

ACT! Technology Corner

OLE DB Reporter in ACT! 2010

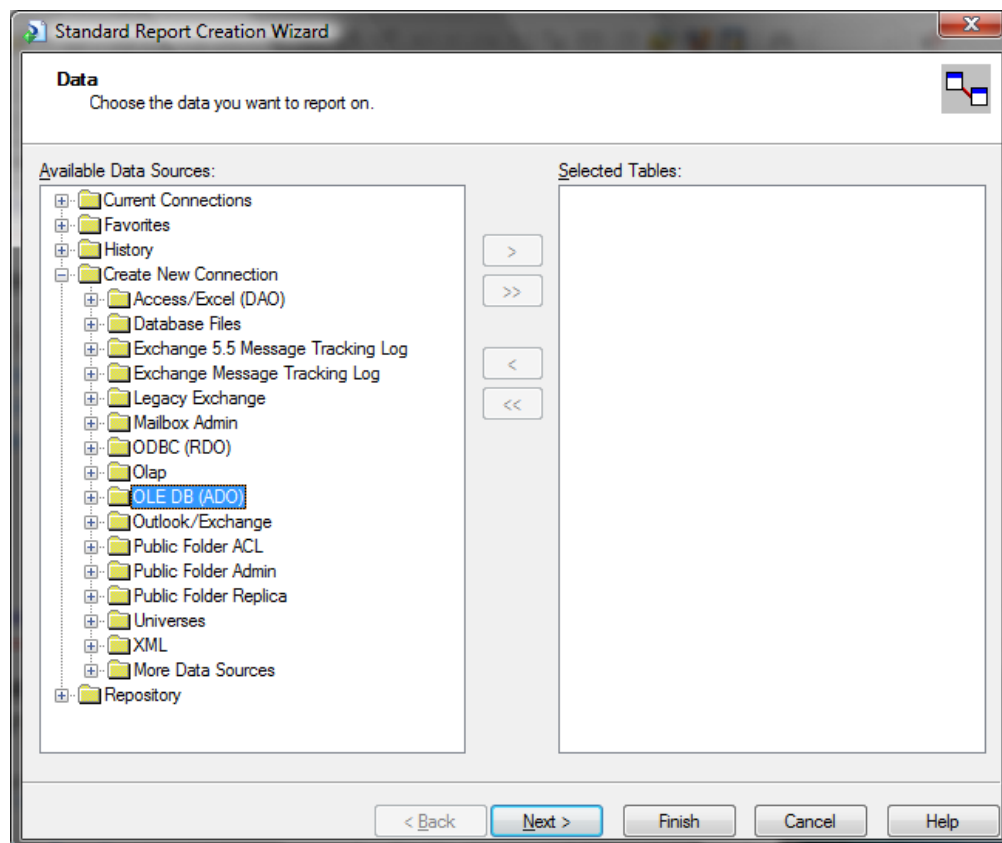
Introducing the new ACT! OLE DB Reporting Provider 2.0

With ACT! 2010, Sage introduces a new OLE DB Reporting Provider (2.0) for the ACT! product family, including ACT! by Sage, ACT! by Sage Premium, and ACT! by Sage Premium for Web. OLE DB is a component which allows database query tools and Report Writer packages to access and retrieve data from a relational database. The ACT! OLE DB 2.0 Provider specifically provides a simplified and familiar way to specify and log on to an ACT! database using the familiar PAD file metaphor and ACT! user credentials for security.

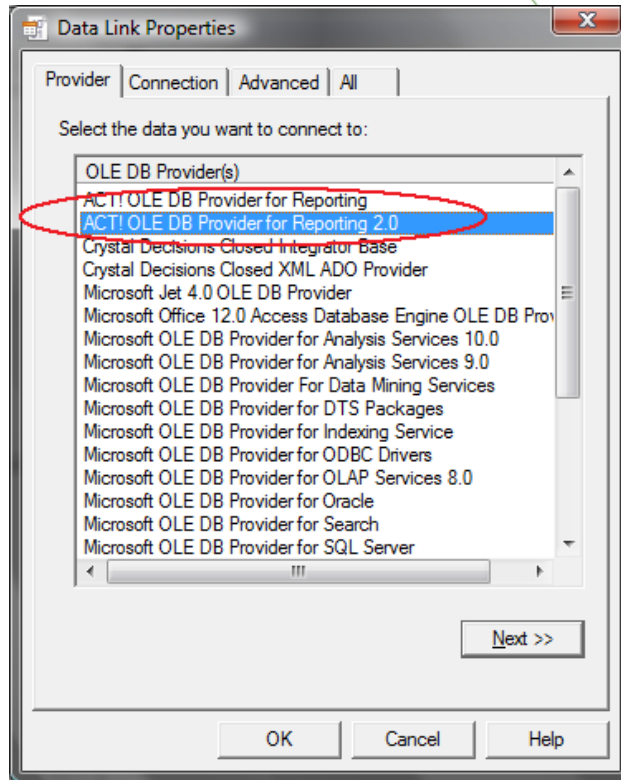
While ACT! has included an OLE DB Provider since ACT! 2005 (7.0), we have redesigned it in ACT! 2010 to make it easier to use and more importantly, to include some additional data that has been unavailable but requested by many users. Specifically, the version 2.0 Provider also now includes:

- Activities
- Group Contact Members (*both static and dynamic*)
- Company Contact Members (*both static and dynamic*)

After installing ACT! 2010, when using a third-party query or reporting tool, such as Crystal Reports, you will now see two ACT! OLE DB Providers, one for the legacy Provider (version 1.0) and the new version 2.0 Provider. The following screenshot provides an example of where to access the connection options from Crystal Reports. You will need to select the “OLE DB (ADO)” connection type:



Select the **ACT! OLE DB Provider for Reporting 2.0** as shown below:



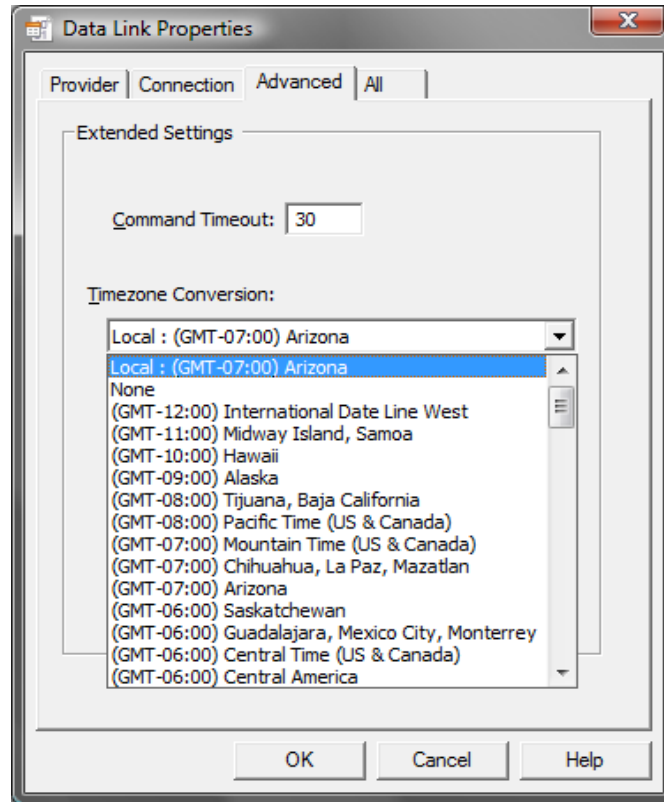
Because of the new capabilities in this provider, it is strongly recommended that any new query or report development use the new 2.0 version of the OLE DB Provider. It is anticipated that in a future release the legacy Provider will be deprecated and no longer included as a part of ACT!.

Features and benefits of this new Provider include:

- Respects both Field-Level Security (FLS) and Record-Level Security (RLS).
- Uses the same PAD file metaphor and user credentials as ACT! for database connection and security.
- Separates Entity (i.e. Contact, Group, Company and Opportunity) and Sub-Entity (Note, History and Activity) records for better autonomy and easier, more flexible reporting. This allows more direct-reporting of Histories by User, for example, without regard to the type of Entity record the History is associated with.
- Views include all fields created as a result of record field customization (via Define Fields and/or any Add-On Products) – one logical View per Entity or Sub-Entity. This provides a much simpler and centralized view of each record.
- ACT! data type adherence for Uppercase, Lowercase and Initial Caps character fields. This means character data will appear just as it does in ACT!, the previous version 1.0 Provider required such formatting to be manually performed by the user.
- Date, Time, and Datetime values default to local client time (*configurable per connection*). This means date/time values will appear as they do in ACT!. The previous version 1.0 Provider showed such values as they are stored, in Coordinated Universal Time (UTC), which required manual local time conversion by the reporting tool.
- A fully-expanded “My Record” View which includes all Contact fields.
- Connection is available with the ACT! Framework SDK for third-party developer Add-Ons.
- Optional descriptive text for Views and Columns (*currently can only be set via the ACT! SDK*). This description can be seen in some third-party report tools, such as Crystal Reports, to assist the user in understanding what the View or column contains.

Additional connection options can be set on the “Advanced” tab of the connection properties dialog:

- **Command Timeout** – Value (in seconds) in which the SQL query is allowed to complete before timing-out. Initialized to 30 seconds by default; if you experience “Timeout expired” messages, you can increase this value higher. A value of zero (0) specifies no timeout.
- **Timezone Conversion** – Datetime values are stored in the ACT! database as Universal Time (UTC). By default, the Provider will display these values using your Windows® time zone setting. This can be changed, to view datetime values in another time zone.



With OLE DB v2.0, View column names are based on the field Alias Name which was introduced in ACT! 10.02. This value can be set programmatically via the ACT! SDK such as by an Add-On product; fields added via Define Fields are set with the name provided upon creation:

- Alias Names do not change; Queries will not break if field name changed
- Use the “Database Structure>Fields Detail Report” in ActDiag to see field name information (“OLE/DB Column” is for the OLEDB v1.0 Provider, the “OLEDB(2) Column” shows the field for the version 2.0 Provider)

In addition to reporting software outside of the ACT! application, ACT! 2010 includes a new Dashboard Component which uses the OLE DB Reporting Provider 2.0. This new component, named “Data Chart”, can be customized to provide virtually any custom list or chart desired in a Dashboard. The source definition for this component is contained in the file **Act.Dashboard.DataChart.XML** which resides in the \Tools folder beneath where the ACT! program is installed (by default c:\Program Files\ACT\ACT for Windows). Upon installation, this file contains a number of stock queries which can be selected while in Design Layout mode. You can edit the XML file using any text editor, such as Notepad, to add, modify or delete a query. You may find it easiest to write the query first using a query or reporting tool, then copy & paste that SQL query into the XML file once you have what you want.



Troubleshooting

ActDiag

It's important to note that the version 2.0 Provider and the original Provider are independent of each other. Some key points:

- If you encounter problems, use the "Rebuild OLE DB v2.0 Report Objects" task on the subject database (as shown on the Database List panel)
- Previous OLE DB options and tasks are valid including:
 - "Rebuild OLE/DB Reporting Objects"
 - "Enable OLE/DB Reporting" in the Database Settings panel

If you choose to disable the legacy OLE/DB Reporting Provider (1.0), it will not affect the version 2.0 Provider.

Summary

With the ACT! OLE DB Reporting Provider 2.0, a wide range of queries and reports become possible that can be used to supplement those included with the ACT! Report Writer. So take a few moments to explore this new feature and discover the possibilities.

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