

INTRODUCTION

Welcome to *The OS/400 and Microsoft Office Integration Handbook—Second Edition*. This book describes some of the techniques you can use to unite applications in the Microsoft Office 97/2000 product suite with data from your iSeries (AS/400). If you've been around the iSeries world for a while, you'll recognize that it hasn't always been easy to retrieve data from the iSeries for use with other systems. PC Support, IBM's old solution to PC connectivity, was often cumbersome to use and not very flexible. Furthermore, productivity applications, such as word processors and spreadsheets, weren't designed to offer a great amount of flexibility for interfacing with external data.

Luckily, all of that has changed. IBM's Client Access Express for Windows is a very capable tool that provides you with seamless integration between Windows desktops and iSeries information.

Note: Throughout this book, the terms AS/400 and iSeries are used interchangeably, except where noted. Since they are both OS/400 machines, the same techniques apply no matter which one you use.

COMBINING CAPABILITIES

Combining the presentation capabilities of Microsoft Office with the database capabilities of the AS/400 provides the best of both worlds. For example, using the Microsoft Access report writer, you can create reports that use live AS/400 data in a fraction of the time that it would take you to create them on the AS/400. And they look better, to boot.

You're reading the right book if you've ever done any of the following:

- Looked at an AS/400's output and thought to yourself, "Gee, I wish I could use my PC data-formatting tools on this AS/400 data."
- Wondered about an easier way to make nice-looking reports with AS/400 data.
- Wanted to use visual query tools to create sophisticated information output.

ABOUT THIS BOOK

The first section of this book introduces you to the various methods you can use to retrieve data from the AS/400 using IBM's Client Access Express. Some of these methods are easier or better than others for retrieving data. You can decide which one works best in your situation.

Chapter 1 looks at using Client Access Express to integrate AS/400 data with Microsoft Office applications. This chapter provides a brief overview of some of the issues you should be aware of when installing and configuring Client Access Express to retrieve data from your AS/400. You should read this chapter to get an understanding of the methods available to you.

Chapters 2 through 8 describe individual methods used to move data between the AS/400 and your PC and Office. While the main focus is on ODBC, which provides the most seamless method of AS/400 integration with Office, other methods covered include the data-transfer and network-drive functionality of Client Access Express. The Client Access Express data-transfer function is the component of Client Access Express that allows you to retrieve data from your AS/400 and store it in PC files. Also included is information on how TCP/IP's FTP function can be used to bring data to your PC.

For each of the Office applications that can use AS/400 data, there's a specific chapter showing you how the two can be used together. For example, Microsoft Word can easily be used to create mailing labels, form letters, and envelopes from data on your AS/400.

With Microsoft Excel, you can bring data into spreadsheets, perform calculations on the data, and even refresh the data to retrieve updated information with just a mouse click.

Microsoft Query, included with Office, is a helper application that provides sophisticated querying and data-retrieval capabilities. While Query can be used as a stand-alone application, its capabilities really shine when combined with another Office application, such as Word or Excel.

Microsoft Access is a veritable “Swiss army knife” when it comes to managing data. Its many features include the capability to query AS/400 data and to create beautiful, sophisticated reports. Wizards even lead you through the process.

Microsoft Outlook is the email client and personal-information manager included with the Office suite. A very powerful tool, Outlook’s many uses include retrieving email from the AS/400 when the AS/400 is set up as an email server.

In spite of Microsoft’s best efforts, more than half of the world’s data is stored in non-Microsoft databases provided by companies like Oracle and IBM. Included in non-Microsoft databases is DB2/400, the AS/400’s native DBMS (database management system). Chapter 11 provides an overview of Microsoft’s follow-on technology to ODBC: Universal Data Access.

As you will see, the combination of the AS/400 and Office gives you a powerful set of useful tools that can be leveraged in many different ways to make your job of delivering information easier.

FOLLOWING ALONG WITH THE SAMPLE DATA

Many of the samples and exercises throughout this book are performed with sample data. Having a separate library with some sample data that you can play with ensures that you are free to learn and experiment with the Office products and AS/400 data without worrying about somehow causing a problem with production data.

Installing the sample data allows you to follow along with the exercises in each chapter. This is the same data that was used to create the examples and screen images for this book. However, if you choose not to install the sample data for some reason, you should still be able to apply the examples to your own data. The sample data is provided for illustration purposes only.

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The sample data comes in the form of a database that can be downloaded from Midrange Computing. To find out how to download the data to your PC, point your browser to this Web page:

<http://www.midrangecomputing.com/ftp/prog/officebook>

Once the data has been copied to your PC, you can upload it to your AS/400 and follow along with the exercises.

Without further ado, let's dive right in!