

IBM SPSS Data Access Pack for Salesforce.com Installation Instructions

The following instructions are for installing and configuring ODBC drivers that provide access to Salesforce.com. The drivers are available in an eAssembly provided with your IBM SPSS product. They are also available on a separate DVD. This feature is only available on Microsoft Windows operating systems.

Important: Use of the ODBC drivers for accessing Salesforce.com requires Microsoft .NET Framework 2.0 SP2. You can check the installed versions of the .NET Framework from Add or Remove Programs, available from the Windows Control Panel. Look for the entries labelled “Microsoft .NET Framework”. Microsoft .NET Framework 2.0 SP2 is freely available from <http://msdn.microsoft.com/en-us/netframework/aa731542.aspx>.

ODBC data sources

When you install IBM® SPSS® Data Access Pack for Salesforce.com, you install an ODBC driver. Before you can use an installed driver, you must define an ODBC data source for that driver. Depending on the type of IBM SPSS application you are using, the location of the ODBC data source can be either an end user’s desktop computer or a remote server.

Location of ODBC Data Sources for Desktop Products

If your IBM SPSS product is a classic **desktop** application, where all data access and processing occurs on the end user’s desktop computer, then the ODBC data source has to be defined on the end user’s desktop computer.

Location of ODBC Data Sources for Distributed Architecture Products

If your IBM SPSS product uses **distributed architecture**, then the correct location for ODBC data sources depends on how the product is being run. IBM SPSS distributed architecture products can be configured to access and process data on a remote server (distributed analysis mode) or on the end user’s desktop computer (local analysis mode).

- **Working in distributed analysis mode.** The ODBC data source has to be defined on the remote server. This data source is created using the ODBC driver that the administrator installed on the server.
- **Working in local analysis mode.** The ODBC data source has to be defined on the end user’s desktop computer. This data source is created by the end user using the ODBC driver installed on his desktop computer, or it is imported from sources created by the administrator.
- **Working in both modes.** If end users need to access data from Salesforce.com in both modes, the ODBC data source has to be installed and configured on both the remote server and the desktop computer.

Deployment options

IBM® SPSS® Data Access Pack for Salesforce.com provides the following options for deploying the ODBC driver for Salesforce.com:

Standalone. You install the ODBC driver on the machine that will access Salesforce.com. This is the machine where ODBC data sources for your IBM SPSS application are defined. It may be a machine where a desktop application is installed or it may be a remote server that is accessed in distributed analysis mode.

The standalone version is only compatible with 32-bit versions of IBM SPSS applications. If you need to access Salesforce.com from a 64-bit IBM SPSS application, then you will need to use the 64-bit client component of IBM SPSS Data Access Pack for Salesforce.com in conjunction with the IBM SPSS Data Access Pack for Salesforce.com server component.

Client/Server. The client/server option consists of a client component and a server component, which are installed separately. You install the client component on the machine where ODBC data sources for your IBM SPSS application are defined. This may be a machine where a desktop application is installed or it may be a remote server that is accessed in distributed analysis mode. The server component can be installed on any machine.

The client component is available in 32-bit and 64-bit versions. Use the 32-bit version with a 32-bit IBM SPSS application, and use the 64-bit version with a 64-bit IBM SPSS application.

Installation

- ▶ If you are using the client/server option, then copy the zip file for the server component to the machine that will host the server and copy the zip file for the client component to the machine that will access the server component.

Windows XP

- ▶ Unzip the contents to a temporary location, double-click *setup.exe* and follow the instructions that appear on the screen. See the Notes section below for addition information.

Windows Vista or Windows 7

You must run the installer as administrator:

- ▶ Unzip the contents to a temporary location and browse to that location using Windows Explorer.
- ▶ Right-click *setup.exe* and choose Run as Administrator.
- ▶ Follow the instructions that appear on the screen. See the Notes section below for addition information.

Notes

- Do not install the IBM® SPSS® Data Access Pack for Salesforce.com in the same directory as another IBM SPSS product.
- If you're installing the server component of the client/server option, the setup program will supply a default port number for the Salesforce.com service. If the default port is not in use, accept it; otherwise specify the port number that you want the Salesforce.com service to use. You will need to enter this port number when setting up an ODBC data source for the client component, so note the value of the port number.

In addition to a default port number, the setup program provides a default name for the Salesforce.com service on the remote server. You can accept the default value or provide a different value.

Defining an ODBC data source for the Salesforce.com driver

To define an ODBC data source for the Salesforce.com driver:

- ▶ Open the ODBC Data Source Administrator.

Important: If you are creating a data source that will be used by a server product, then you should create a System data source, not a User data source.

- ▶ Click Add and select the driver that you want to use: *IBM SPSS Data Access Pack for Salesforce.com Standalone* or *IBM SPSS Data Access Pack for Salesforce.com Client*. Click Finish. The Driver Setup dialog box appears.

Standalone version

- ▶ Specify a value for the Data Source Name field. This is the name you will use to access this data source within your IBM SPSS product. Optionally, specify a value for the Description field. Accept the default values for the other fields.

Client component

- ▶ Specify a value for the Data Source Name field. This is the name you will use to access this data source within your IBM SPSS product. Optionally, specify a value for the Description field.
- ▶ In the Salesforce Service Host field, enter the host name of the remote server where the server component (for IBM SPSS Data Access Pack for Salesforce.com) is installed.
- ▶ In the Salesforce Service Port field, enter the port assigned to the server component when it was installed. Accept the default values for the other fields.

Notes

- In order to access Salesforce.com through an ODBC data source you will need a user name and password, which you will need to supply when using the data source from within your IBM SPSS product.
- For system administrators who are setting up ODBC data sources for Salesforce.com on IBM SPSS server products (for use in distributed analysis mode), your end users will need to know the names of those ODBC data sources. Specifically, when end users are working in distributed analysis mode, they utilize the ODBC data sources defined on the server machine.