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** and **CRM** inquiries. The **Sage 300 Inqury Configuration Generator** utilityis located in the following directory:

[WebSDK]\bin\utilities\Sage300InquiryConfigurationGenerator\

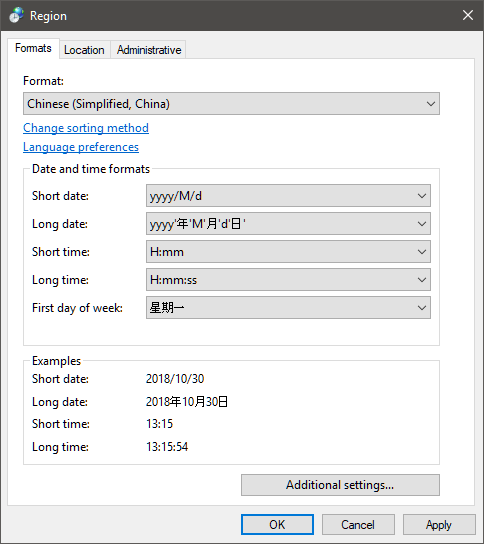
The **Sage 300 Inqury Configuration Generator Utility** will attempt to read the necessary settings from it’s INI configuration file. If this file doesn’t yet exist, the utility will generate one. The INI file specifies the following settings:

|  |  |
| --- | --- |
| **SETTINGS** | **Description** |
| Option | Can be one of the following:   * Adhoc * CRM |
| RootPath | Path of the configuration files |
| DatasourceConfigurationFile | Sage 300 View Column Setting Configuration Excel spreadsheet name and location |
| TemplateConfigurationFile | Inquiry Configuration Excel spreadsheet name and location |
| SQLScriptName | Output script file name prefix |
| OutputPath | Output directory |
| DisplayOutputFolderOnCompletion | Optionally have the utility display the output directory |
| DisplayLogFileOnCompletion | Optionally display the log file |

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

**Notes:**

1. *Activate Sage 300 SDK in SAMLTD*
2. *Setup users for different languages to support Generic Inquiry in different languages*
3. *For Chinese, make sure to set up Region and Language Format to Chinese (Simplified, PRC). The following page shows the Region/Language dialog in Windows 10 where this information can be configurated.*



The following is an example of the configuration file:

**[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

DisplayOutputFolderOnCompletion=True

DisplayLogFileOnCompletion=True

**[COMPANY]**

Company=SAMLTD

Version=66A

IncludeFra=False

IncludeEsn=False

IncludeCht=False

IncludeChn=False

1. Configuration

In order to generate JSON 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:

1. Template Configuration
2. Datasource Configuration

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

* 1. Setting up the Template Configuration Excel Workbook:

The Template Configuration Excel workbook contains four worksheets:

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

The Datasource 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 |

**Notes:**

* *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

The Template 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

The Translation 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

The DatasourceSage300ViewMapping 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 settiing file.

|  |  |  |
| --- | --- | --- |
| **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. Setting up the Datasource Configuration Excel Workbook:

The Datasource Configuration Excel workbook contains two worksheets:

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

The Sage300View worksheet contains the following columns.

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Required** | **Description** |
| Included | Yes | Y/N flag to specify whether or not 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 or not 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 or not the field is a drilldown. Default is N |
| Controller-AreaList |  | List of Area Codes, separated by comma |
| Controller-ControllerList |  | List of controllers, separated by comma |
| Controller-ActionList |  | List of actional list, separated by comma |
| 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 the 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 |