided with the option to select and install the desired data connectors from a supplied suite of optional Arbutus data connectors. These data connectors are solely for the use of Arbutus software.

During installation, the installer will be prompted to choose which of the desired Arbutus connectors should be installed.
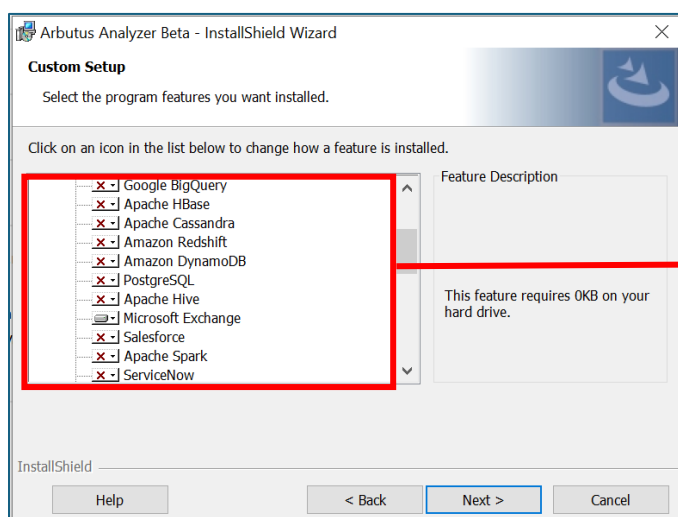

A sample of Connectors listed and available for selection

Once the installation is complete, the Arbutus Connectors that were selected during the installation are also installed and as such will be made available for selection and connection to the data source(s) when required. In addition, the applicable driver associated with the Connector is also installed.

D. Selecting a Connector post-installation

If a Connector was not selected at the time of installation, there is no need to uninstall and reinstall the application.

However, the installer would still need to run the install again (the *.exe file), and this will give them the choice to '**Modify**'. Upon clicking the '**Modify**' option, they proceed to the Arbutus Connectors screen where they will then be able to add/remove the Connector of their choice.
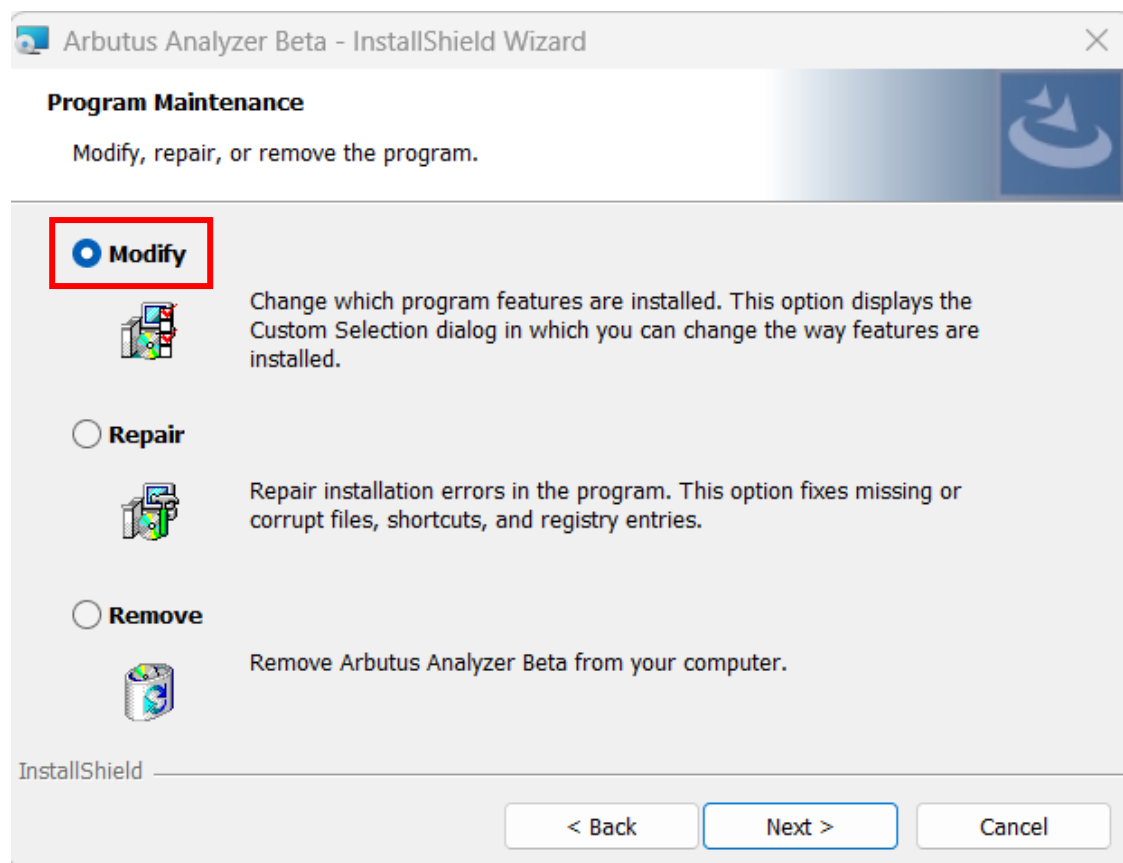
E. What happens once the Arbutus Connectors are installed?

Once the Arbutus Connectors are installed, they must be configured prior to usage.

One method of configuring the Arbutus Connectors is by using the Window's 32-Bit **ODBC Data Source Administrator**, pictured below.
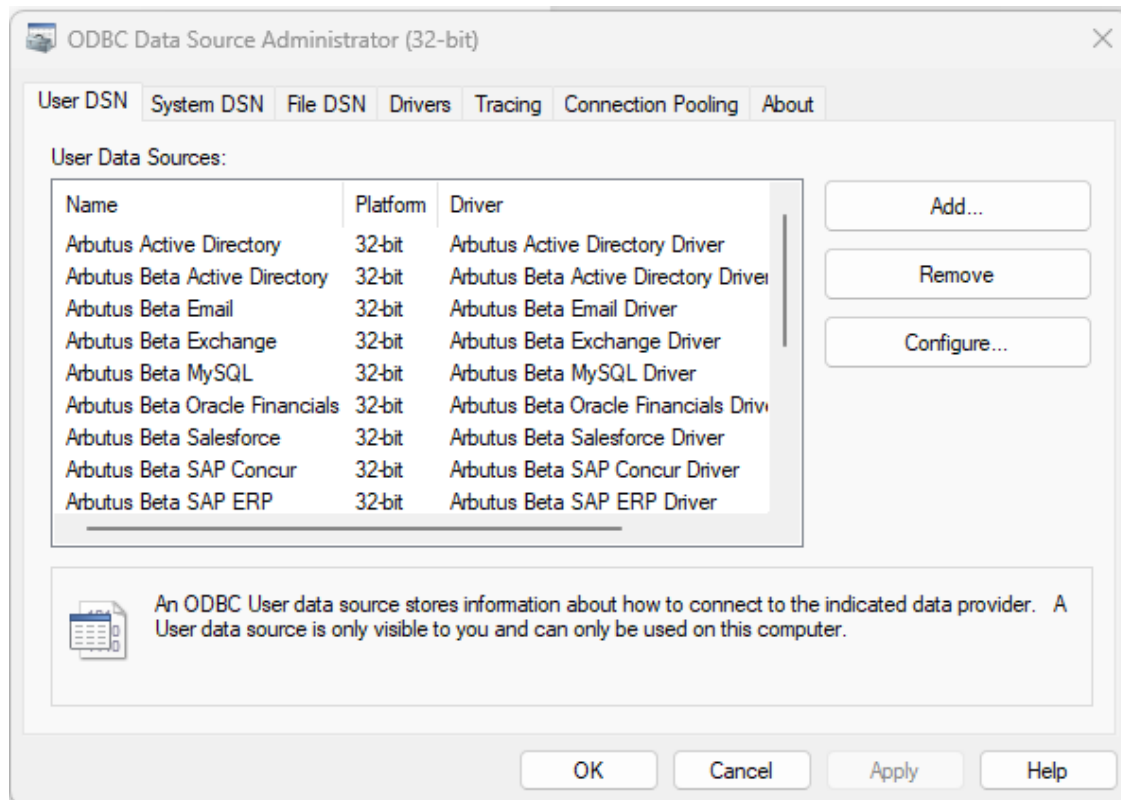
Below is the file path to access and run the ODBC Data Source Administrator application:

   C:\Windows\SysWOW64\odbcad32.exe

Alternative, the User may also try locating and opening the ODBC Data Source Administrator application by doing a search on their desktop application.

Installed data connectors will automatically appear in the list of available ODBC/Relational data sources when using Analyzer's Data Definition Wizard, the SQL command or the ODBC Explorer.

F. Configuring the Arbutus Connectors

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

Each of the data connector's names are prefaced with Arbutus, for example, **Arbutus Amazon S3.**
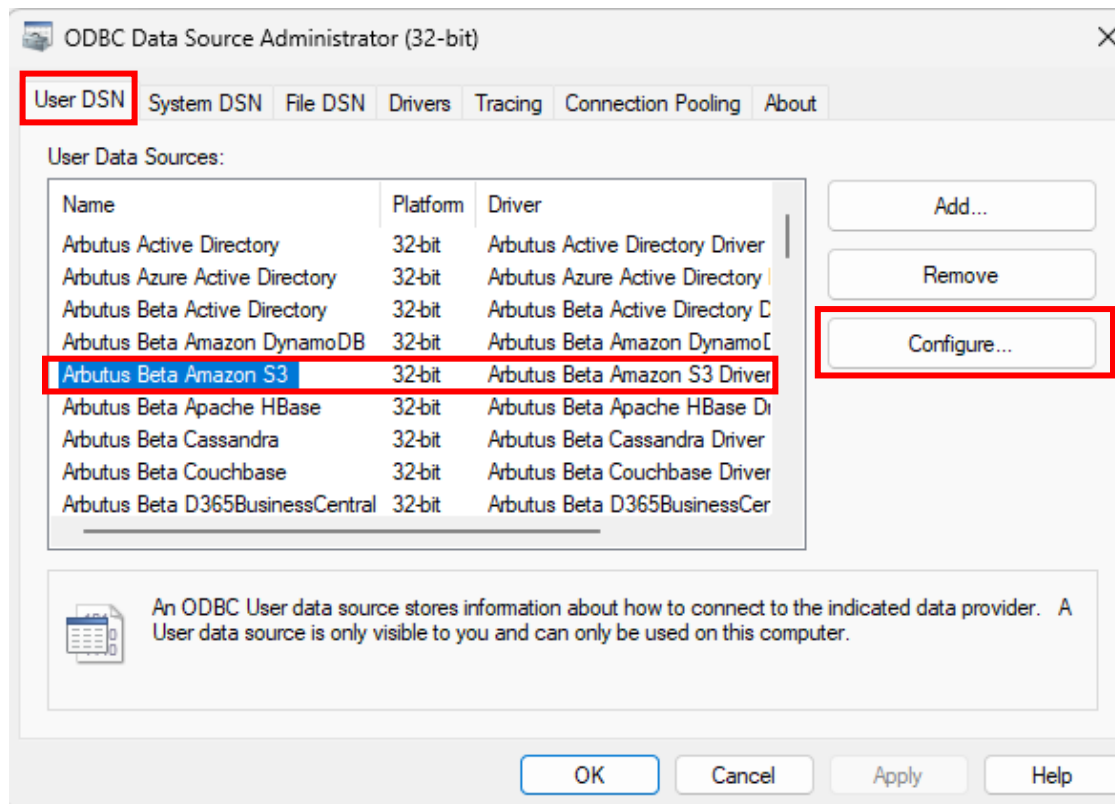
DSN, Drivers, and Data Sources

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.

- *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.

To configure an Arbutus Connector, the user can simply highlight or click the Connector of their choice, and then click the **Configure** button.

After clicking **Configure**, the **DSN Configuration** dialog opens. For example, suppose that the user had selected the **Arbutus SQL Server Connector** and then clicked **Configure**, this would open the **Arbutus SQL Server Driver – DSN Configuration** dialog box, as pictured below.
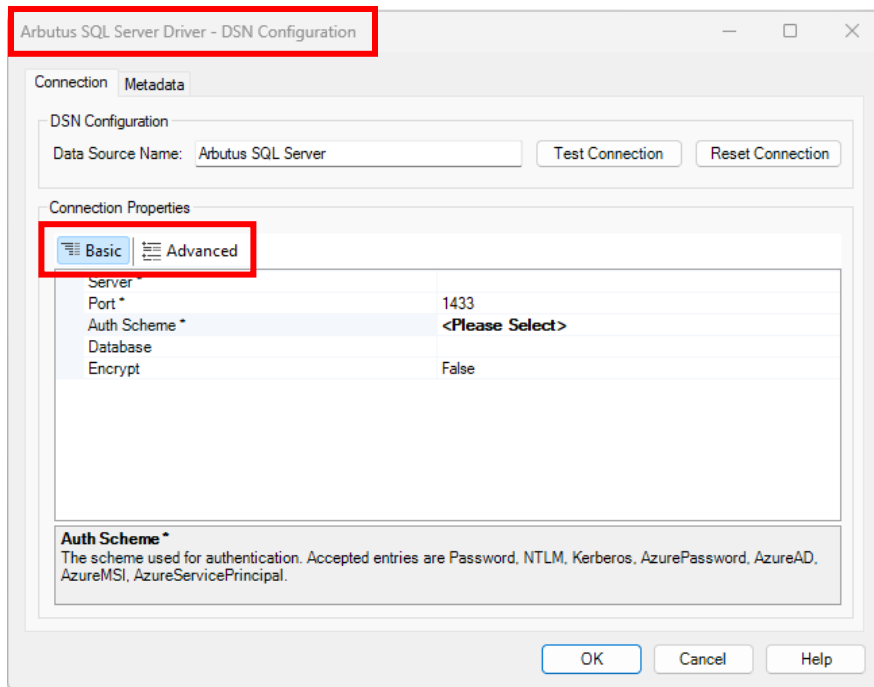
Within the **DSN Configuration** dialog box, there are usually two tabs (see screenshot above):

> *Note:*
> *Depending on the Connector you are configuring, e.g.* **REST***, there will only be one tab – Advanced (see below).*

- **Basic** - This tab typically includes the most commonly used properties and options, and as such is designed to be more user-friendly and straightforward, allowing users to quickly make changes without needing in-depth technical knowledge.

- **Advanced** - This tab provides more detailed and technical properties. It is intended for 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.

Assuming that all the necessary properties on the Basic tab have been completed, the user can proceed to test the connection by clicking the **Test Connection** button.
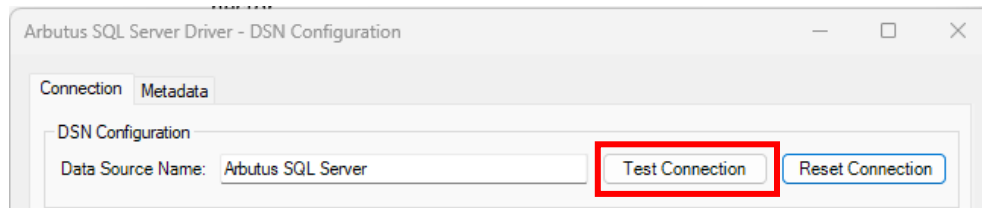
Accordingly, a message will be displayed to indicate a successful connection or not.

If, however, more fine tuning is required, the user can click the **Advanced** tab to edit or enter any of the properties under this tab.

G. Currently available Arbutus Connectors in Analyzer v9

The following data Connectors are currently available for selection in Analyzer version 9 and above at the time of installing the software. These data Connectors are solely for the use of Arbutus Software.

If a Connector of interest is not listed below, please contact your Arbutus Account Manager to check for its availability.

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