Excel, ODBC, & Viewpoint

How to Use an ODBC Connection in Excel to Pull Data from Viewpoint V6
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Overview
Microsoft Excel has a built-in tool you can use to pull data from Viewpoint through an Open Database Connectivity (ODBC) connection. The data you pull into Excel can be saved in a workbook to be accessed and refreshed as needed. Once the data is pulled into Excel, you can manipulate it as you would any other Excel data. This is particularly useful when you want to see or manipulate data in a way that is not available in a standard Viewpoint report.

Prerequisites
• You must have Microsoft Excel and Viewpoint V6 installed.
• You must have a SQL login (all Viewpoint users have a SQL login).
• You must have Viewpoint data security access to the information you want to see.
• You must know which Viewpoint tables contain the data you want. The Viewpoint View Columns report is an excellent reference guide if you are not familiar with Viewpoint’s table structure.
**Viewpoint View Columns Report**

You can access the **Viewpoint View Columns** report in one of two ways:

- Find it in the **Reports** module’s **Reports** folder
- Find it in the **Viewpoint Administration** module’s **Reports** folder.

This report is very long (nearly 1000 pages), so you may want to print/save it as a PDF rather than print it to paper.

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1. The **Index Name** lets you know the table name to use in your query.
   - **Note:** The Index Name is also the View name in the Viewpoint F3 Field Properties form.

2. The **Columns in Index** shows you what “columns” are key fields in the table.

3. The **Column** tells you what fields are available on that table. The columns typically correspond to the fields you see on Viewpoint forms.

So for example, if you’re looking for Job Cost information, find the Job Cost tables or views on this report and determine which ones have the information you want. If you are planning to pull data from multiple tables, make sure they have at least one common column in the Columns in Index area. Otherwise, you may not end up with the results you want.
Create the Connection

Get started using the following steps:

1. Open **MS Excel**.
2. Go to the **Data** tab.
3. Click **From Other Sources**.
4. Select **From Microsoft Query**.

5. In the **Choose Data Source** window, select your **Viewpoint** database and click **OK**.

6. In the **SQL Server Login** window, enter your **Login ID** and **Password** and click **OK**.

**NOTE:** Your Login ID and Password should be the same as your Viewpoint Login ID and Password. However, SQL is more case-sensitive than Viewpoint so if you have trouble logging in, check with your system administrator to verify how you are set up in SQL.
Create the Query
After connection is made, use the Query Wizard to choose the tables and columns (fields) to add to your report. To recreate our example:

1. Find the **bJCCM** table (JC Contract Master) on the left and click the + sign.
2. To select a column (field) for your query, click on the column to highlight it.
3. Click the > button to add the column to the “**Columns in your query:**” box. Add the following columns.
   a. JCCo
   b. Contract
4. Click **Next** until you get to the end of the Query Wizard.
5. Select **View data or edit query in Microsoft Query**.
6. Click **Finish**.

The **MS Query** window will open. The bJCCM table with its columns displays at the top in the upper portion. The grid displays the JCCo and Contract.
In our example we want to add fields from another Job Cost table.

7. Add the **JC Contract Item** table
   a. Click the **Add Table** button.
   b. Select **JCCI**, click **Add, Close**

8. Next, link the **JCCM** and **JCCI** tables by the columns in the index (fields) that they have in common. Both of these tables have the **JC Co** and **JC Contract** fields. In MS Excel 2010, the link will be created automatically but it is a good idea to double check the links.
   a. One at a time, select **JC Co** and **JC Contract** in the JCCM box. Drag them to the corresponding fields in the JCCI box to create the links.

   **Note:** Without these links, the query may return crazy results.

9. Find the **Item** in the **JCCI** box and double-click on it to add it to the grid.
10. Double click the **Description**, **Contract Amt**, and **Orig Contract Amt** to add them the grid as well.
11. Go to **File**, select **Return Data to MS Excel**.
12. Select a cell, **A1** in our example. Click **OK**.

Data from the Viewpoint database populates the worksheet. You can now manipulate the data as you would any worksheet, using formulas and filters, graphs etc.
Add a Prompt to the Query

To add criteria to a query so that the user is prompted for a JC Company when the data is refreshed:

1. Go to the Data tab and select Connections.
2. Select Properties for the query.
3. Go to the Definition tab.
4. Click Edit query.

5. Click the Next button until you reach the end of the Query Wizard.
6. Select View data or edit query in Microsoft Query.
7. Click Finish.
8. In the Microsoft Query window, go to the View menu and select Criteria.

9. Select b.JCCI.JCCo from the Criteria Field drop-down list. Alternately, you can drag the JCCo from the bJCCI table onto the Criteria Field box.
10. In the Value field, enter the prompt text. In our example, enter [Choose a JC Company]. You must include the brackets around the text to avoid syntax errors.
11. Save the query.
12. Go to File and select Return data to MS Excel.
13. Click **OK** in the Connection Properties window and then **Close** in the Workbook Connections window.
14. Login to the database if prompted.
15. On the **Data** tab, click **Refresh All** to see the prompt you created. Enter a value and the data will now be filtered to the company you chose.

**Note:** You must refresh the data in order to have the most current Viewpoint data.