Microsoft Excel Connector

This guide will cover various methods for connecting the platform with Excel files, including using:

- ODBC (Open Database Connectivity)
- ODBC Microsoft Excel Driver
- Configuring ODBC with a Data Source Name (DSN)
- Utilizing OleDB

Each technique offers unique advantages and capabilities. Thus, you can choose the one most suitable approach for your specific needs.

Using ODBC
- Microsoft Office 365
- Microsoft Office 2007
- Microsoft Office 2003

ODBC Microsoft Excel Driver
ODBC With A DSN
OleDB

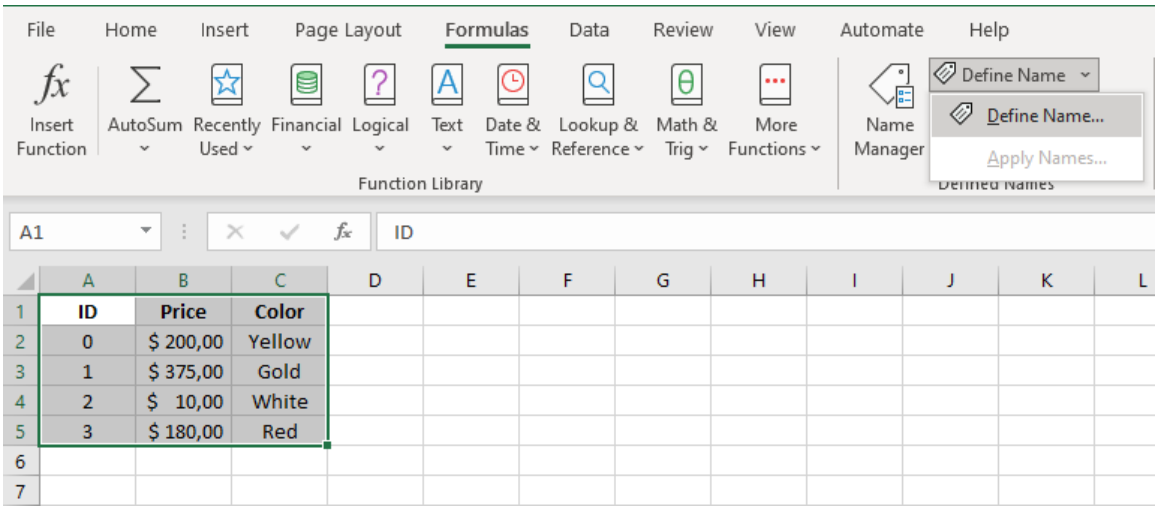
Using ODBC

This option offers a standardized and widely supported method for connecting various applications to databases. As a result, it ensures compatibility across diverse data sources. In the following sections you find guides to connect to different Microsoft Office versions.

Microsoft Office 365

To connect to a datasheet in Office 365, follow the steps below:

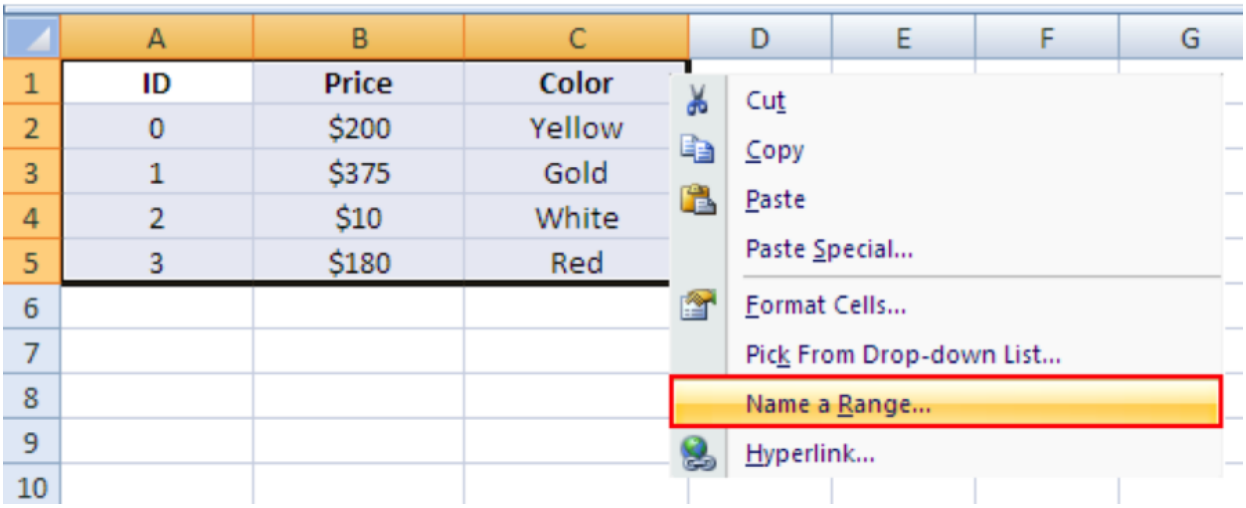
1. Select the cells to use as data.
2. Access **Formulas Define Name**.
3. Select **Define Name**.
4. Define a name for the selection. The Excel file will be ready to use.



Microsoft Office 2007

To connect to a datasheet in Office 2007, follow the steps below:

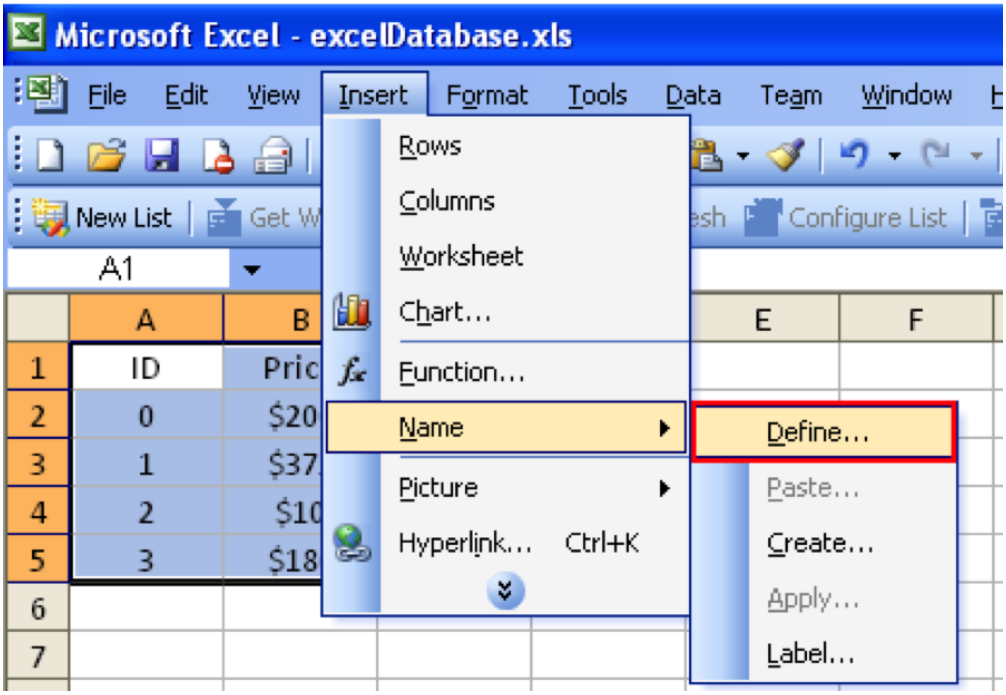
1. Select the the cells to use as data.
2. Right click the selection and choose **Name a Range**.
3. Define a name for the selection. The Excel file will be ready to use.



Microsoft Office 2003

To connect to a datasheet in Office 2003, follow the steps below:

1. Select the the cells to use as data.
2. Access **Insert Name**.
3. Select **Define**.
4. Define a name for the selection. The Excel file will be ready to use.

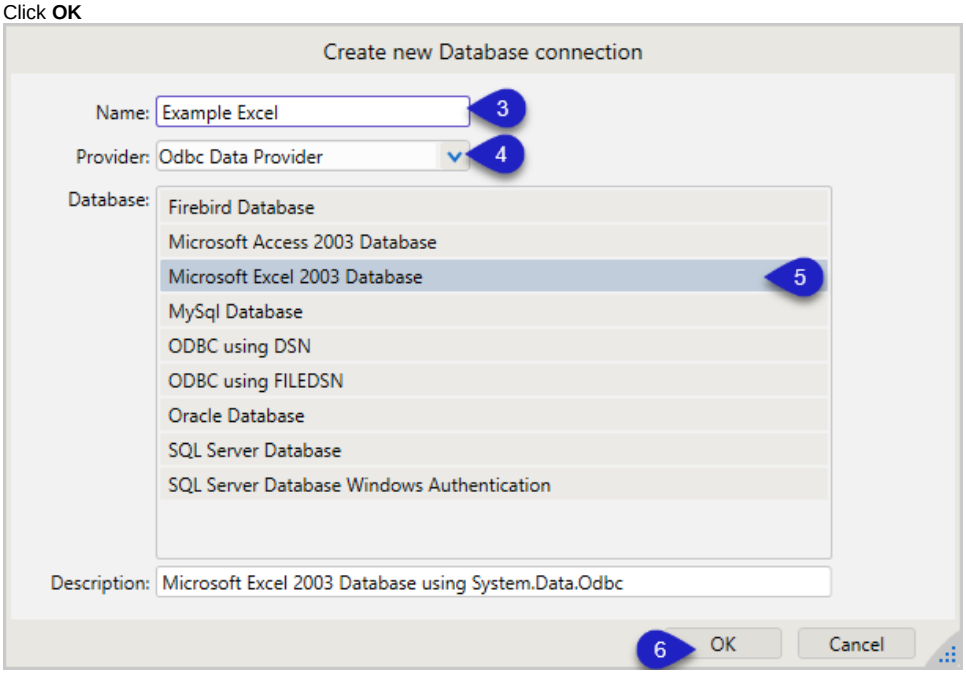


ODBC Microsoft Excel Driver

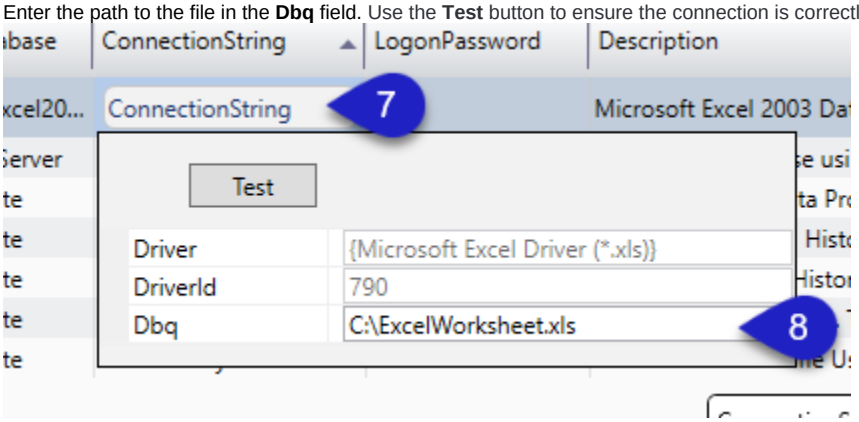
The ODBC Microsoft Excel Driver provides a dedicated driver for Excel to ensure optimal performance and seamless integration. To connect using this method, follow the steps below:

1. In the platform, access **Datasets** / **DBs**.
2. Click the **plus icon**.
3. Fill in the **Name** field
4. In the **Provider** field, select Odbc Data Provider.
5. Choose **Microsoft Excel Database** in the **Database** field.

6. Click **OK**



7. After returning to the data grid, click the **Connection String** column related to the newly created row.
8. Enter the path to the file in the **Dbq** field. Use the **Test** button to ensure the connection is correctly configured.

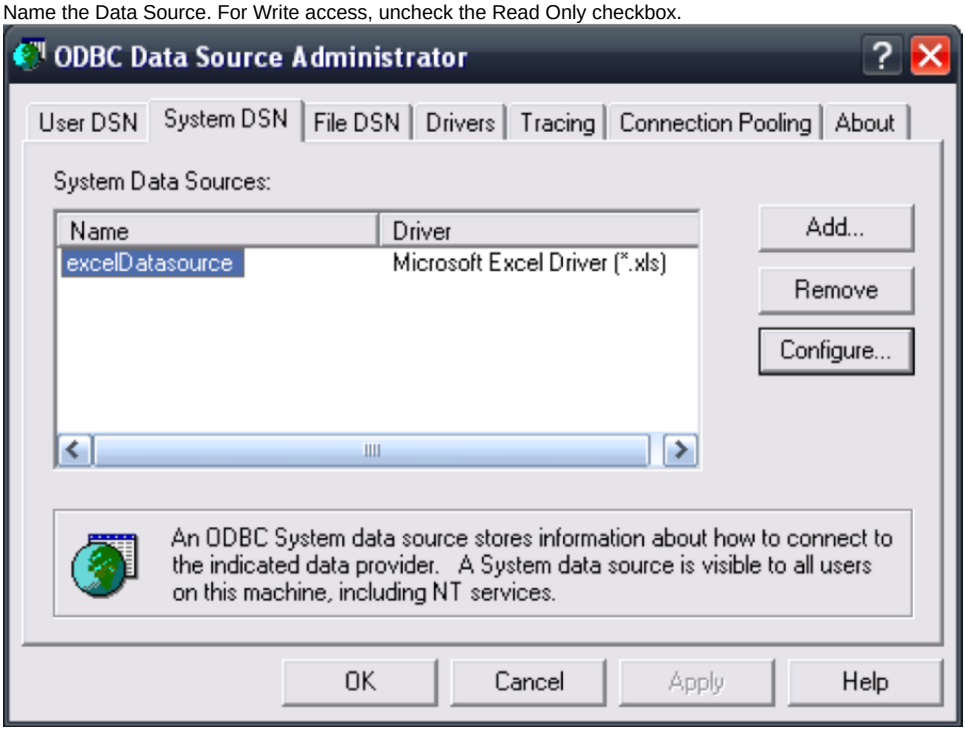


ODBC With A DSN

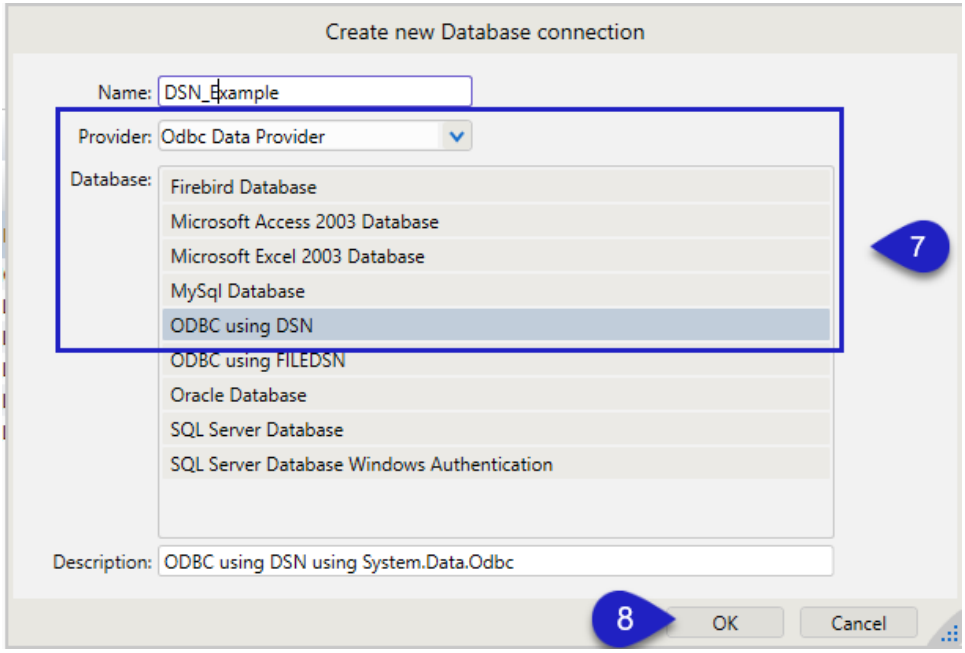
Using ODBC with a DSN allows for centralized management and easier maintenance of data source connections, simplifying the configuration process. To connect using this method, follow the steps below.

1. Access your computer's **Control Panel** and search for **ODBC Data Source Administrator.**
2. In the **ODBC Data Source Administrator** window, click **Add**.
3. Select **Microsoft Excel Driver (*.xls)**.
4. Click **Select Workbook** and choose the Excel file that was previously created.

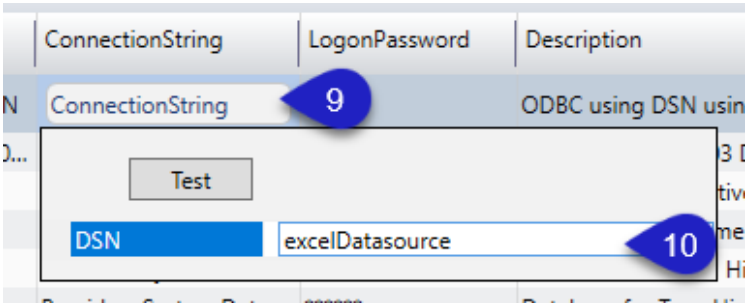
5. Name the Data Source. For Write access, uncheck the Read Only checkbox.



6. Back into the platform, access **Datasets** / **DBs**.
7. Create a new DB choosing **ODBC Data Provider** as **Provider**. For **Database**, select **ODBC using DSN.**
8. Click **OK.**



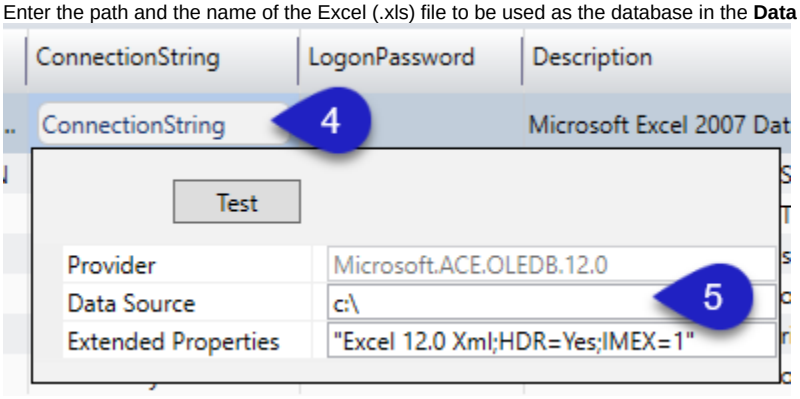
9. After returning to the data grid, click the **Connection String** column related to the newly created row.
10. Enter the DSN (Data Source Name) in the **DSN** field.



OleDB

OleDB enables higher abstraction and flexibility when connecting to data sources, supporting a more comprehensive range of data access technologies and file formats. To connect using this method, follow the steps below:

1. Access **Datasets** / **DBs** and click the **plus icon**.
2. Select **ODBC Data Provider** as **Provider** and choose the **Microsoft Excel Database** as **Database**.
3. Click **OK**.
4. After returning to the data grid, click the **Connection String** column related to the newly created row.
5. Enter the path and the name of the Excel (.xls) file to be used as the database in the **Data Source** field.



In this section...
