Aurora webData™

Aurora v2.0

September, 2022

Added Features

Conditional Questions

Online editing of Questions

Online creation and editing of Tips for Pages and Questions

On-demand overviews of webQs

Breadcrumb navigation on every Admin page

Popup banners when changes have been saved

Consistent location and action for navigation buttons on the Admin pages

SORT commands that remember previous filter

An improved Data Provider landing page

Improved installation process for access for Admins and Patrons

Multiple Admins available in premium service

Why Aurora?

Aurora webData™ enables ordinary people—professionals, managers, information workers at all levels—to securely collect, store, and use information collected from others—and to effortlessly create customized databases to fit their specific needs for document automation and complex decisioning.

Aurora performs magic in three ways:

> It automatically converts a Questionnaire built in Microsoft Word by a program from TheFormTool into language interpretable by the Aurora Data Center. There's no need for programming skills.
>
> It automatically creates a customized online HTML-based questionnaire, a webQ, available to any selected audience to securely solicit the desired answers.
>
> It automatically builds and modifies as needed, in real time, a completely customized database to capture and store the answers asked by the Questionnaire/webQ.

Aurora includes a combination of one product, the Aurora add-in to Word for Windows, and two services, web-enabled data collection and secure data storage, all without requiring IT support, at an unmatchable price point.

Aurora's amazingly easy to use document assembly and decisioning software allows anyone to create intelligent forms or make complex decisions consistently, rapidly, and without errors.

It includes sophisticated, secure, and easy to use tools to ask questions and securely collect answers from anyone, anywhere, anytime using any browser.

It includes magical software that creates customized databases on the fly in which it safely stores data for use in creating customized documents, reports, and decision points.

Aurora is intended to completely change your relationship with information. It dramatically simplifies how you collect it and how you use it.

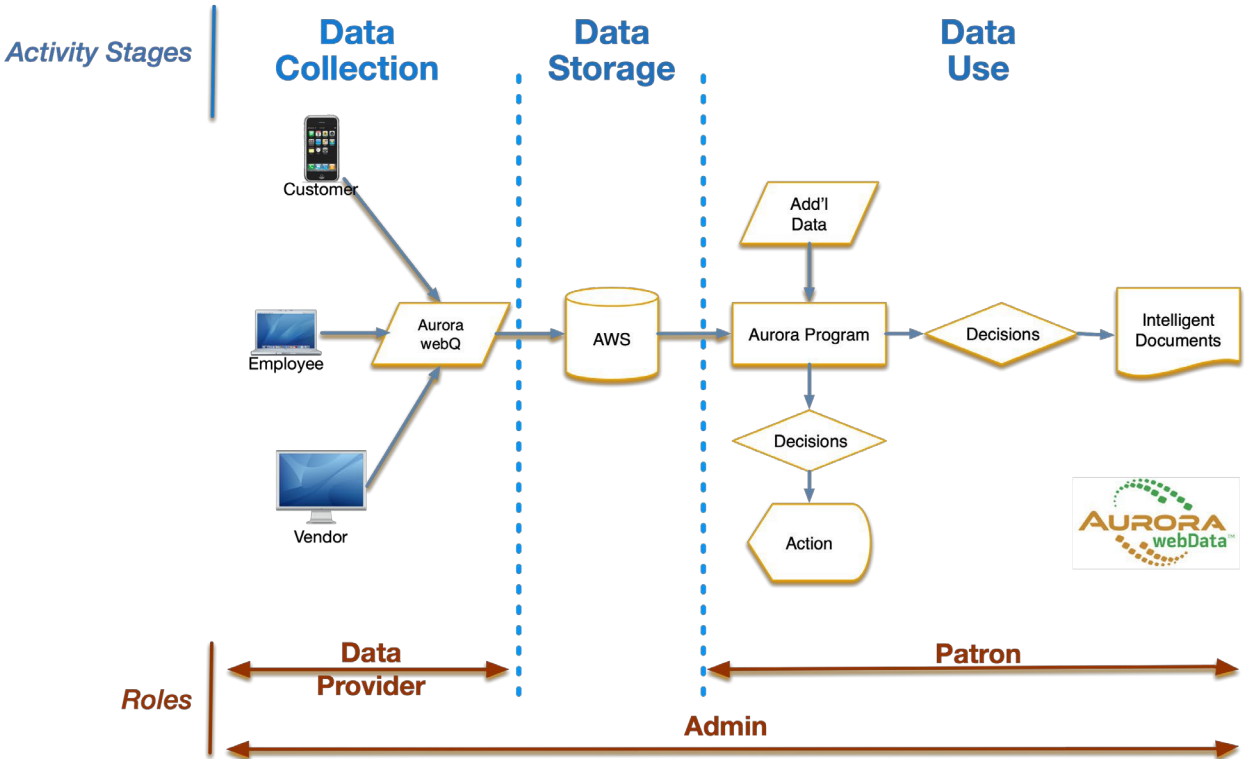
For many of our customers Aurora may be the most sophisticated and complex software they'll ever own. But like all software from TheFormTool, it is amazingly easy to use.

There is no need too simple, no requirement too complex for Aurora to answer at a price that cannot be beat.

Please read the entire manual. The time you will save is your most valuable asset!

What is Aurora?

THREE PROCESSES IN THE AURORA WEBDATA™ SYSTEM



Data is collected through secure and completely customized web Questionnaires ("webQs") where Aurora's customers—you—invite your audiences to answer your specific questions to provide the information you need. Only people you invite can answer your webQ.

As Answers are submitted, they are stored in a secure facility in Amazon's Web Services Cloud to which access is strictly limited to only those whom your Account Admin has specifically authorized.

The stored data can be accessed and used for manual or automated decisioning and document assembly using *Aurora, Doxserá DB, or DB User* software offered by TheFormTool, LLC. Customers may also access or download stored data at any time using their favorite secure SQL management software. It's your information, after all, to do with what you choose.

THREE ROLES IN THE AURORA WEBDATA™ SYSTEM

Admin	The account Admin creates databases, converts Questionnaires to webQs, invites Data Providers to answer questions, and authorizes Patrons to access stored data. Each account includes one Admin and the equivalent of a Doxserá DB license; other Admins can be added by subscription.
Data Provider	Data Providers are invited to answer webQs by the Admin either individually or in groups. Each can answer securely in one or more sessions. The Admin or delegate can be notified when the DP completes the webQ.
Patron	Patrons are additional persons authorized by the Admin to access and use stored data, typically with Doxserá DB or DB User. Accounts may have several Patrons.

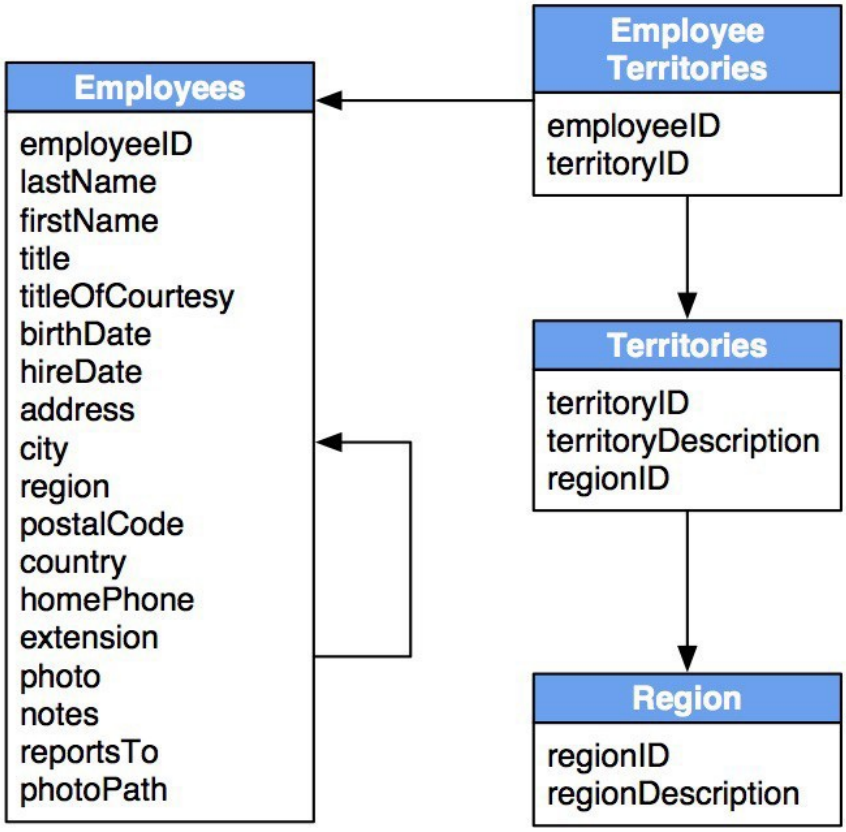
FOUR TECHNOLOGIES IN THE AURORA WEBDATA™ SYSTEM

webQs	A webQ is an Internet-based Aurora questionnaire that has been published in your Account for your audiences to securely answer using the browser of their choice. A webQ is created by the Aurora program converting a Questionnaire created by one of TheFormTool programs. Answers from members of your audience (“Data Providers”) are automatically stored in your Database.
Web Submissions	A Submission is when a Data Provider answers a webQ by clicking Done at the end of a webQ. That saves the answers into your database where it becomes instantly available to the Admin and Patrons.
Uses	A Use occurs when you access the stored Data to fill a form, create a report, or inform a complex decision.
Databases	Your Aurora Account can contain several Databases. A database is an organized collection of related data. The Aurora webData™ system automatically creates the relational tables within a database that organize and store your data as it is captured when your audience answers webQs.

Databases (cont.)

The Aurora program stored on an Admin's computer automatically converts Questionnaires into language that the Aurora Data Center can use to create your database on the fly.

A single database with four tables of related data



Best practices call for storing any and all related data in a single database so that it can be efficiently extracted or analyzed. Aurora automatically structures databases based on the Labels and linkages contained in the webQ that are derived from those in the initial Questionnaire.

You can easily create separate databases for data that has no direct relation to other data.

How to Manage Aurora

Overview of the Aurora Process

The Admin typically uses two Roles, Admin and Data Provider to create and perfect a "first" webQ. When it is ready for use, the Admin will move it to the account's operational database and Publish it for viewing by others. Upon Publishing, Aurora will automatically create a completely customized database to store the Answers provided by Data Providers.

The Admin will then invite one or many Data Providers to securely connect to and answer

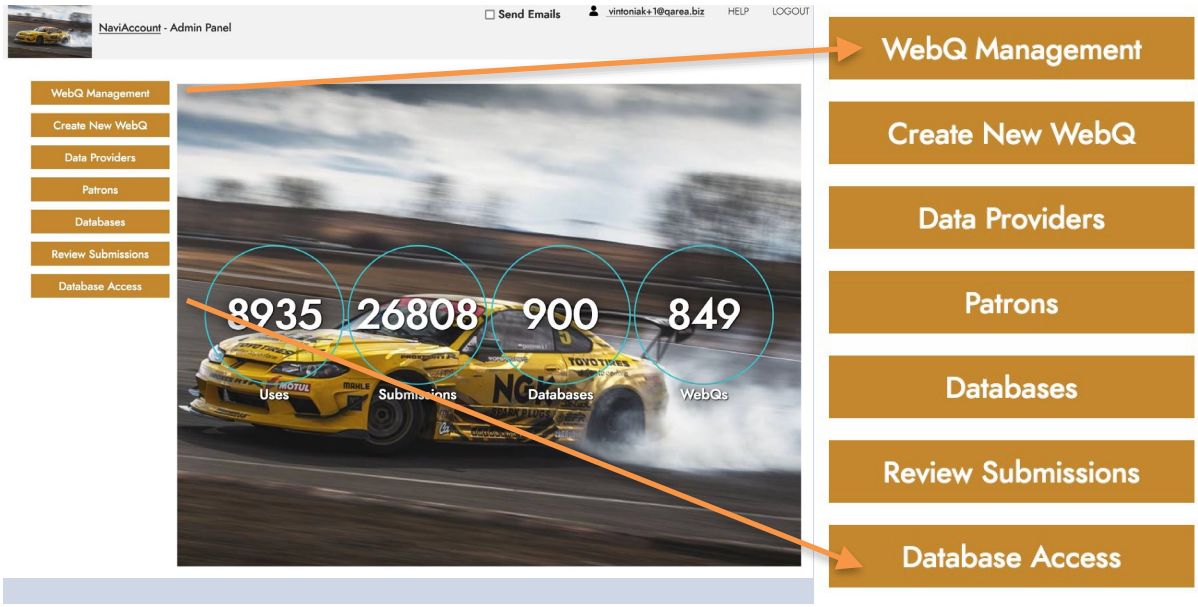
specific webQs, which are stored in a specific database.

The Admin or authorized Patrons may access the data 24/7 and use the *Aurora, Doxserá DB, or DB User* programs to access the stored data, or any combination of data (a Questionnaire, SQL DB, Excel, Outlook Contacts, or Master List), to automatically create documents, generate reports, or recommend decisions that take into account complex data relationships. In other words, Aurora allows our customers to do what they already do with our other programs but on an exponential scale, automatically.

The Account Admin

Use the link and the complex password provided to login as Admin from an authorized IP address. Your Password should be safeguarded and not be shared with anyone, but you can change it as you wish. Your email address, the password, and your IP address are the keys to the kingdom.

The Admin Panel will show the activity remaining in the Account, your selected graphic, and seven menu buttons in the left margin.



Admins exercise power managing seven major areas. We'll discuss them in the order in which a typical Admin will experience them, starting with the Admin's own existence. Signing into *https://www.aurorawebdata.com* with an Admin-registered email address and password from an Admin-registered IP address opens the Admin Panel to display Aurora unused and available resources and buttons to access the seven administrative screens.

Navigation items are colored gold.

What Makes an Admin?

An Admin role is the only Aurora role that is created only by the Aurora Desk at TheFormTool, which creates one for each account. Additional Admin roles can be created as needed for a fee.

The Admin performs critical tasks: Converting Questionnaires into webQs, modifying the webQs as necessary, linking them to specific databases, and inviting Data Providers to

answer them. In addition, the Admin authorizes others to access the saved data by assigning the roles of Patrons to access one or more secure databases.

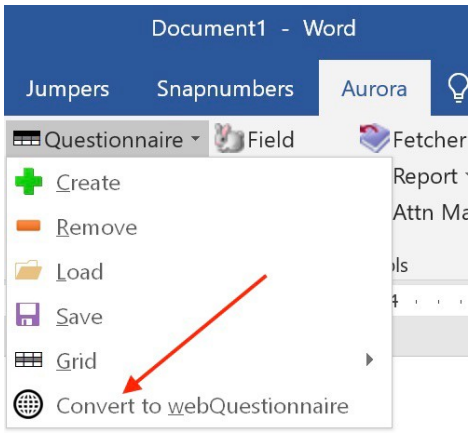
An Admin's Tools

Converting Word Questionnaires into webQ's

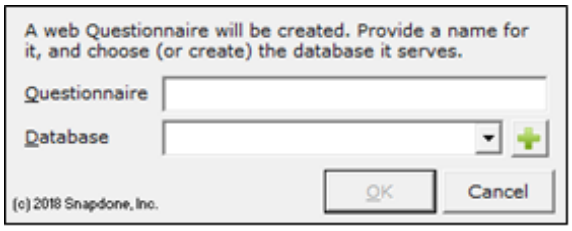
The Admin uses the Aurora program to convert any user-friendly Questionnaire from a TFT program into a webQ. The conversion is simple, easy, nearly instantaneous, just one click under Aurora's Questionnaire menu tab, but the preparation of the Questionnaire should be thoughtful and considerate of the prospective audience that will be answering.

The Aurora program is a more powerful version of Doxserá DB, a big brother to Doxserá, the more robust sibling to TheFormTool PRO. If you've mastered any one of those programs, understanding and using Aurora is within your grasp.

If you have used any version of TheFormTool or Doxserá, you're already familiar with creating Questionnaires in Word. (If not, you can learn all about it in the *Quick Start Guide* and *Expert Guide*.) The Aurora program allows you to take one of those Word Questionnaires and watch as Aurora automatically translates it into an internet-based questionnaire (a "webQ") that can be answered by your invitees ("Data Providers") in their web browser.s To convert a Questionnaire to a webQ, on the Aurora menu bar click Questionnaire>Convert to web Questionnaire.



This Conversion is how Aurora creates the simple yet powerful internet-based data collection tools and databases that you want.



If the Questionnaire is for a brand-new database, click the green plus icon to create the connection to the already-established Aurora database. Otherwise select an existing database. Make sure the name of the Questionnaire is what you want, and click OK.

The Aurora program converts each of the components of a Questionnaire into language that the Aurora Data Center can interpret into HTML with which to build not only the webQ but also the database, all automatically.

Differences Created in the Conversion Process

Questionnaire Dividers form the backbone of a webQ's structure and user guidance. Here are descriptions of how the major components of a Questionnaire are treated in the conversion.

Questionnaire version	webQ treatment

Aurora (c) 2022 Snapdone, Inc.		
Label	**Ques9on**	**Answer**
General Info¶ Please answer as many ques3ons as you can. If you don't know the answer, leave blank for now.¶ A?er your answers are submiAed, we'll call youto gather any addi3onal informa3on that's required.		
MyColor	Choose a **color** and *style*	[??]
SigName	Which party will sign?	[??]
Date Info forPurchase of Property¶ If the property is being sold instead of purchased, use Form 206B instead.		
SigDate	Date of signing¶ Leave blank if unknown.¶ *(format: mm/dd/yy)*	[??]
PchDate	Date of purchase¶ If the date of purchase precedes the date of signing, a notarized signature will be required.	[??]

As the first item in a Divider, "General Info" becomes a Page Title.

Any following paragraphs become Page Tips.

Each Page can have as many or as few Questions as wished.

The Questions become Questions on the webQs Page. They can have their own Tips and can be made Conditional inside ADC. Colored text will be black on white.

To "stack" multiple Page Title, Question, or Tips lines, use a linefeed "↵" instead of a Return.

A Question with its own Tip and a format suggestion, which is right-formatted.

A Question with a Tip

We've found that the level of user-friendliness and helpful navigation directions is extremely important to how Data Providers experience the webQ. Non-professionals generally do not care for an endless stream of linear questions. They want to know, "*Are we there yet?"* And if not, when? It's worth stressing, *keep your audience in mind!*

Formatting Is Removed

To allow for standardized formatting of webQs, all Questionnaire text formatting is removed during conversion— things like underline, bold, italic, color, size, and indents. You don't need to remove the formatting yourself — it will happen automatically during conversion

Page Headings and Explanations

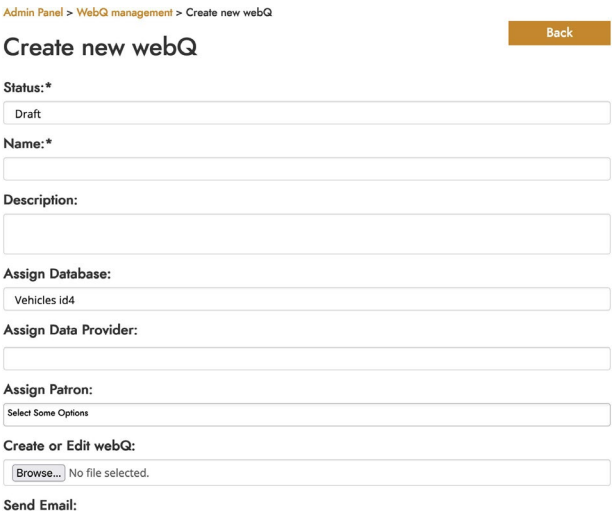
Dividing a webQuestionnaire ("webQ") into Pages, perhaps by subject area or other natural division that is logical to the audience, will help response levels and accuracy. If the Word Questionnaire includes Dividers and/or GRIDs, it will be split into several pages in the webQ. Each Divider signals the start of a page, and each GRID gets its own page. Every Page, GRID, and Question can have its own TIP added to explain the purpose, navigation to Data Providers, or for any other reason. We strongly encourage the use of TIPs to increase DP comfort and participation.

It is an excellent practice to physically diagram the desired webQ layout before converting the Questionnaire so that the "flow" and "logic" of questions is as desired and any use of Conditions is efficient and understandable to both the Author and the eventual Data Provider.

TOOLS FOR THE ADMIN WITHIN THE AURORA DATA CENTER

Loading the webQ

Aurora Data Center's Create new webQ Screen



After the Aurora program converts a Word Questionnaire into coding for the Aurora Data Center, the Admin can upload the webQ, name it and assign it to a specific database. Any number of different webQs can be assigned to a single database, aggregating data, but a webQ can only be assigned to one database. Draft mode should be used to develop and refine the webQ's design and readability in the TRAINING database. When all is ready move the finished webQ to your operating DB and set the status to Publish; the webQ becomes available to any and all DPs whom you invite to answer it.

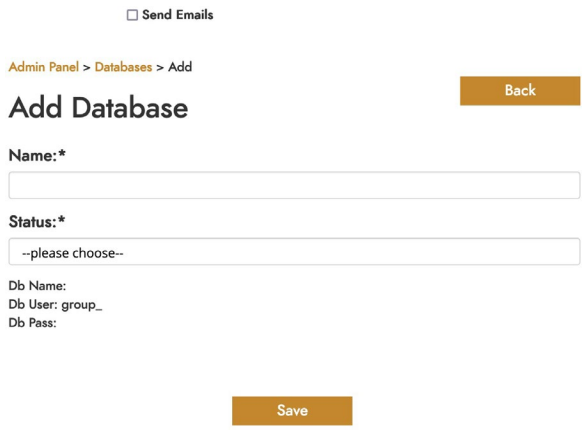
Using the new Constructor page, an Admin can preview the look and feel of your webQ, modify the text of the Questions and Tips and, importantly, determine whether any of the Questions should be Conditional while leaving it in Draft mode. Give it a name that all your audiences will relate to and an optional description if you wish. Move the webQ to an operational DB only when you are completely satisfied with it. You REALLY don't want to clutter operations with disposable questions. Leave it in Draft status while you perfect its appearance and tweak your questions. When you're ready, move it to operations and then change its status to Publish.

If you've already created Data Providers, you can assign them now that the webQ is related to its final database and published.

Creating a Database

Creating a database is the simplest of all Aurora functions, merely select a name, activate, and save. That said however, caution is a good approach. Limit databases to the absolute minimum necessary to store common information so that your future access will be efficient and straightforward. The Aurora Desk at TheFormTool will typically create three initial databases for the customer: an operating DB, Training, and Samples.

It is critical that all development work take place in the Training DB and that only final versions be loaded into the operating database to prevent cluttering a "real, live" DB.



Admins create Databases to organize the storage of related data by category, type, use, department, geography, or similar divisions. While Aurora will support almost endless extensions and flexibility in a database, best practices suggest that each one stores similar data, keeping BBQ recipes out of client data, for instance.

The three fields below Status on your Admin Database page—DB Name, DB User Group, DB Pass(word)—are the secret codes for connecting to your database using your ODBC Driver.(See "Installing Aurora Access on a Computer" for a discussion of ODBCs). Safeguard them. They are critical to your own connections and highly confidential security credentials.

Name a new database on the Database page and create access to retrieve data. Aurora will automatically structure it for you as you connect webQs. With the first Answers, it will begin to populate itself.

A Database can store an almost unlimited number of Answers in an almost unlimited number of relationships but you will want to create additional databases for non-related data. In other words, plan to keep your recipes in a separate database from your business matters (unless you run a catering operation) but generally all of your business material will go into a single database. Don't worry, Aurora can keep track of it all!

Caution: Use the Training database!

Aurora's capacity for creating storage is amazing but needs to be respected. Loading your operating database(s) with endless "rough drafts" will slow them down with clutter. We strongly recommend that you do all of your creative, training, and proofing work in your Training database. That way, should the worst ever happen, the Training DB can be shut down and deleted without significant effect on operations.

Creating and Authorizing Data Providers

While we will expand the ability to add DPs in bulk and perhaps with less information,

at the moment we want the process to include detail. On the Data Providers page you see the DPs you've authorized and can add DPs by clicking the Add provider link.

The Add Provider page will ask for contact information and allow you to assign the DP to one or more webQs. The list is sortable and searchable.

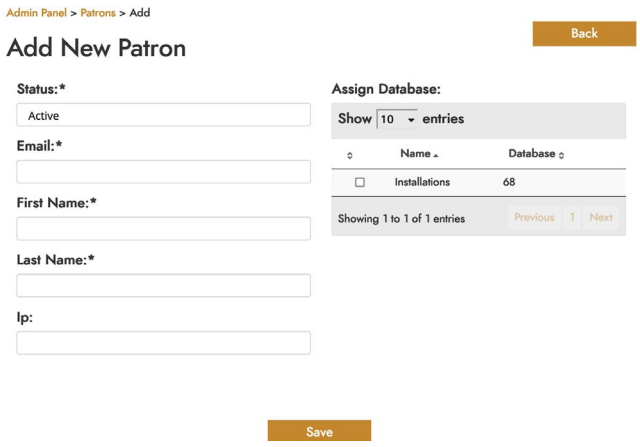
Once you've created one or more DPs, essentially building a pool of them, you'll be able to assign them to webQs as you create them.

Reviewing Submissions

Review Submissions is a reporting feature that allows the Admin with just a click or two to see, but not use, Answers provided by any Data Provider to any webQ. The feature is extremely useful as a memory refresher, as when a client calls in and you need to instantly remember or be brought current on the details of the relationship.

Empowering Patrons

Authorizing a Patron is only slightly more complex than adding a database, but it does require that the Admin know the Patron's IP address and exactly which databases the Patron will be authorized to access. Empowering a Patron's computer to connect to a secure database will generally require installation of an ODBC Driver and adding the Aurora Sources to the Patron's TFT program (DB, DB User, or Aurora).



Reviewing Database Access

Database Access is a reporting feature that shows who has access to your data, which Patrons and Data Providers. It allows the Admin to delete a Patron.

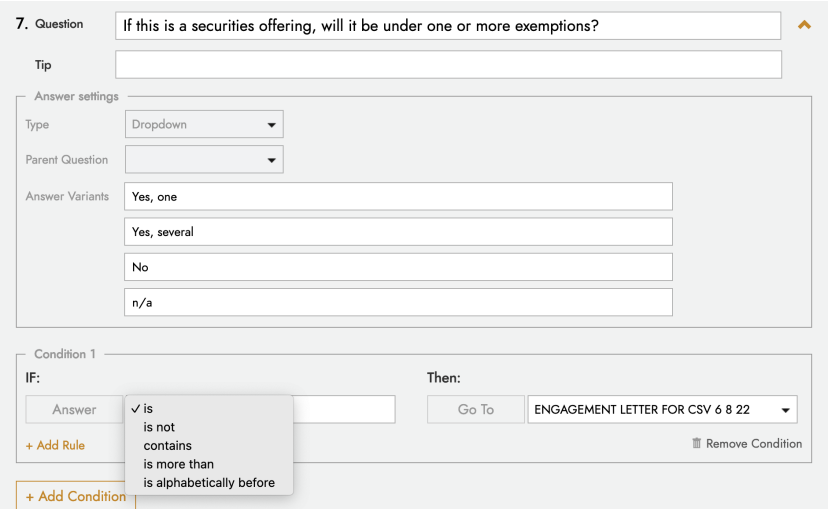
Managing webQs

webQ Management is the most interesting and complex area in Aurora Management because it allows the Admin to see the status of all the webQs, Active or not, who the DPs are, what database it's connected with. The Admin can change the name or the status, view the pages and the questions, see which DPs have Submitted Answers, and even Delete them as wished.

Building Conditional Questions

The big add is the **Constructor** page. The Constructor allows the Admin to modify the text of Page Titles and their Tips, and Questions and their Tips. The Admin can see the Parent Question, if there is one, the Question Type, and—wait for it—set any Conditions that

should be attached to any of the Answers to the Question. Conditions can be complex and/or compounded. Each Answer can have its own Condition(s). Aurora 2.0 is starting off with five comparators: *is, is not, contains, and variations on order*.



In cases where it doesn't matter what the answer is, or where only a few answers need specific Conditions and the rest can all proceed to some other Question, the "catch-all" Condition at the bottom of the page will handle that nicely.

Our own experience while working with Conditions demonstrates that time invested in brainstorming and designing the flow of Conditions—particularly how to enter and exit a logic loop—will pay off with enormous time savings and frustration avoidance.

Initial uses of Conditionals include insurance companies differentiating on types of policies, client industries, and sizes; law firms in specialized fields creating final documents for specific end uses, or generalists creating engagement letters; significant commercial developers or realtor estate investors, speccing industrial properties; and others too numerous to imagine. We expect classes will spring up teaching how to get the most out of a series of questions as customers' imaginations expand to the possibilities!

Accessing Your Data

Connectivity to your data occurs in three stages:

Allowing your computer to locate and connect to our secure portal,

Enabling your computer to connect to the specific DBs in your Account, and

Creating intelligent forms to request the specific data needed to Fill the form.

As part of the initial Account setup, we'll do the first two for you. You'll do the third by creating an intelligent form that follows best practices for retrieving information from a database. For more information and lessons about forms creation, see the appropriate sections of the *Aurora/Doxserá DB Expert User Guide* included with your download.

Connecting to the Portal

After we have installed the ODBC Driver, Aurora's connectivity module, your computer will know the location of your data through its Open Database Connection ("ODBC") software provided by Microsoft. The ODBC allows applications to access data in database management systems (DBMS) using SQL for accessing the data. ODBC permits maximum interoperability, which means a single application can access different DBMSs. We'll provide your computer with the confidential connection string. Once established it will not change, but will need to be customized with appropriate codes for each of your Aurora DBs.

Similar installations will need to be made for each person (Patron) you authorize to have access to your data.

Connecting to Your Specific Databases

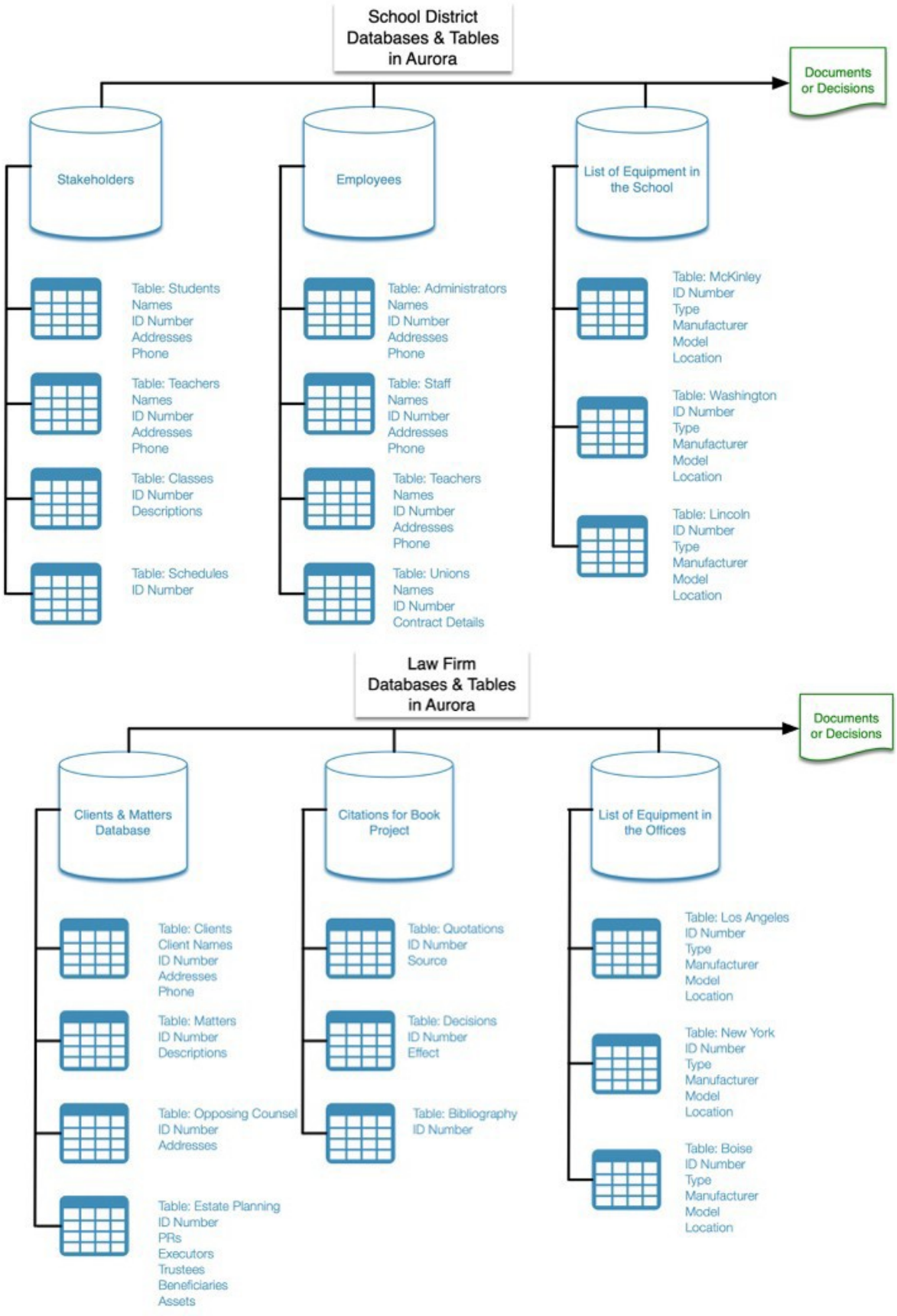
The Aurora Desk will connect your computer to your initial Aurora databases during initial installation. A new DB address, user code and password will be automatically created for each DB Aurora builds for you. Using these credentials is a relatively simple manual task that is covered in Step 2 of the ODBC section in this manual.

Sketch out your family of databases. No need to stretch, you can add DBs as needed, but it is a good idea to have a basic structure in mind to avoid complexity down the road.

While an intelligent form can simultaneously access and use data from any number of databases, each webQ is associated with a single database in Aurora.

Aurora will take care of structuring and building your database, adding to it as you think of new information you'd like to capture and store, so all you need is a basic idea of what subject areas you'd like to include. Again, the example of clients and recipes come to mind as being too different to include in one DB. It'll work, but over time will slow and may become complex to work with.

Two ideas for structures



Creating Intelligent Forms

An intelligent form can connect to as many DBs as needed, whether within Aurora webData™ or elsewhere. The section *Sources: Data,* in the ***Expert Manual***, describes the process for accessing a database with a form. Aurora and Doxserá DB can create and run forms capable of accessing Aurora, SQL, Access, Excel, or Outlook Contacts. DB User can also run such forms but cannot create them.

Suggested Exercises for New Aurora Users

Here are some suggested exercises that will help you familiarize yourself with Aurora.

Try converting a few Questionnaires into webQs, then loading them into into your Training database. You might:

> Experiment with headings, using Dividers. See how line breaks and paragraph marks affect them. Notice how Dividers affect page boundaries in the webQ.
>
> Do similar experiments with line breaks and paragraph marks within the text of questions so that you understand how to create multi-paragraph Questions, TIPs, and even multi-paragraph TIPs.
>
> Use a variety of answer types -- text, dropdown, checkbox, series, linked, GRID, yes/no, pronoun. Remember to use the Draft feature for this sort of activity. Doing so will save you time, effort, and money.

Pretend to be a Data Provider and respond to some of the webQ's you created. Remember that you'll need to Publish them before a DP can see them; doing so in TRAINING is just fine! Pay close attention to the experience — this is the process you're asking your Data Providers to perform. Is there any way you can make it easier for them? Do the questions make sense? Are the headings informative and the page breaks logical?

Create a form that selects one of the Data Provider's responses and uses those responses to fill in blanks and make decisions. The questionnaire at the bottom of this form should likely contain only a single question, along the lines of "Name." It will be a dropdown question that uses the "Name" column (or something similar) of the Aurora database you set as its source. Try Filling the form. Identify and fix any issues.

After responding to the webQ's as several different Data Providers, there will be enough information in the database to do some data analysis. You could create a form that uses a Count Data Function to report the number of submissions, and an average of some number they reported. (For example, if you asked their annual income, your report could use the Average Data Function to report the average income of all respondents. Your report could also include a listing of all responders along with relevant info about each (using a Data Table). Or a listing of certain responders -- only the ones who reported that they live in New York, or only the ones with incomes that meet a certain threshold.

Using two browsers while testing, one for the Admin role and one for DP, will save enormous amounts of time.

The Aurora program converts the Questionnaire into an HTML-based webQ

Each Divider becomes a new Page in a webQ, bring its Questions with it

Label	Question	Answer
Welcome to the Aurora Engagement Demonstration		
MyName	What is your name?	[??] [??]
Practice Area		
PracticeArea	What is the practice area within our firm that you are requesting to managing this matter?	[??]
Probate		
DeceasedName	What is the deceased's name?	[??] [??]
Estate Planning		
TaxDed	Is any portion of the fee likely to be tax deductible?	[??]
SimplePlan	Is this a Simple Plan?	[??]
EPFee	If this is not a Simple Plan, do you expect this will be a Fixed Fee arrangement?	[??]
Securities Offering		
SECExempt	Given this is a securities offering, will it be under one or more exemptions?	[??]
Bankruptcy		
Preference	Given this is a bankruptcy filing, is it likely to be a preference item?	[??]
Litigation		
AdversaryName	Who are your opponent(s) in this matter?	[??] [??] [??] [??] [??] [??]
AdversaryRole	Are you the plaintiff or defendant in this matter?	[??]
Divorce		
DivOpponen	What is the name of our opponent?	[??] [??]
DivOpponentRole	Petitioner or Respondent?	[??]
RetainHeld	What will be the treatment of the retainer?	[??]
Fixed Fee Arrangements		
FixedFee	If this will be a Fixed Fee arrangement, what is the fee? Leave blank if not a Fixed Fee.	[??]
Hourly Fee Arrangements		
HourlyRates	Quote responsible attorney's and paralegal's hourly rates? *If not, use the current range of hourly rates.*	[??]
Retainer and Costs		
Retainer	What is the amount of the retainer? *Leave blank if there is no retainer*	[??]
NotEPFixFee	Describe the services that are included.	[??]
StdCosts	If costs will not be billed back using the standard method, describe the alternative to	[??]
General Items		
SpecificMatter	Describe the specific matter. If this engagement is for all matters, leave	[??]
ReferralName	If you were referred to us by another firm, which one should we thank?	[??] [??]
Personnel		
SignAtty	Have you a preference as to the responsible attorney?	[??]
AddAtty	A preference for a second assigned attorney, if any?	[??]
LegalAssist	Which legal assistant will be assigned?	[??]
Client Information		
ClientSign	Who will sign this engagement letter?	[??]

[List all clients' contact information, starting with the **main** contact or sole client]

ClientName	ClientSalut	Signer	ClientStreet	ClientCity	ClientState	ClientZip	PayPercent	ClientAffiliates
Client(s) Name(s)	**Client Salutation**	**Signer's Name**	**Client(s) Street**	**Client(s) City**	**Client(s) State**	**Client(s) Zipcode**	**Percentage of bill** *Ignore percentage sign*	**Name of client affiliates** *If none, leave blank*
[??] [??]	[??]	[??]	[??]	[??]	[??]	[??]	[??]	[??]
[??] [??]	[??]	[??]	[??]	[??]	[??]	[??]	[??]	[??]

These are the final steps to co ...swers

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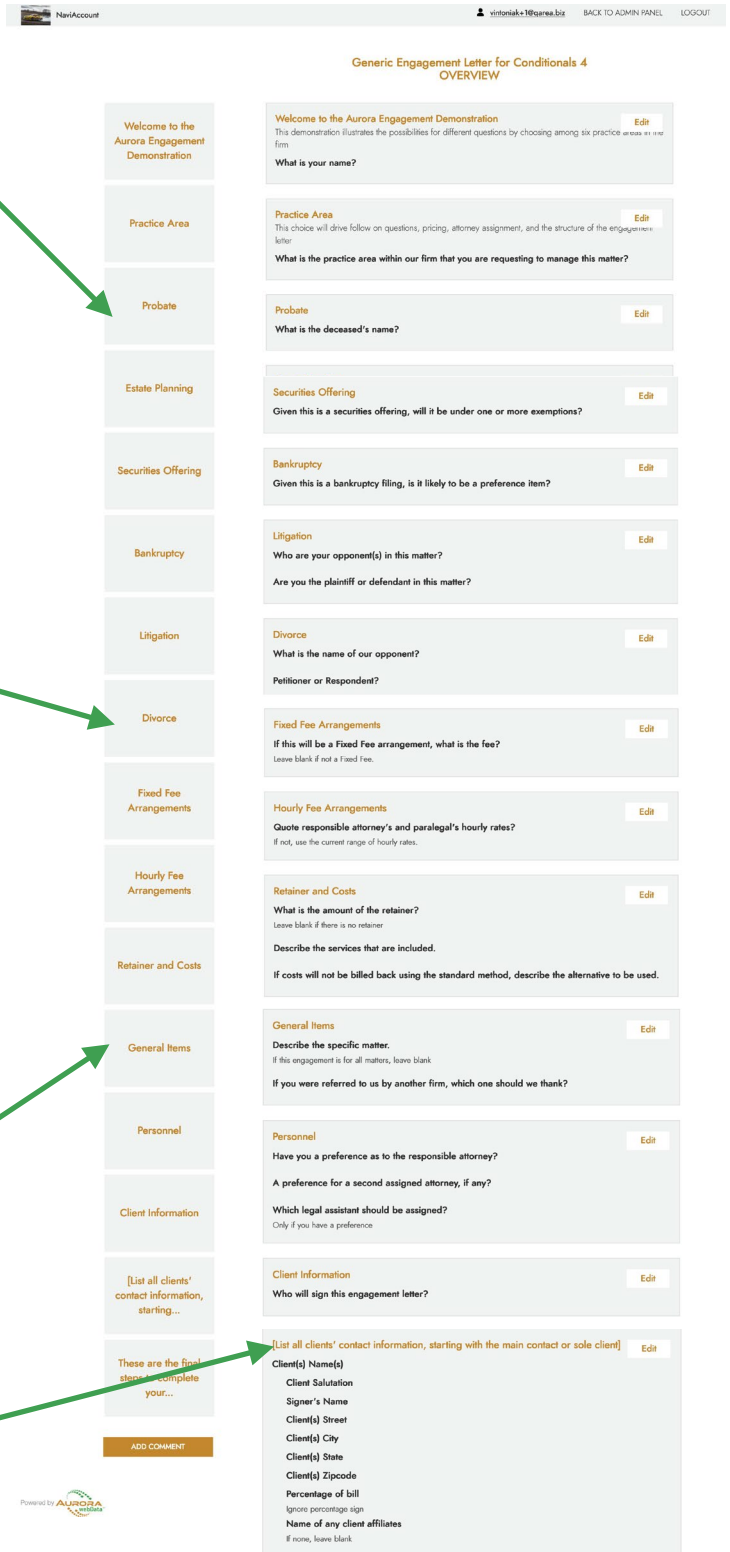


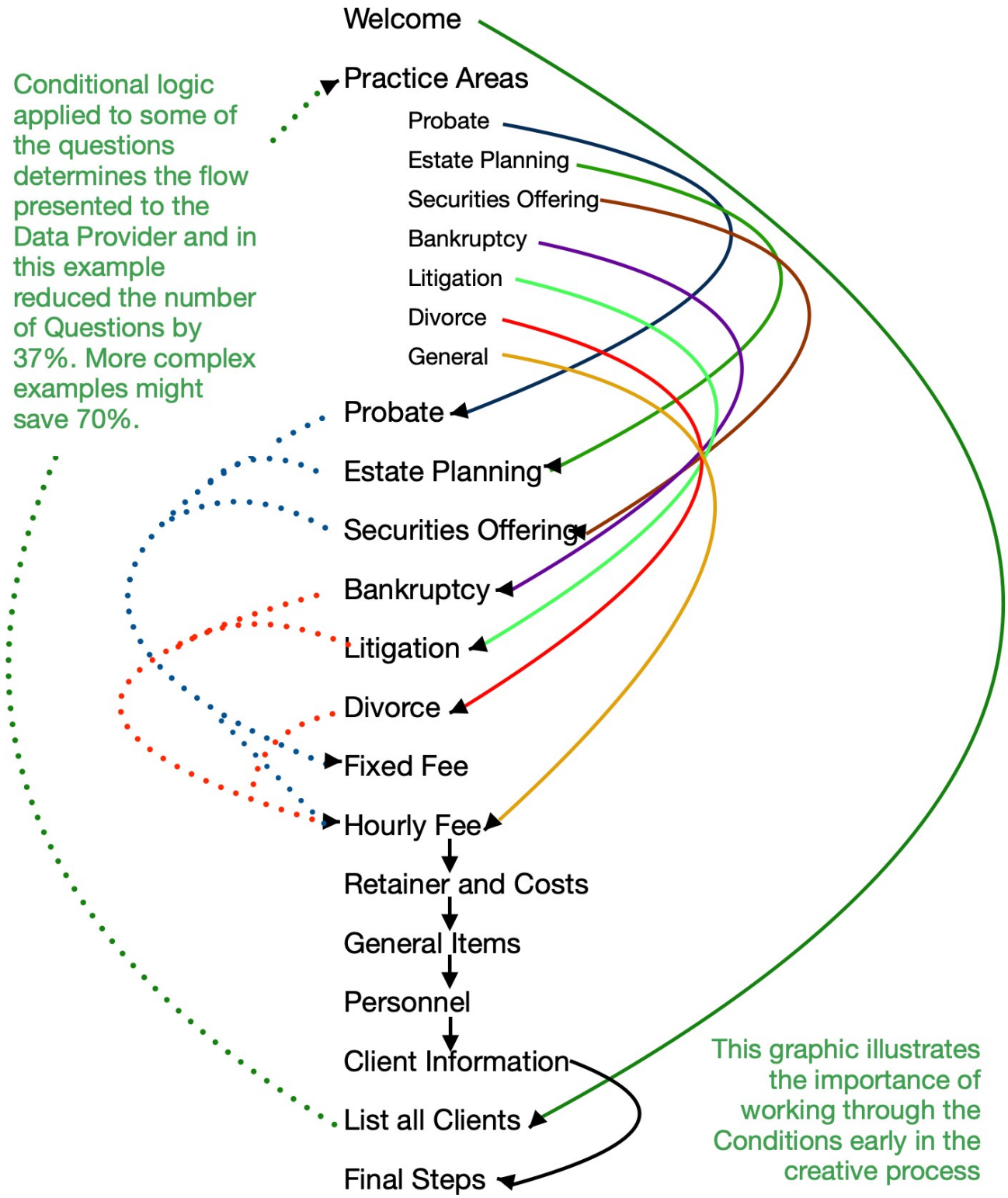
The Structure of a webQ, an Admin's Overview

(Showing first page)

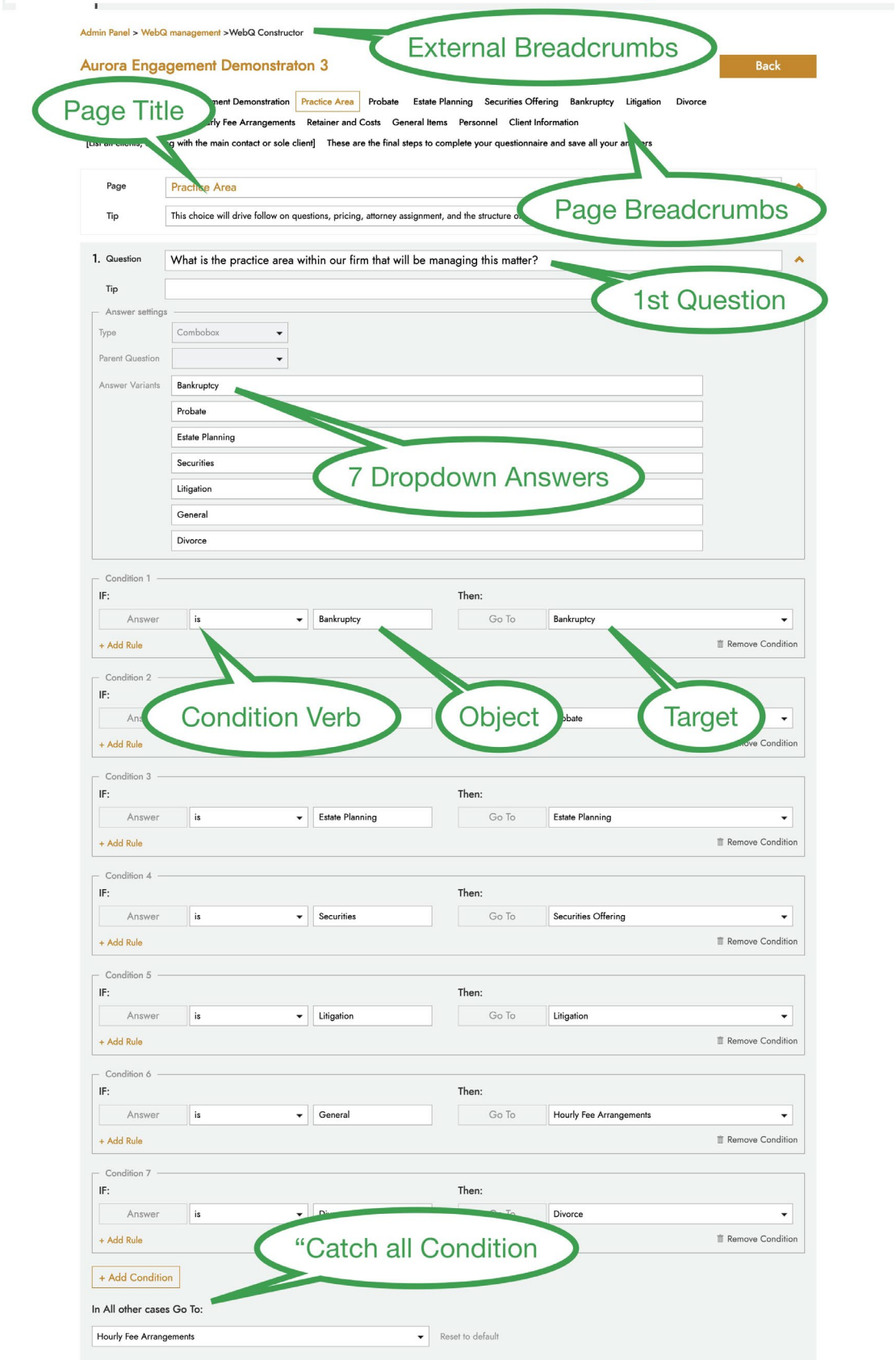
Scrollable
& Selectable
Page Titles

Overview of Pages and
their Questions

An Example of Logic in Conditional Questions

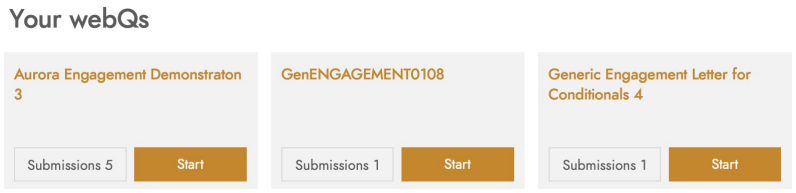


The "Constructor" Page

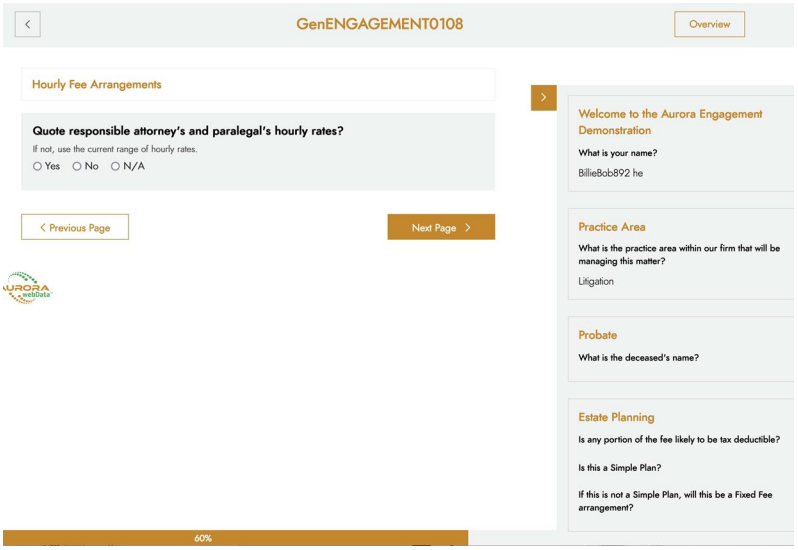


The Data Provider's View

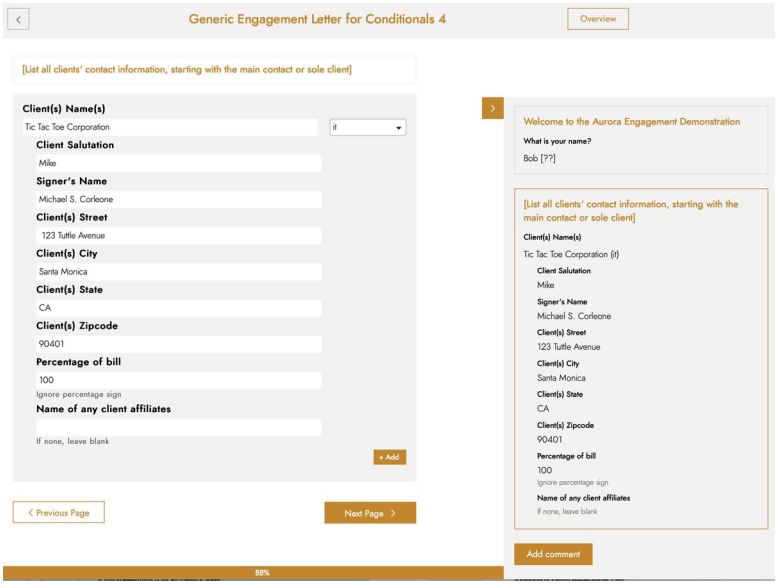
DP Home page showing webQs the DP has been invited to answer.



A single "Yes/No" Question with Overview showing.
The completion graph (60%) is shown at the bottom of the page.



A single answered GRID Question with Overview showing.



Installing Aurora Access on a Computer

Installation Summary

1. Confirm the computer's IP address
2. Confirm WORD Version (32 or 64 Bit)
3. Find ODBC Drivers, whether 64-bit or 32-bit
4. Download ANSI Driver, (Default to 64-bit if possible)
5. Add the ANSI Driver to the Computer's ODBC file
   - 5.a Repeat as needed for access to additional Aurora databases
6. Convert the Sample Questionnaire to a webQ
7. Add the Sample webQ to the TRAINING database
8. Logout as Admin, login as Data Provider
9. In the Aurora program, view Sources
10. In the Sample form, show effect of Fetch command using the input Sample data.

Detailed installation instructions follow.

Installing Aurora Access on a Computer

Understanding the Connection Tools

Connecting to Aurora via DSN is a two-step process.

Step 1, empowering the secure computer connection to the Aurora Data Center, is done once per computer and is completed by our Aurora Desk during the installation process using an ODBC Driver to make the secure connection. We've included the instructions here for those times when you change computers, add locations, or add Patrons.

NO, ODBC *DOESN'T* STAND FOR "OH DEAR, BURNT TO A CRISP!"

What Is an ODBC Driver?

ODBC, Open Database Connection, permits maximum interoperability, which means a single application can access different data base management systems, DBMS. Application end users can then add ODBC database drivers to link the application to their choice of DBMS. An ODBC driver uses the Open Database Connectivity (ODBC) interface by Microsoft that allows applications to access data in database management systems (DBMS) using SQL for accessing the data.

ODBC is the tool that can securely connect your computer to Aurora.

The technical fine print:

The ODBC driver interface defines:

A library of ODBC functions contains calls of two types:

Core functions that are based on the X/Open and SQL Access Group Call Level Interface specification

Extended functions that support additional functionality, including scrollable cursors

SQL syntax based on the X/Open and SQL Access Group SQL CAE specification (1992)

A standard set of error codes

A standard way to connect and logon to a DBMS, a standard representation for data types.

The ODBC solution for accessing data led to ODBC database drivers, which are dynamic-link libraries on Windows and shared objects on Linux/UNIX. These drivers allow an application to gain access to one or more data sources. ODBC provides a standard interface to allow application developers and vendors of database drivers to exchange data between applications and data sources.

Data Source Name (DSN)

A data source name (DSN) is a data structure that contains the information about a specific

database that an Open Database Connectivity (ODBC) driver needs in order to connect to it. Included in the DSN, which resides either in the registry or as a separate text file, is information such as the name, directory and driver of the database, and, depending on the type of DSN, the ID and password of the user. Aurora automatically creates codes to use in a separate DSN for each database. The connection coding is created once for each database and is then available to any intelligent form. To actually draw data from a particular database after the connections and codes have been created and installed, the form Author will specify which Aurora (or other) database to use within a form. In contrast, DSN-less connections require that all the necessary information be specified within the program.

Step 2, Creating a webQ and empowering it to access databases and automatically draw information. It largely uses tools and skills many of our customer have already developed using other programs from TheFormTool.

Installing Aurora Access on a Computer

Step One — Add an ODBC Connection from the Computer to Aurora

Note: Installing an ODBC Driver can seem intimidating and be frustrating. If you like, the Aurora Desk will do it for you on a fixed-fee basis.

1. Confirm the computer's IP address

test at: http://whatsmyip.net/

2. Confirm WORD version (32 or 64 Bit?)

at: Word>File>Account>About Word

3. Search for ODBC, then check for a 64-bit or 32-bit ANSI Driver

Look for an ANSI Driver:

Standard locations (Note that the "windir" folder is a hidden, high-security location, so input this location into Explorer address window):

if: 64-bit WORD:
%windir%\system32\odbcad32.exe

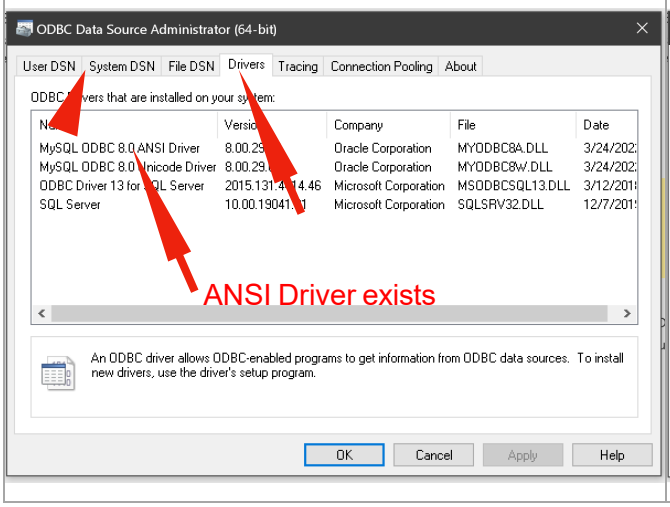
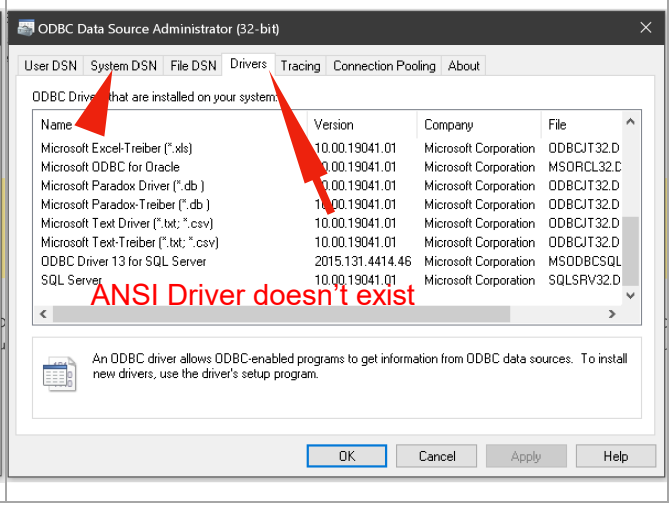
if: 32-bit WORD:
%windir%\syswow64\odbcad32.exe

If the ODBC isn't there, Search for ODBC Data Sources.

64-bit is now standard, but some machines running Word 365 may have selected 32-bit. The sysWOW folder accommodates 32-bit programs for a 64-bit machine.

Confirm lack of ANSI drivers under Drivers Tab (4th Tab). See below.

Installing Aurora Access on a Computer

64-bit Driver Window in **System 32**	32-bit 3rd Driver Window in **SYSWOW 64**
	

4. Download ANSI Driver (Default to 64-bit if possible)

Shortcut: Determine which Driver is needed. Then go to one of these locations. (Don't worry that msl files can't be previewed)

For 64-bit Word, https://www.dropbox.com/s/4ugxcx6n1q8ajsd/mysql-connector-odbc-8.0.29-winx64.msi?dl=0

For 32-bit Word, https://www.dropbox.com/s/r6jgdcbeutts1pc/mysql-connector-odbc-8.0.29-winx64%202.msi?dl=0

Original Source, if necessary: https://dev.mysql.com/downloads/connector/odbc/
Note X-86 and bit

Optional

(use only if required by computer)

Redistributable and Visual Studio

4a. If need Redistributable (This may be old, only needed for some 32-bit installations)

Shortcut: https://www.dropbox.com/s/1cpv9cmfxe0hwu5/vcredist.x86.exe?dl=0

Original Source: https://aka.ms/vs/17/release/vc_redist.x86.exe

Installing Aurora Access on a Computer

4b. If need Visual Studio (This may be old, only needed for some 32-bit installations)

Shortcut: https://www.dropbox.com/s/k07ale2qvvlfo6m/VisualStudioSetup%202.exe?dl=0

Click Install

If necessary, Click Modify

Click Individual Components

Scroll to Cloud, database, and server

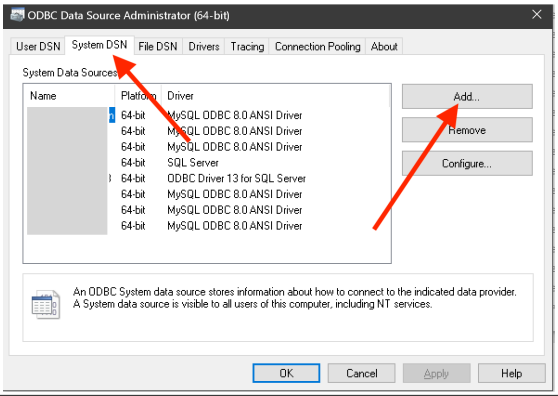
Select SQL Server Express 2019 LocalDB and SQL Server Data Tools

Click the appropriate *mysql-connector-odbc* you downloaded to install.

(Accept license, Typical, Finish)

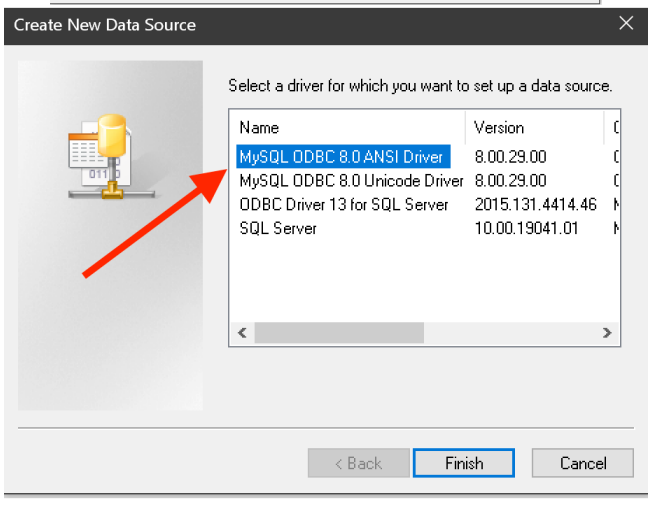
CONFIRM INSTALLATION

Then, click Add



On Create New Data Source, select the ANSI Driver and click "Finish" to start

(Did we mention this is a Microsoft product?)



Installing Aurora Access on a Computer

5. IN ODBC open the System DNS tab

Click ADD

Load Aurora DB credentials, specific for each Aurora database

Data Source Name: “Training”

Description: Optional

TCP/IP Server — Highly confidential (copy from existing installation)

Port — 3306

User — Highly confidential, DB specific from Aurora Data Center Add Database page (“User Group”

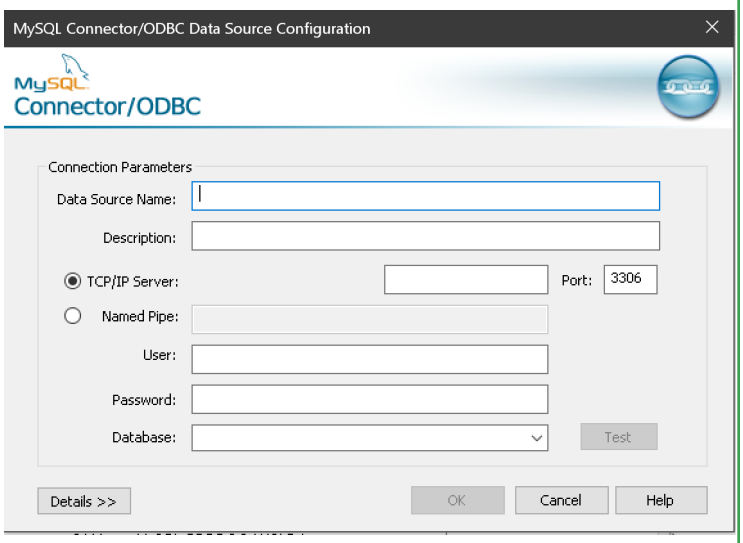
Password — Highly confidential, DB specific from ADC Add DB page

Click Test — if any issues, check carefully for a typo

Database — Choose any Dropdown Answer except schema

Click Test

Click OK and return to the ˆ



Aurora database names may not include spaces or special characters.

:

5.a Repeat as needed for each Aurora database

Step Two — Create a webQ and Test the Connection

6. Create a webQ using Sample included with Aurora program download

Questionnaire > Convert to webQuestionnaire > Save > (Name it) >Use Training as DB

Note: This creates the CSV Source for Aurora, so no need to do so manually

Tour Sample Questionnaire

Look at CSV

Look at Sources

The Aurora DB will populate with first Answers and expand with any additional webQs that are pointed to it

Installing Aurora Access on a Computer

7. Upload Sample CSV to webQ

Make sure that you use the TRAINING database

When satisfied Publish in Training so that a Data Provider can see and answer it

Tour webQ

Assign your Data Provider role to the webQ

8. Logout as Admin > Login as DP

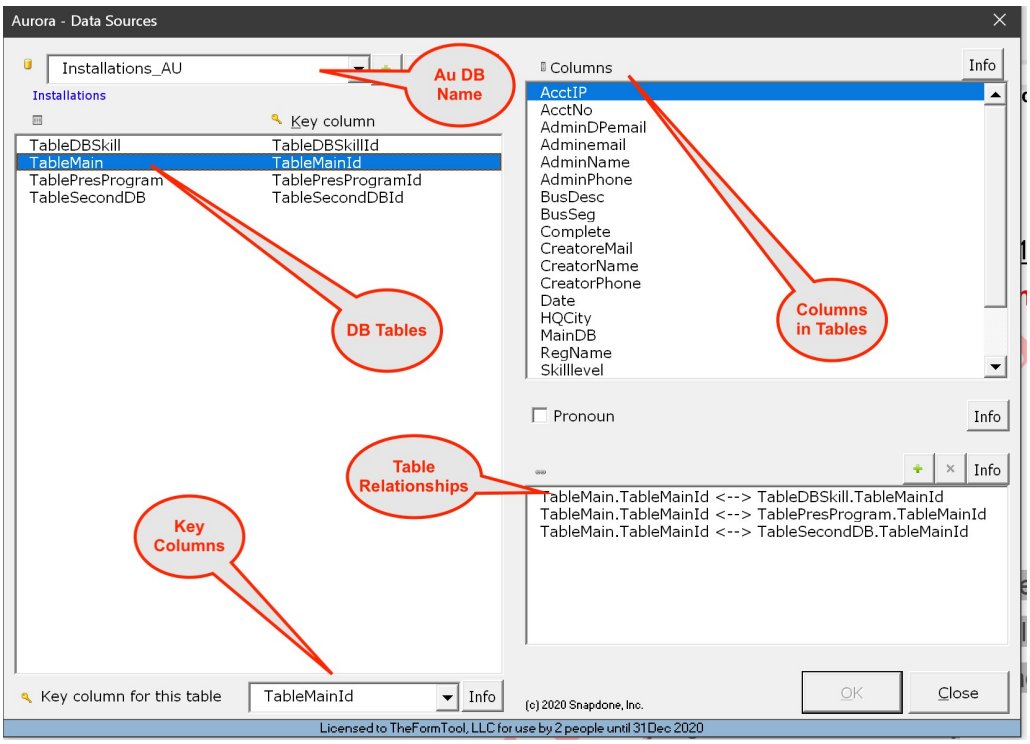
Answer a few questions in the Sample webQ, then Save Answers

9. In the Aurora program in Word's menu bar, show Sources

Sources>Data>Training

illustrate creation of four separate Tables,

View Table Main>Columns, Key Column> and Relationships



10. In form, show effect of Fetch command using Customer's own data.

Show Field