Deltek Cloud Server Installation Guide

The Deltek Cloud connector uses an ODBC data source and linked server to retrieve data from the accounting system. Follow the instructions below to install SQL Server Express (if needed), set up a System DSN and a Linked Server on a local server or workstation before proceeding with the installation on the client workstation.



This document provides the steps for installing SQL Server 2017 Express Edition. Screenshots may not match if a different SQL Server version is being installed.

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Install SQL Server Express and SQL Server Management Studio

1. Download SQL Server Express and SQL Server Management Studio Express from Microsoft. At the time this article was written, this installer could be downloaded from the following URL:

SQL Server 2017 Express

https://www.microsoft.com/en-us/sql-server/sql-server-editions-express

2. Double-click the downloaded SQL Server installation executable.



3. Click on the Basic option.



4. Read through the EULA and click Accept.



5. Click Install.



6. Click Install SSMS when the installation completes.



7. Internet Explorer will open to the site from which SSMS can be downloaded. Click on the download link.



8. When the download completes, double-click the install executable.

😺 l 💽 🔛 = l	Application Tools	Do	wnloads –	□ X
File Home Share View	Manage			• ?
🔄 🍥 👻 🕆 🚺 🕨 This PC 🕨 Do	wnloads	~ ¢	Search Downloads	Q
☆ Favorites	*		Date modified	Туре
📃 Desktop	-Setup-ENU		5/10/2018 8:57 AM	Application
🗼 Downloads				
Recent places				
III This PC				
🗣 Network 🗸 🗸		Ш		>
1 item 1 item selected 802 MB				:== 🖿

9. Click **Install** to begin the installation.



10. Click Close when the installation completes.

-	
RELEASE 17.7 Microsoft SQL Server Management Studio	
Setup Completed	
All specified components have been installed successfully.	
Close	

11. Close the SQL Server installation complete dialog.

INSTANCE NAME	CONNECTION STRING
SQLEXPRESS	Server=localhost\SQLEXPRESS;Database=master;Trusted_Connection=Tru
SQL ADMINISTRATORS	SQL SERVER INSTALL LOG FOLDER
SERVER2012R2-LD\linda	C:\Program Files\Microsoft SQL Server\140\Setup Bootstrap\Log\2018051
FEATURES INSTALLED	INSTALLATION MEDIA FOLDER
SQLENGINE	C:\SQLServer2017Media\Express_ENU
VERSION	INSTALLATION RESOURCES FOLDER
14.0.1000.169, RTM	C:\Program Files\Microsoft SQL Server\140\SSEI\Resources

Enable SQL Browser Service and TCP/IP Protocol

1. Start SQL Server Configuration Manager.



2. Click on SQL Server Services in the left pane and double-click the SQL Server Browser service in the right pane.

Sql Server Configuration Manager		
File Action View Help		
🗢 🄿 🙋 😡 😰		
SQL Server Configuration Manager (Local)	Name	State
SQL Server Services	SQL Server Browser	Stopped
SQL Server Network Configuration (32bit	SQL Server (SQLEXPRESS)	Running
▷ ➡ SQL Native Client 11.0 Configuration (32)	SQL Server Agent (SQLEXPRESS)	Stopped
SQL Server Network Configuration		
▷ <u>.</u> SQL Native Client 11.0 Configuration		

3. Click on the Service tab, change the Start Mode to Automatic and click Apply.

SQL Server Br	owser Properties ? X	
Log On Service Advanced		
General		
Binary Path	"C:\Program Files (x86)\Microsoft S	
Error Control	1	
Exit Code	1077	
Host Name	SERVER2012R2-LD	
Name	SQL Server Browser	
Process ID	0	
SQL Service Type		
Start Mode	Automatic 🔹	
State	State Stopped	
Start Mode The start mode of this service.		
ОК С	ancel Apply Help	

4. Click on the Log On tab and click Start. Click OK to close.

SQL Server Browser Properties
Log On Service Advanced
Log on as: Built-in account: Local Service This account: Account Name: Password: Confirm password: ***********************************
Service status: Stopped
Start Stop Pause Restart OK Cancel Apply Help

5. Expand SQL Server Network Configuration and click on Protocols for SQLEXPRESS in the left pane. Double-click the TCP/IP protocol in the right pane.



6. Change the Enabled property to Yes. Click Apply.

	TCP/IP Properties	?	x
Protocol IP Addresses			
General Enabled Keep Alive Listen All	Yes SUUUU Yes		•
Enabled			
Enable or disable TCP/I	P protocol for this server instance		
ОК	Cancel Apply	H	elp

7. Click OK to the message about restarting the SQL Server service.



8. Click OK to close the TCP/IP Properties dialog and go back to the SQL Server Services node.

🖀 Sql Server Configuration Manager 🔄 🗖 🗙			
File Action View Help Image: Provide the second sec	Name	State	Start Moc
SQL Server Services	SQL Server Browser SQL Server (SQLEXPRESS) SQL Server Agent (SQLEXPRESS)	Running Running Stopped	Automati Automati Other (Bo
< III >	<		>

9. Select the SQL Server service in the right pane and click the restart button.

🚡 Sql Sei	ver Configuration Manager		- 🗆 X
File Action View Help Image: SQL Server Configuration Manager (Local)	Name	State	Start Moc
SQL Server Services SQL Server Network Configuration (32bit	SQL Server Browser	Running	Automati
 ▶ ♣ SQL Native Client 11.0 Configuration (32k ▲ SQL Server Network Configuration ♣ Protocols for SQLEXPRESS ▶ ♣ SQL Native Client 11.0 Configuration 	SQL Server Agent (SQLEXPRESS)	Stopped	Other (Bo
< III >	<		>

Add Windows Firewall Exceptions

1. Open the Windows Firewall applet on the server.



If the Firewall is off for all profiles, there is no need to continue.

2. Click on Inbound Rules.



3. Click on New Rule.



4. Choose the **Port** radio button and click **Next**.

@	New Inbound Rule Wizard			
Rule Type Select the type of firewall rule to o	Rule Type Select the type of firewall rule to create.			
Steps: Protocol and Ports Action Profile Name	What type of rule would you like to create? Program Rule that controls connections for a program. Pot Rule that controls connections for a TCP or UDP pot. Predefined: BranchCache - Content Retrieval (Uses HTTP) Rule that controls connections for a Windows experience. Castom Custom rule.			

5. Leave the **TCP** option selected and type in port **1433**. Click **Next**.

@	New Inbound Rule Wizard
Protocol and Ports	
Specify the protocols and ports to	which this rule applies.
Steps:	
Rule Type	Does this rule apply to TCP or UDP?
Protocol and Ports	
 Action Profile 	0 bbr
Name	
	Does this rule apply to all local ports or specific local ports /
	All local ports Specific local ports: 1433
	Example: 80, 443, 5000-5010
	< Back Next > Cancel

6. Leave the Allow the connection radio button selected and click Next.



 Check the appropriate profiles to which the rule should apply. Refer to this Microsoft article for more information about Firewall Profile types: <u>https://technet.microsoft.com/en-</u> us/library/getting-started-wfas-firewall-profiles-ipsec(v=ws.10).aspx.

@	New Inbound Rule Wizard	x
Profile		
Specify the profiles for which this i	rule applies.	
Steps:		
Rule Type	When does this rule apply?	
Protocol and Ports	Demain	
 Action Profile 	Applies when a computer is connected to its corporate domain.	
Name	✓ Private	
	Applies when a computer is connected to a private network location, such as a home or work place.	
	Applies when a computer is connected to a public network location.	
	< Back Next > Cancel	

8. Type a name and description for the exception and click **Finish**.

@	New Inbound Rule Wizard	x
Name		
Specify the name and description of	f this rule.	
Steps:		
Rule Type		
Protocol and Ports		
Action		
Profile	Name:	
Name	BizNet-TCP 1433	
	Description (optional):	
	Opened for BizInsight reporting	
	< Back Finish Cancel	

9. Repeat these steps to add a UDP port exception for port 1434.

<i> <i> </i> </i>	New Inbound Ru	le Wizard	×
Protocol and Ports			
Specify the protocols and ports to	which this rule applies.		
Steps:			
Rule Type	Does this rule apply to TCP or UDP?		
Protocol and Ports	O TCP		
 Action 	• UDP		
Profile			
 Name 	Does this rule apply to all local ports of	or specific local ports?	
	O All local ports		
	Specific local ports:	434	
		Example: 80, 443, 5000-5010	
		< Back Next > (Cancel

10. Add a third new inbound rule for a program exception.

<i> </i>	New Inbound Rule Wizard	x
Rule Type Select the type of firewall rule to c	reate.	
Steps: Program Action Profile Name	What type of rule would you like to create? • Program Rule that controls connections for a program. • Pot Rule that controls connections for a TCP or UDP port. • Predefined: BranchCache - Content Retrieval (Uses HTTP) Rule that controls connections for a Windows experience. Custom Custom rule.]

11. Click on the **Browse** button and browse to the SQL Server installation's Binn directory and select the **sqlservr.exe**. Then click **Next**.

@		Open			x
🍥 🐵 🔻 🚺 « P	rogram Files 🔸 Microsoft SQL Server	► MSSQL14.SQLEXPRESS ► MSSQ	L ▶ Binn ▶	✓ ♥ Search Bini	n P
Organize 🔻 New folder	r				:= 🔻 🔟 🔞
☆ Favorites	Name	Date modified	Туре	Size	
Desktop	DIITmp32	5/10/2018 11:43 AM	File folder		
🐌 Downloads	DIITmp64	5/10/2018 11:43 AM	File folder		
📃 Recent places	Resources	5/10/2018 11:43 AM	File folder		
	퉬 Templates	5/10/2018 11:43 AM	File folder		
🌉 This PC	퉬 Xtp	5/10/2018 11:43 AM	File folder		
	BackupToUrl	8/22/2017 10:16 PM	Application	40 KB	
📬 Network	DatabaseMail	8/22/2017 10:17 PM	Application	30 KB	
	DCEXEC	8/22/2017 10:17 PM	Application	73 KB	
	SQLAGENT	8/22/2017 10:16 PM	Application	566 KB	
	💷 sqlceip	8/22/2017 10:16 PM	Application	242 KB	
		8/22/2017 10:16 PM	Application	2,950 KB	
	sqlservr	8/22/2017 10:17 PM	Application	474 KB	
	StretchCodeGen	8/22/2017 10:16 PM	Application	55 KB	
	📰 xpadsi	8/22/2017 10:16 PM	Application	87 KB	
File r	name: sqlservr			Programs Open	(*.exe) V Cancel

12. Leave Allow the connection selected and click Next.



13. Check the appropriate profiles to which the rule should apply. Refer to this Microsoft article for more information about Firewall Profile types: <u>https://technet.microsoft.com/en-us/library/getting-started-wfas-firewall-profiles-ipsec(v=ws.10).aspx</u>.

2	New Inbound Rule Wizard	x
Profile Specify the profiles for which this r	ule applies.	
Steps: Protocol and Ports Action Profile Name	When does this rule apply? ✓ Domain Applies when a computer is connected to its corporate domain. ✓ Private Applies when a computer is connected to a private network location, such as a home or work place. O Public Applies when a computer is connected to a public network location.	2

14. Type a name and description for the exception and click **Finish**.

@	New Inbound Rule Wizard	x
Name		
Specify the name and description	n of this rule.	
Steps:		
Rule Type		
Program		
Action		
Profile	Name:	1
ame	BizNet-sqlservr.exe	1
	Description (optional):	
	Added for BizInsight reporting	
	< Back Finish Cano	el

Install and Configure ODBC Driver

(From Deltek First Vision Essentials Administrator Guide pdf; edited for use by BizNet Software)

- 1. Contact Deltek Customer Care to request ODBC accounts and drivers
- 2. Download the ODBC driver installer from the appropriate link you received from Deltek Customer Care
 - a. ODBC Driver 32-Bit
 - b. ODBC Driver 64-Bit

Name	Date modified	Туре	Size
config.properties	3/27/2018 6:03 PM	PROPERTIES File	2 KB
📄 ddcloud.pem	3/28/2018 1:09 PM	PEM File	4 KB
ddcloudTrustStore.jks	3/28/2018 1:13 PM	JKS File	2 KB
OnPremise.properties	3/27/2018 6:03 PM	PROPERTIES File	2 KB
PROGRESS_DATADIRECT_HDP_ODBC_WIN_32	3/28/2018 1:36 PM	Application	75,831 KB
ROGRESS_DATADIRECT_HDP_ODBC_WIN_64	3/28/2018 2:05 PM	Application	76,089 KB

3. Run the ODBC driver installer. Follow the prompts, accepting all the defaults. Install.





D Progress DataDirect	t Hybrid Data Pipeline for ODBC 4.3	- 64 bit	_ 🗆 X
	Install Director		
1	Choose a destination directory for this Where Would You Like to Install?	installatior	L.
Progress	C:\Program Files\Progress\DataDirect\Hybrid	_Data_Pipeli	ne_for_ODBC
DataDirect*	Restore	Default	Choose
InstallAnywhere Cancel		Previou	s Next

20 | Page







4. Click Start > All Programs > Progress DataDirect Hybrid Pipeline for ODBC 4.3 and select ODBC Administrator.



5. From the ODBC Data Source Administrator dialog box, you will create a System DSN. User DSNs are for a single user; System DSNs are available to all users of the workstation. Select the System DSN tab.

ODBC Data Source Administrator (64-bit) 🗶
User DSN System DSN File DSN Drivers Tracing Connection Pooling About]
System Data Sources:	
Name Platform Driver	A <u>d</u> d
	<u>R</u> emove
	Configure
An ODBC System data source stores information about how to connect to t A System data source is visible to all users on this machine, including NT se	he indicated data provider. ervices.
OK Cancel	Apply Help

6. Click Add.

ODBC Data Source Administrator (64-bit)
User DSN System DSN File DSN Drivers Tracing Connection Pooling About
System Data Sources:
Name Platform Driver Add
Remove
Configure
An ODBC System data source stores information about how to connect to the indicated data provider. A System data source is visible to all users on this machine, including NT services.
OK Cancel Apply Help

7. In the Create New Data Source dialog box, select "DataDirect HDP 4.3" and click Finish.

	Create New Data Source		x
	Select a driver for which you wan	t to set up a data sou	rce.
T	DataDirect HDP 4.3	4.03.00.03	Pro
	SQL Server SQL Server SQL Server Native Client 11.0	6.03.9600.17415 2011.110.2100.60	Mic Mic Mic
	< 111		>
	< Back	Finish Can	cel

8. In the ODBC Driver Setup dialog box, enter a name in the Data Source Name field. This can be any name that helps you identify the data source. (Helpful tip: keep this name on hand once created – you will use this name when creating the Linked Server)

General	Advanced	Security	Web Servi	ice Proxy A	bout	
Data Sou	urce Name:		Your Data S	Source Name	Help	
Descripti	on:					
Hybrid D	ata Pipeline	Source:				
Service:						
Port Num	ber:		443			

9. In the Hybrid Data Pipeline Source filed, enter the database name that you received from Deltek Customer Care when you requested the ODBC accounts

Progress DataDirect Hyb	orid Data Pipeline ODB	? X
General Advanced Security	Web Service Proxy About	
Data Source Name: Description:	Your Data Source Name	lelp
Hybrid Data Pipeline Source:	Database Name	
Service: Port Number:	443	
Test Connect	OK Cancel	Apply

Note

10. In the Service field, enter the service URL that you received from Deltek Customer Care when you requested the ODBC accounts.

The Port Number filed should be left as is.

	Advanced	Security	Web Service	Proxy	About	
Data So	urce <mark>Na</mark> me:		Your Data Sou	rce Name	•	Help
Description:						
Hybrid D	ata Pipeline	Source:	Database Name			
Service:			Service URL			
Port Nur	mber:		443			

11. On the Security tab, ensure that the Enable SSL checkbox

Progress DataDirect Hybrid Data Pipeline ODB ? ×
General Advanced Security Web Service Proxy About
Help
Authentication
User Name:
Logon Domain:
Data Source Authentication
Data Source User:
Data Source Password:
SSL Authentication
Trust Store Password:
Host Name In Certificate:
Test Connect OK Cancel Apply

12. Click Test Connect and enter the credentials that you received from Deltek Customer Care when you requested the ODBC accounts. Click OK. A "Connection established!" message displays. Click OK.

General	Advanced	Security	Web Service	Proxy	About	
Data So	ource Name:		Your Data Sour	ce Name		Help
Descrip	tion:				10	
Hybrid [Data Pipeline	Source:	Database Name	e		
Service	÷		Service URL			
Port Nu	mber:		443			

Progress DataDirect Hyb	orid Data Pipeline ODB ? 🗴
General Advanced Security	V Web Service Proxy About
Data Source Name:	Your Data Source Name Help
Description:	
Hybrid Data Pipeline Source:	Database Name
Service:	Service URL
Port Number:	443
Test Connect	OK Cancel Apply

13. Click OK in the ODBC Data Source Administrator dialog box.

er DSN	System DSN	File DSN	Drivers	Tracing	Connectio	n Pooling	About		
ystem Da	ata Sources:								
Name		Platform	Driver					Add	8
four Dat	a Source Name	64-bit	DataDirec	t HDP 4.3	1				
								Remove	e
								Configure	
	An ODBC Sy A System dat	stem data a source is	source stor s visible to a	es informa all users of	tion about h this comput	ow to conr er, includir	nect to the ng NT servi	indicated data p ices.	provider.

Create Linked Server

1. In SQL Server Management Studio, Expand Server Objects > Linked Servers > Right click on the Linked Server Folder



2. Select "New Linked Server" option from right click menu



3. The "New Linked Server" Dialog appears

9	New Linke	d Server	-		x
Select a page Page General	🔄 Script 🔻 🛐 Help				
Security	Linked server:				
	Server type:				
	O SQL Server				
	 Other data source 				
	Provider:	Microsoft OLE DB Provider for SQL Server			v
	Product name:				
	Data source:				
	Provider string:				
	Location				
	Catalog				
0 (
Connection					
Server: DELTEKERP					
Connection: sa					
View connection properties					
Progress	Linked Server: This is the name t	he linked server will be referenced by.			
Ready					
		ОК		Cance	

4. Make sure the "General" page has been selected

8	New Linke	d Server	_		x
General	🔄 Script 🔻 📑 Help				
Server Options	Linked server:				
	Server type:				
	O SQL Server				
	 Other data source 				
	Provider:	Microsoft OLE DB Provider for SQL Server			~
	Product name:				
	Data source:				
	Provider string:				
	Location				
	Catalog				
Connection					
Server: DELTEKERP					
Connection: sa					
View connection properties					
Progress	Linked Server: This is the name t	he linked server will be referenced by.			
Ready					
		ОК	(Cancel	

5. For "Server Type" make sure "Other Data Source" is selected. (The SQL Server option will force you to specify the literal SQL Server Name)

*	New Linke	ed Server	_ [x
Select a page	🔄 Script 🔻 🛐 Help			
Security	Linked server:			
	Server type:			
	O SQL Server			
	Other data source			
	Provider:	Microsoft OLE DB Provider for SQL Server		~
	Product name:			
	Data source:			
	Provider string:			
	Location			
	Catalog			
Connection				
Server: DELTEKERP				
Connection: sa				
View connection properties				
Progress	Linked Server: This is the name t	the linked server will be referenced by.		
Ready				
		ОК	Ca	ncel

6. Type in "VISIONCLOUD" into Linked Server text box

8	New Linke	d Server	_		x
Select a page	🖾 Script 👻 📑 Help				
Security	Linked server:	VISIONCLOUD			
	Server type:				
	O SQL Server				
	 Other data source 				
	Provider:	Microsoft OLE DB Provider for SQL Server			~
	Product name:				
	Data source:				
	Provider string:				
	Location				
	Catalog				
Connection					
Server: DELTEKERP					
Connection:					
View connection properties					
Progress	Linked Server: This is the name to	he linked server will be referenced by.			
Ready					
		ОК		Cance	I

7. Provider – Select "Microsoft OLE DB Provider for ODBC Drivers"

8	New Linke	d Server	_ D X
Select a page Page General	🔄 Script 🔻 🛐 Help		
Security Server Options	Linked server: Server type: O SQL Server O Other data source	VISIONCLOUD	
	Provider:	Microsoft OLE DB Provider for ODBC Drivers	~
	Product name: Data source: Provider string: Location Catalog		
Connection			
Server: DELTEKERP Connection: sa <u>View connection properties</u> Progress Ready	Provider Name is one of the prov	iders installed on the server.	
		ОК	Cancel

8. Product Name – ODBC data source name (Same as *Your Data Source Name* when you created your data source name in step #8 of above "Install and Configure Driver" section)

8	New Linked Server			x	
Select a page	🖾 Script 🔻 📑 Help				
Security	Linked server: Server type:	VISIONCLOUD]
	 SQL Server Other data source 				
	Provider:	Microsoft OLE DB Provider for ODBC Drivers		v	ק
	Product name:	Your Data Source Name			
	Data source:	Your Data Source Name			
	Provider string:				
	Location				
	Catalog				
Connection					
Server: DELTEKERP					
Connection: sa					
View connection properties					
Progress	System DSN of ODBC data source	e.			
Ready					
		ОК	C	ancel	

9. Datasource – ODBC data source name (Same as *Your Data Source Name* when you created your data source name in step #8 of above "Install and Configure Driver" section)

9	New Linked Server		
Select a page	🖾 Script 🔻 📑 Help		
Security	Linked server: Server type: O SQL Server O Other data source	VISIONCLOUD	
	Provider: Product name: Data source: Provider string: Location Catalog	Microsoft OLE DB Provider for ODBC Drivers Your Data Source Name Your Data Source Name	
Connection			
Server: DELTEKERP Connection: sa IP <u>View connection properties</u>			
Progress Ready	System DSN of ODBC data source	ce.	
		ок	Cancel

10. Navigate to the "Security" page

8	New Linked Server			x			
Select a page	🔄 Script 🔻 📑 Help						
Server Options	Local server login to remote server login mappings:						
	Local Login	Impersonate	Remote User	Remote	Passwo	ord	
				A.1.1			
Connection				Add	Ke	move	_
Connection	For a login not defined in	the list above, connec	ctions will:				
DELTEKERP	O Net ha mada						
Connection:	Re made without usi	ng a security context					
Use connection properties	 Be made using the log 	ogin's current security	context				
	Be made using this s	ecurity context:					
Progress	Demote la sia:		I				_
Ready	With password:						
				OK	C	ancel	

11. Select "Be made using this security context:" and enter Remote login and password provided by Deltek Customer Care

8	New Linked Server			
Select a page	Script 👻 🎼 Help			
Security	Local server login to remote server login mappings:			
	Local Login Impersonate Remote User Remote Password			
	Add Remove			
Connection	For a login not defined in the list above, connections will:			
Server: DELTEKERP				
Connection:	○ Not be made			
sa	 Be made without using a security context 			
View connection properties	O Be made using the login's current security context			
	Be made using this security context:			
Progress	Remote Login: Login and PW provided by Deltek Customer Care			
Ready	With password:			
	OK Cancel			

12. Select OK

8	New Linked Server				
Select a page Provide the select a page of the sele	Script 🔻 💽 Help				
Security	Local server login to remote server login mappings:				
	Local Login Impersonate Remote User Remote Pas	sword			
	Add	Remove			
Connection	For a login not defined in the list above, connections will:				
Server: DELTEKERP	O Not be made				
Connection: sa	 Hot be made Be made without using a security context 				
View connection properties	Be made using the login's current security context				
Progress	Be made using this security context:				
Ready	Remote login: Login and PW provided by Deltek Cu	stomer Care			
1.1	With password:	1			
	ОК	Cancel			

13. To test the Linked Server, click on the New Query button.



14. Paste the following query into the query dialog.

```
SELECT TOP 1
*
FROM
OPENQUERY(VISIONCLOUD,'SELECT TOP 1 * FROM CA');
```

15. Click Execute to run the query.

🧏 Microsoft SQL Server Management Studio	
File Edit View Query Project Debug Tools Window (Community Help
😳 New Query 🛅 📸 📸 🌇 📄 🔽 🖂 🖂 🦉 🥫	
🗄 🌉 📆 master 🗸 🕴 Execute 🕨 💷 🗸 💱	5 🖷 🔲 📅 🥦 👹 🖏 📋 🖆 👍 🚝 🐔 🖕
Object Explorer - T X S	GQLQuery1.sql - server2012-Id(54))*
Connect * # # #	<pre>SELECT TOP 1 * FROM - OPENQUERY(VISIONCLOUD,'SELECT TOP 1 * FROM CA');</pre>

The query should return records. If it does not, contact BizNet Software Support for assistance.