

Perceptive TransForm E-Forms Manager Data Source

Getting Started Guide

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Overview

The Data Source Setup Wizard for Perceptive Transform E-Forms Manager, version 8.14.1, was enhanced to allow form administrators the ability to configure data sources without needing technical specifications for the specific driver type.

ODBC data source end of support

Note that version 8.14.1 is the final major release that supports ODBC data sources. All new data sources are created as a JDBC data source. Existing ODBC data sources are supported in 8.14.1 and work as normal, however, you are unable to create new ODBC data sources.

The next major release of 8.15.0 removes support for ODBC data sources completely and any existing ODBC data sources will fail to connect to the database. We recommend that a new data source is created for all existing ODBC data sources and the items that use that data source are modified to use the new data source. This should be done in 8.14.1 so that the removal of ODBC data source support in the next major release does not affect any in-use data sources.

Data Source Setup Wizard

The enhanced wizard allows selection of the database type, such as SQL Server or Oracle. Based on the database type, the required information is collected to connect to the database.

Wizard step one

The first step of the enhanced wizard collects the name of the data source name (DSN) and the database type.

Database types

The setup wizard contains database type options for the most common relational databases that customers use with Autofill and Autowrite. These types are SQL Server, Oracle, and MySQL. Relational database types other than these can still be used if the database has a JDBC driver.

SQL Server

No additional steps outside of the setup wizard are needed when configuring a data source to connect to a SQL Server database.

Oracle 10g/11g or Oracle 12c

No additional steps outside of the setup wizard are needed when configuring a data source to connect to an Oracle database.

MySQL

To connect to a MySQL database, the MySQL JDBC driver must be obtained and installed in E-Forms Manager before a connection through the data source will work. To obtain and install the MySQL JDBC driver, complete the following steps.

Note If E-Forms Manager's data repository is running on MySQL, you do not need to complete these steps.

1. Stop the E-Forms Manager Server service.
2. Download the latest Windows version of the MySQL JDBC driver from <http://dev.mysql.com/downloads/connector/j/>
3. Run the downloaded executable and then locate the newly installed JDBC driver .jar file.
4. Copy this file into the folder FSBServer\shared\lib, relative to the E-Forms Manager installation.
5. Start the E-Forms Manager Server service.

Other

Before a data source connection can be made to a relation database other than SQL Server, Oracle, or MySQL, the database's JDBC driver must be obtained and installed in E-Forms Manager. To obtain and install the database's JDBC driver into E-Forms Manager, complete the following steps.

1. Stop the E-Forms Manager Server service.
2. Download the latest version of the database's JDBC driver. See to the database's documentation for the name and location of the JDBC driver.
3. Copy the JDBC driver .jar file into the folder FSBServer\shared\lib, relative to the E-Forms Manager installation.
4. Start the E-Forms Manager Server service.

Wizard step two

Based on the selected database type, the second step of the setup collects the required information for the database. Complete one of the following set of steps.

SQL Server

1. In the **Host** box, enter the host name or IP address of the database server. To connect to a named instance, specify the host as ServerName\InstanceName, for example, **dbserver\SQLEXPRESS**.
2. In the **Port** box, enter the port number that the database server is listening on for connections. If connecting to a named instance, do not specify a port number.
3. In the **Database Name** box, enter the database name.
4. Select the **Windows Authentication?** checkbox to use Windows Authentication to connect to the database.
5. In the **User Name** box, enter the name of the user that will connect to the database.

Oracle 10g/11g

1. In the **Host** box, enter the host name or IP address of the database server.
2. In the **Port** box, enter the port number that the database server is listening on for connections.
3. In the **SID** box, enter the SID that identifies the database.
4. In the **User Name** box, enter the name of the user that will connect to the database.

Oracle 12c

1. In the **Host** box, enter the host name or IP address of the database server.
2. In the **Port** box, enter the port number that the database server is listening on for connections.
3. In the **Server Name** box, enter the name of the service that identifies the database.
4. In the **User Name** box, enter the name of the user that will connect to the database.

MySQL

1. In the **Host** box, enter the host name or IP address of the database server.
2. In the **Port** box, enter the port number that the database server is listening on for connections.
3. In the **Database Name** box, enter the database name.
4. In the **User Name** box, enter the name of the user that will connect to the database.

Other

1. In the **JDBC Driver Class** box, enter the class name of the JDBC Driver. See to the database vendor's documentation for the class name.
2. In the **JDBC Connection URL** box, enter the connection URL that the driver will use to establish a connection to the database. See the database vendor's documentation for the structure of this connection URL.
3. Optional. In the **Properties** box, enter additional properties used when establishing a connection to the database.
4. In the **User Name** box, enter the name of the user that will connect to the database.

Existing ODBC Data Sources

If a data source was created as an ODBC data source prior to 8.14.1, you can only modify the ODBC DSN and Username and Password when editing the data source.