



MYOB ODBC Direct

Installation Guide

About MYOB ODBC Direct

MYOB ODBC Direct is an ODBC driver that makes your MYOB company file information accessible from other applications. The driver acts as an interface between the MYOB database and the other applications, interpreting requests to, and providing information from, the database using ODBC, a standard database access method.

This document contains instructions for:

- installing MYOB ODBC Direct
- defining a company file as an ODBC data source
- registering a company file to enable ODBC access
- testing the company file connection
- getting help for MYOB ODBC Direct.

System Requirements

Before you install, ensure that your system meets the following requirements:

RECOMMENDED SYSTEM REQUIREMENTS

- Pentium IV processor (or equivalent) @ 2GHz, or faster
- 512 MB or more of RAM
- 350 MB or more of free hard disk space
- Either Windows 2000 Professional or Server (Service Pack 3), Windows XP Home or Professional (32 bit), or Windows Server 2003 Standard Edition (32 bit)

MINIMUM SYSTEM REQUIREMENTS

- Pentium III processor (or equivalent) @ 1GHz
- 256 MB RAM
- 350 MB of free hard disk space
- Either Windows 98, Windows Me, Windows 2000 Professional or Server, Windows XP Home or Professional (32 bit), or Windows Server 2003 (32 bit)

NOTE: ODBC Performance The MYOB ODBC Direct driver will only perform as well as the system it runs on, and the above specifications are only a guide. If performance is lacking, you should try using a faster processor or increasing the amount of available RAM.

Installing MYOB ODBC Direct

The MYOB ODBC Direct installer is available from a number of sources, including the MYOB website and your MYOB software CD. The installer is also *copied* to your hard drive when you install your MYOB accounting software.

To install MYOB ODBC Direct

- 1 Log in to Windows as the Administrator or Power User if your computer only allows people with administrator privileges to install programs.
- 2 Locate and launch the installer file you downloaded from the MYOB website or received on CD.

If the driver was installed with your MYOB software, go to the **Start** menu, choose **Programs**, **MYOB Accounting** (or the name of your MYOB software's Start menu folder), **MYOB Tools**, **MYOB ODBC**, and then choose the MYOB ODBC Direct installer.

A splash screen appears, followed by the **Welcome** window.

- 3 Click **Next**. The **License Agreement** window appears.
- 4 Ensure you read and understand the license agreement. Click **Yes** to accept the agreement or click **No** to stop installing MYOB ODBC Direct.
- 5 Click **Next**. The **Choose Destination Location** window appears.
- 6 Select the folder into which you want to install the driver. The default is **C:\MYOBODBC**.
 - If you want to **select a different folder** from the default folder, click **Browse**, locate and select the desired installation folder, and then proceed to step 6 below.
 - If you want to **use the default location**, proceed to the next step.
- 7 Click **Next**. The **Select Program Folder** window appears.
- 8 Click **Next**. The **Start Copying Files** window appears.
- 9 Review the installation settings and click **Next**.
- 10 When the installation is complete, the **InstallShield Wizard Complete** window appears. Click **Finish**.

Defining a company file as an ODBC data source

Before you begin

- Ensure you have installed MYOB ODBC Direct on your system. See the procedure [‘To install MYOB ODBC Direct’](#) on page 3.
- Ensure you know the version of the MYOB accounting software used to create the company file to which you want to connect.

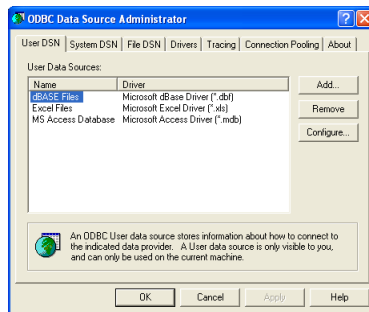
To configure an ODBC data source

To connect to a company file using the MYOB ODBC Direct driver, you must first define the file as a data source and set up a Data Source Name, or DSN. A DSN identifies your company file as a database on your system to which other ODBC-compatible applications can connect.

1 Go to the **Start** menu, choose **Settings** and then choose **Control Panel**.

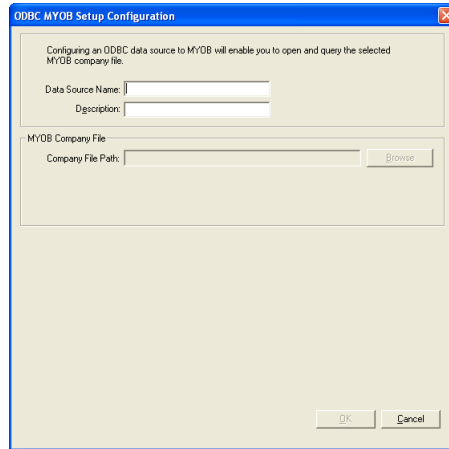
- For Windows 2000 and XP, double-click **Administrative Tools**, then double-click **Data Sources (ODBC)**.
- For Windows operating systems prior to XP, double-click **Data Sources (ODBC)**.

The **ODBC Data Source Administrator** window appears.

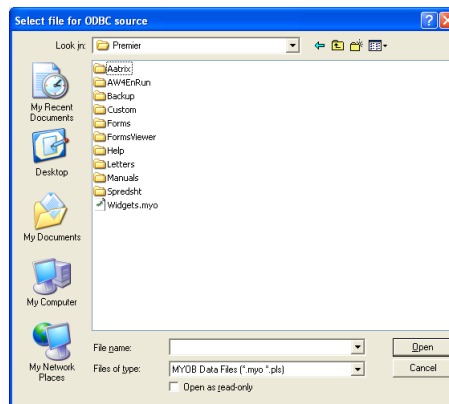


2 Click **Add**. The **Create New Data Source** window appears.

- 3 Select the MYOB_ODBC driver and then click **Finish**. The **ODBC MYOB Setup Configuration** window appears.

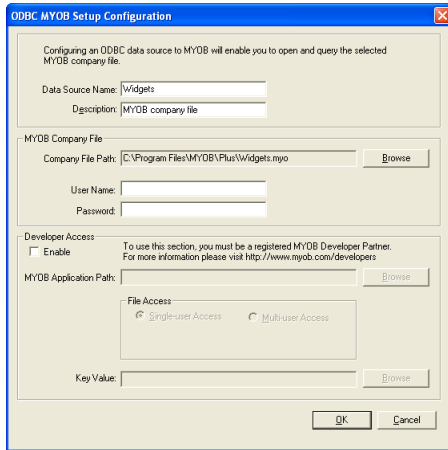


- 4 In the first section of the **ODBC MYOB Setup Configuration** window, enter a unique Data Source Name and a description. (For example, you could enter "Widgets" as the Data Source Name and "MYOB company file" as the description.)
- 5 In the MYOB Company File section of the **ODBC MYOB Setup Configuration** window, click **Browse**. The **Select file for ODBC source** window appears.



- 6 Navigate to the MYOB company file you wish to connect to, select it and then click **Open**. Follow the procedure below to continue configuring the company file as an ODBC data source.

a The ODBC MYOB Setup Configuration window appears showing the company file path.



- b In the **User Name** field, enter the administrator's user name for this company file. (If you have not renamed the administrator user name when you created the company file, or you are connecting to the Clearwater sample file, the default user name is Administrator.)
- c In the **Password** field, enter the administrator's password, or if you have not set a password for the administrator, leave the field blank.
- d The data source setup is complete. Click **OK** and then see '[Registering a company file that has been activated](#)' on page 7 to learn how to register the company file for ODBC access.

Registering a company file to enable ODBC access

By registering a company file for ODBC access, you will get full read access to your company file.

Registering a company file that has been activated

If your company file is of a version that requires activation, you must first activate the file before you can register it for ODBC access. For instructions on how to activate a company file, see the documentation that came with your software.

Once your file is activated, contact MYOB Customer Service on (852) 3402 9888 to register for ODBC access.

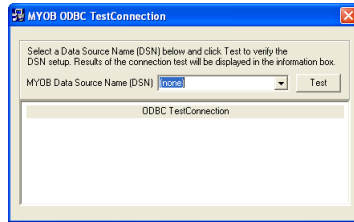
After registering your file, open it, go to the **Setup** menu and choose **Company Information**. Click the **License** button and confirm your company file over the internet, or by calling the phone number that appears in the **License** window. You will then have full ODBC read access to the company file.

Testing an ODBC data source connection

The MYOB ODBC TestConnection utility checks that your MYOB ODBC Direct driver is installed correctly and that your data source is accessible.

To use the TestConnection utility

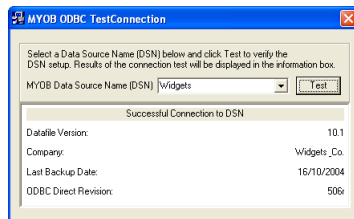
- 1 Go to the **Start Menu**, choose **Programs, MYOB ODBC Direct**, and then select **MYOB ODBC TestConnection**. The **MYOB ODBC TestConnection** window appears.



- 2 Select the DSN you created for your MYOB company file from the **MYOB Data Source Name (DSN)** drop-down list and then click **Test**.

If the company file is of a version that does not require activation and you have not registered the file for ODBC (see [Getting help for MYOB ODBC Direct, page 10](#)), a warning message appears informing you that you have limited access to an unregistered company file. Click **OK** to accept this message.

If the connection is successful, a window similar to the following appears.



If the connection is unsuccessful, see the following troubleshooting section for help checking your installation and data source setup.

Troubleshooting a connection

If you have installed MYOB ODBC Direct and have defined your company file as a data source but you are unable to connect to your company file, review the following troubleshooting list:

- Ensure the DSN you created matches the name you selected in the MYOB ODBC TestConnection utility. To check the DSN, see [‘To configure an ODBC data source’ on page 4](#).
- Ensure the company file that you have defined as a data source is located in the correct folder. To check the folder path, go to the **ODBC Data Source Administration** window, select the DSN you are testing and then click **Configure**. Click **Browse** and verify that the company file is still located in the selected path. If not, locate the file and then click **OK**.
- Check the version of the MYOB ODBC Direct driver. You may have upgraded your MYOB company file and not your MYOB ODBC Direct driver. Locate the latest version of the MYOB ODBC Direct driver and upgrade your version to this one. All MYOB ODBC Direct drivers are backward-compatible, so you will always be able to access your old company files.

If you are still having problems connecting to your MYOB company file, check with your local consultant, or if you are installing MYOB ODBC Direct as part of a business solution, you should contact your provider for support.

Getting help for MYOB ODBC Direct

If you have subscribed to a support plan for your MYOB software, MYOB can help you install the MYOB ODBC Direct driver and perform a successful test connection to your company file.

Call MYOB Customer Service on (852) 3402 9888 for registration and installation enquiries.

Before you call, ensure you have performed the installation and setup procedures outlined in this document. If you are unable to perform a successful test connection to your MYOB company file, ensure you have attempted all suggestions listed in the troubleshooting section on [page 9](#).

When calling MYOB for support, please have your MYOB software serial number on hand and be close to the computer on which you are installing the MYOB ODBC Direct driver.

Note that MYOB cannot provide support for third party applications that you want to connect to your MYOB company file. Contact the supplier or developer of the third party application if you require support or training for their product.