Sage 300 Web Screens SDK

Generic Inquiry Configuration Tutorial

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1. Overview

This document will outline how the Sage 300 Inquiry Configuration Generator utility can be used to generate Generic Inquiry JSON and SQL script files for **Adhoc**, **CRM** and **Inquiry** type inquiries. The Sage 300 Inquiry Configuration Generator utility is in the following directory:

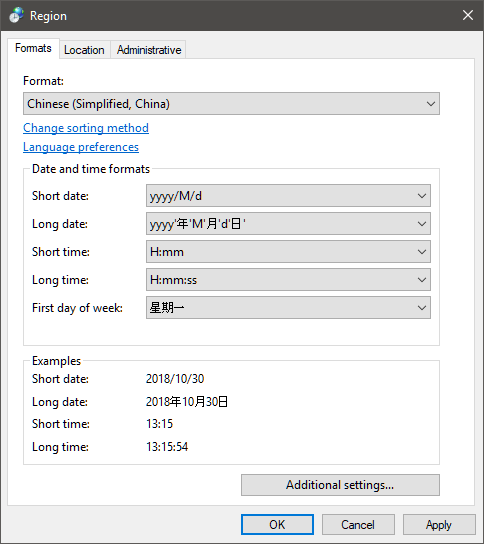
[WebSDK]\bin\utilities\Sage300InquiryConfigurationGenerator\

The Sage 300 Inquiry Configuration Generator Utility will attempt to read the necessary settings from its INI configuration file. If this file doesn’t yet exist, the utility will generate one. The INI file specifies the following settings:

|  |  |
| --- | --- |
| **SETTINGS** | **Description** |
| Option | Can be one of the following:   * Adhoc * CRM * Inquiry |
| RootPath | Path of the configuration files |
| OutputPath | Output directory |
| SQLScriptName | Output script file name prefix |
| DatasourceConfigurationFile | Sage 300 View Column Setting Configuration Excel spreadsheet name and location |
| TemplateConfigurationFile | Inquiry Configuration Excel spreadsheet name and location |
| ControllerParameterDefinitionFile | Optional: Controller Parameter Definition file name and location |
| OverridePresentationListFile | Optional: Override Presentation List file name and location |
| DisplayOutputFolderOnCompletion | Optional: Display the output directory |
| DisplayLogFileOnCompletion | Optional: Display the log file |

|  |  |
| --- | --- |
| **COMPANY** | **Description** |
| Company | Sage 300 Company Name |
| Version | Sage 300 Version Number |
| IncludeFra | Optional: Include French language resources |
| IncludeEsn | Optional: Include Spanish language resources |
| IncludeCht | Optional: Include Chinese (Traditional) language resources |
| IncludeChn | Optional: Include Chinese (Simplified) language resources |

* 1. Setup
* The company being used in the tool to generate the metadata must be activated
* The Sage 300 SDK should also be activated
* If multiple languages are to be generated, a user and password will need to be setup with the appropriate language
* For Chinese translations, be sure to setup the Region and Language Format to Chinese (Simplified, PRC) as in the following example:



* 1. Configuration INI File Example

**[SETTINGS]**

Option=Adhoc

SQLScriptName=AdhocDemo

RootPath=C:\InquiryDemo

OutputPath=C:\InquiryDemo\Output

DatasourceConfigurationFile=C:\InquiryDemo\InquiryConfiguration\Adhoc\Sage300ViewColumnSetting\_Demo\_Adhoc.xlsx

TemplateConfigurationFile=C:\InquiryDemo\InquiryConfiguration\Adhoc\InquiryConfiguration\_Demo\_Adhoc.xlsx

ControllerParameterDefinitionFile=C:\InquiryDemo\InquiryConfiguration\Controller.json

OverridePresentationListFile=C:\InquiryDemo\InquiryConfiguration\OverridePresentationList.json

DisplayOutputFolderOnCompletion=True

DisplayLogFileOnCompletion=True

**[COMPANY]**

Company=SAMLTD

Version=66A

IncludeFra=False

IncludeEsn=False

IncludeCht=False

IncludeChn=False

1. Configuration

In order to generate JSON, used in the SQL file, and SQL script files to be used in the Sage 300 Generic Inquiry web screen, two configuration files in Microsoft Excel format, must be created:

* Template Configuration Excel Workbook
* Datasource Configuration Excel Workbook

The following sections document the format of each of these files.

* 1. Template Configuration Excel Workbook

This workbook contains four worksheets:

1. Datasource
2. Template
3. Translation
4. DatasourceSage300ViewMapping
   * 1. Datasource

This worksheet contains the following columns.

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Required** | **Description** |
| DatasourceID | Yes | Datasource GUI ID |
| Module | Yes | Sage 300 Module ID |
| ViewID | Yes | Sage 300 View ID |
| ViewName | Yes | Sage 300 View Name |
| Name | Yes | Datasource Name (No Space) |
| Description | Yes | Datasource Description in English |
| DescriptionFra |  | Datasource Description in French |
| DescriptionEsn |  | Datasource Description in Spanish |
| DescriptionChn |  | Datasource Description in Chinese Simplified |
| DescriptionCht |  | Datasource Description in Chinese Traditional |
| SecurityResource | Yes | Security Resource ID |
| SecurityResourceName |  | Security Resource Description (information Purpose) |
| SQL |  | SQL statement string to retrieve data |
| SkipTableName |  | Y/N flag to specify whether to include table name in SQL select string or not |

Generic Inquiry supports retrieving Sage 300 data through direct SQL query or Sage 300 View.

Sage 300 View method doesn’t support grouping and aggregation. As a result, all Adhoc Inquiries’ datasource are using direct SQL query.

* + 1. Template

This worksheet contains the following columns.

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Required** | **Description** |
| Included | Yes | Y/N flag to specify whether or not to process the template |
| Module | Yes | Sage 300 Module ID |
| TemplateID | Yes | Template GUI ID |
| DatasourceID | Yes | Datasource GUI ID |
| DatasourceName | Yes | Datasource Name (No Spaces) |
| Name | Yes | Template Name |
| DisplayList | Yes | List of columns to be displayed |
| ViewID | Yes | Sage 300 View ID |
| WhereClause |  | Additional criteria to filter the result |
| SortFields |  | Default sorting field |
| SortOrder |  | Default sorting order (ASC or DESC) |
| DisplayOrder |  | The complete list of available columns sorted in the order to be displayed in the Generic Inquiry Column |

* + 1. Translation

This worksheet contains the following columns.

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Required** | **Description** |
| TemplateID | Yes | Template GUI ID |
| Name | Yes | Template Name (English) |
| NameFra |  | Template Name in French |
| NameEsn |  | Template Name in Spanish |
| NameChn |  | Template Name in Chinese Simplified |
| NameCht |  | Template Name in Chinese Traditional |
| Description |  | Template Description (English) |
| DescriptionFra |  | Template Description in French |
| DescriptionEsn |  | Template Description in Spanish |
| DescriptionChn |  | Template Description in Chinese Simplified |
| DescriptionCht |  | Template Description in Chinese Traditional |

* + 1. DatasourceSage300ViewMapping

This worksheet contains the following columns. If a Generic Inquiry involves multiple Sage 300 Views, each Sage 300 View will have an entry (a row) in this worksheet.

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Required** | **Description** |
| DatasourceID | Yes | Datasource GUI ID |
| ViewID | Yes | Sage 300 View ID |
| ViewName | Yes | Sage 300 View Name |
| SelectedList | Yes | Selected list of columns from a Sage 300 View (separated by comma). Use ALL to include all columns. |
| Notes |  | Informational purposes |

* 1. Datasource Configuration Excel Workbook

This workbook contains two worksheets:

1. Sage300View
2. View ID (One worksheet for each View used in the inquiry)
   * 1. Sage300View

This worksheet contains the following columns:

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Required** | **Description** |
| Included | Yes | Y/N flag to specify whether to process this view |
| Module | Yes | Sage 300 Module ID |
| ViewID | Yes | Sage 300 View ID |
| ViewName |  | Sage 300 View Name |
| SecurityResource |  | Security Resource ID |
| SecurityResourceName |  | Security Resource Description (Informational Purposes) |
| Comments |  | Comments for informational purposes |

* + 1. View ID

Each View ID worksheet contains the following columns:

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Required** | **Description** |
| Field | Yes | Sage 300 View Field |
| Label |  | Override default column header label in English |
| LabelFra |  | Override default column header label in French |
| LabelEsn |  | Override default column header label in Spanish |
| LabelChn |  | Override default column header label in Chinese Simplified |
| LabelCht |  | Override default column header label in Chinese Traditional |
| FieldAlias |  | Field Alias in SQL query. Required if a column name is SQL key word (e.g. DESC) |
| IsDummy |  | Y/N flag to specify whether the field is a dummy field or not |
| OverridePrList |  | Override default presentation list |
| IsFilterable |  | Y/N flag to specify whether the field is filterable. Default is Y |
| IsSortable |  | Y/N flag to specify whether the field is sortable or not. Default is Y |
| SortFieldsStr |  | List of Sage 300 View Fields to be used in SQL query Order by clause to override the default sorting field. Default is the Sage 300 View Field |
| IsDrilldown |  | Y/N flag to specify whether the field is a drilldown. Default is N |
| Controller-AreaList |  | List of areas, separated by comma (i.e. AR, GL, IC) |
| Controller-ControllerList |  | List of controllers, separated by comma |
| Controller-ActionList |  | List of actions, separated by comma (controller methods) |
| Controller-ParamName |  | List of parameter names used in Controller separated by comma |
| Controller-ParamField |  | List of column names or actual parameter value separated by comma |
| Controller-Type |  | Sage 300 view field to determine which controller will be used if the field can be drilldown to different web screens |
| Controller-TypeList |  | List of controller types separated by comma |
| Controller-SrceAppl |  | Source Application Field |
| Controller-SrceApplList |  | List of Source Application types separated by comma |
| DrilldownCondition-Operator |  | Operator to determine whether the field can be drilldown or not (eq, neq) |
| DrilldownCondition-Field |  | Sage 300 View Field to determine whether the field can be drilldown or not |
| DrilldownCondition-Value |  | Expected value |
| IsGroupBy |  | Used in Adhoc Inquiry only, Y/N flag to specify whether the field is groupable or not. Default is N. |
| Aggregation |  | Used in Adhoc Inquiry only, Y/N flag to specify whether the field can be aggregated or not |